CRM for Housing and Energy Desk Mechelen

Manual

Annex to D5.1

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Version 0.1	Preparation manual, taking screen shots from CRM	18-08-2025
Version 0.2	Draft version Manual	02-09-2025
Version 0.3	Pre-final version manual	18-09-2025
Version 0.4	Final version manual	22-09-2025

Introduction

In the period 2022-2025, the energy house and the City of Mechelen participated in two European LIFE projects: FOSSTER and CondoReno.

The FOSSTER project aimed to review, consolidate and combine the existing guidance and support services provided by energy houses with best practices from other related projects to create a one-stop-shop model for different types of property owners. The CondoReno project focused on developing one-stop-shop services for co-owners in condominiums who want to renovate not only their individual units but also the common parts of the condominium.

Since these one-stop-shop services for detached homes and condominiums take place in the same energy house, the internal tools to follow up on these services are integrated in one CRM system. Therefore, the redesign of the CRM system was fed and driven by both LIFE projects.

By using a CRM system correctly and consistently, the energy house can streamline the follow-up of customer journeys, facilitate reporting and better respond to the needs of our customers and policy objectives.

In this manual for the CRM system, we begin with the advantages and general structure of the system and explain how to work with it. We then take a closer look at the types of files that can be created. We focus on the basic types: information, advice, project design and implementation. We also explain the file type for the renovation master plan.

Note that the CRM system is a dynamic system that is still evolving. With feedback from users, we are constantly improving the system.

The following elements from the original CRM manual are not included in this manual for CondoReno reporting:

- the basic file types: applications and loans, loans, premiums and subsidies,
- the personalisation options for dashboards and file views
- the administrator functionalities of the CRM
- the link between the CRM and PowerBI for data analysis and reporting.

If you are interested in these functionalities, please contact the energy house and city of Mechelen via woon-en-energieloket@mechelen.be

Contents

PART 1: Introduction

This is a manual. You are not expected to read this manual from cover to cover. Find the chapter you need in the table of contents. Then come back if you have forgotten something or have a specific question.

Not everyone learns in the same way. The CRM manager will be happy to schedule time with you to go over the basics. Is the manual unclear or is it missing content? Be sure to speak to the CRM manager. This will help us improve and complete the manual.

It is okay to make mistakes, and they can be corrected, even in the CRM. If you are unable to do so yourself, please speak to the CRM manager. They will be happy to know what went wrong so that it can be avoided in the future. And, of course, they will correct the mistake for you.

1.1 Advantages of the CRM

The CRM system was developed to support and optimise the services provided by the Housing and Energy Desk. By using the system correctly and consistently, we can streamline the follow-up of customer processes, facilitate reporting and better respond to the needs of our customers and policy objectives.

Registration of individual customer journeys
As soon as contact is made with an individual customer, a file is created in the CRM. This provides a clear overview of the entire process, from initial contact to evaluation, and enables consistent follow-up. Using this method, we can guarantee a high-quality, flexible and transparent service for customers.

Efficient follow-up of customer journeys
The CRM offers a clear and structured way to manage interactions with customers and their journeys. The system makes it possible to continuously evaluate and improve services based on clear reports.

Advantages of consistent and uniform use of the CRM

- Better collaboration: by filling in the system uniformly, colleagues can easily take over each other's tasks, for example in the event of unexpected absence.
- Simple and accurate reports: filling in the CRM correctly helps to generate reports for various purposes, such as reporting to VEKA, European projects, or policy feedback.

Flexible and modular design
Although full integration of apartment management was taken into account, the CRM system is modularly designed to grow with the needs of the Housing and Energy Desk.

New services can be added without major adjustments. In addition, the system offers the possibility to link files and store documents centrally and accessibly.

1.2 General concepts

Data subject: the entity 'data subjects' is an intermediate layer between a contact person and a file. The data subject indicates the capacity in which a contact person acts in a file. Some possibilities are: owner-occupier, owner-landlord, property manager, contractor, etc.

Business Process Flow (BPF): these are the 'blue dots' that you see at the top of a climate file type. These indicate the phase your climate file type is in.

Dashboard: every time you log in to the system, you will see a dashboard. This dashboard can display queues, views and simple graphs. In addition to the standard dashboard, you can also create personal dashboards that better suit your needs.

Entity: entities define the types of records that people can use in the CRM. Within the CRM of the Housing and Energy Desk, you will find the different entities in the left-hand column.

Customer journey: A collection of linked files, linked to a single address. Together, these files form a journey. This customer journey contains the customer's basic data, regardless of the file type. Within this customer journey, the timeline and files are stored in an overarching manner.

Climate file: A collection of data that supports the process that the back office goes through. This file stores the data needed to handle the file.
A climate file contains four general tabs that appear in all file types: file info, contact details, customer journey and files. These climate files form an **overarching entity**: they bundle all files regardless of file type, giving you a clear overview of all files related to an address or contact person.

Climate file type: Files with certain characteristics, all of which follow the same specific flow (see business process flow). For example, an information request requires less information than an advisory file. The files are therefore adapted so that no unnecessary information is requested.

Climate file subtype: each climate file subtype is linked to one specific climate file type. This subtype provides more detailed information about the file type. It specifies more precisely what the information request is about.

Subtypes can be easily added by the administrator. If a subtype is no longer applicable, it can also be easily deactivated.

Queue: used to organise and assign work or tasks to different teams.
Within the Housing and Energy Desk, a queue is specifically used for dispatching the woon-en-energieloket@mechelen.be mailbox. All incoming emails are automatically placed in this central queue. From there, they are manually forwarded to **thematic queues**, depending on the subject or type of request.

View: a 'grid' or view consists of a list of records for a specific entity. A view determines:

- The columns to be displayed
- The width of the columns displayed
- The way in which the list of records is sorted by default
- Which default filters are applied to limit which records are displayed in the list.

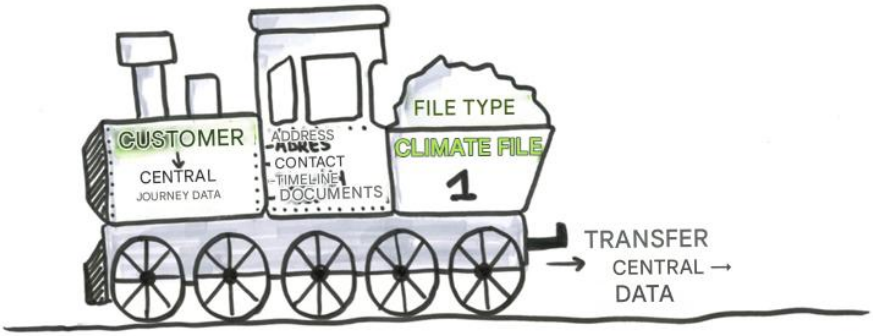
By using filters and choosing which columns are displayed, you can get an overview of the CRM data. Views also determine the data source for graphs used in the application. System views are visible to all users. You can create your own personalised views, which you can share with colleagues.

Work: a collection of data about a renovation measure or study, linked to a single contractor.

Part 2: Getting started with CRM

2.1 CRM structure

A climate file is created for every enquiry (information, advice, support) received by the Housing and Energy Desk. Climate files that belong together are linked in the CRM system. To illustrate this, we use the metaphor of a train.



The locomotive: the start file
When we receive an initial enquiry from a customer, a **climate file** is created. This climate file is the start file and therefore represents the **customer journey**. It contains the customer's basic details and their enquiry. We see the basic details as the **locomotive** of the train and the enquiry as the carriage.

The locomotive includes:

- Customer contact details
- Address(es) to which the question relates
- Communication (such as emails, telephone calls, appointments)
- Documents shared with the Housing and Energy Desk, or drawn up by an employee of the Housing and Energy Desk

The wagon
The wagon contains the customer's question. This is the type of **climate file** that is created. The following wagons are possible:

- Information
- Requests and borrowing
- Advice
- Project design
- Implementation
- Loan
- Premium & subsidy

Would you like more insight into the wagon? Would you like to open the 'container'? Then click through to the **subfolder.**

Follow-up process: additional wagons
As the customer receives further guidance, we attach new carriages to the train. Each carriage represents a different type of **climate dossier** (advice, project design, loan, etc.).

Important: all carriages are attached to the locomotive, the customer journey, and therefore automatically receive the customer's central data.

End of the journey
Sometimes the train stops after the first contact. In that case, the train consists only of the locomotive with the first carriage. But if the customer completes the entire journey, the train grows with additional carriages.

2.2 Queues

Queues are overviews of activities or tasks that need to be carried out by teams. In the CRM environment of the housing and energy desk, queues are used to dispatch the mailbox woon-en-energieloket@mechelen.be. The inbox of this email address is loaded in its entirety into the CRM, in the 'H&E' queue. From this queue, items are dispatched to thematic queues.

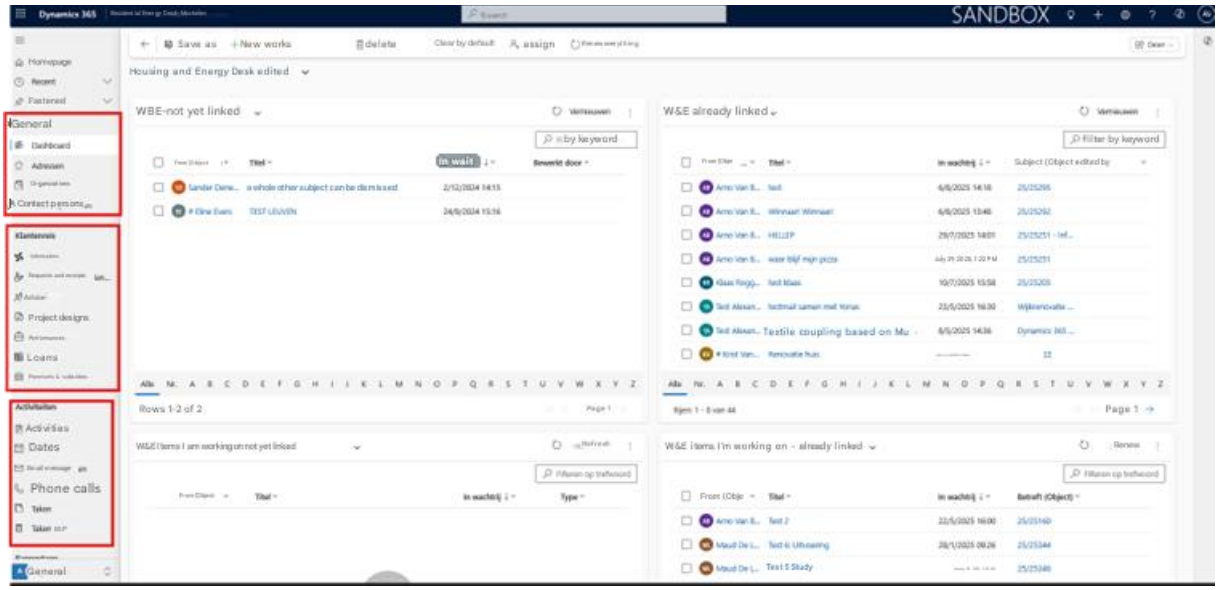
Each thematic queue has its own manager. This person ensures that the emails in the relevant queue are dealt with. The queue manager determines the agreements within this queue.

A distinction is made between the following queues:

Queue name	Description	Dispatcher/ person responsible	Rules
H&E	This queue contains the inbox of the email address woon-en-energieloket@mechelen.be.	...	General dispatch to other queues.
Energy (H&E)	Queue for all emails with general questions about energy.	...	Questions about the energy desk, My Renovation Grant, My Renovation Guidance, energy sharing
Housing (H&E)	Queue for all emails handled by the Housing department.	...	Dispatching to other employees
Apartments (H&E)	Queue for all emails relating to apartment services.	...	Dispatching to renovation coaches and other employees
Neighbourhood renovation (H&E)	Queue for all emails relating to neighbourhood renovation(s).	...	Dispatching to renovation coaches and other employees
Adaptation (H&E)	Queue for all emails relating to adaptation.	...	Adoption of street garden, neighbourhood compost, green garland, softening, rubble bags, tile garden.
Loan (H&E)	Queue for all emails concerning loans.	...	Dispatching to loan employees

For the 'H&E' and 'queue items I am working on' queues, a distinction can be made between 'not yet linked' and 'already linked' emails. Unlinked emails are not yet linked to a file. This may be because it is a new referral or because the customer has not responded to an existing email. Already linked emails are already attached to an existing file.

2.3 CRM overview

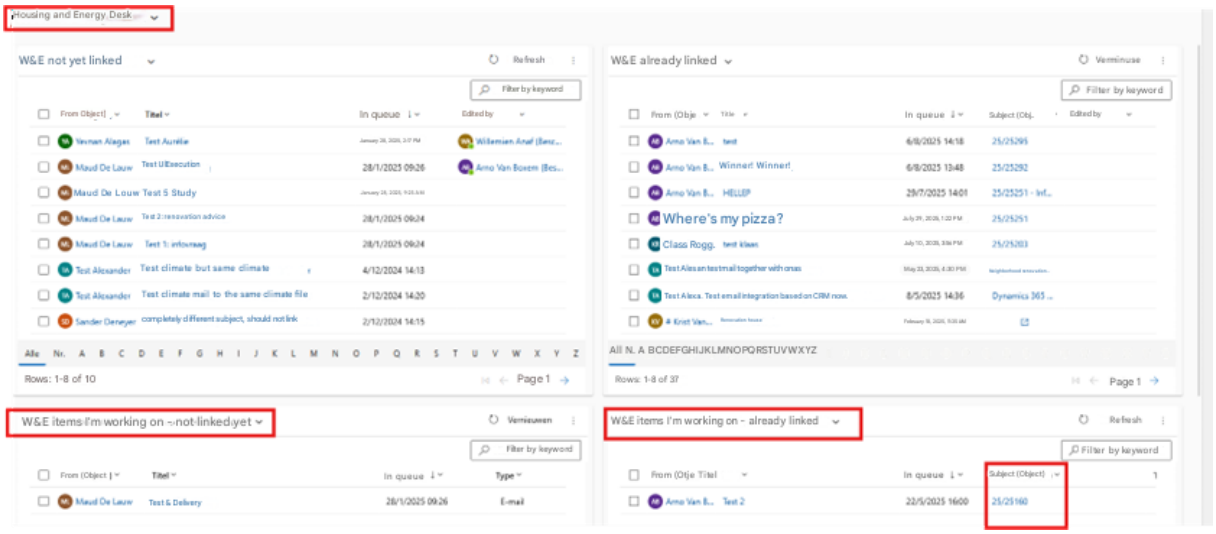


2.3.1 General

This includes the information you will use most often.

Dashboard

The dashboard is your personal desktop. In the CRM, you will see a personal overview of your emails and tasks that have been assigned to you from a queue.



Your dashboard is located at the top left. It ensures that you see the queues you need.

Below, you will see the emails assigned to you from the general queues. On the left, you will see the emails without a file. On the right, you will see files with a file and the file number to which they are linked.

Addresses

Here you will find all the details about an address. You can see which files are linked and what work has already been done here.

Organisations

There are no organisations at this level. This can include VMEs, contractors, syndicates and much more. At this level, you can keep track of various files related to this organisation.

Contact

Here you will find all the information about a person. Here you can also see which files are linked to that person.

2.3.2 Customer journey

Below you will find all the different types of climate files. These files are structured in such a way that the flow is automatically followed.

For the flows, see Part 5.

2.3.3 Activities

Below you will find all your outstanding tasks and emails.

2.3.4 Reporting

Climate files

All the overarching climate file types are kept track of here. At this level, you will also find the Customer Journey.

PART 3: Working in CRM

3.1 Creating a file

You can create a file in the CRM system in various ways, depending on the situation of the file. The following options are available:

1. Creating a file from an incoming email
2. Creating a file when contacting the citizen by telephone, at the physical counter or during an event
3. Creating a file as a follow-up file

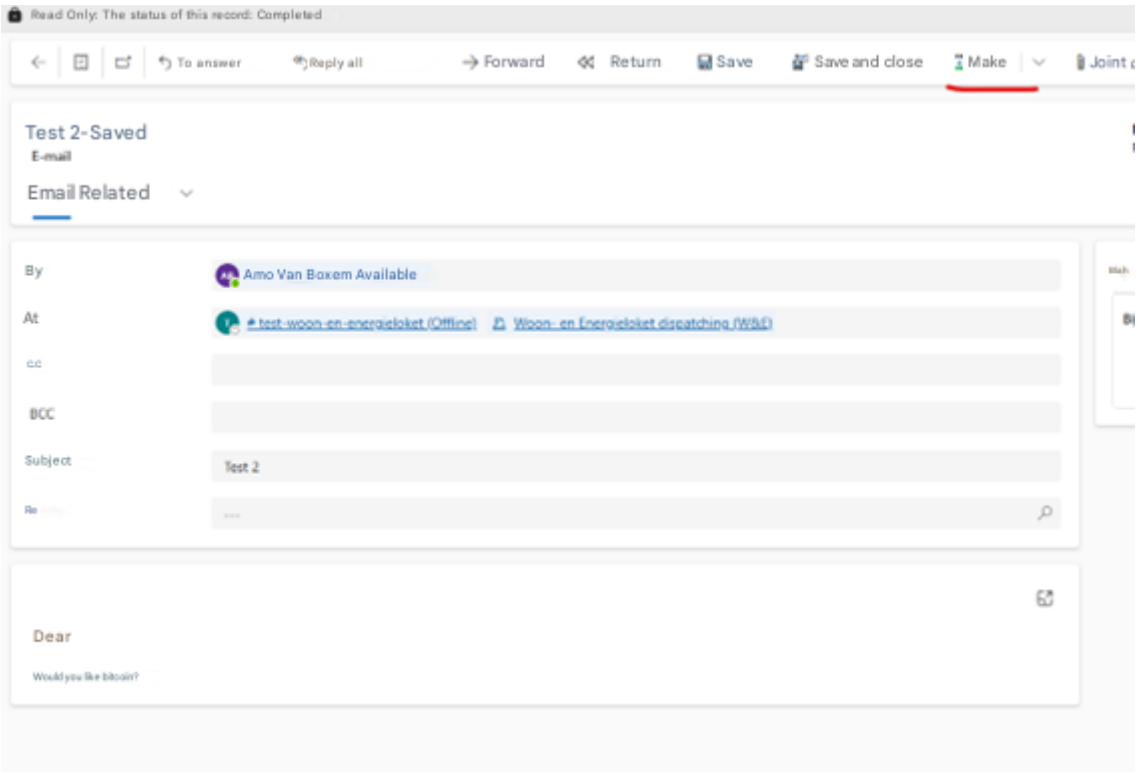
We discuss these different options below.

3.1.1 Creating a file from an incoming email

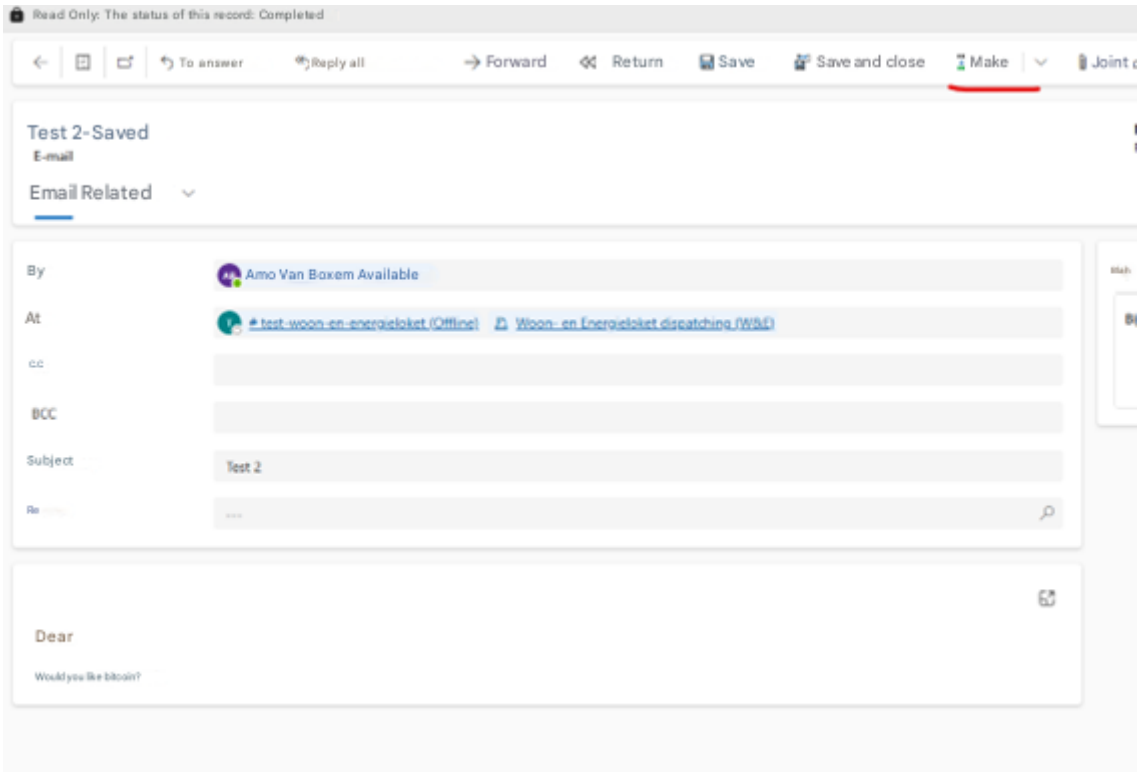
When a question from a citizen arrives by email, you can create a file directly from this email. The advantage of linking via email is that the email is immediately attached to the new file.

Instructions

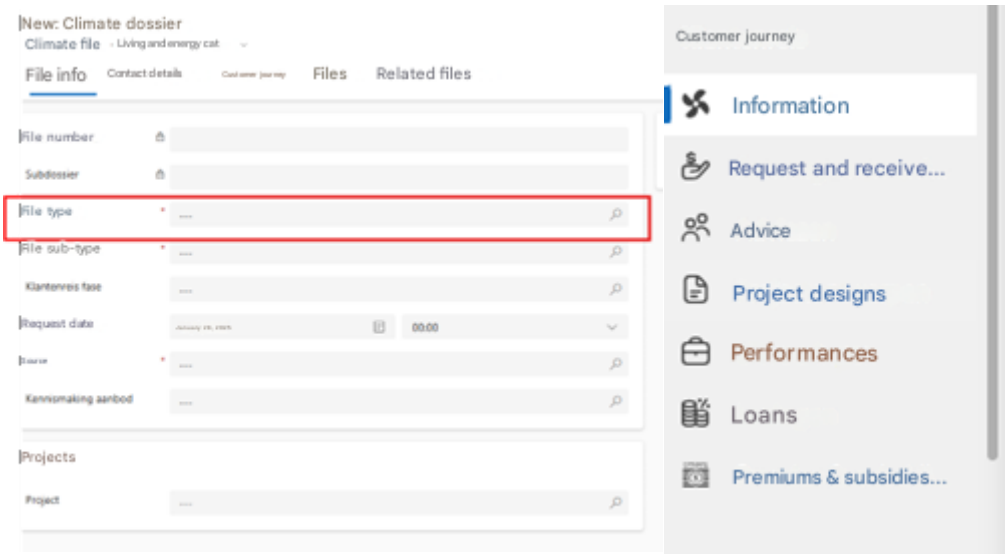
Click on the tick next to the 'Create' option at the top of the navigation bar.



Select **'Climate file'** here. A new screen will open where you can enter the file information.



Enter the file type that corresponds to the citizen's question.
The file type determines how the rest of your file will look, the steps to be taken and the phase of the customer journey in which the file falls.



3.1.2 Creating a file when contacting the citizen by telephone, at the counter or during an event

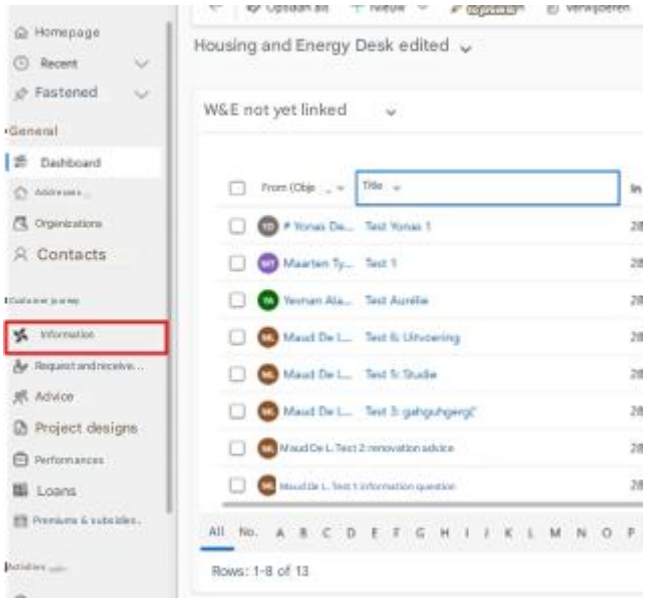
In the left-hand navigation bar, go to the 'Customer journey' section. This contains all available file types.

Select the file type that corresponds to the citizen's request, and a climate file of the requested file type will be created automatically.

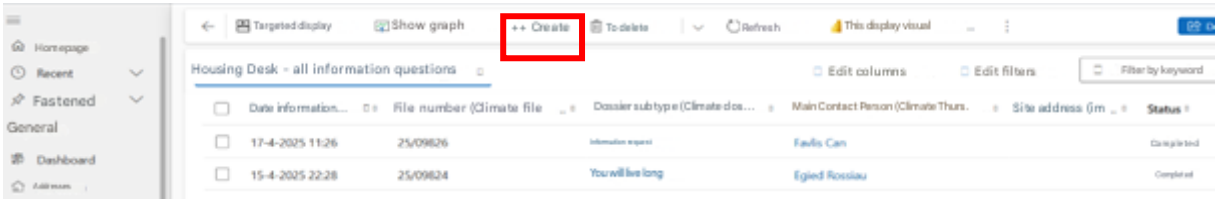
Instructions (example file type: Information)

(start screen = your personal dashboard – see 'Dashboard' highlighted in the left-hand navigation bar)

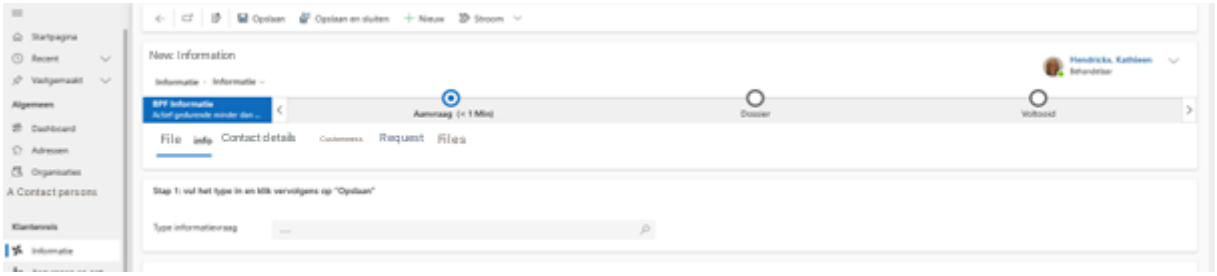
Step 1: In the left-hand navigation bar, under Customer journey, select the **'Information'** option and left-click. A screen will open with a list of information questions.



Step 2: Click on **'+ Create'** in the navigation bar at the top with the left mouse button.

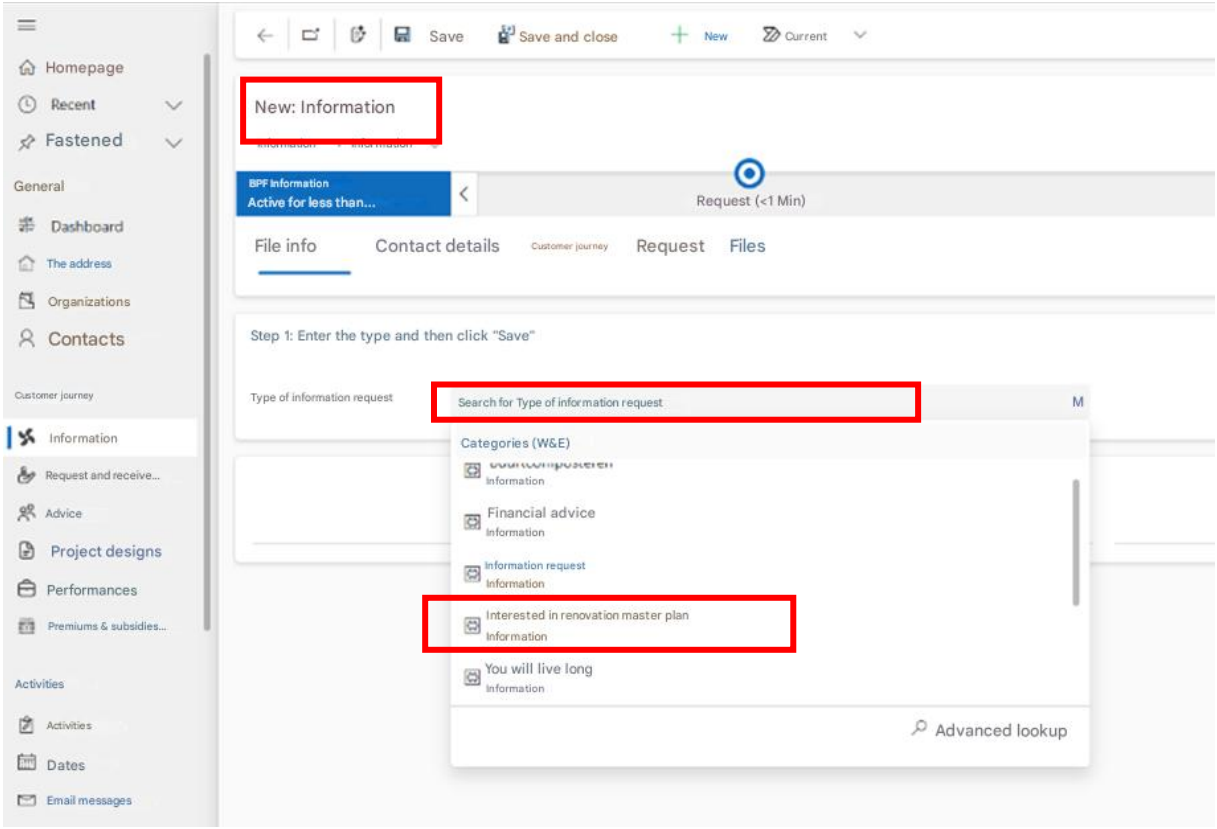


The Information start screen will appear and open in **the 'File info'** tab.



Step 3: Go to the **magnifying glass** next to the 'Type of information request' box. Left-click: a drop-down menu will appear.

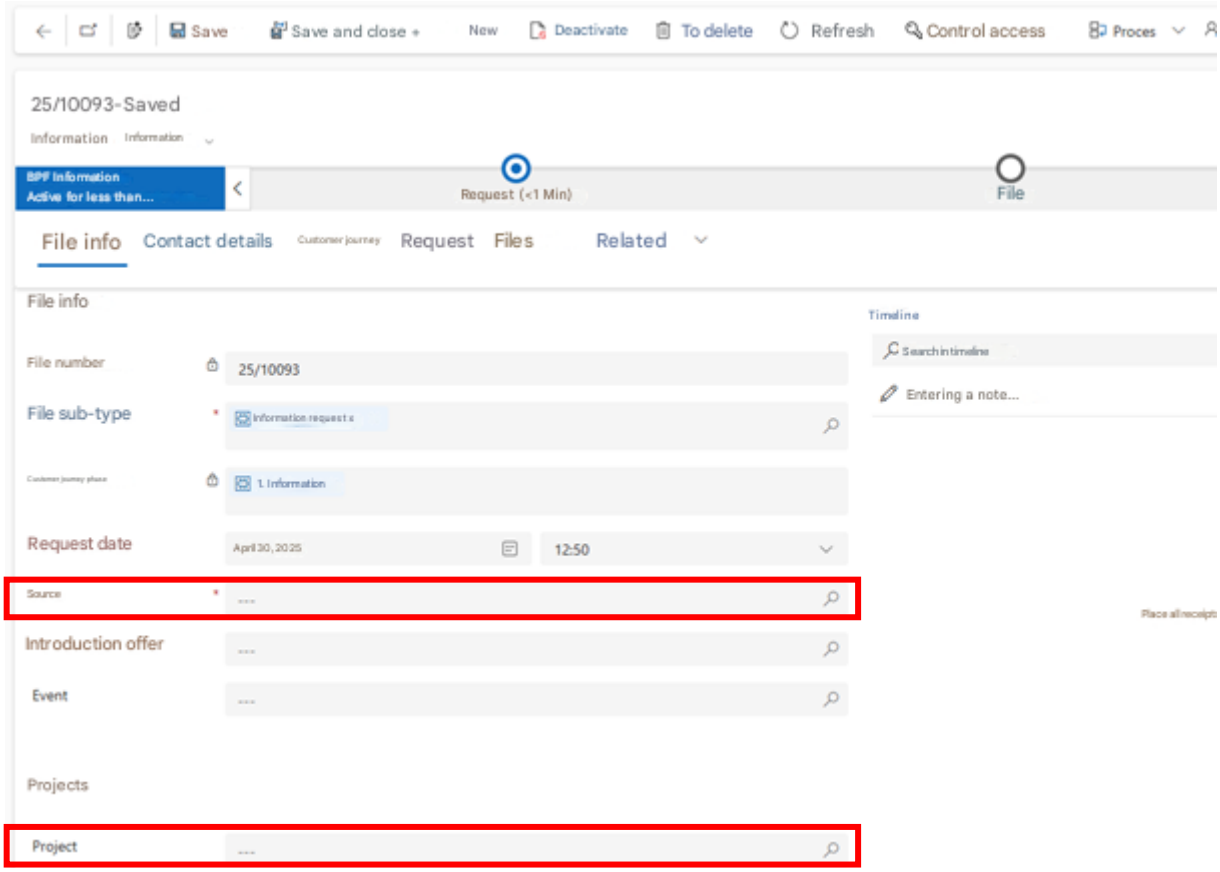
Select the appropriate file type from the drop-down menu, e.g. **'Information request'.** Click on 'Save' (navigation at the top).



The following new screen will appear.

Step 4:Enter the requested information in the 'File info' tab.
The fields framed in red are mandatory. Otherwise, you will not be able to save or enter other information.

- 'Source' field: Left click on the magnifying glass and select from the drop-down menu (e.g. physical counter, email, contact form, etc.).
- 'Project' field: Left click on the magnifying glass and select from the drop-down menu.



Step 5: Then click on 'Save' to save all the file information. You can now proceed to the next tab with the contact details.

3.1.3 Creating a file as a follow-up file

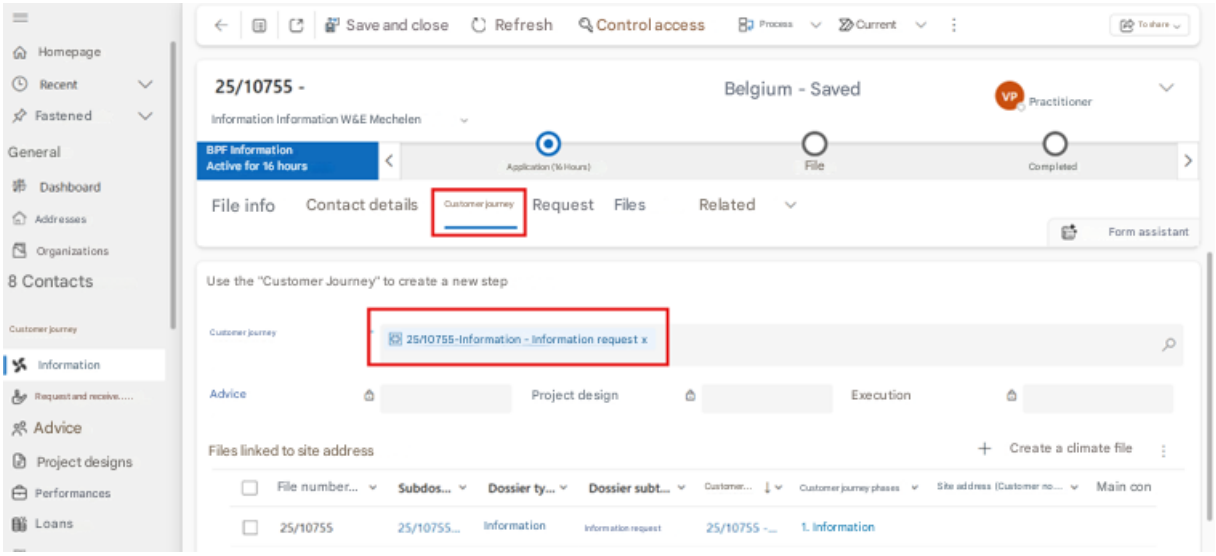
Some questions from citizens are related to their previous files. The first question on a particular subject is the start file. You can think of this as a locomotive to which other carriages – climate files of a different type – can be attached.

The basic information contained in the climate file that is the starting file, such as emails, contact information and files, is transferred to the corresponding newly created files. The starting file (the locomotive) has been given a file number. The number of the newly created file is linked to the number of the first climate file. This ensures that all files relating to a customer journey remain linked.

Instructions for creating a linked file

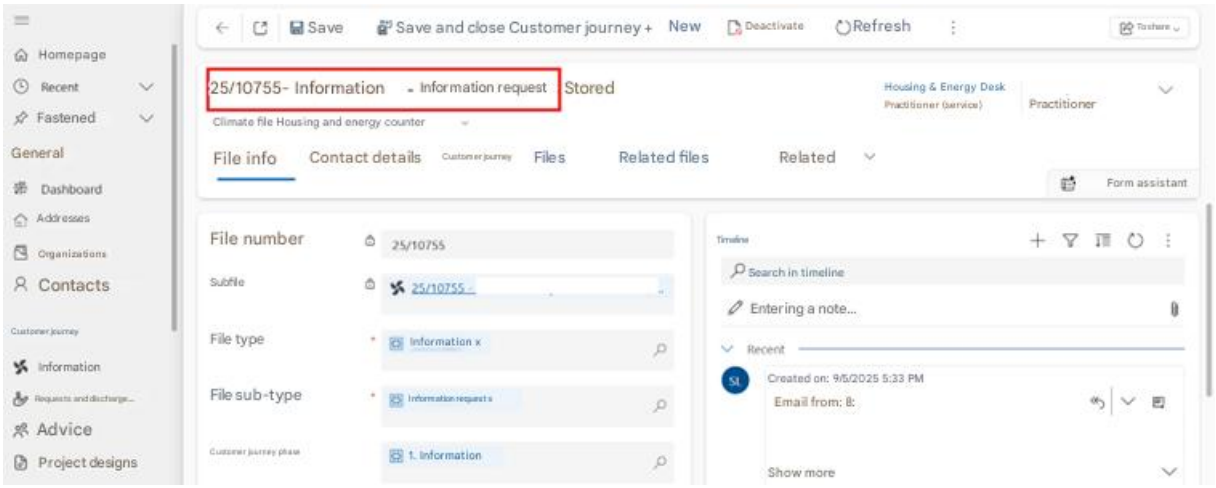
Go to the initial file to which you want to link the incoming enquiry. You can do this by opening the citizen's previous file.

Go to the 'Customer journey' tab and double-click on the file number in the 'Customer journey' field.

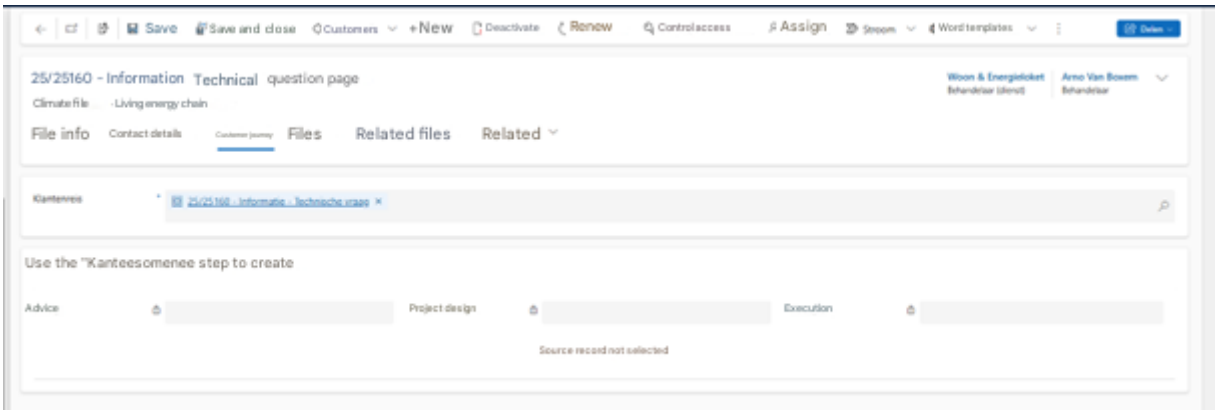


This will open the climate file that was created as the driving force behind the customer journey.

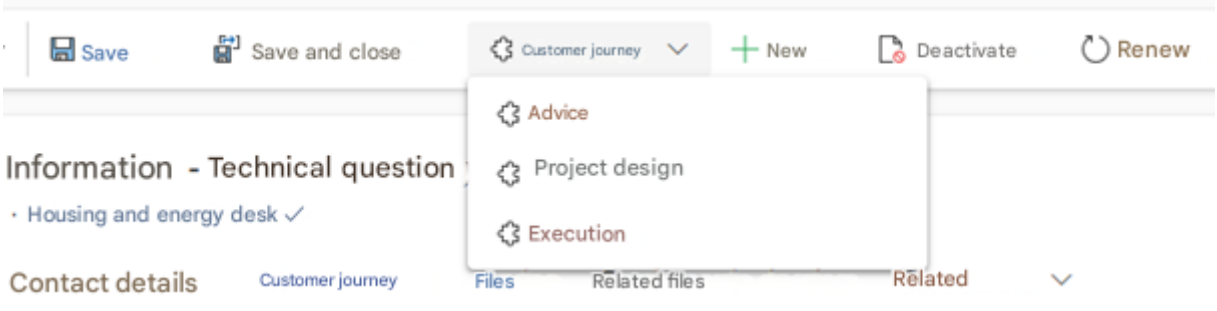
☑ **Tip:** You can recognise that you are in the climate file by the name of the file. Instead of the citizen's personal details, the file type and subtype are mentioned. You can also see that you are in a start file if the blue dots that indicate the progress of a file are not there.



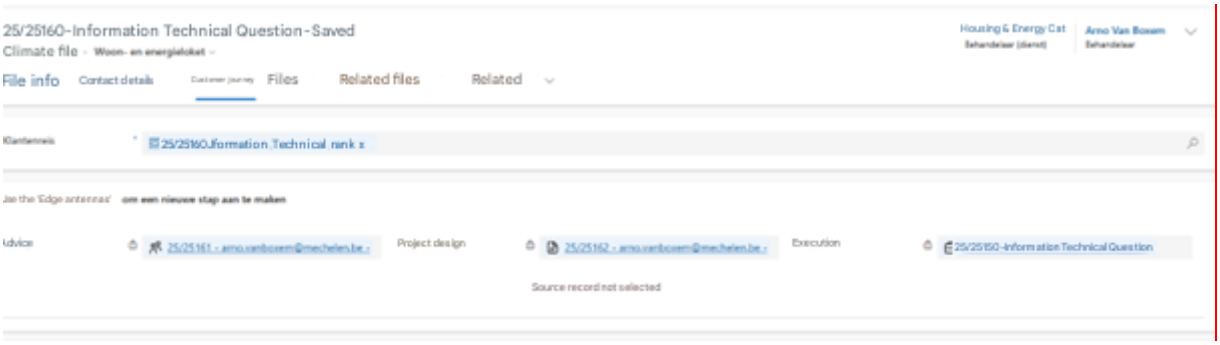
Select the 'Customer journey' tab. The file number of the start file will already be filled in in the 'Customer journey' field (the driving force). Below that, you will see open fields for any subsequent steps in the customer journey (advice, project design, implementation).



Click on the tick next to the 'Customer journey' option in the navigation bar at the top. A drop-down menu will open. Select the type of file you want to create as a follow-up file.



The file will be created and a file number will appear in the field of the file type you selected.



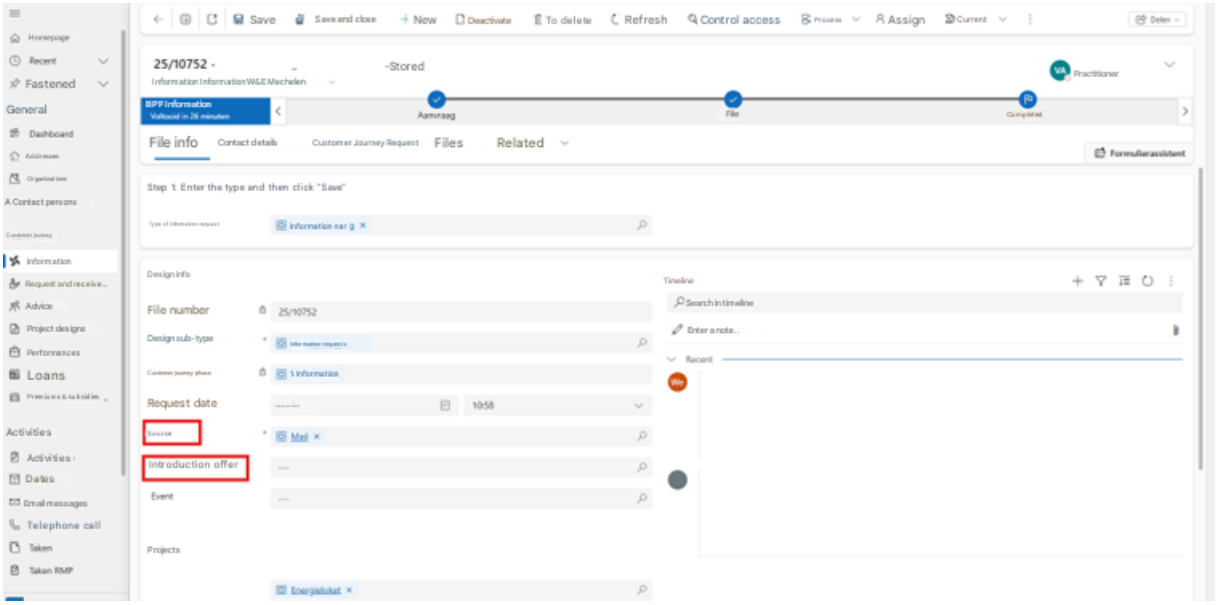
3.2 Adding general information to the file

In addition to information about the file type and subtype, the File info tab also contains fields with general information:

- the 'Source of the request' field
- the 'Introduction offer' field
- the 'Projects' field

A drop-down menu with answer options is available for each of these fields.

This general information is mainly included for reporting purposes.



3.3 Adding contact details to a file

Go to the 'Contact details' tab to add the address and the person involved in the question to the file.

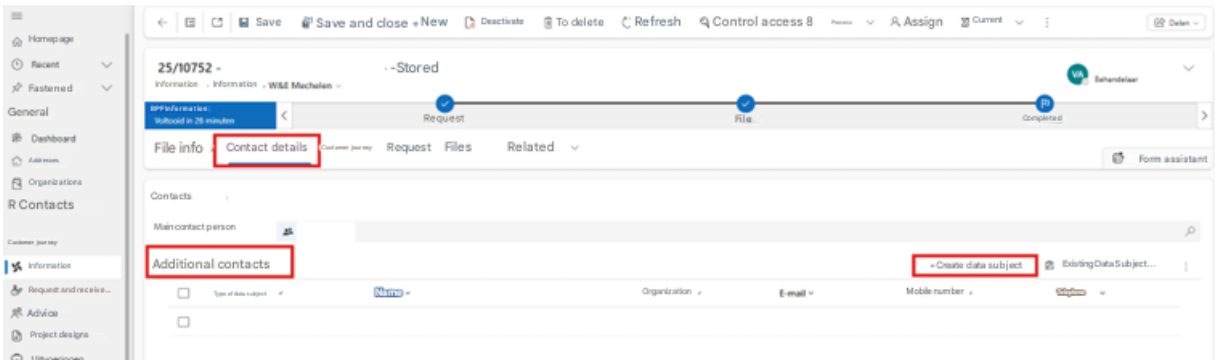
A person can be associated with a file in various capacities: as owner-occupier, tenant, co-owner in an apartment building. But also as a contractor, architect or professional or voluntary property manager.

When adding contact details, we first add a person and immediately indicate in what capacity that person is involved in the file.

3.3.1 Adding contact persons as interested parties

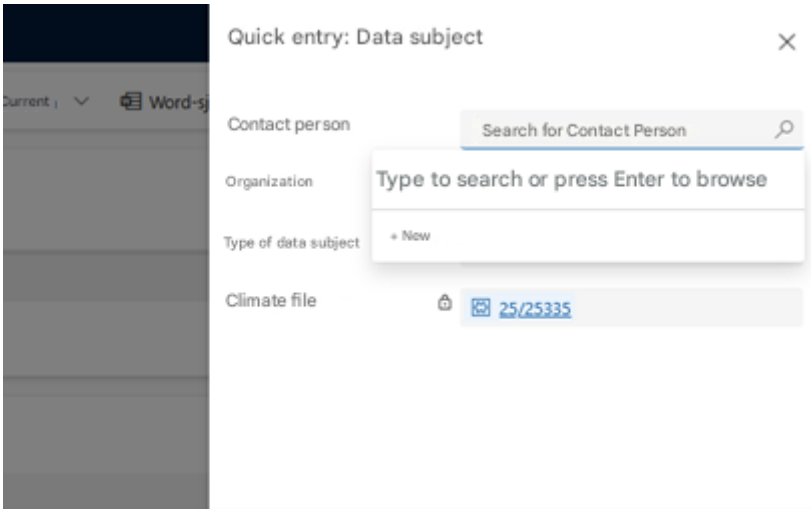
Start by adding contact persons as data subjects in the 'Additional contact persons' grid.

Add a contact person by clicking on '+ Create data subject'.

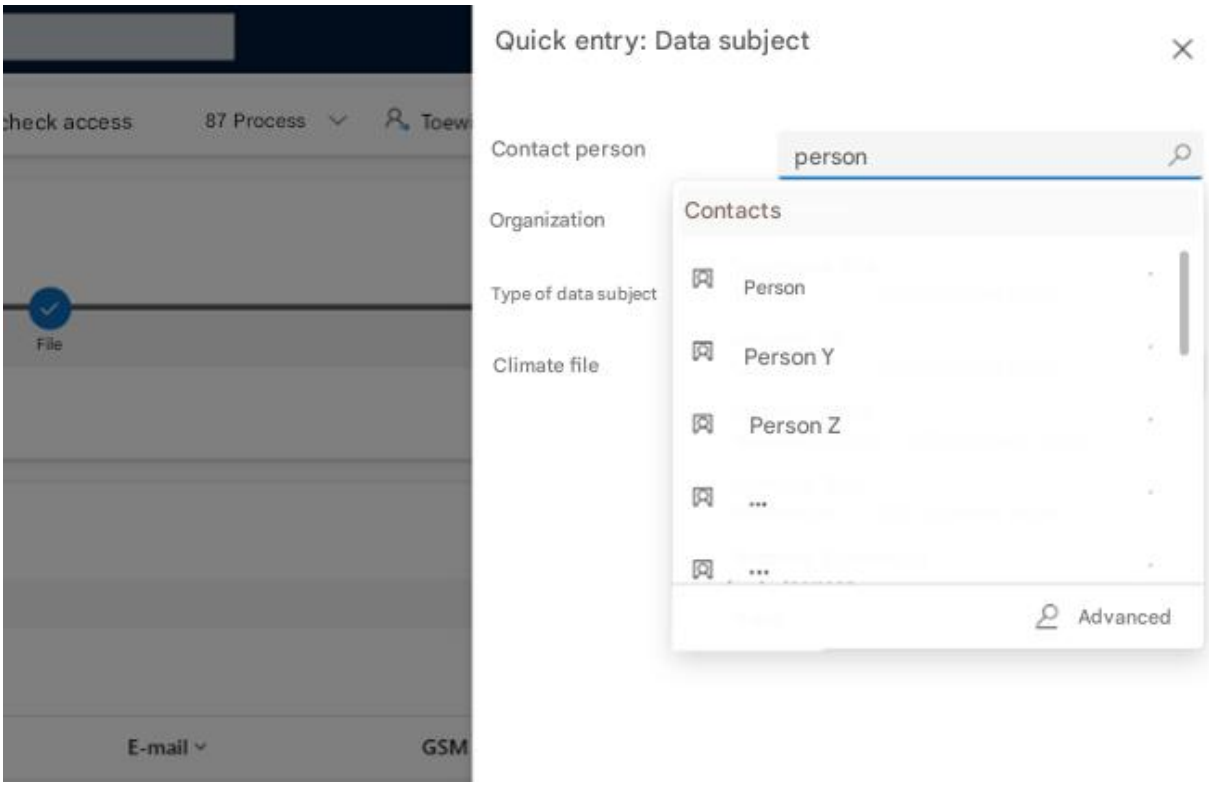


The 'Quick entry: Data subject' window will open.

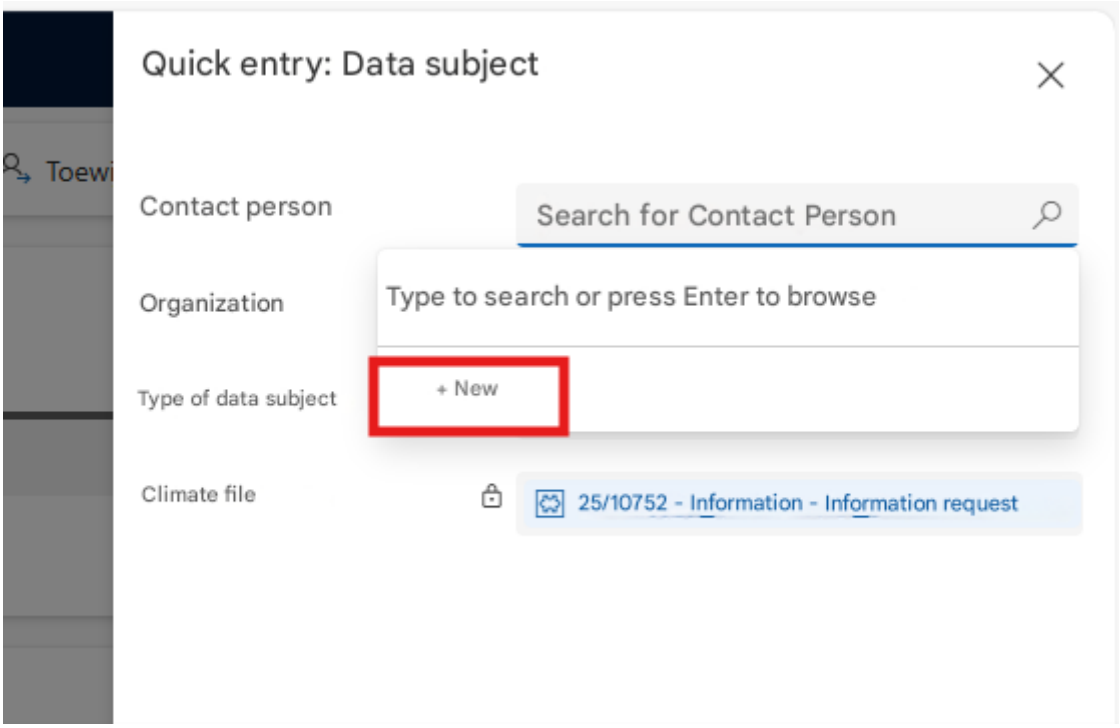
Click on the field next to 'Contact person'. You will be given two options: search for a contact person or create a new contact person.



Type the name of the contact (or part of the name) in the 'Contact' field. If the person is already in the CRM system, they will appear in the list of possible persons. Select the correct name by double-clicking. The name will appear in the field next to Contact.

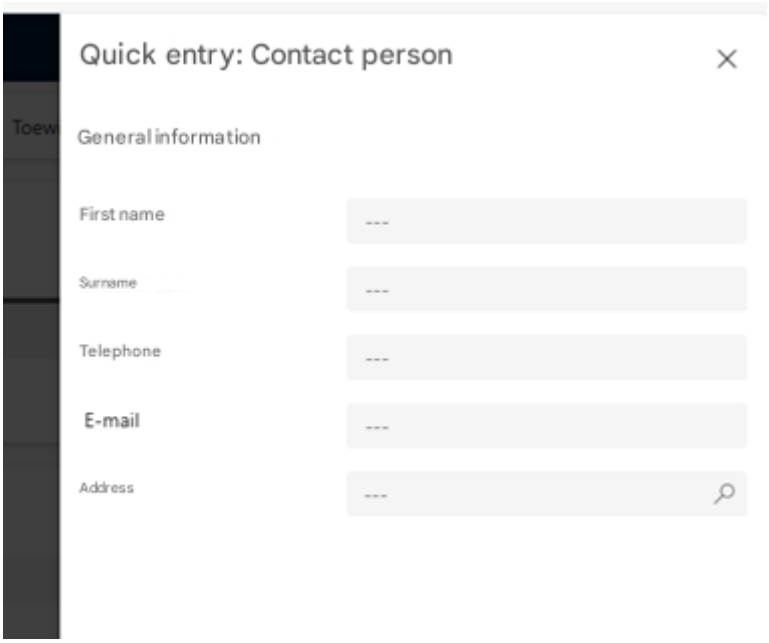


If the name does not appear in the list, select the '+ New' option in the 'Quick entry: Person involved' window.



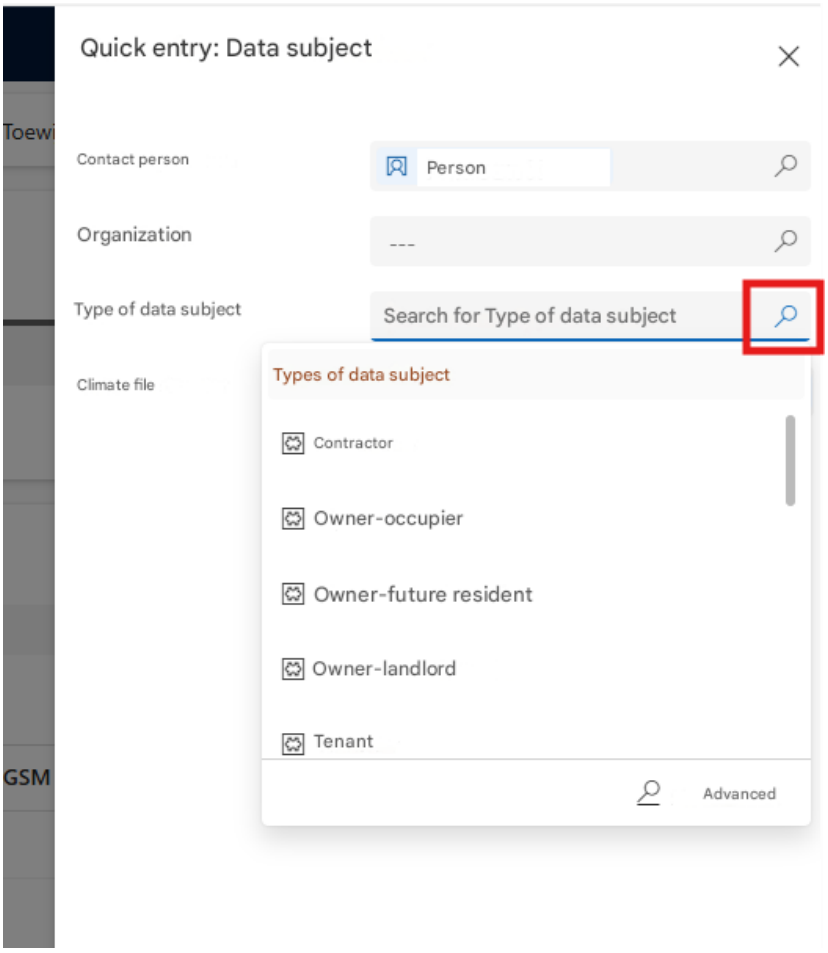
A new input screen 'Quick entry: Contact person' will open.

Enter the citizen's contact details here and click 'Save and close' at the bottom.



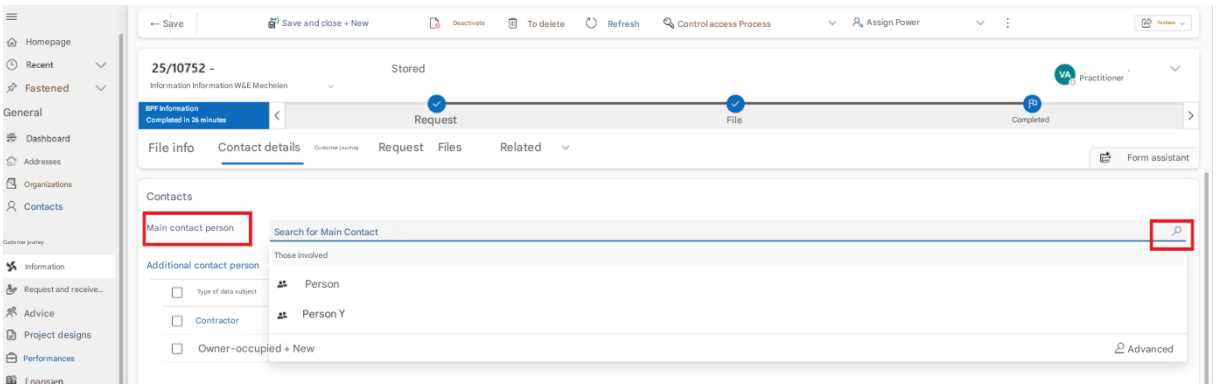
The name of the contact person will appear in the 'Contact person' field.

Then click on the magnifying glass in the 'Type of Person Involved' field and select the capacity in which the contact person is involved in this file from the drop-down menu.



You create a contact person by linking a contact person to that specific file (data subjects). This is then displayed in both the file and the contact person. This allows you to find them in different ways.

Once you have added contacts, you can click on the magnifying glass to select the main contact for this file.



☑ **Please note:** You can add more involved parties to a file, but it is only possible to search for a second involved party. If you are not searching for the main contact person, you must go via contact person.

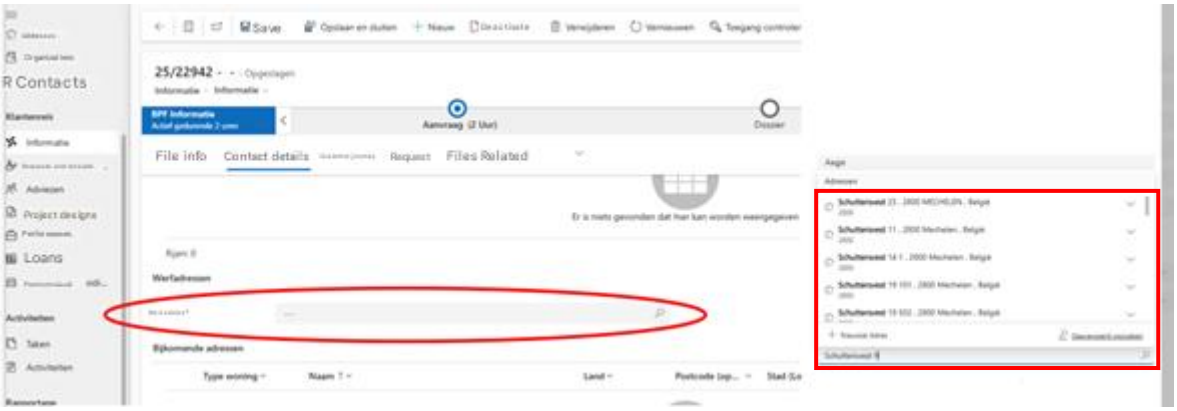
☑ **Tip:** Add the VME itself as an organisation to the list of parties involved. The file will then also appear in the list of files at the organisation level.

3.3.2 Create address

Addresses in CRM are loaded from the building and address register. This ensures that street names, house numbers and bus numbers are displayed correctly.

Scroll to the bottom of the 'Contact details' tab where you will find the 'Site address' field.

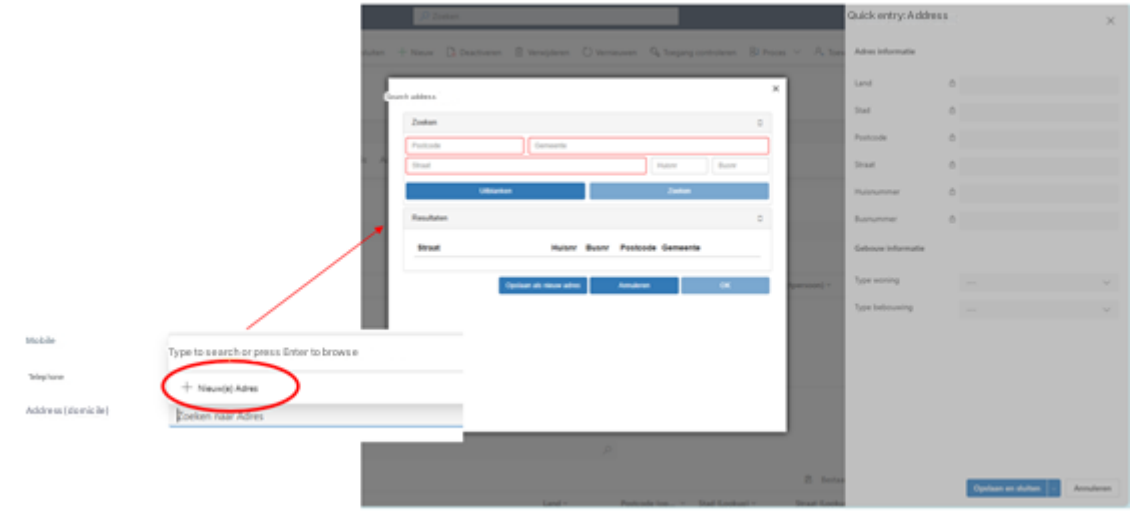
First check whether the address already exists by entering it in the address bar. A drop-down list of possible addresses will appear. Select the address that corresponds to the file.

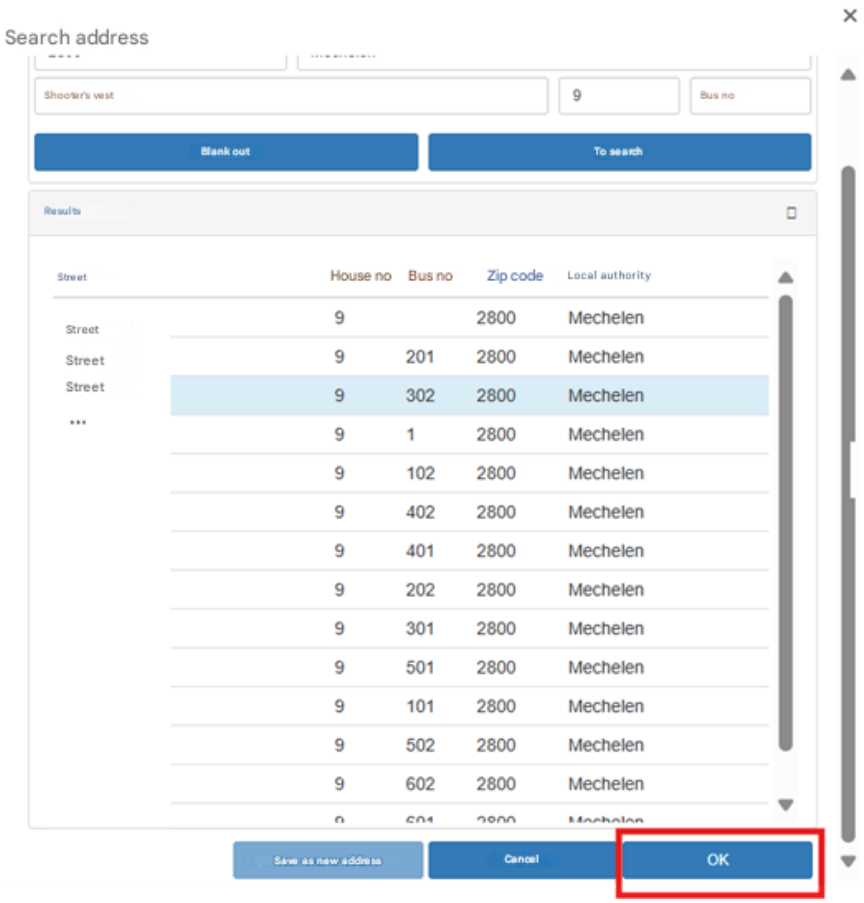


If the address is not in the list, select the '+New' option at the bottom of the list of addresses.

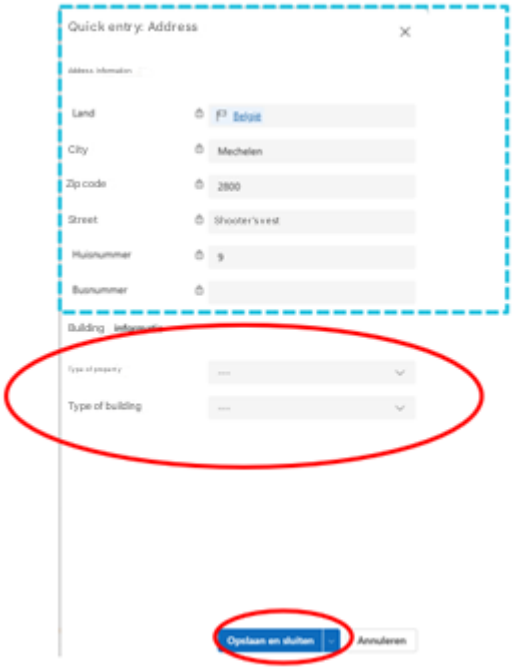
A pop-up window 'Search Address' will appear. Enter the postcode here and select the correct (language) option. The system will automatically fill in the municipality based on the postcode.

Enter the first letters of the street and select the street from the drop-down list. Enter the house number and then click on search. You will then automatically see all house and box numbers at this address (important for apartment buildings.) Select the correct address and click OK.





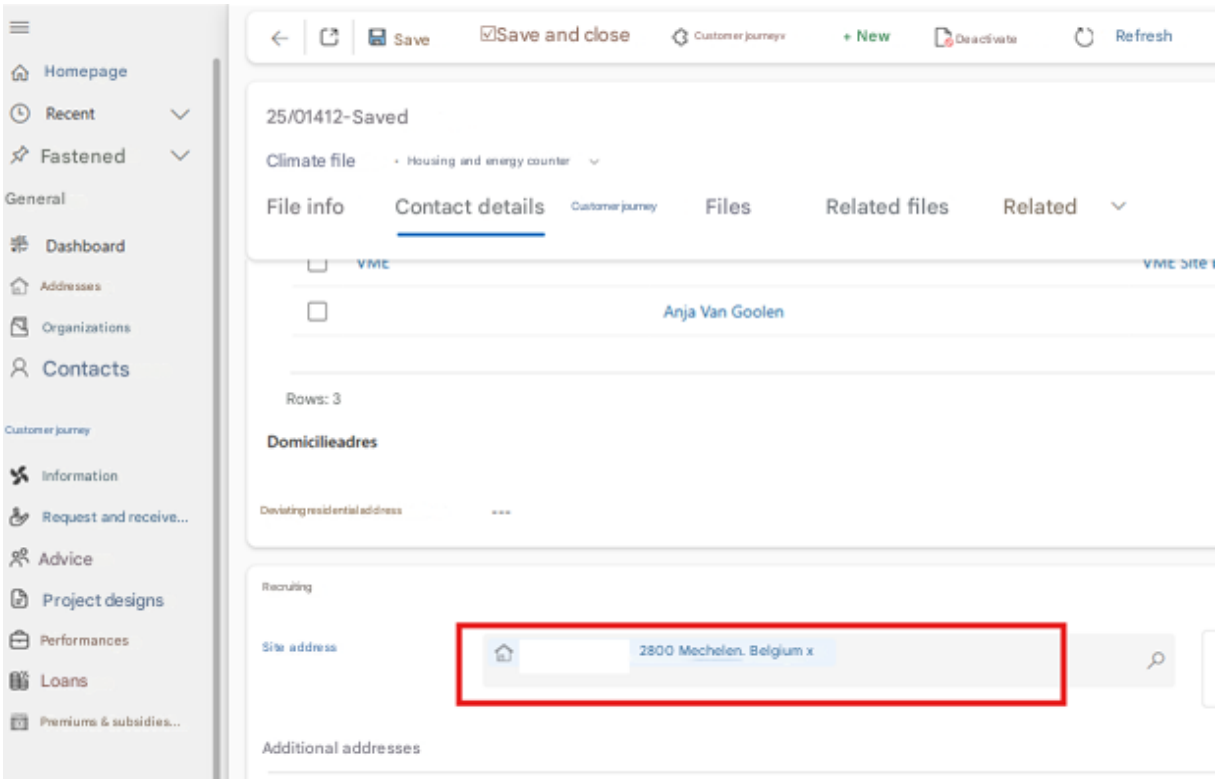
☑ **Please note: Always select the address using the search function and save it by clicking OK.** This ensures that you are registering an address from the building and address register. NEVER use the 'save as new address' option.



The site address is now included in 'Quick entry: Address'.

Fill in 'type of dwelling' and 'type of building' and click on 'Save and close'.

The address details will now appear under 'Site address' in the 'Contact details' tab.



3.3.3 Completing address information

If information is known, you must add it. Please respect the spelling and adjust it if necessary.

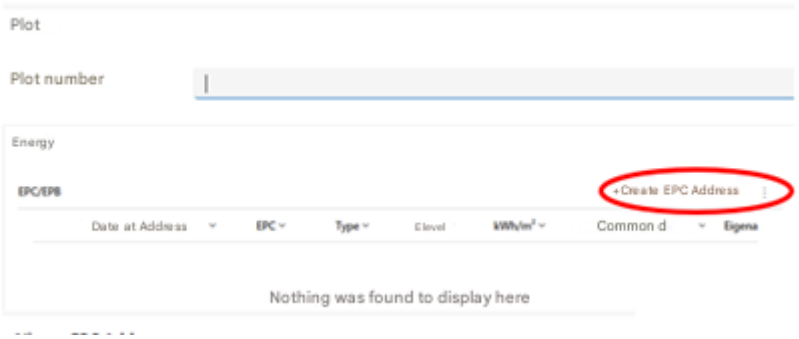
Plot number

Enter the plot number (e.g. 12403D/00N009)

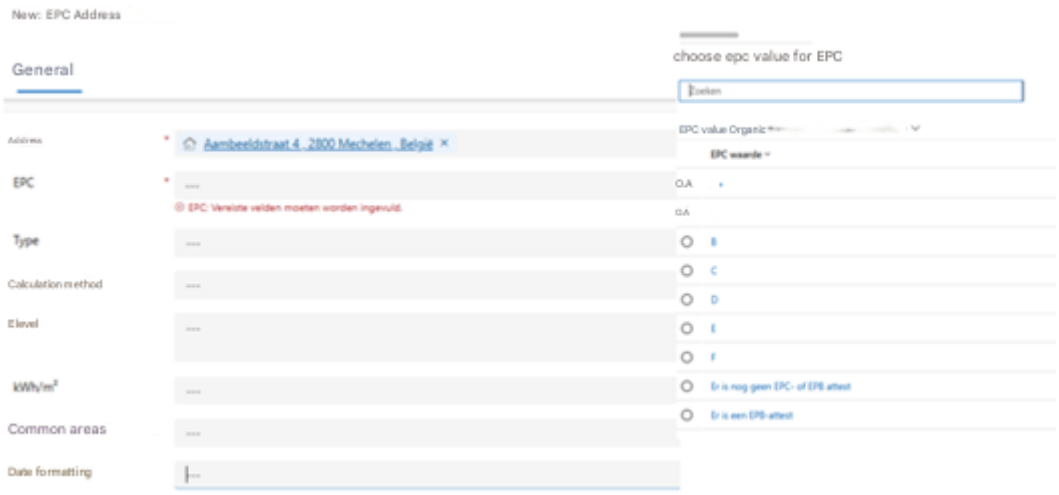
Energy

If the building has an EPC or EPB certificate, enter the energy data.

Click on '+ Create EPC Address' (pop-up window will open)



Select EPC value (drop-down list) and choose type: EPB or EPC

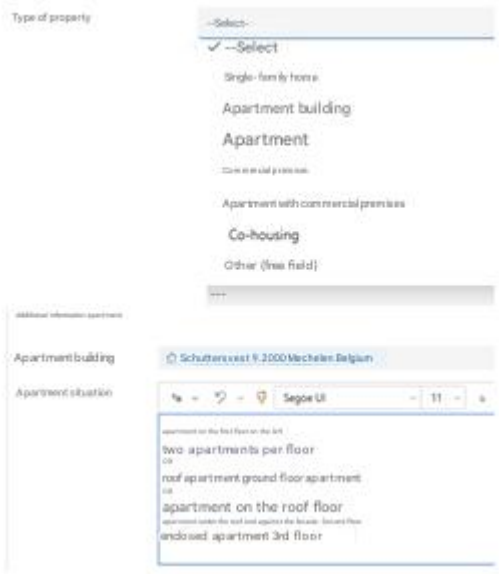


Continue to fill in:

- Calculation method: actual or estimated (= by renovation advisor)
- E-level (e.g. E-20)
- kWh/m² (e.g. 37 kWh/m² per year)
- Common areas: yes/no (for flats)
- Date of preparation

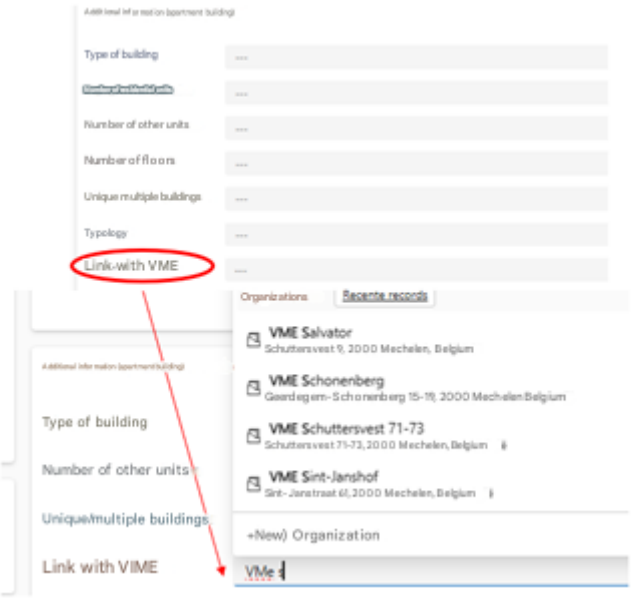
Additional information for flats and apartment buildings

If **you select 'Apartment' as the type of property**, you will see an additional box where you can provide information about:



- The apartment building:
  enter the address of the apartment building here
  = same address, but without the box number
- The location of the flat: describe where (approximately) the flat is located in the building

If **you select 'Apartment building' as the type of property**, you will see an additional box where you can provide information about the building

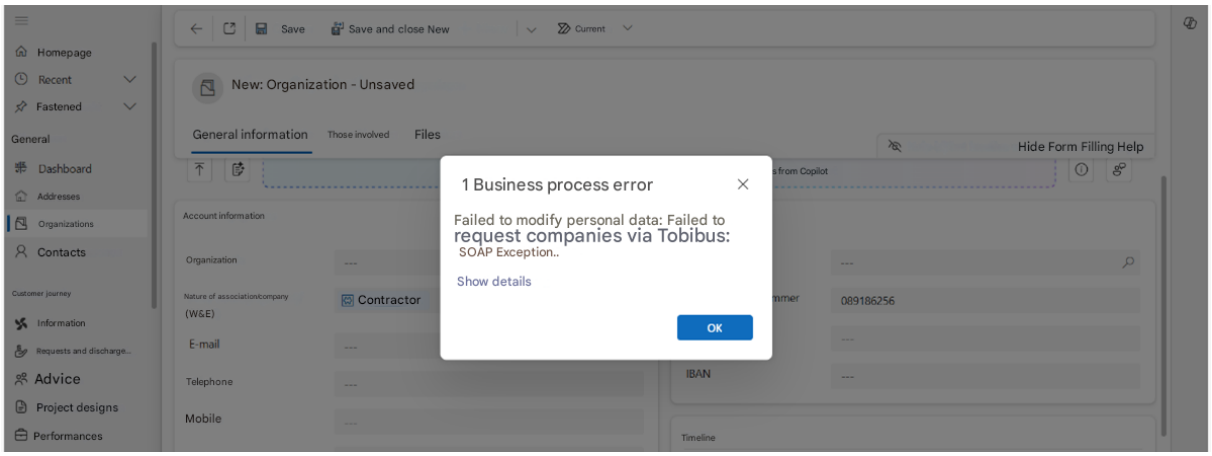


- Number of residential units
- Number of other units
  = cellars, parking spaces, garage boxes, garages (inside and/or outside the building), commercial premises, offices, etc.
- Number of storeys (excluding basement/attic)
- Single building / multiple buildings
- Type of apartment building (drop-down menu) (Mechelen only)
- Link to VME: search and select VME (or create new organisation based on VME company number)

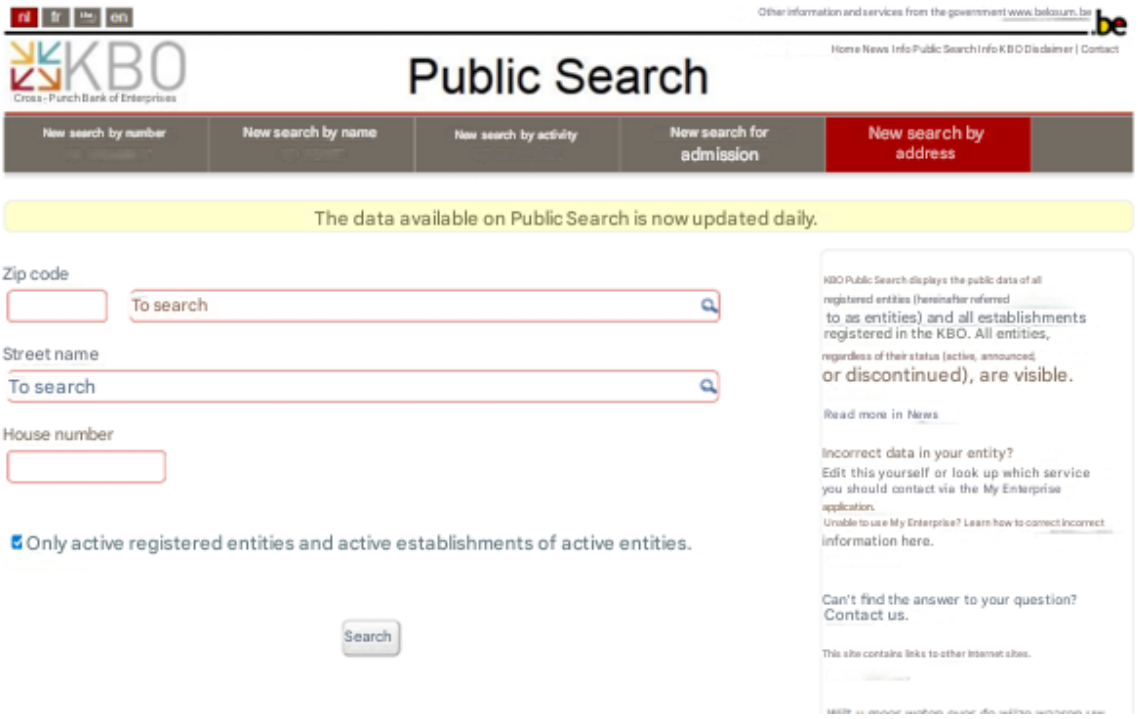
3.3.4 Entering a new organisation via the company number

Link a new organisation to a file via the 'Company number' field. Enter the company number and click on save. The CRM retrieves the organisation's details from the Crossroads Bank for Enterprises (KBO).

☑ **Please note:** If you receive the following error message, it means that the company number is incorrect (format: xxxx.xx.xxx). If necessary, add a 0 at the beginning.



Are you still getting the error message? Look up the correct number in the CBE: [Search in the Crossroads Bank for Enterprises (CBE) | CBE Public Search](). Select 'New search by address'.

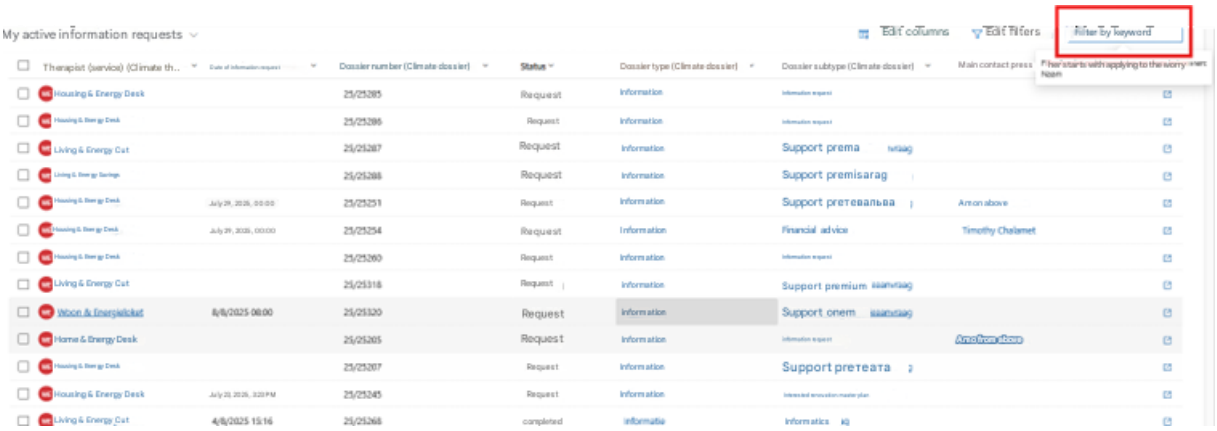


PART 4: Working in a Climate File

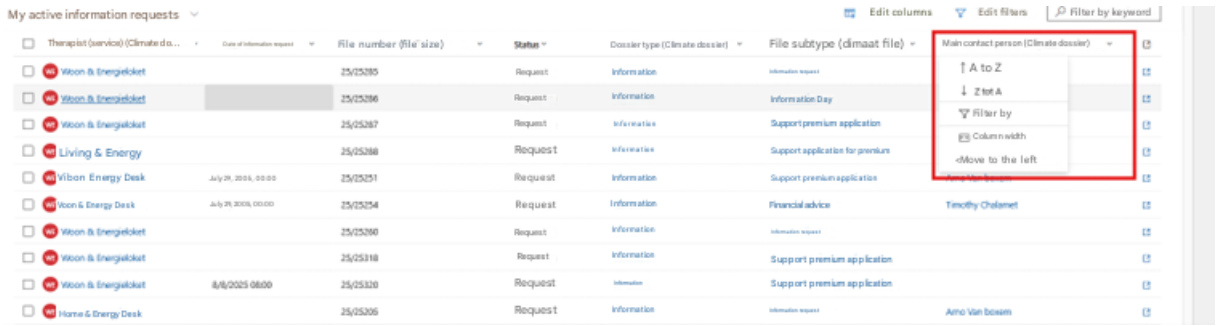
4.1 Searching in the CRM

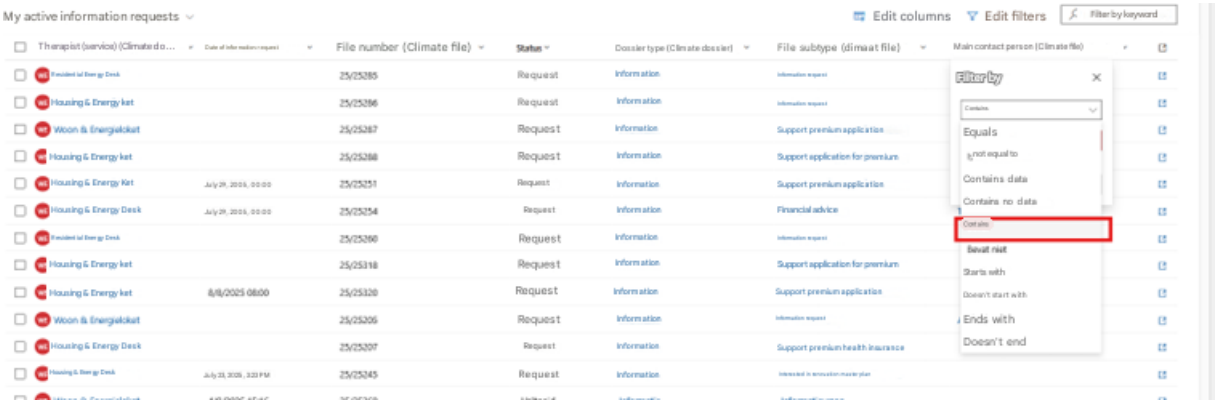
The overviews in the CRM (grids) are made up of columns. There are two ways to search in the CRM:

1) **In all columns at once, using the search function at the top left of the grid**. This works, but is less efficient. It is best to search here with an * before your search term.



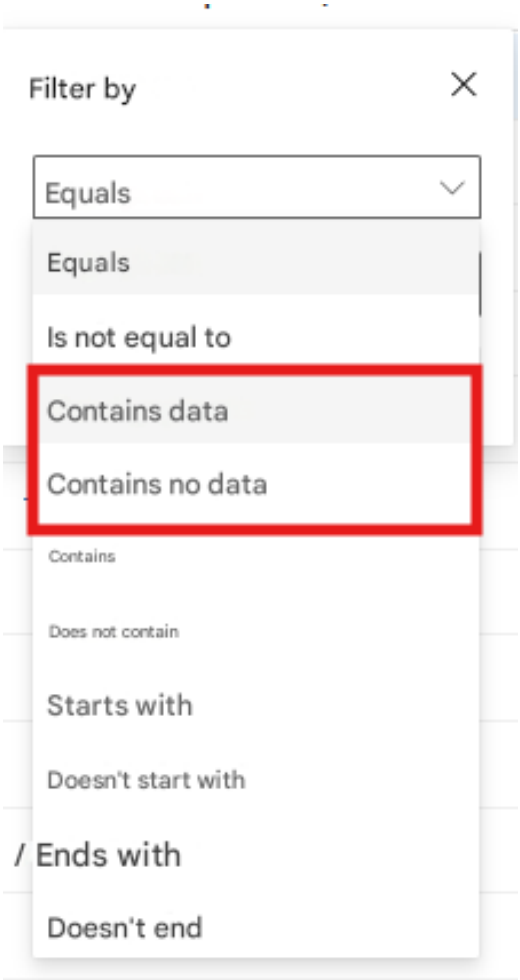
2) **Within a single column, using the 'Filter by' function**. This type of filtering gives quick results.
Select the column you want to filter and click on the tick at the top of the column.
A drop-down menu will open. Select 'Filter by'.
A drop-down menu with filter options will appear. **Select the filter option 'Contains'.** Within the results list, search for the person, address, etc. you are looking for.





☑ **Please note:** If you select the filter option 'Is equal to', your search must contain the exact description of what you are looking for. If there is a typo or a different spelling, you will not get any results.

☑ **Tip:** Are you looking for fields that are or are not filled in? Then use the filter options 'Contains data' or 'Does not contain data'.



4.2 Uploading documents to a file

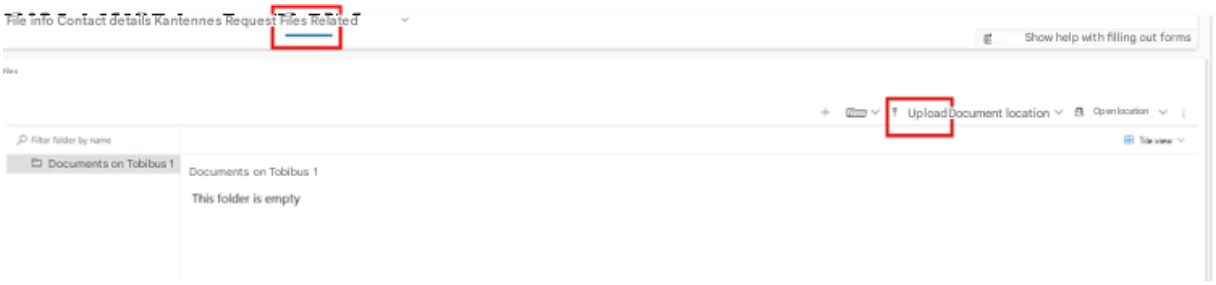
Documents uploaded to a climate file are stored in Sharepoint and transferred to subsequent files in the customer journey.

You can upload files in various ways:

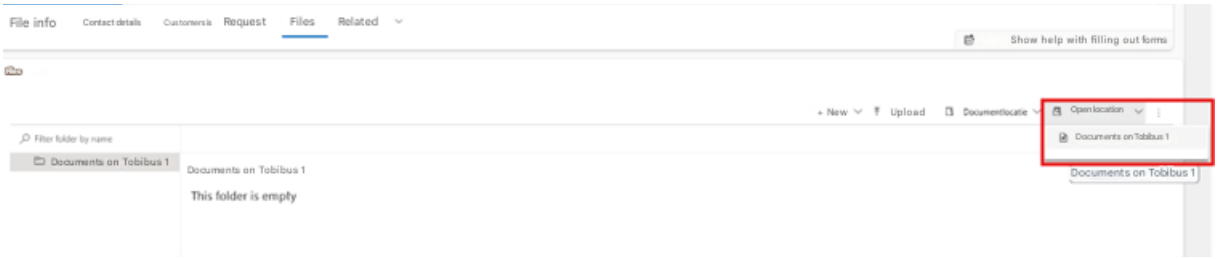
- Uploading one document at a time
- Upload documents in bulk via Tobibus.

Select the 'Upload' option in the 'Files' tab to upload one document at a time.

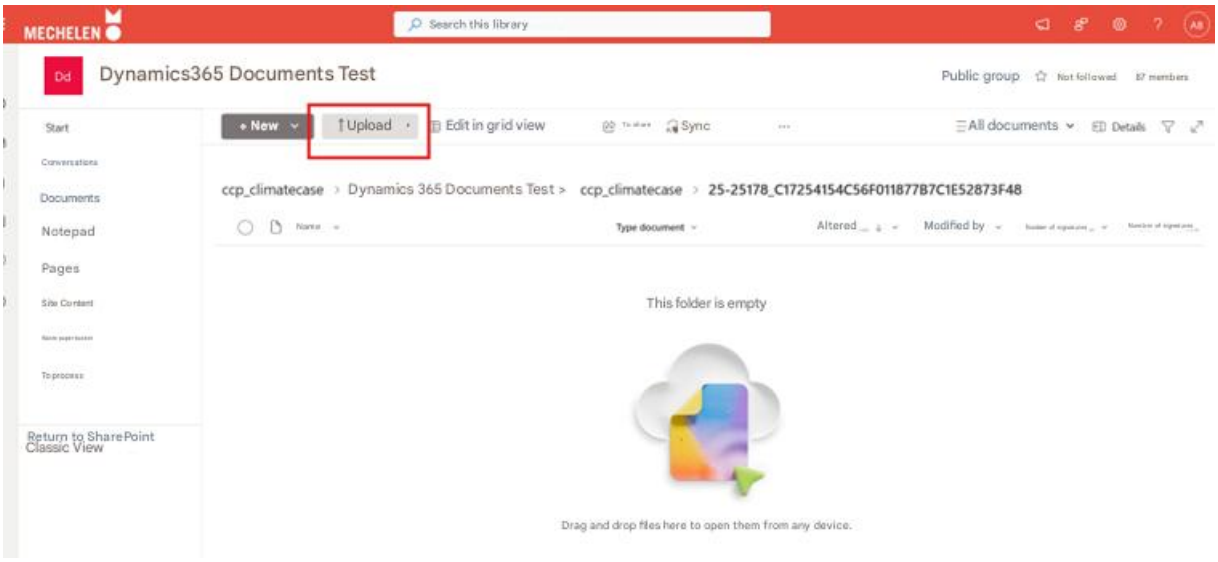
If you choose this option, the Finder programme will open on your computer, and you can search for and select the desired document.



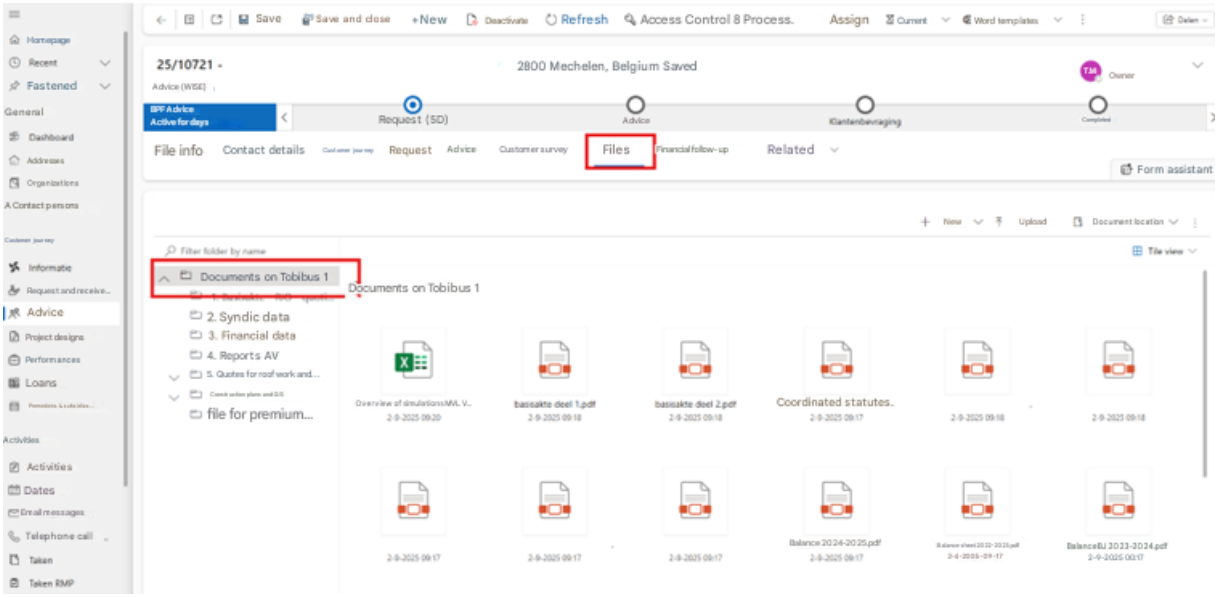
Click the check mark next to 'Document location' to upload multiple files at once. Then click the 'Documents on Tobibus 1' option.



This will open a related web page in Sharepoint. Use the 'Upload' option or drag and drop the files into the window below to add documents in bulk.



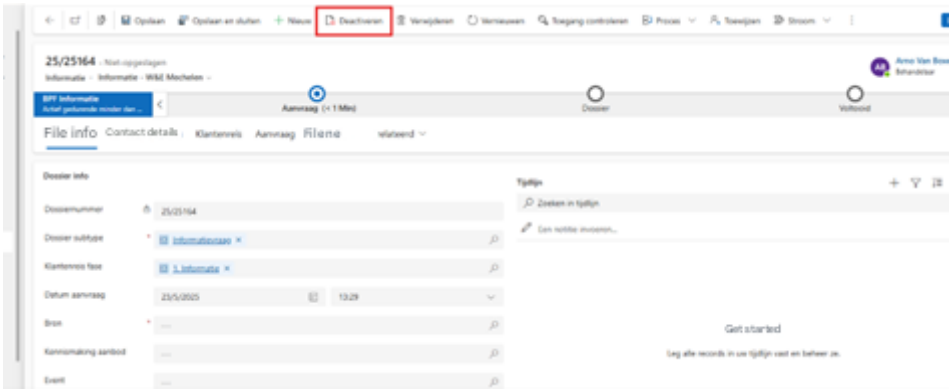
☑ **Tip:** If you need to upload a lot of documents, create subfolders for a clear overview.



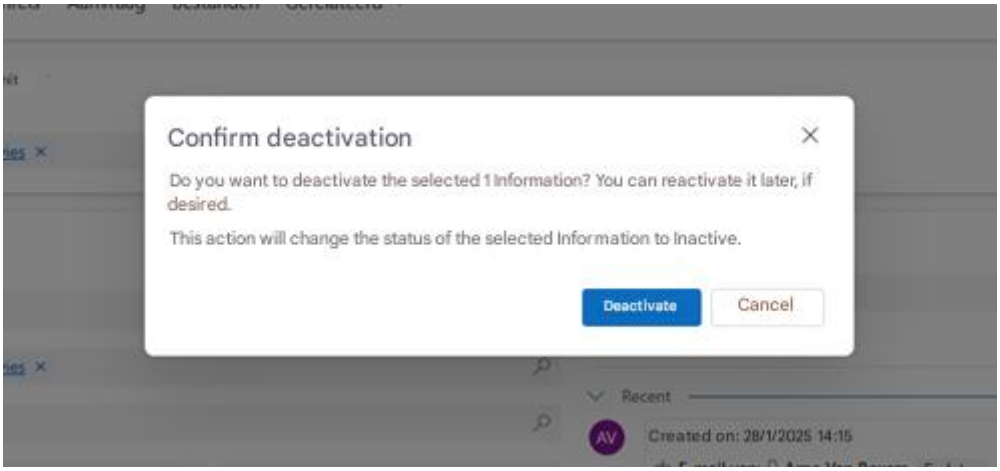
4.3 Deleting a file

Error is human. Occasionally, you may create a duplicate file or have a duplicate contact person. No problem, this can be quickly resolved by deactivating them.

Select the 'Deactivate' button in the navigation bar at the top.



You will then see the following message:



Deactivation sets a file to inactive so that it can still be retrieved if necessary. Next to deactivation is deletion. However, this permanently deletes the file and only people with certain rights can do it.

PART 5: Types of climate files

5.1 Types of climate files

We distinguish between **seven file types**: information, applications and loans, advice, project designs, implementations, loans, and premiums and subsidies. Each file type is represented in a separate entity with a corresponding name. **Each file type is characterised by the same flow** (see table below). The file types are fixed.

Icon	File type	Flow
	Information	Application – File – Completed
	Requests and loans	Request – File (pending) – Completed
	Advice	Request – Advice – Customer survey – Completed
	Project designs	Application – Additional Studies – Request for quotation – Completed
	Implementations	Request – Preparation – Implementation – Customer survey – Completed
	Loans	Application – Analysis – Decision – Signing – Withdrawal – In Circulation – Completed
	Premiums and subsidies	10. Submitted – 20. Processing – 30. Decision – 40. Reporting – 50. Payment – 60. Completed

5.2 Subtypes Climate file

There are **subtypes** for each file type. These subtypes follow the same flow as the file type. Subtypes can be easily added and deactivated by the CRM administrator. The table below shows the current file types. When a file subtype is deactivated, you can no longer select it for a new file, but this subtype will remain in old files.

Icon	File type	File subtypes
	Information	Financial advice Information request Interest in renovation master plan Support with premium application Technical enquiry

	Applications and borrowing	Adopt a street garden Neighbourhood composting Energy meter Green garland Water softening team Rubble bags Tile garden (collective) Tiled garden (individual) Heat scan
	Advice	Adaptation advice Sustainable planning advice Energy scan (external) Renovation advice Renovation master plan
	Project designs	My Renovation Guidance Collective renovation
	Implementation	My Renovation Guidance Collective renovation
	Loans	0% loan 1% loan Energy loan+ Loan – preparation Mechelen is sprucing up My Renovation Loan Emergency Purchase Fund Pre-financing Renovation loan with interest subsidy
	Premiums and subsidies	Green roof Rainwater infiltration Rainwater recovery Public domain intake Climate action (small & large + Ready for Climate)

5.3 Phases

Within a complete renovation process, we foresee several major phases (or stages) that a customer goes through, with or without support from the Housing and Energy Desk: information, advice, project design, implementation and aftercare. Ideally, a customer will come in at the start of their customer journey, but, in reality, customers will find their way to the services of the Housing and Energy Desk at different times.

1. Information

Providing general information via email, telephone, at the desk, or during a conversation at an event. This phase may include the following:

- Listening to the customer
- Identifying the customer's wishes and needs (intake)
- Providing basic, general information
- Referring to the appropriate service/service provider, with customer qualification (possibly income check)

🔗 File subtypes linked to this customer journey phase:

- Information request
- Interest in renovation master plan

2. Advice

In this phase, you provide comprehensive advice tailored to the customer. This usually takes place during a home visit or an extensive appointment at the counter. At the end of this phase, the customer makes a preliminary decision on whether to take further (more concrete) steps. This phase includes:

- Renovation advice (at home)
- Renovation master plan (flats)
- Energy scan (via Energiesnoeiers)
- Technical advice
- Financial advice

🔗 File subtypes linked to this customer journey phase:

- Renovation advice
- Renovation master plan

- Sustainable planning advice
- Heat scan
- Financial advice
- Technical advice
- Energy scan (external)

3. Project design

This phase begins when the customer decides to proceed with the renovation. This phase is about 'how are we going to do it?'. Concrete preparations are made, both technically and financially. At the end of this phase, the customer makes a final decision on whether to carry out the work. The project design phase includes:

- Requesting quotations
- Comparing quotations
- Working out the financial details
- Applying for a loan & signing upon approval

🔗 File subtypes linked to this customer journey phase:

- My Renovation Guidance

4. Implementation

In this phase, the renovation is carried out. Support from the energy house can include:

- Site visit
- Independent point of contact
- ...

🔗 File subtypes linked to this customer journey phase:

- My Renovation Guidance

5. Aftercare

Here we include the actions that take place after the work has been completed:

- Support with subsidy applications
- Possible referral to a subsequent measure
- Individual awareness-raising regarding the follow-up process
- ...

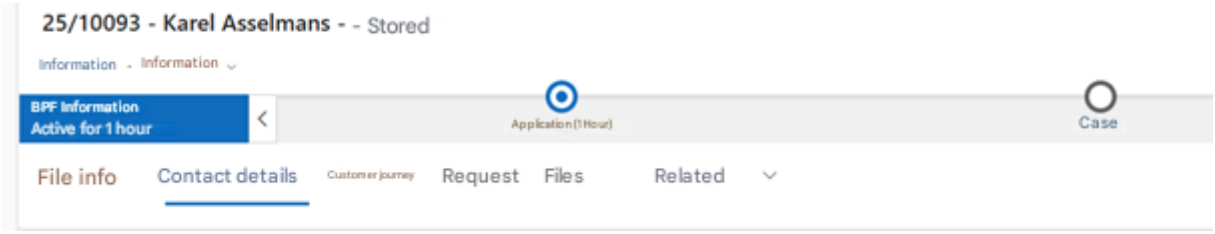
🔗 File subtypes linked to this customer journey phase:

- Support with premium applications
- Green roof subsidy
- Rainwater infiltration subsidy
- Rainwater recovery subsidy
- Public domain intake subsidy

5.4 Processing time per type Climate file

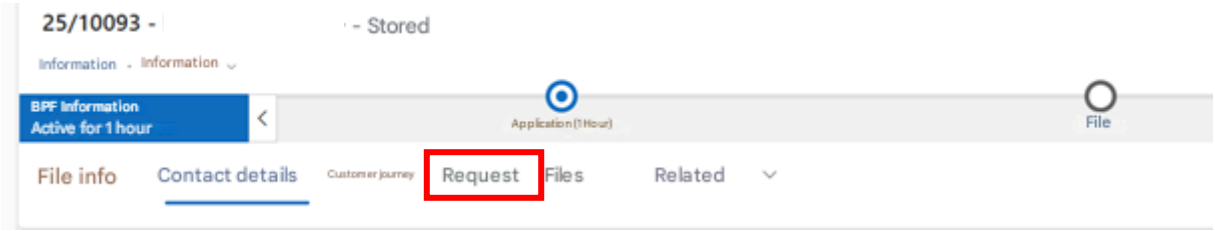
5.4.1 File type Information

FLOW (blue dots)

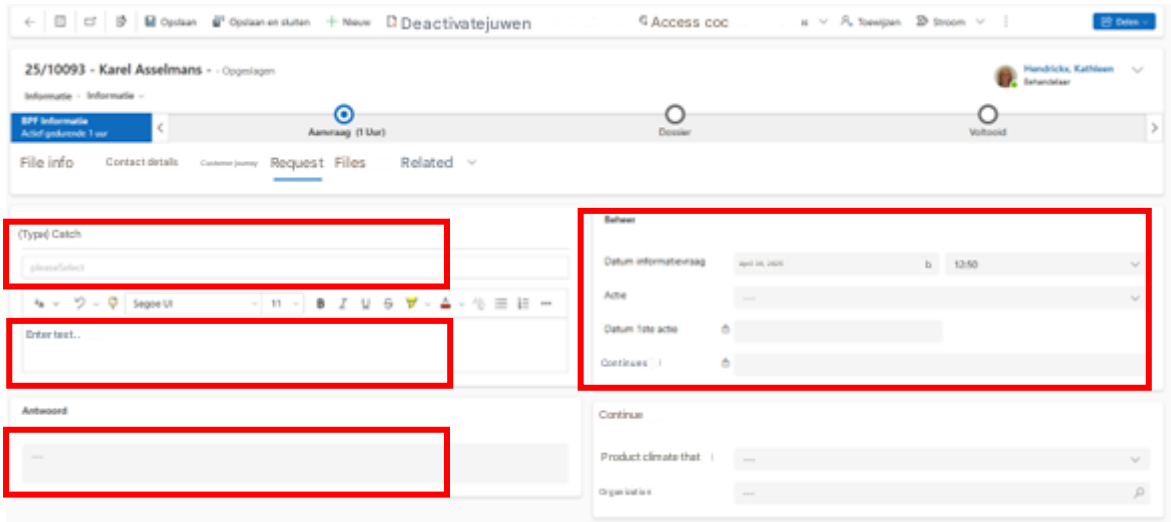


METHOD

Create a climate file of the Information type. Enter the file information and contact details. Then open the 'Application' tab.

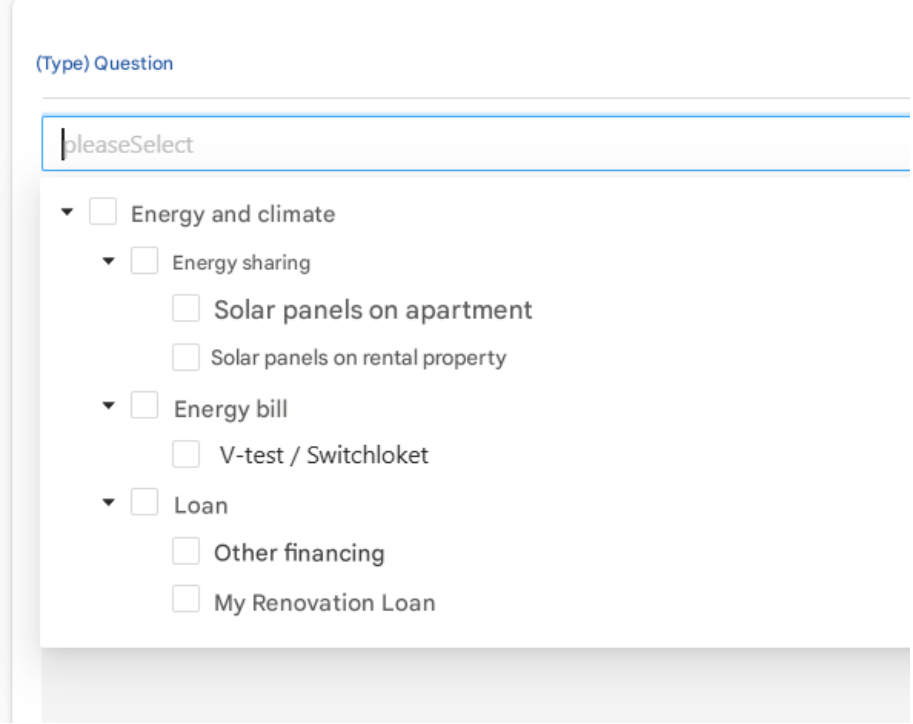


The window below will open. Fill in all the fields marked in red.



Type of question

Indicate what the question is about. Multiple choices are possible. If you encounter a question that is not listed, please report it to the CRM manager. A new option can then be added.



Question and answer

Provide a summary so that anyone consulting the file can quickly understand what it is about.

Management

These fields show the interventions in the file.

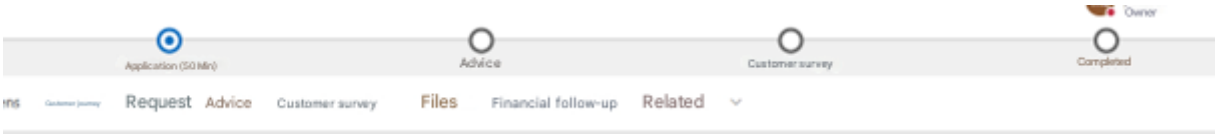
- Date of information request: this is the date of the very first contact with the citizen (by email, telephone, at the counter or at an event).
- Action (drop-down list): select the first intervention after contact with the citizen.
- Date of first action: enter the date of the first action
- Lead time: the CRM automatically calculates the lead time between the citizen's contact and the first action taken by the housing and energy desk.

Referral

Refer the citizen to the appropriate service or external organisation as much as possible if you are unable to help them yourself.
Select the product for which you are referring (loan, premium, advice, other).
Search for the organisation to which you are referring (or create a new organisation).

5.4.2 File type Advice

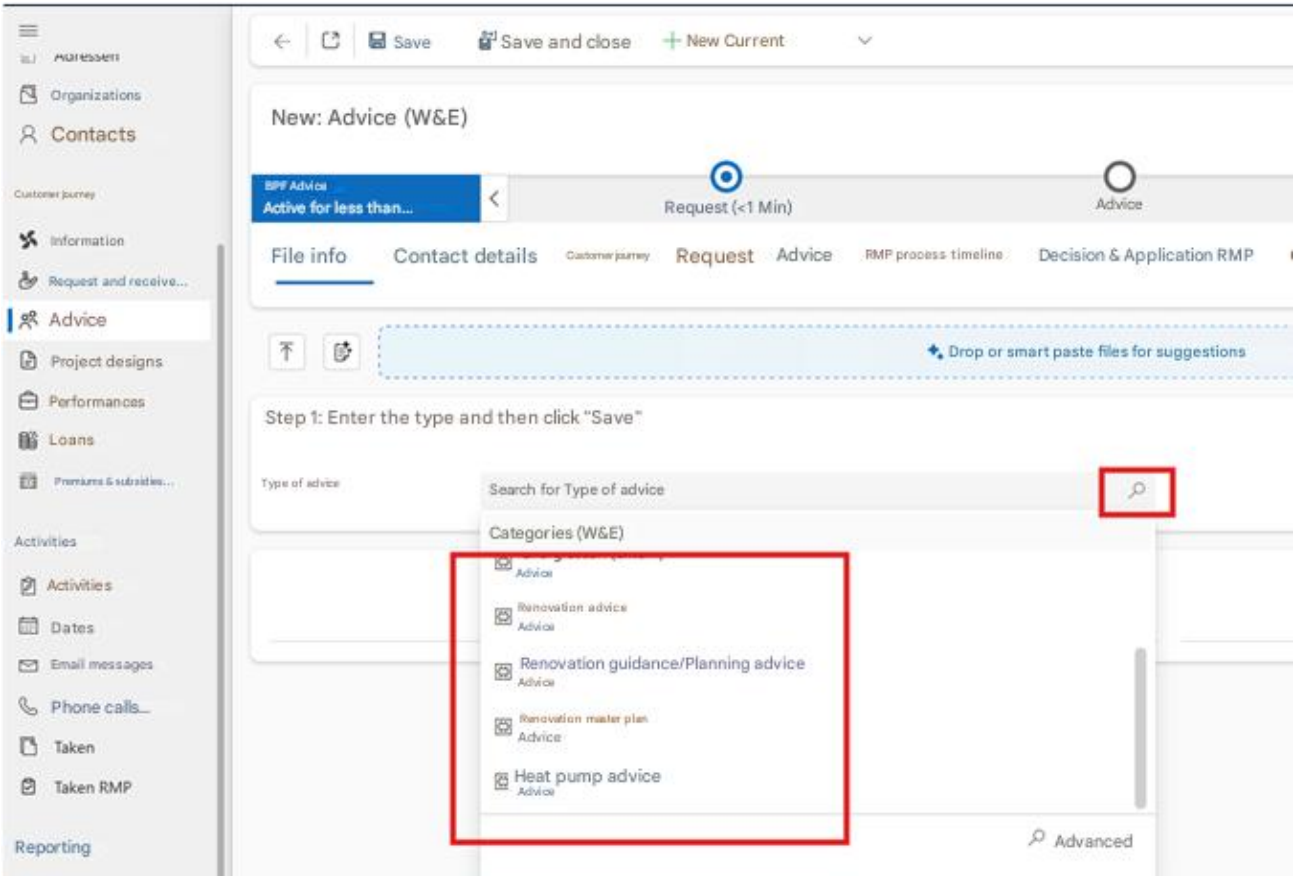
FLOW (Blue dots):



METHOD

Create a Climate File. Click on the magnifying glass and select the type of advice requested:

- Adaptation advice
- Sustainable plan advice
- Energy scan (external)
- Renovation advice
- Renovation guidance / planning advice
- Renovation master plan
- Heat pump advice



File info tab

Fill in the file info as completely as possible using the registration form.

Add the main project under Projects.

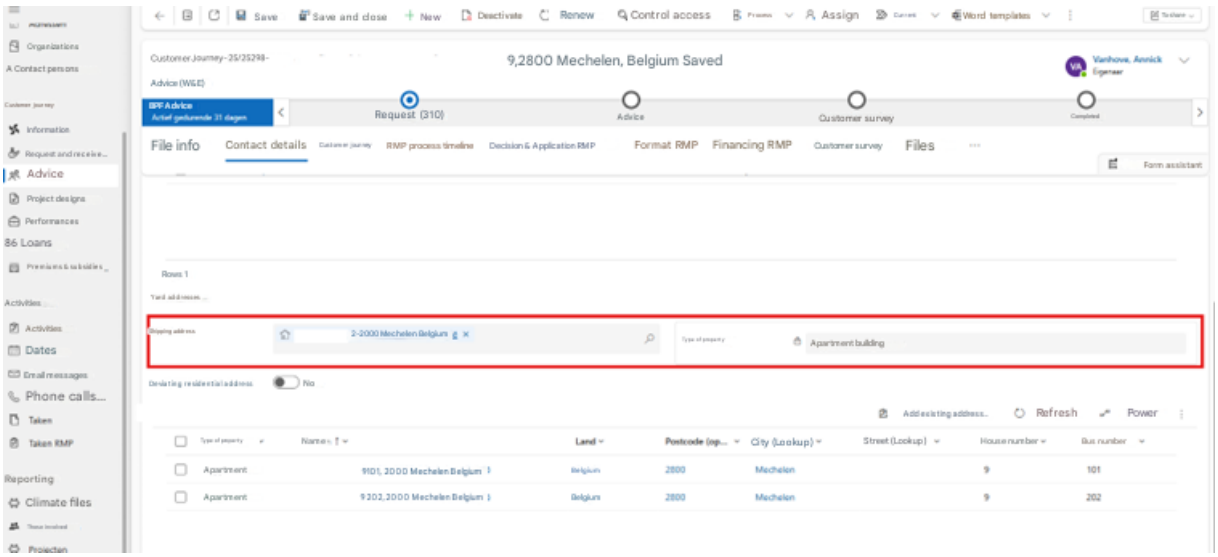
☑ **Tip:** If there are several projects that the file could fall under, add these via 'additional projects'.

> Example: A resident of the Arsenaal neighbourhood signs up for the Arsenaal Neighbourhood Renovation offer. He lives in an apartment and requests renovation advice.
>
> - Main project: Arsenaal Neighbourhood Renovation
> - Additional project: CONDORENO

Contact details tab

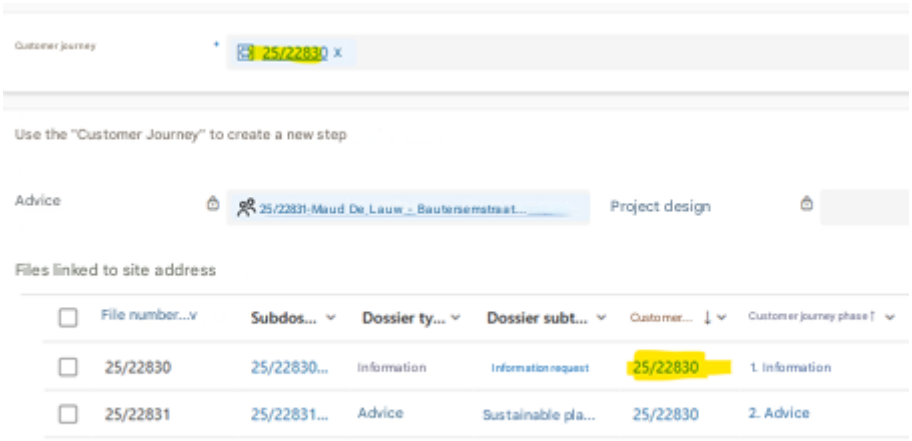
Also fill in the contact details from the registration form (main contact person, parties involved, site address).

☑ **Tip:** If you receive a request for advice from an apartment, add the address of the apartment building under 'Additional addresses'. If you receive a request for advice about the common parts of an apartment building, add the additional addresses of the apartments where relevant.



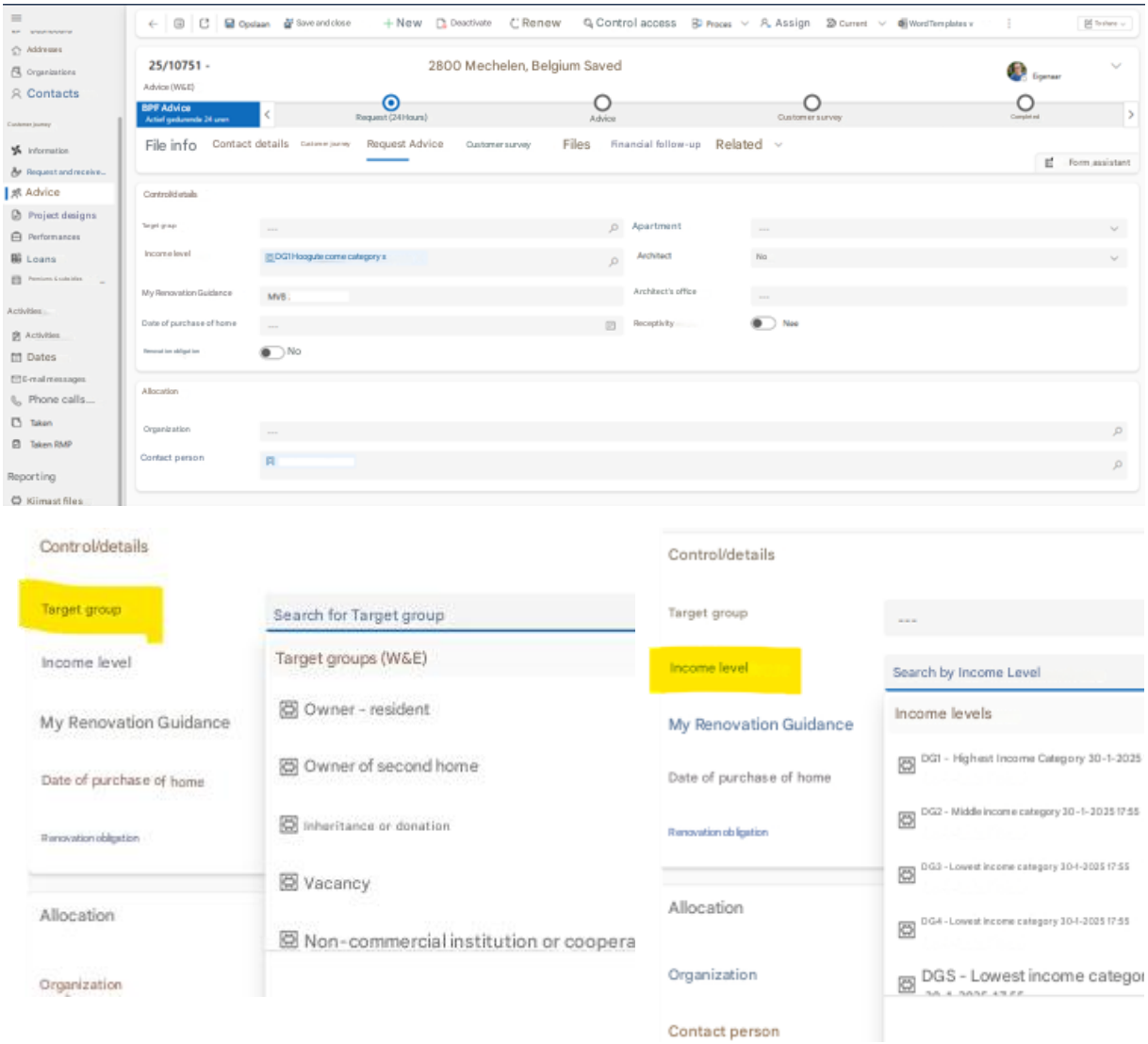
Customer journey tab

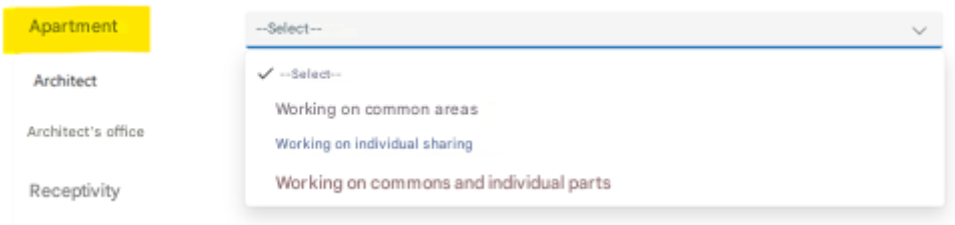
In the Customer journey tab, you get a view of all files linked to this site address.



Request tab

Fill in all fields in the 'Check/details' block.



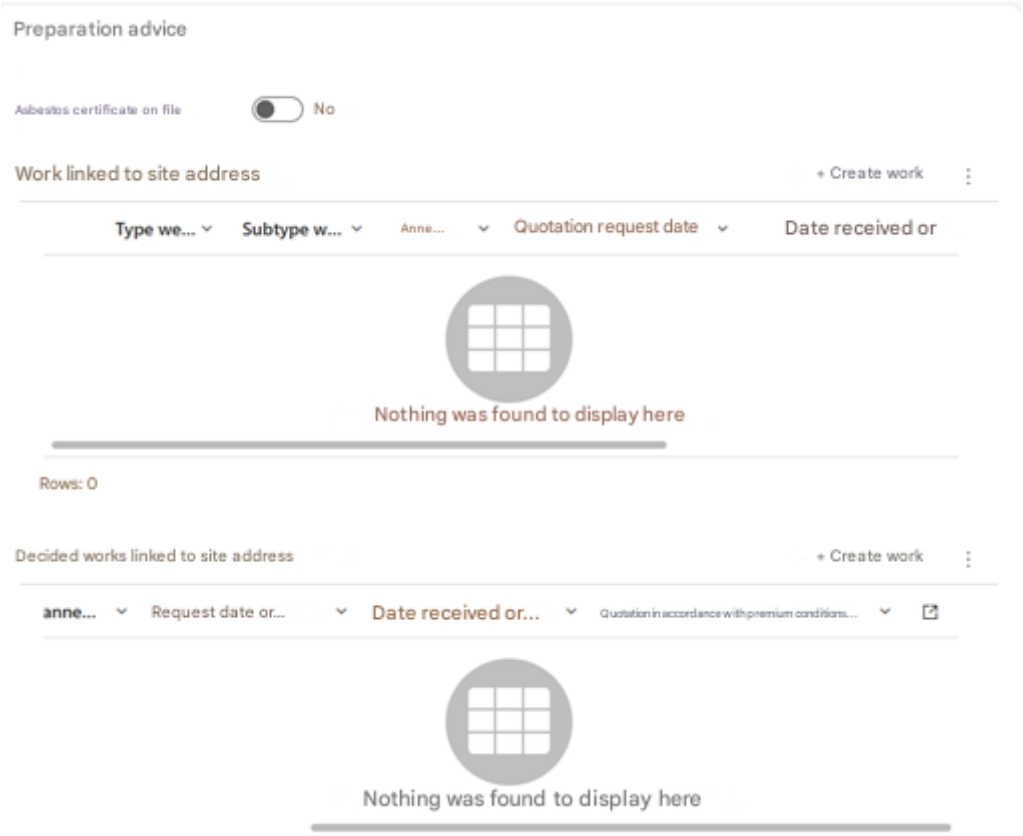


'Assignment' field: Enter the renovation coach/case handler for the file here.

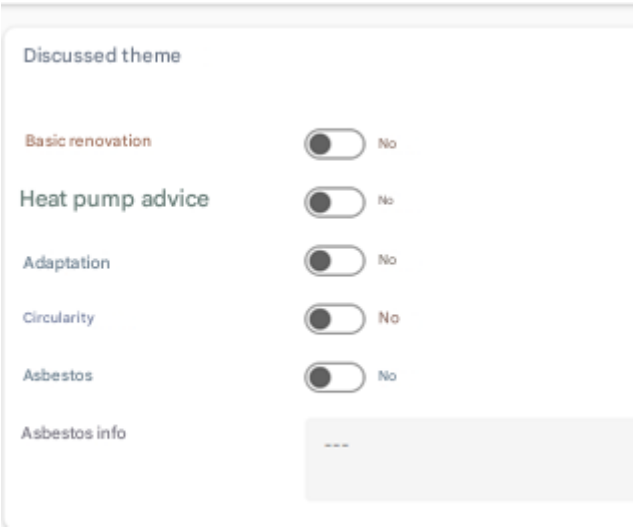
Advice tab

Fill in the **'Advice preparation'** fields for the home visit.

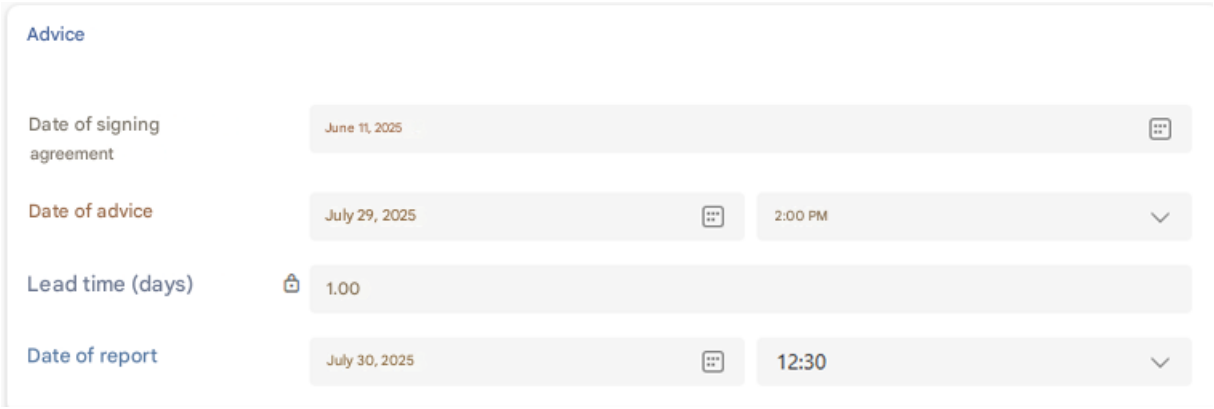
- Only fill in 'Works linked to site address' if works have already been carried out. Indicate the date of the works in the *'date of completion* of works' field (if only the year is known, enter 1/1/YYYY).
- Fill in 'Decided works linked to site address' when ...



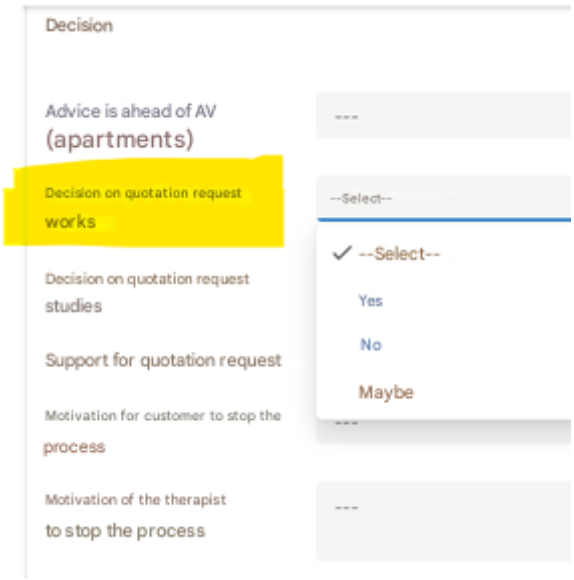
Fill in the **'Discussed** topics' fields after the home visit. Use the scroll bars to indicate which topics were discussed.



Fill in the **'Advice'** fields after drawing up the report.

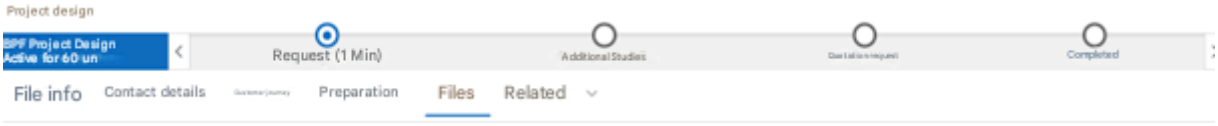


Fill in the **'Decision'** fields after feedback on the report to the citizen.



5.4.3 File type Project design

FLOW PROJECT DESIGN (Blue dots):



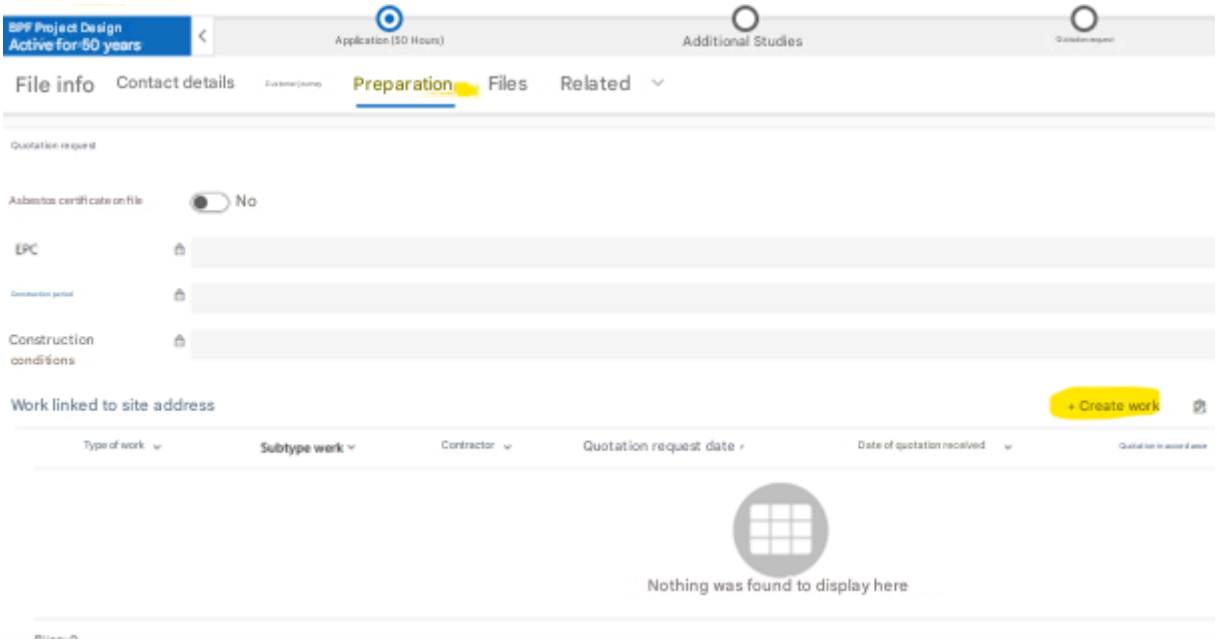
METHOD
Create a new climate file from the previous advice file (via the customer journey).

Tabs File info and Contact details

Fill in the file information and contact details as completely as possible (as with previous file types).

Preparation tab

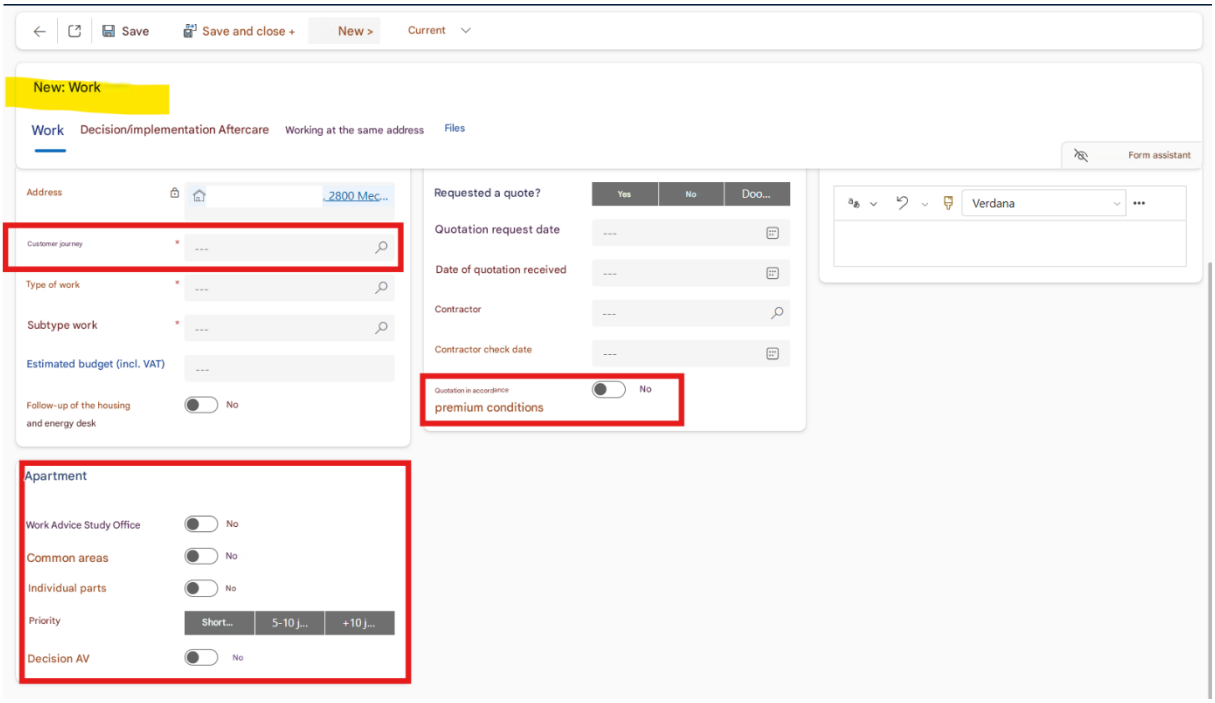
Add the works for which quotations are requested here via the '+ Create work' option.



This will take you out of the project design file and into the 'Works' entity. This entity covers the project phases of project design, implementation file, etc.

Enter the basic information about the planned work in the 'Type of work' block. Add the number of the project design file to the created work via the 'Customer journey' field.

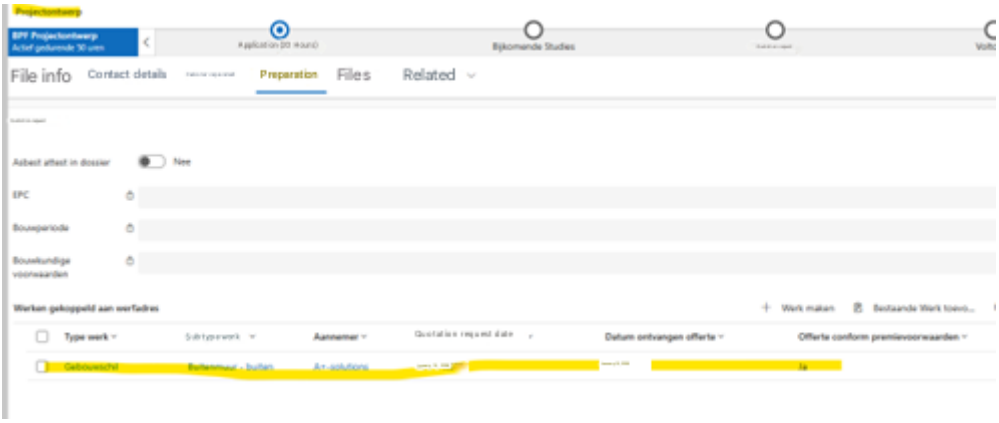
Then indicate whether quotations have been requested and received for this work. Select the contractor and indicate whether the quotation has been drawn up in accordance with the premium conditions of the My Renovation Premium.



☑ **Please note:** In the 'Apartment' section, indicate whether you will be carrying out work in the individual parts of an apartment or in the common areas of an apartment building.

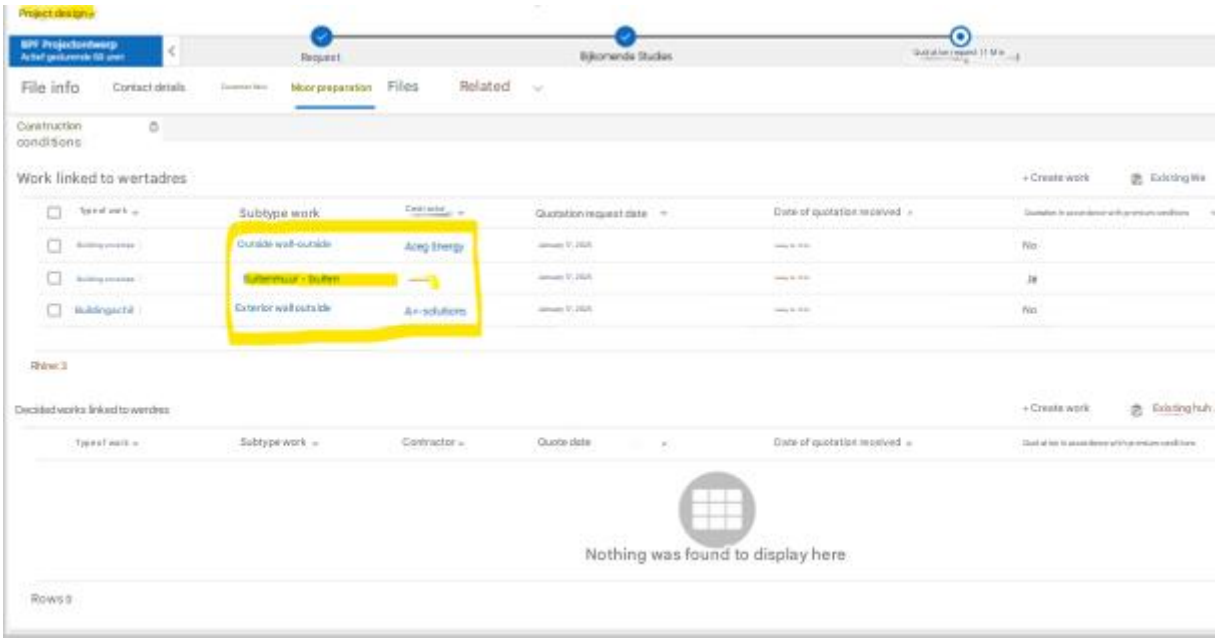
☑ **Please note:** If you are adding work that is included in a renovation master plan, move the slider in the 'Work Advice Study Bureau' field to Yes. Also indicate the priority given to the work in the RMP (short term, medium term, long term).

When you save and close the work, it will appear in the project design file under the 'Preparation' tab in the 'Works linked to site address' grid.



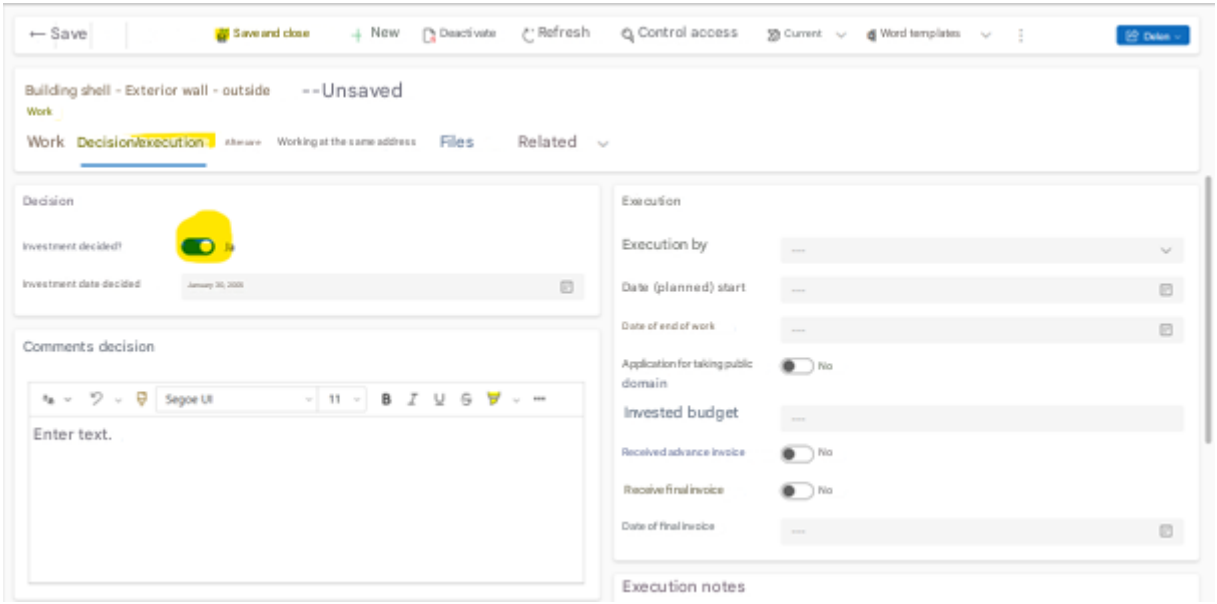
☑ **Tip:** Are multiple quotations being requested? If so, add all requested quotations to the Project Design File using the method described above.

The grid in the project design file provides an overview of the quotations requested and received.

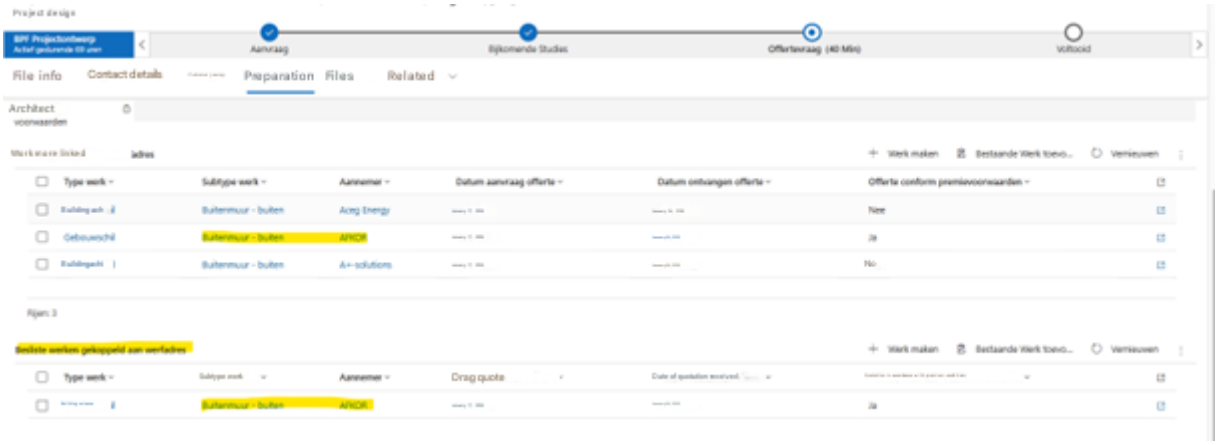


From project design to implementation

For the time being, the view 'decided works linked to site address' will remain empty. Once you want to proceed with the implementation of your first work, click on the work to open it. You will be taken to the 'works' entity. Click on the second tab and slide the **'Investment decided'** bar **to YES.** Then click 'save and close'.



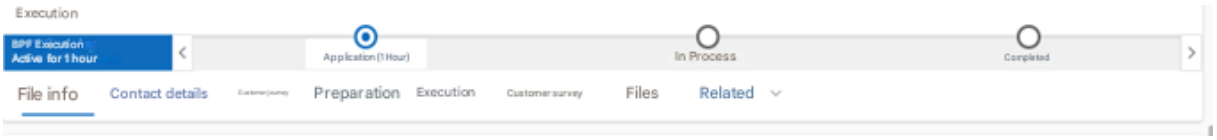
The selected work will appear in your design file under 'decided works linked to site address'.



You can use this method for studies, EPC layout, quotations for works, etc.

5.4.4 File type Implementation

FLOW IMPLEMENTATION (Blue dots):



METHOD

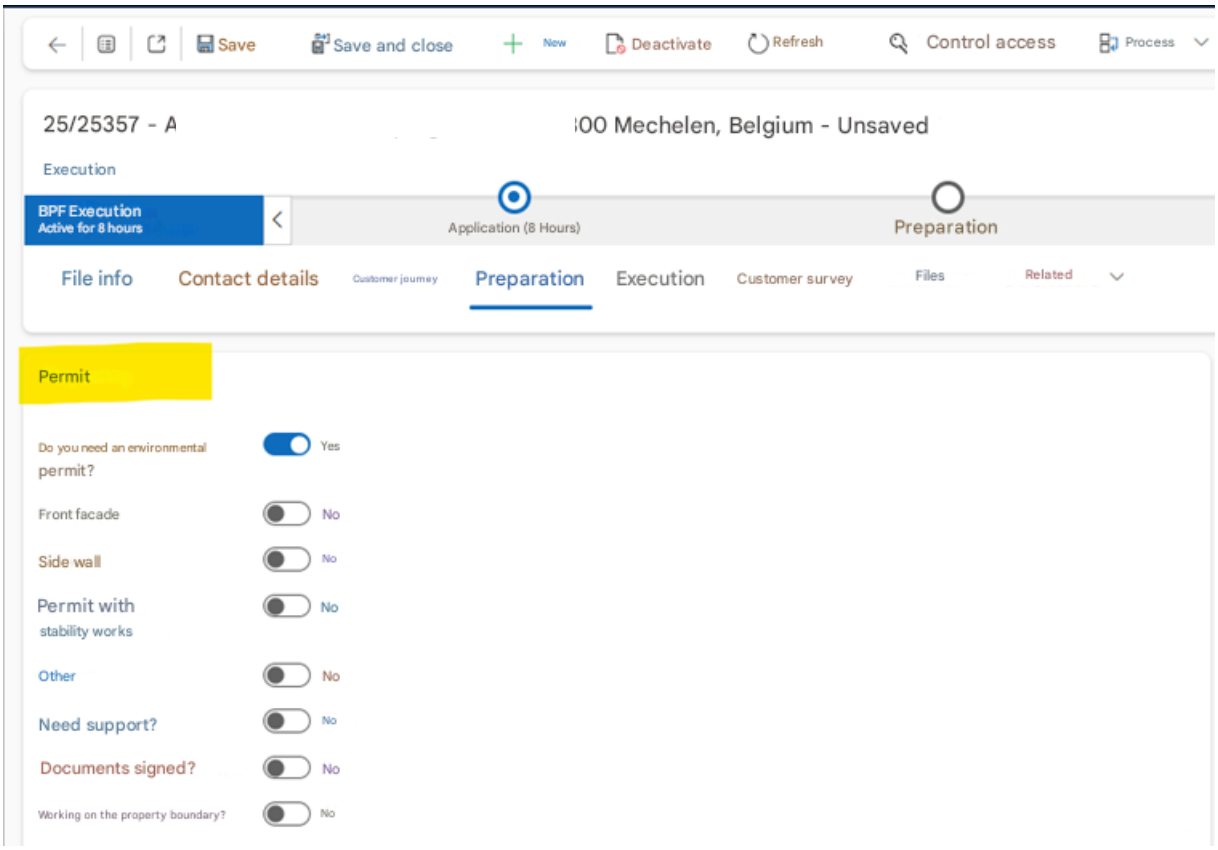
Create a new climate file from the previous advice file (via the customer journey).

File info and Contact details tabs

Fill in the file information and contact details as completely as possible (as with previous file types).

Preparation tab

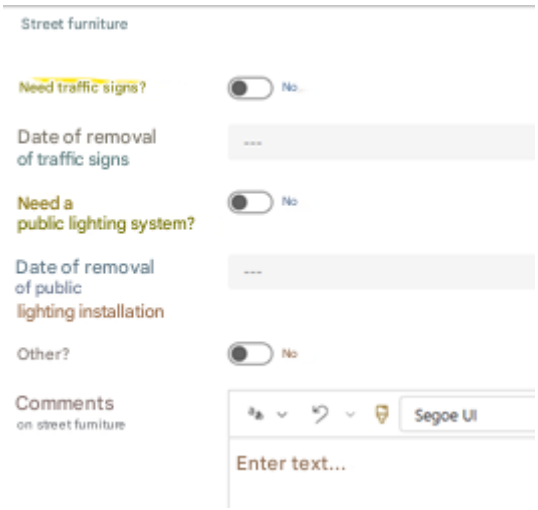
In the 'Permit' section, indicate whether an environmental permit is required and, if so, for which parts of the building a permit is required.



If an environmental permit is required, the following can be filled in at a later stage:

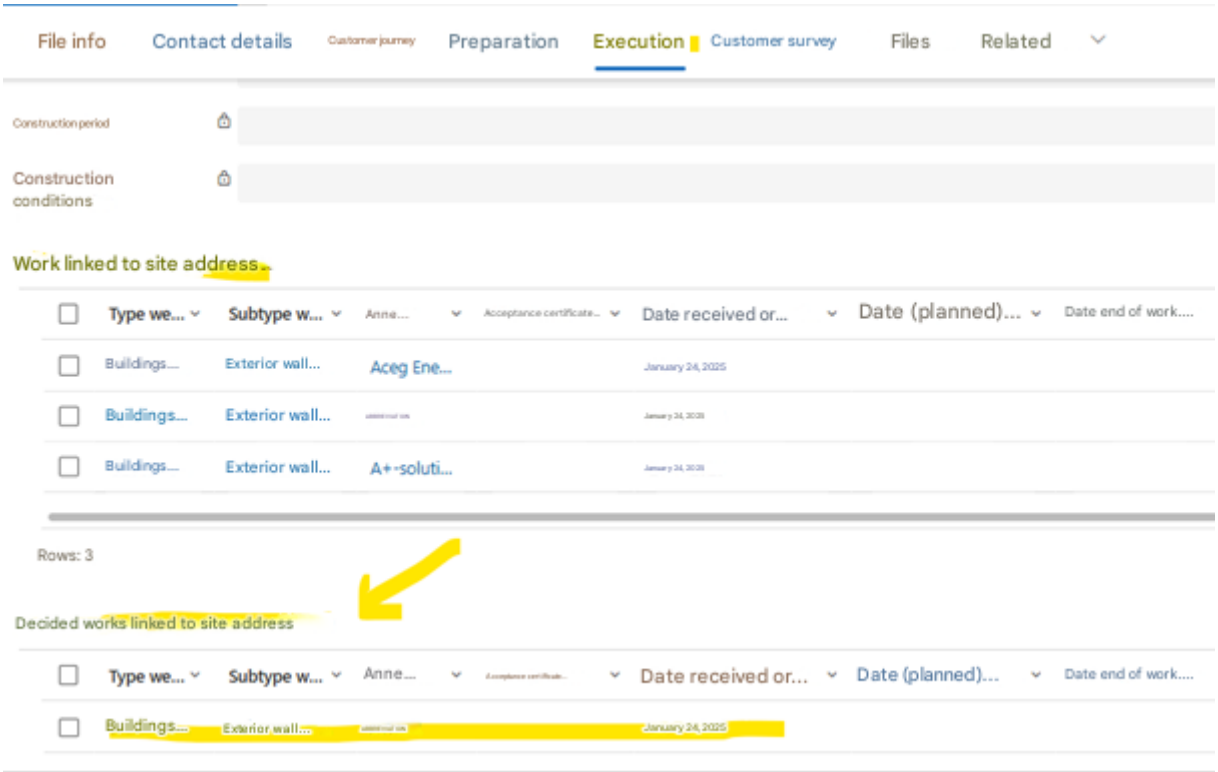
- Date of preparation of environmental permit
- Date of application to the Flemish Environmental Permit Office
- Date of approval

In the **'Street furniture'** section, indicate which preparatory works need to be applied for in relation to façade insulation or roof insulation (application +/- 2 months before the start of the works). This concerns, for example, the installation of traffic signs on public land or the need to remove public lighting installations (on the pavement or on the façade).



Implementation tab

In the 'Execution' tab, you will find the works for which quotations have been requested in the 'Works linked to site address' grid. The grid below shows the works for which a decision to execute has been taken.

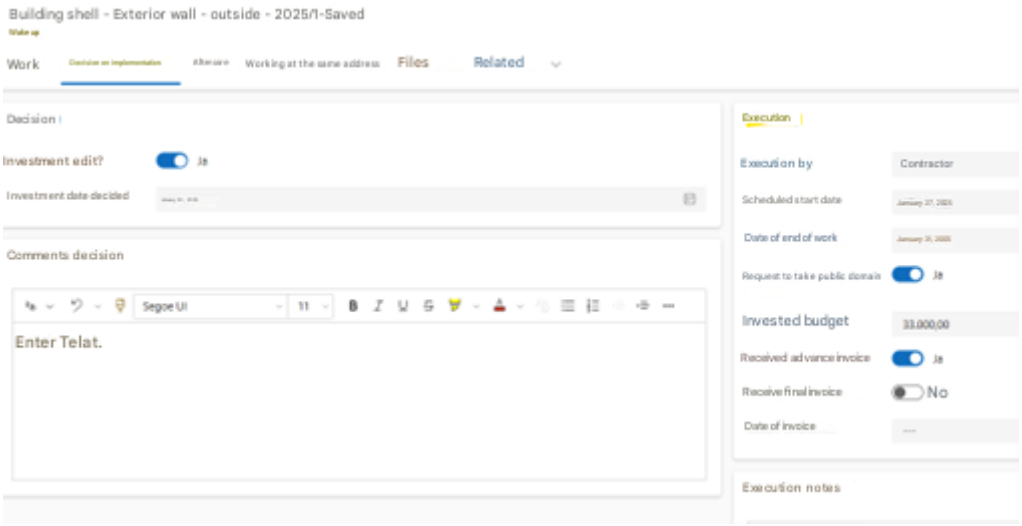


To migrate a work from the 'Works at site address' grid to the 'Decided works linked to site address' grid, double-click on the work in question. You will then be taken to the

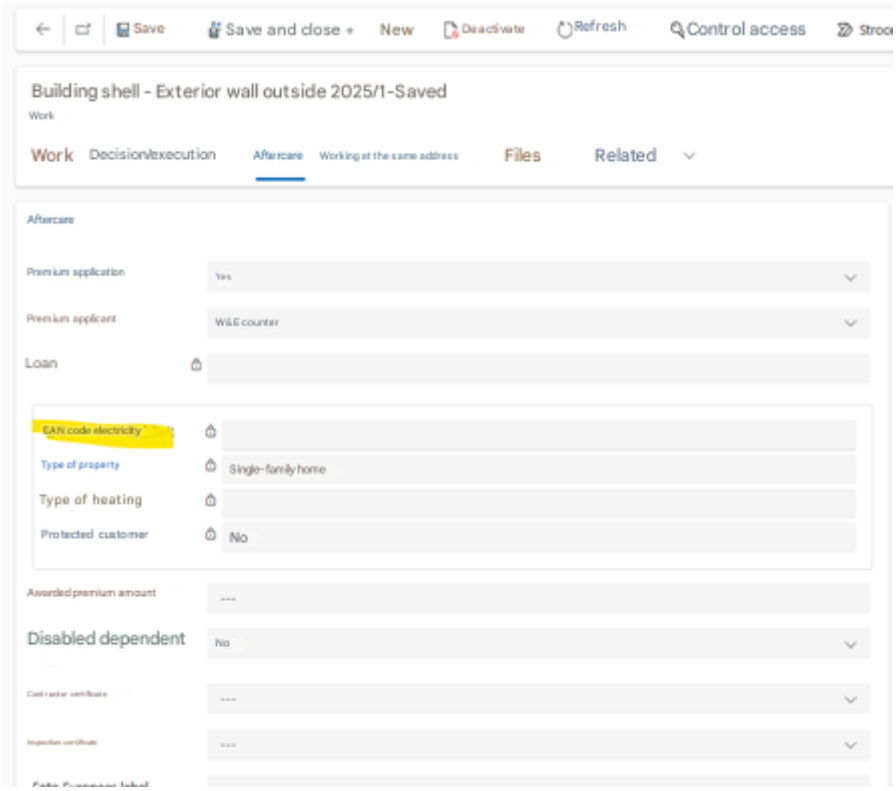
'Works' entity, where you can indicate in the 'Decision/implementation' tab that the investment has been approved.

In this tab, also enter the quotation amount and the date on which the quotation was approved.

In the 'Implementation' section, enter the details of the implementation.



After the works, fill in the fields in the 'Aftercare' tab.



Add all documentation and certificates in the 'Files' tab.

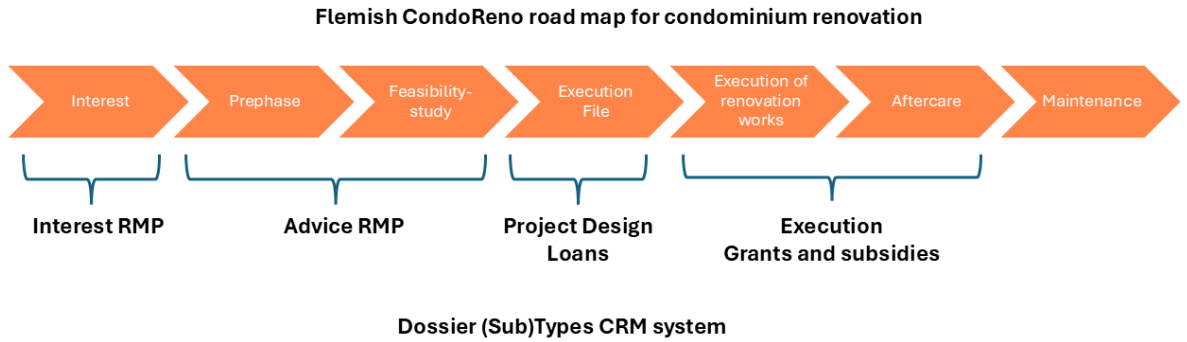
Part 6: Deep dive into the Renovation Master Plan file subtype

Given CondoReno's focus on the comprehensive renovation of condominiums to achieve an energy label A, we will take a closer look at the file subtypes that were specifically developed to follow up on files from owners' associations that have a renovation master plan drawn up within the Flemish Energy and Climate Agency's framework contract Renovation Master Plan.

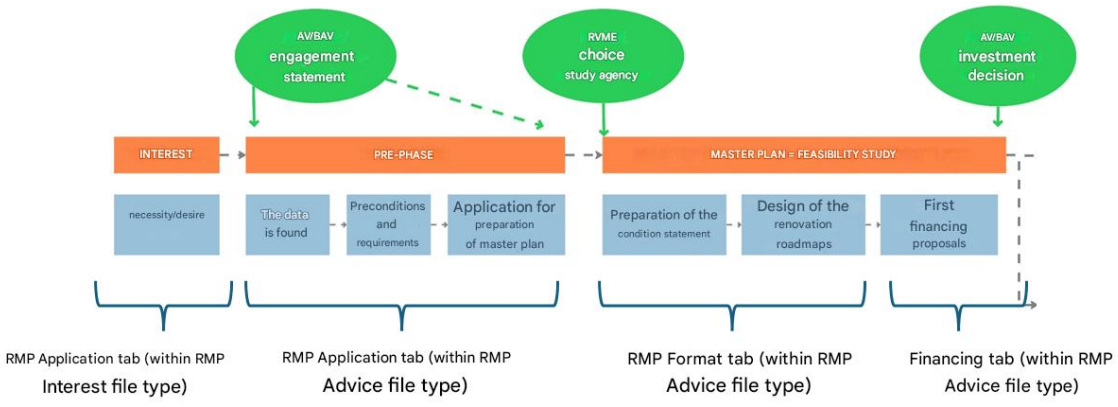
Within the Information file type, we have a subtype: Interest in Renovation Master Plan.

Within the Advice file type, we have a subtype: Renovation Master Plan.

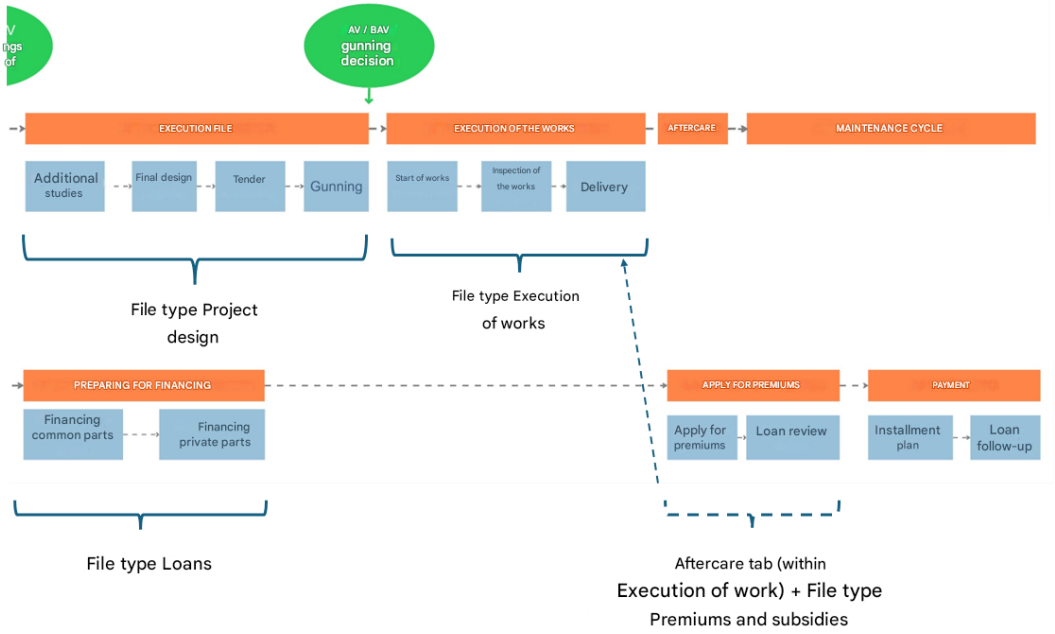
The figure below shows how the phases of the CondoReno roadmap for the renovation of apartment buildings are incorporated into the various file types in the CRM system.



In part 5, we describe the structure and specific CRM fields for the first three steps in the CondoReno roadmap (interest, preliminary phase and master plan).



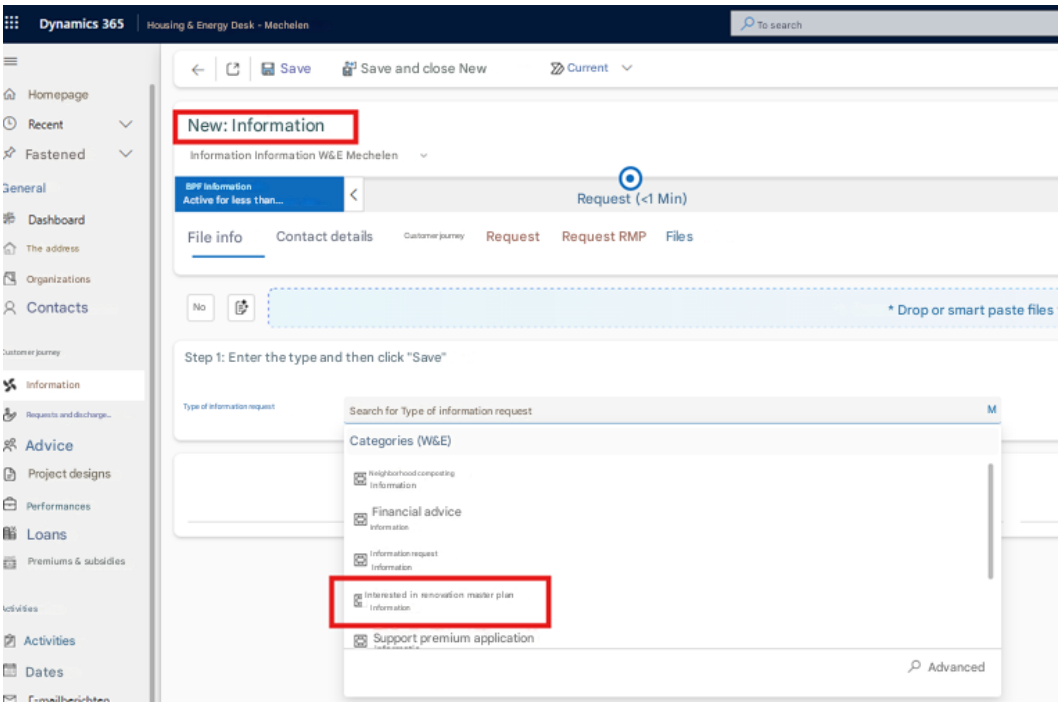
To record information about the subsequent phases (implementation file, execution of works and aftercare), you can use the file types provided, which are also used for renovation of homes (project design, loans, implementation, premiums and subsidies[1]) (see part 5. Types of climate files).



6.1 Interest in renovation master plan

Create an 'Interest in renovation master plan' information file when a condominium association or condominium manager is interested in drawing up a renovation master plan. Click on 'Save' to generate the file.

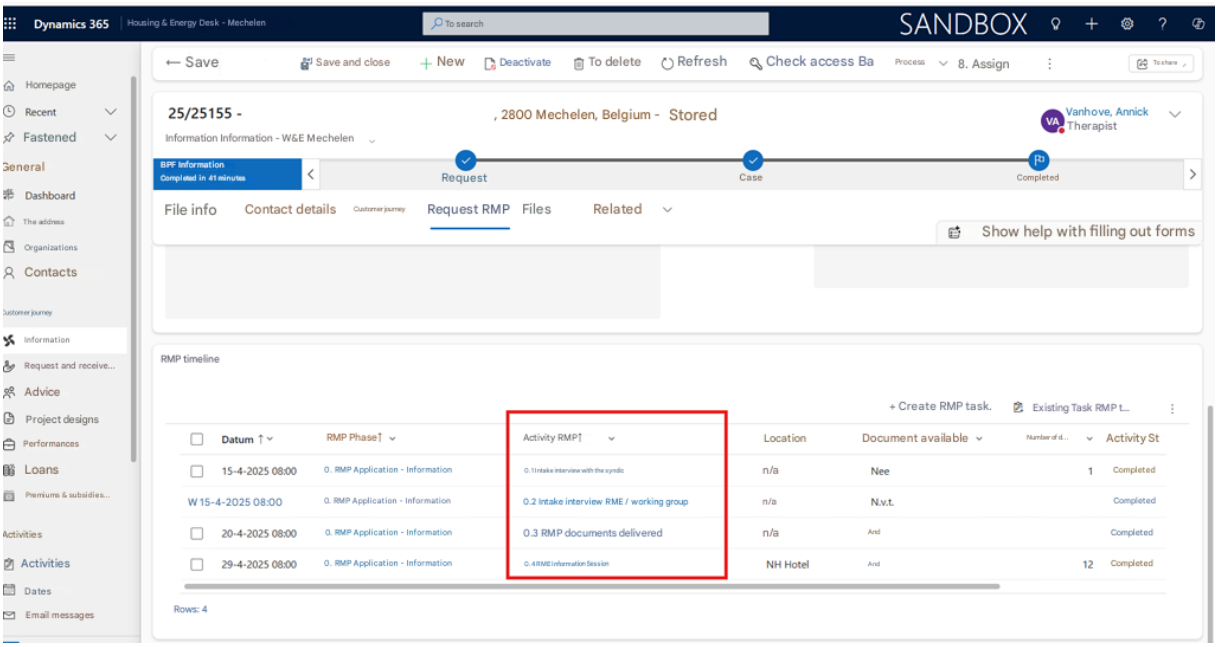
[1] This manual only describes the file types 'project design' and 'execution of works', as the working method and content of the file types 'loans' and 'subsidies' are strongly locally bound.



In the 'File info' and 'Contact details' tabs, enter the information about the file, the main contact person and those involved, and the site address.

When the file is generated, predefined tasks are immediately added to the file's timeline. Specifically, there are four tasks: intake interview with condominium manager, intake interview with Board of Co-ownership / working group, RMP documents delivered, information session for the Board of Co-ownership.

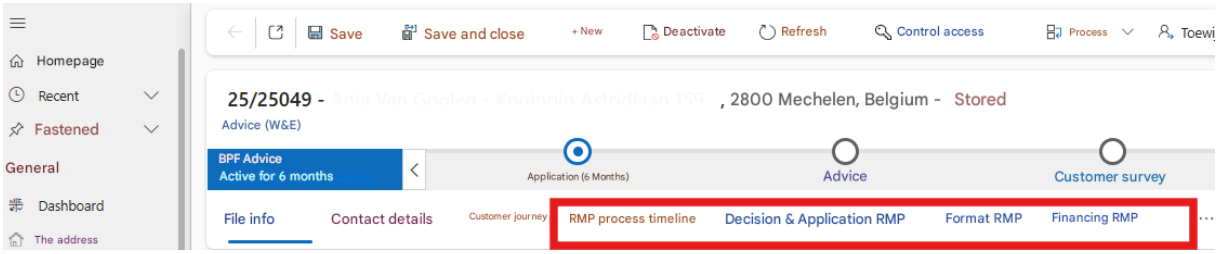
Add the information from the contacts with the condominium association and condominium manager in the 'Timeline' tab.



6.2 Renovation master plan

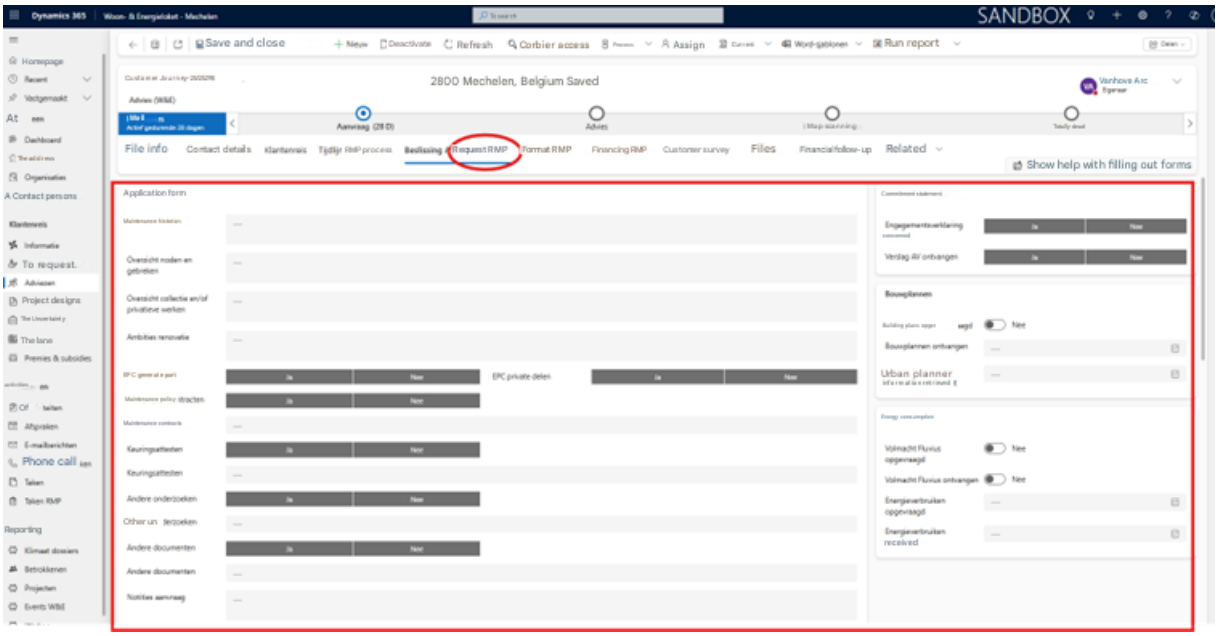
Create a climate file of the type 'Advice' – subtype 'Renovation master plan' when an Condominium association (or Board of co-owners) decides to submit an application for the renovation master plan (RMP) to the Flemish Energy and Climate Agency.

In addition to the recurring tabs 'File info', 'Contact details' and 'Customer journey', four tabs specific to the renovation master plan process will appear. These are the tabs 'RMP timeline', 'RMP decision & application', 'RMP layout' and 'RMP financing'. In these tabs, you can enter all the information about the progress of the renovation master plan project.



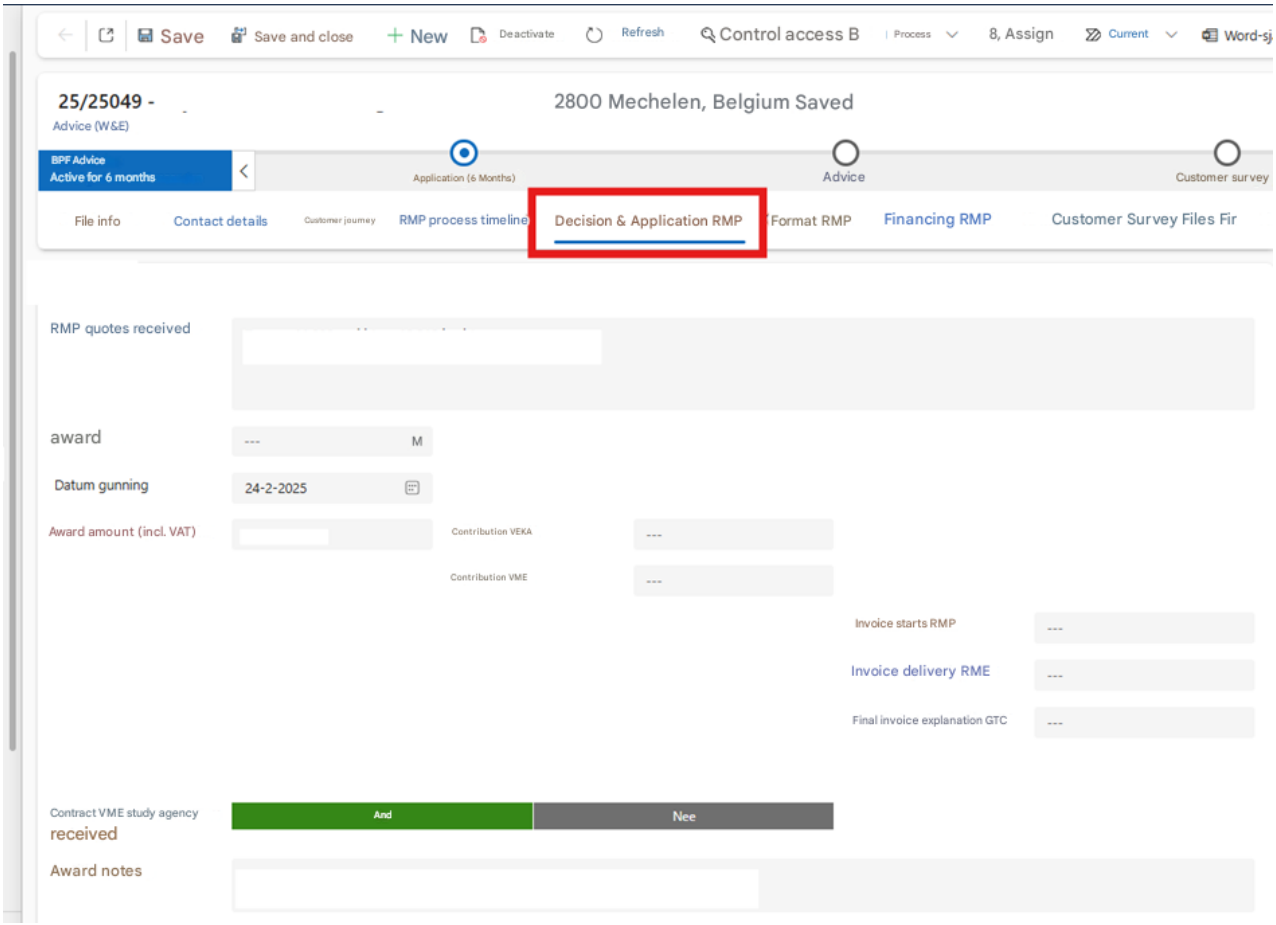
The 'Decision/Application' tab contains fields on the left-hand side for the information that must be provided in the Flemish Energy and Climate Agency (VEKA) application form. The fields on the right-hand side are actions that the housing and energy desk carries out to support the application file (e.g. looking up building plans, requesting energy consumption data from Fluvius, the electricity distribution network management).

Fill in the fields in detail. They form the basis of the file.



After a condominium association has submitted an application file, it will receive quotations from the VEKA.

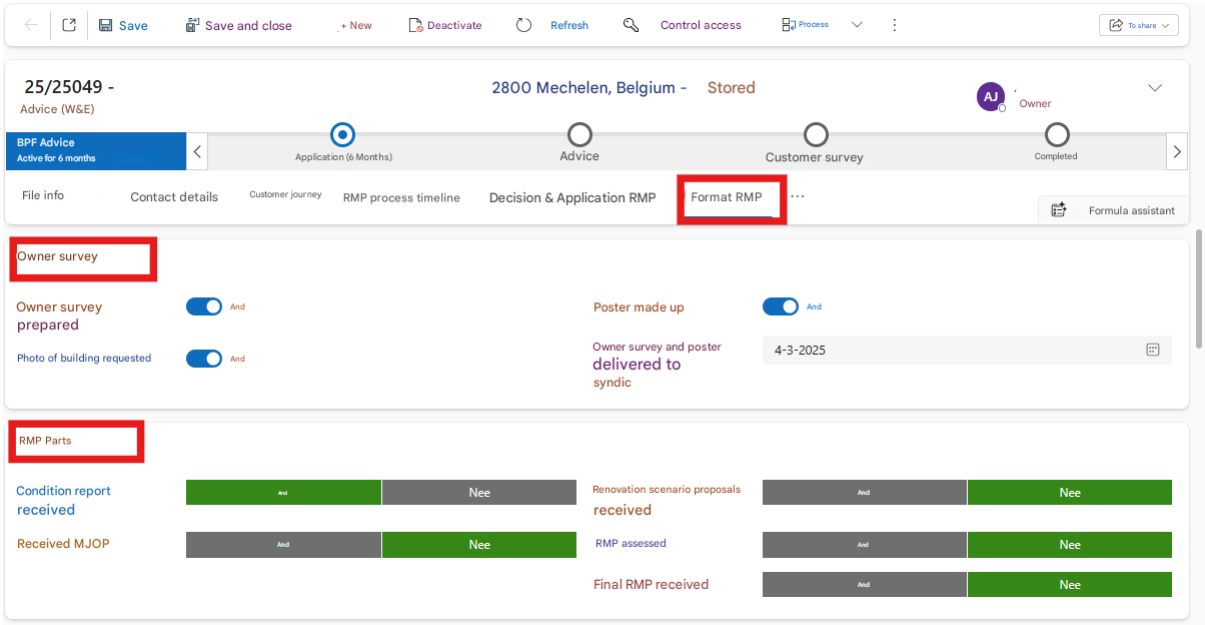
Fill in the information about the quotations, the award, the award amount, the VEKA subsidy amount and the own contribution. Indicate whether the signed contract between the condominium association and the engineering firm has been received.



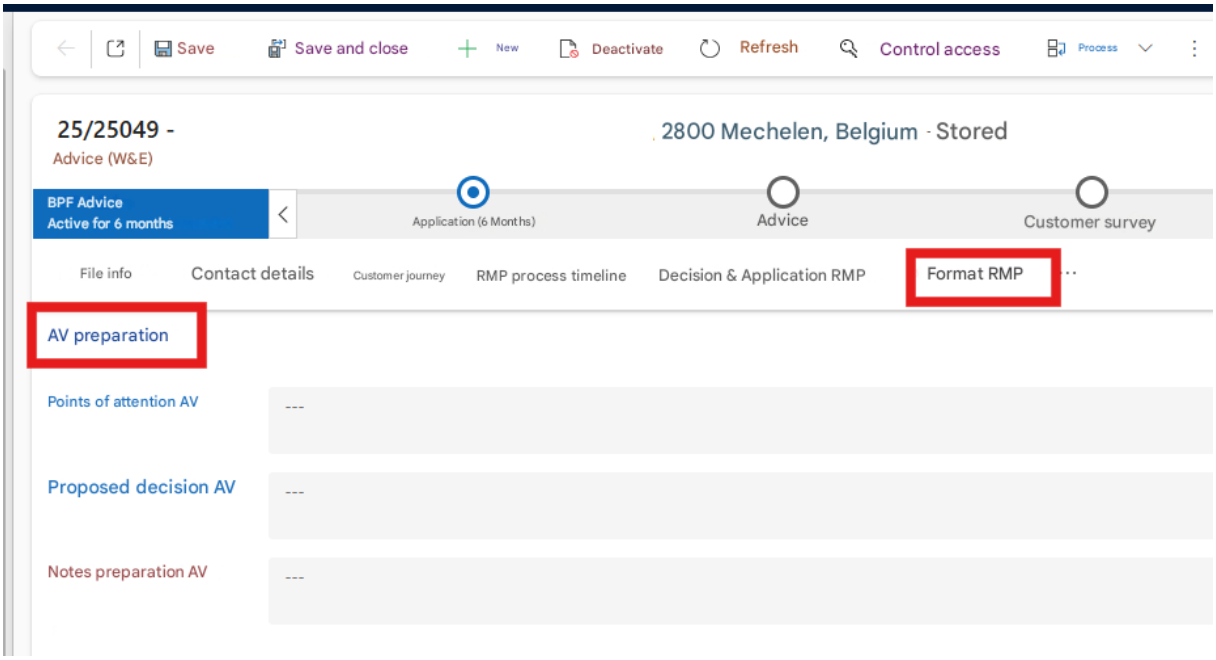
After the award, continue in the 'RMP layout' tab.

Fill in the details of the owner and resident survey.

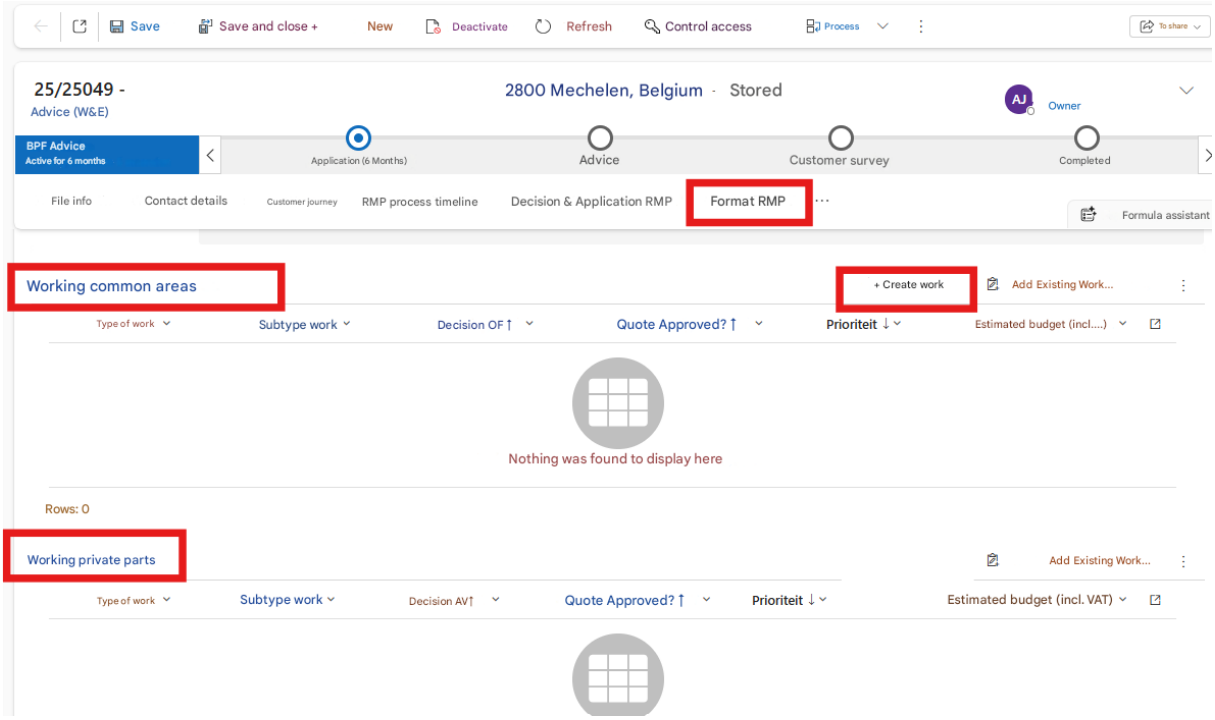
Show the progress of the renovation master plan process by indicating which RMP components have already been received.



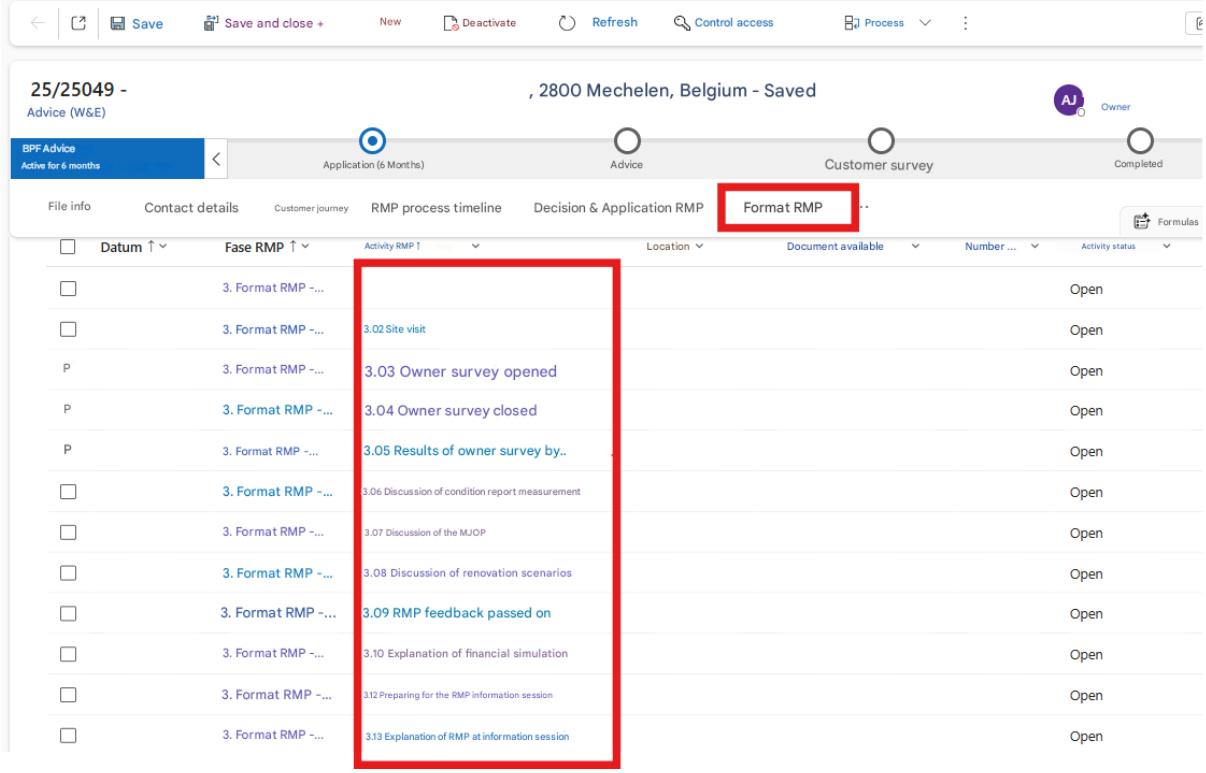
In the 'Preparation of General Assembly section, provide more information about the preparation of the (Special) General Meeting at which the results of the renovation master plan will be presented.



Use the 'Works' entity to create the works that are included as priorities in the renovation master plan. Use the predefined list of works for this. Enter both the works on common areas and the works on private apartments (e.g. replacement of joinery).



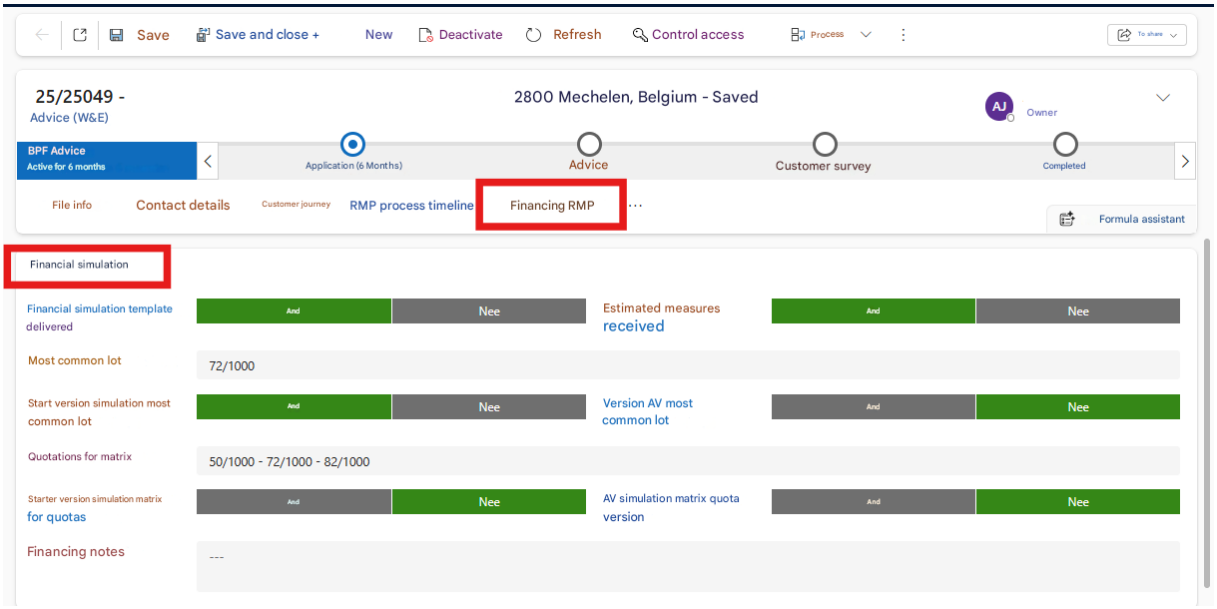
At the bottom of this tab, under 'Timeline', enter the information about the various steps in the renovation master plan process. The timeline shows the progress of the process.



Enter information in the 'RMP Financing' tab when you make financial simulations of the cost of works.

Make an initial rough financial simulation using the quotas for the most common plots. To do this, consult the overview of the residential units with their quotas for the building. Discuss this simulation with the Board of Co-ownership or working group. Write down any notes in the notes field.

Refine this financial simulation in preparation for the General Assembly by filling in the financial matrix for multiple quotas.



Complete the timeline at the bottom with the details of the financial steps.