

Multi Stage Advice

Supporting householders along their retrofit journey, from initial engagement and advice all the way to post-installation support

How it works

This approach ties together many of the other methods described in the LEAD Toolkit series, but is also part of project design in its own right. The following stages may not all be needed for all audiences and circumstances.

Getting starting requires getting your target audience's attention. The first stage is **initial engagement**, typically through marketing, outreach and referrals. Language, service offers, channels and messengers should all align with your audience. **Initial advice** may be given during community outreach, online, via phone or email, or through a home visit.

Households able to access grants or self-fund work ideally move to **full retrofit assessment** to identify what will work best for their home, and encourage whole-house retrofit as the most effective approach. A **six-month follow-up** can help nudge households into action or help them with barriers that have arisen. Some households will want help with **finding an installer** or **reviewing quotes**, as many technical quotes can be hard to understand and compare, and having these explained can give people more confidence to proceed. Some may also want **onsite support** to help supervise contractors, depending on the complexity of work.

Finally, **post-installation support** can help people get the best from their new retrofit. This is particularly the case for heat pump installations and smart technologies, and for older and offline audiences, or those with low literacy.

Case studies

Among the six South West LEAD projects, four involved interventions along the whole retrofit journey: **Accelerate LEAD**, **Far South West LEAD**, **Futureproof Wiltshire LEAD**, and **EnergyWise LEAD**. In the LEAD Webinar Series (see Resources), two of these talk through their approach.



Image © Green Isle of Wight CIC

What you'll need

- An understanding of the stages of service your target audience is most likely to need (which may be part or all of the retrofit journey outlined here)
- A plan for which stages of retrofit you plan to support, and how this will dovetail with other local services (if you are not supporting the whole process)
- A GDPR-compliant approach to data management from the start, allowing you to track householder progress
- Relevant material resources, skills, expertise and (in some cases) qualifications to undertake the stages you plan to support (see other elements of the LEAD Toolkit for more information on specific areas of work)

Why it works

Households often need several points of contact along their retrofit journey to reach the end. Multi-stage advice works because it builds householder confidence, nudges behaviour and helps overcome barriers that arise. For many people, retrofit is a big investment and it can take time to build the evidence, confidence and finances to go ahead. There can be fear of making costly mistakes, especially with stories in the news about retrofit gone wrong, and worries about whether installers are delivering quality work for fair rates. Initial engagement can nudge people into thinking about retrofit, while initial advice can give quick wins and build trust, giving people confidence that there is value in having a full retrofit assessment. Hand-holding through the installer process can overcome fears around poor service and scams, especially if people don't feel knowledgeable enough to judge whether they are being fairly treated. Post-installation support can ensure that people are getting the savings they expect from their new systems, especially when new technology requires a change in behaviour, e.g. to their previous approach to heating their home, or when they must use electricity during the day.

Top tips

- ✓ Independent advice is highly valued by householders, so any relationship promoting or receiving referral fees from installers needs to be carefully managed to avoid perception of bias that might undermine confidence
- ✓ Many self-funded households (ineligible for grants) still cannot afford retrofit upfront and may not move beyond initial advice; this is still a valuable outcome
- ✓ Self-funded audiences may be unaware of their finance options – there may be grants available that aren't means-tested, or opportunities to access funds when remortgaging
- ✓ Giving households a consistent, trusted point of contact throughout the retrofit process helps give confidence and move the process along
- ✓ There is not currently much demand for full retrofit assessments at full price; work may be needed to demonstrate the benefits of an assessment, such as case studies on how this has informed decisions and saved money later
- ✓ Six-month follow-ups after a retrofit survey and report is a good timeframe to keep momentum, offer additional advice and discuss barriers (e.g. getting contractors, managing disruption, sequencing the retrofit project)
- ✓ Don't be discouraged if no progress has been made after six months – there are many reasons for delays, including finding finance and availability of suitable installers

Resources

- Specific resources for different stages of the retrofit process can be found throughout the other documents within the LEAD Toolkit (see [South West Net Zero Hub](#))
- The SWNZH LEAD Webinar Series includes discussion on multi-stage advice and the customer journey: [Innovations in domestic retrofit advice - Power in Partnerships: collaboration and consortiums](#) 20 Nov 2024 (PEC: 14:40 to 21:28) (see also [full slides](#)); [Innovations in domestic retrofit advice - Retrofit as a service](#) 22 Jan 2025 (Testlands/Green Isle of Wight: 50:26 to 52:10) (see [also full slides](#)).

About LEAD

LEAD is managed by South West Net Zero Hub and funded by the Department for Energy Security and Net Zero. The programme is trialling innovative approaches to retrofit advice for hard-to-reach groups and hard-to-treat homes. Find out more [here](#).

Publication date: March 2025