



Streamlining domestic energy assessment

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Paul Staley, Managing Director, ERS

FACTS

Customer: Energy Reports and Surveys (ERS), a British specialist in property services.

Challenge: To provide Domestic Energy Assessors with simple and reliable technology that makes data collection and processing as quick and easy as possible, but also provides a full audit history.

Solution: Anoto partner Digital Field Solutions' FAS application, based on Anoto Digital Pen and Paper technology.

Benefits: A faster, more efficient, more productive and higher quality domestic energy assessment service, allowing the assessors to conduct up to ten assessments instead of only around six per day.

In 2007, the UK Government introduced new legislation that means every home put on the market must have a Home Information Pack (HIP). The HIP includes an Energy Performance Certificate and documents such as a sale statement, legal searches and evidence of title. In addition, the certificates are required by domestic rental properties.

Energy Reports and Surveys (ERS) was founded in 2007 by the company LMS Survey & Valuations (LMS S&V), specifically to provide Energy Performance Certificates to homeowners and estate agents. Today, ERS is one of the largest employers of Domestic Energy Assessors in the UK.

The energy certificates provide A-G ratings (like household appliances) on the energy efficiency of a home, plus advice on how to make it even more energy efficient. The production

of a certificate requires a home visit and assessment by an accredited energy surveyor, known as a Domestic Energy Assessor.

Competitive Advantage

Paul Staley, the Managing Director of ERS, recognised early on that choosing the right technology for capturing energy assessment data in the field would provide a significant competitive advantage for ERS. From previous experience in the insurance sector, Paul knew that PDAs were a potential solution but the screens were too small for the assessors' purposes. Tablet PCs were another option but were found to be expensive and ineffective for ERS.

Paul had seen the benefits of Anoto Digital Pen and Paper technology (DP&P) before. Proven to be scalable, easy to use and cost effective to implement, it was the best option for the task in-hand:

“Having evaluated a range of alternative technologies, we felt that the simplicity and convenience of Digital Pen and Paper technology would work best for collecting the large amount of data required to complete an energy assessment. Not only is DP&P easy to use, the system also automatically converts handwriting into data and interacts remotely with the energy calculation package that we use.”

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"Another key advantage is that the system retains a faithful electronic copy of the site notes and sketches, which is essential for audit and quality control."

The pens have helped energy assessors reduce administration time by at least 90 minutes per day as well as raising overall productivity. Instead of the six visits that competitors' assessors make in a day, ERS staff can do up to ten assessments a day.

How it works

Digital Field Solutions' enterprise-strength Forms Automation System (FAS) has proven to be robust, reliable and secure. FAS incorporates Anoto Digital Pen and Paper technology and Scribbleweb, Digital Field Solutions' unique forms management portal. FAS is seamlessly integrated with Northgate Information Solutions' energy calculation package:

To complete an Energy Performance Certificate, the assessors fill out a four page form with their digital pen, providing information on construction, heating and floor areas. The pen looks and feels like any standard ink pen, but contains a tiny infrared camera and processor which enables it to "read" and digitise words as they are written on the forms.

Continuation sheets which automatically link to the main data form are provided for additional notes and sketches. Once completed, the assessors simply tick each form to send it back to the ERS server via Bluetooth® on their mobile phones.

Any missing data is instantly flagged on the phone as part of the send process. This avoids the assessors leaving a site without all the necessary information.

Once all the required data has been collected, the system automatically communicates via XML (a data format used for transferring data over the Internet) with an energy calculation engine and sends back the energy ratings to the assessors' mobile phones.

To complete the certification process, the assessors log on to an online portal to view the submitted forms, review and edit the data, add recommendations and publish each energy certificate.

Once a certificate is produced, all site notes are stored centrally for future reference and audit.

Benefits of Digital Pen and Paper technology

According to Paul Staley, Anoto Digital Pen and Paper technology delivered by Digital Field Solutions has been very positively received across the business. He points out a number of key benefits:

- **Convenience:** DP&P is very portable and easy to use in a site environment.
- **Quality:** instant feedback during the send process ensures that all required data is collected before leaving site. The instant energy rating response also means that assessors can complete quality control checks before leaving.
- **Efficiency:** the integrated system eliminates data re-keying and avoids the need for scanning or filing of site notes.
- **Audit:** the instant availability of site notes on the system has proven to be extremely useful for handling customer queries, reviewing quality and discussing technical issues with assessors whilst they are still on site.

Future plans

The company is now rolling out the pens as part of a new service for creating floor plans. Traditionally, floor plans have been drawn on a piece of paper while on site. Back at the office, these drawings would then be scanned, recreated electronically and amended. ERS will use Anoto Digital Pens to capture floor plans digitally and transmit them directly to the office, where they will be converted ready for clients to use.

Partner profile:

Digital Field Solutions was founded in the UK in 2004 with the aim to help businesses take advantage of affordable mobile technology and, in particular, Digital Pen and Paper technology. The business was born from its founders' experiences at GAB Robins, one of the world's leading loss adjusting organisations, where they developed digital pen and paper solutions to help loss adjusters quickly and simply collect claims data in the field.

Digital Field Solutions has delivered Digital Pen and Paper applications into a wide range of industries including financial services, utilities, healthcare, surveying and manufacturing.

www.digitalfieldsolutions.com

Customer profile:

Energy Reports and Surveys (ERS) is one of the largest employers of directly employed Domestic Energy Assessors in the UK, with two contact centres and a robust management structure providing full support. In addition to this the company has relationships with over 200 companies as well as 2,000 panel members available to carry out survey and valuation instructions.

www.ers-uk.com