



**Acronym:** ActiveAdvice

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# 1 Concept of Human ActiveAdvisor

## 1.1 Role of the human advisor

The ActiveAdvice human advisor assists the users in using the platform and in preparing and taking decisions.

This is a human addition to the ICT platform and service. This is considered as a necessary addition, even if importance and impact will depend on the user. Older adults have a preference to receive advice personally, digital means being used to collect and screen information rather than to seek advice. The AAL2B group values advice as one of the most important services, but being conscious good advice is customized or even tailor-made.

The ActiveAdvisor plays primarily an advisory role towards consumers and can play a similar role towards the AAL2G target group.

Some of the ActiveAdvisor can play a more comprehensive role towards the AAL2G target group, e.g. in assisting in public procurement.

Three types of human advisors, corresponding to the three types of digital advice:

**Table 1: ActiveAdvice Digital Advisors**

Focus	Target Group	Content
AAL in General	Consumers, Governments, Businesses	Generic advice about AAL
AAL2C	Consumers	Products & Services
AAL2B	Businesses	Products & Services
AAL2G	Governments	Products & Services
Special	Consumers (and their associations) Governments	e.g. information about funding, reimbursement

Because of the complexity and the many open questions related to human advice directly to the older adults, the project is being used to test various profiles. The human advisor concept is considered to add complexity to the ActiveAdvice platform concept and to be non-critical for the launch of the platform.

## 1.2 Services delivered

Human ActiveAdvisors do assist individual persons in finding the right solution for their problem or goals:

- They listen to the need and translate the need into a search strategy that complements the digital advisory component.
- They identify solutions and suppliers and assess their pertinence.
- They assist the individual in making the decision.
- They follow-up on satisfaction and stimulate users to provide a feedback on the platform.
- They can themselves feed the platform with professional feedback/testimony.

Services can be provided at no cost or for a fee. The way the ActiveAdvisor will be rewarded always has to be clear to the user of the service and will be part of the code of conduct:

- If the service is free, or if a part of the service is for free.
- If the service is for a fee.
- If the service is free but linked to (potential) sales of other products or services (e.g. a supplier of alarm systems who offers ActiveAdvice as a service to (potential) customers – to lower the risk of false alarms). The service always has to be neutral, and not linked to direct business.

## 2 Services to the advisor

ActiveAdvice will deliver following services to the human advisors:

- Maintenance and access to the platform and all its resources.
- Regular information on updates and on innovations entering the market (on the platform or through linking with the market observatory).
- Initial training on how to make maximum use of the platform via partners.
- Feedback on satisfaction and experience with solutions, products and service as well as suppliers.
- Advertising: creating links between the ActiveAdvisor and potential users of the advice. All accredited advisors are reachable through the platform.
- Handling of complaints.

## 3 Human advisor workflow

The human advisor workflow is based on following principles and pillars:

- Assessment of products and services: the product and service database include a digital advice component fed by user and expert feedback
- Training: offering basic as well as advanced training and creating a human network around the digital community of the platform
- Code of conduct: using a co-designed code of conduct as a means to control the interaction between offer and demand.

The code and training are the two central elements of the accreditation of advisors.

## 3.1 Recruitment

Recruitment will be open at the start, to test various potential profiles. A real detailed recruitment policy and action plan will be developed based on the pilot experience during the project.

### 3.1.1 Profile

Various profiles are possible. Being an ActiveAdvisor should have a low threshold, and should be evaluated on the basis of criteria.

Examples of profiles:

- **Professionals** who are involved in the process of assisting elderly persons and therefore have an interest in applying AAL technologies and services:
  - In the private sector, this could be an **architect** who develops a special interest in adapting houses for the aging population.
  - In both the public and private sector, this could be a (homecare) organisation which has a service to assist older persons to adapt their house to a situation of loss of autonomy (normally **occupational therapists**).
- Individual persons who act as **volunteers** to assist their peers in living longer at home: this could be retired persons who have an interest in AAL technologies and in spreading their use among other elderly persons; this could also be students, who have an interest in technology and like to earn extra money besides their study
- **Public sector** services: in charge of assisting citizens in adapting their house to save energy, be more ecological, or promoting active lifestyles. These services could diversify their offer and become ActiveAdvisors.
- **Suppliers of (partial) solutions**, including retailers (e.g. alarm systems, hearing aid, ...) who develop ActiveAdvisors as a service for their customers.

The last profile is mentioned for the record, as based on present knowledge, they would probably be ruled out because of the risk regarding neutrality.

### 3.1.2 Criteria and code of conduct

The following criteria are essential:

- Neutrality;
- Knowledge of ActiveAdvice platform (achieved by following a training);
- Accept to follow the code of conduct; this includes the recording and handling of complaints;
- Knowledge of the local situation (for the advisors who include this dimension in their service).

The code of conduct is a central element in the management of quality and in linking the human advisors to the ActiveAdvice platform.

This code will be co-designed with a group of potential ActiveAdvisors and will cover (non-exhaustive list):

- The service and promise made to the persons seeking advice.
- The principle of free advice and complete transparency for services which are for a fee.
- The relationship between the ActiveAdvisor and the platform, e.g. the commitment to contribute to content: use cases, usestories, new products and services.
- The commitment to accept complaints handling by the ActiveAdvice platform management as well as an arbitration mechanism

### **3.1.3 Minimal time to act as ActiveAdvisor**

An important criterion for becoming an ActiveAdvisor is a minimal time, that the person can spend on this role/task. This minimum can be different depending on the profile and will be assessed as it is linked to generating sufficient experience to act as an advisor.

## **3.2 Training**

ActiveAdvisors are expected to follow a 6 hour training course on the ActiveAdvice platform.

This basic training covers:

- The use of the platform as a source of information and as a platform of exchange
- The taalxonomy, up to the detailed level
- The different target groups and their needs
- The decision-making process and how to enhance the quality of decisions

The training will be a face-to-face training to set-up concept and content during the project. It will however evolve into an elearning platform to save on travel costs. At the start, the training will be in English only, but gradually more languages will be added.

Specific training:

ActiveAdvice will provide specific training linked to technologies and/or product groups. These trainings are expected to be online and in English and e based on modules of 1 to 3 hour duration. Examples of themes are 'fall prevention', 'safety and ergonomoy in the bathroom', 'intelligent locks', safety and ergonomoy in the kitchen, ... .

## **3.3 Accreditation**

Accreditation is automatic after following the basic course and signing the code of conduct.

The outcome is inclusion on the list of accredited advisors on the ActiveAdvice platform and the right to mention the accreditation in communication.

A procedure to challenge the accreditation is launched automatically after a complaint is received on an active advisor, and is part of the complaint handling.

### **3.4 Support and help desk**

The help desk function for the digital advice will be used as well for the human advisors.

### **3.5 Quality control**

Quality control will ideally be based on two systems:

- A user feedback on the platform, including a scoring and the possibility to leave comments.
- A complaints handling system.

There will be a user feedback system for products in ActiveAdvice. It is the intention to have such a system also for the active advisors unless this appears to become a major barrier when recruiting the advisors.

For complaints handling, users of ActiveAdvice, whether advisors or users of the advice, have the possibility to file a complaint which will be processed by a specific staff member of the help desk function. A panel of ActiveAdvice trainers and advisors will be involved in the process of collecting information and documenting the complaint before proposing a solution.

This complaint handling can lead to arbitration in case no solution can be found which is acceptable to both parties.

## **4 Next Steps**

Based on the validation of the business plan, the concept of the human advisors will be updated. Input of the various stakeholders and potential advisor profiles will be collected and in interactive feedback cycles the concept of the human advisors will be tested, optimised and validated.