



## Customer Appointments Policy - Retrofits

It is Sycous' policy to conduct its business in a professional and transparent manner. The following document sets out our policy and process for making appointments for any retrofit works and any 'No Access' process that will be followed.

Sycous endeavour to offer customers where we are employed to undertake a retrofit flexibility in arranging appointments, seeking to maximise access and completed works in line with the provided project plan.

### Appointments process and requirements

This policy should only be implemented once a project commencement date has been agreed as part of the project plan and following an introduction letter sent by the client to customers about the work being undertaken and introducing the mySycous or HIUService engineering team.

All communications will be agreed by both parties in advance.

Sycous must receive 5 working days' notice of cancellation prior to a confirmed appointment, otherwise it will be chargeable unless alternative appointments can be undertaken during this time. Sycous, or the client, will seek to fill any cancelled appointment with other customers in the same project. If after 2 days, the appointment space is not filled, Sycous will offer this time to other clients.

A 'No-Access', where applicable, will equate to the labour value of one install / job, as confirmed on an accepted quotation.

Prior to the Project Commencement, the Sycous Project Team will work through the 'Project Commencement - Retrofit Customer Engagement' checklist with the client and ensure all information is available prior to on-site works commencing.

All customer contact details must be provided by the client at least 7 working days in advance of communication strategy start date, i.e. Stage 1 below.

### Stage 1 - Client introductory letter

The client will issue a letter of introduction, including the nature of the project, requirement for access and introducing the mySycous or HIUService team. The date of issue and content must be agreed between the client and Sycous Project Team.

### Stage 2 - Our 1st appointment letter

Please note, that where the retrofit project is delivered in stages, the below is to be implemented in accordance with the project plan. The Sycous Project Team will contact the customers to attempt to book an appointment, following the process below, in line with the project plan.

- At least 7 working days following Stage 1: the mySycous scheduling team will text and/or email (where this information has been supplied), requesting the customers contact us to make an appointment.



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- At least 8 working days following Stage 1 the mySycous scheduling team will commence phone calls to each customer (where this information has been supplied) and endeavour to make an appointment.
- At least 9 working days following Stage 1: the mySycous scheduling team will send out / deliver a 'First Appointment Letter' with a proposed appointment date and time slot. This letter will give at least 10 working days' notice of this appointment.
- At least 7 working days prior to the appointment date, the mySycous scheduling team will attempt to contact each customer to confirm, or amend, the appointment via email and telephone, where this information has been supplied. If contact and confirmation cannot be made the appointment will be cancelled and the customer contacted by text informing them of the cancellation. The mySycous scheduling team will re-engage with this customer as part of Stage 3.
- At least 3 working days prior to the confirmed appointment, the mySycous scheduling team will send a text to the customer with a reminder of the appointment, where the contact details have been made available.
- For appointments that have been confirmed mySycous will attend the property on the day stipulated on the 1st Appointment letter unless the customer has been in contact 3 working days prior to the appointment to cancel or rearrange.
- Where a 1st appointment results in 'No Access', the attending engineer will contact the customer if a phone number is available and then leave a 'Sorry we missed you card' with details to arrange another appointment and take photographic evidence to support this.
- Where an appointment results in 'No Access' the attending engineer, with prior permission from the Sycous Project Team, will then attempt to 'door knock' to gain access to another appointment or location.
- If the engineer has success and can access another property to fully carry out required works, the Resident Liaison Fee and the Full Labour / Install cost will apply for the accessed property only.
- If door knocking is unsuccessful - the full no access fee and Resident Liaison fee will be applied as a variation.

### Stage 3 – No access, following a no access visit, or non-engagement

The Sycous Project Team will seek your approval to contact the customers again to attempt to rebook an appointment, following the process below.

- A second appointment letter will be issued with an appointment date and time slot, aligned with resource availability. The letter will give at least 10 working days' notice of this appointment.
- At least 5 working days prior to the appointment date, the mySycous scheduling team will attempt to contact the customer to confirm or amend the appointment via email and telephone, where the contact details are made available. If contact cannot be made the appointment will be cancelled from the scheduling system, and the customer contacted by text informing them of the cancellation.
- At least 3 working days prior to the confirmed appointment, the mySycous scheduling team will send a text to the customer with a reminder of the appointment, where the contact details have been made available.
- For appointments that have been confirmed mySycous will attend the property on the day stipulated on the 2nd Appointment letter, unless the customer has been in contact 3 working days prior to the appointment to cancel or rearrange. Any unconfirmed appointments will be referred to the client.



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- Where a 2nd appointment results in 'No Access', the attending engineer will contact the customer if a phone number is available and then leave a 'Sorry we missed you' card and take photographic evidence to support this.
- Where an appointment results in 'No Access' the attending engineer, with prior permission from the Sycous Project Team, will then attempt to 'door knock' to gain access to another appointment or location.
- If the engineer has success and can access another property to fully carry out required works, the Resident Liaison Fee and the Full Labour/Install cost will apply for the accessed property only.
- If the engineer is unsuccessful in accessing an alternative property, the full no access fee and Resident Liaison fee will be applied as a variation.

#### Stage 4 – No access, 2nd failed attempt

- Following a second 'no access', the Sycous Project Team will refer the customer to the client using an Issue Log and will not make further appointment attempts.
- Where a customer has not engaged with the mySycous scheduling team and confirmed an appointment, the Sycous Project Team will refer the customer to the client using the Issue Log and will not make further appointment attempts.

#### Stage 5 – No access, 3rd failed attempt

The client may make a confirmed appointment with the customer, agreed with the mySycous scheduling team.

- Where a 3rd appointment, arranged by the client, results in 'No Access' the attending engineer, with prior permission from the Sycous Project Team, will then attempt to 'door knock' to gain access to another appointment or location.
- If the engineer has success and can access another property to fully carry out required works, the Resident Liaison Fee and the Full Labour/Install cost will apply for the accessed property only.
- If the engineer is unsuccessful in accessing an alternative property, the full no access fee and Resident Liaison fee will be applied as a variation.
- Where a 3rd appointment arranged by the client results in 'No Access', the Sycous Project Team will refer the customer to the client using an Issue Log and will not make further appointment attempts.

#### Customer refusal

During the appointment process, should a customer refuse to have the work done no attempt will be made to complete any work, or access the location, and the full details of the customer's conversation documented by the mySycous scheduling team, and then referred to the client using the Issue Log.

Should a customer refuse entry, this will be considered a 'No Access' and managed in line with this process.

#### Appointment visit process

All those attending to undertake any work will be issued a Method Statement and Risk Assessment, where the installation and reporting process will be documented.



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All work will be recorded on the scheduling system and the following information will be recorded in writing and / or photographs, where applicable:

- Location address
- Work start time
- Job status (Complete, Incomplete...)
- Removed meter serial number
- Removed meter reading
- New meter serial number
- PAYG Hub serial numbers
- Any observations on the current installation e.g. leaking HIU.

If any other information is required by the client, it must be agreed with the Sycous Projects Team at least 1 week prior to the start of the project.

### Reporting procedures

The following reports will be made available to the client by the Sycous Project Team, normally on an appropriate frequency to the size of project and no more than weekly.

- Client Progress Report
- Appointment Tracker
- Issue Log

### Return visits and additional requirements

Any return visits shall be agreed in writing between the Sycous Project Team and client, confirming the reason for the return visit and any associated cost for Resident Liaison, Project Management, labour, additional stock, or anything else that may need to be considered.

### Review and agreement

This policy is agreed by the board of Sycous who agree to review this policy and arrangements on an annual and more frequent basis, as necessary, to maintain our commitments.

Signed

Matthew Hall (Responsible Director)

Date 20th July 2024



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