

CASE STUDY

Optify Group's AI-powered energy optimiser automates key process to increase sales team capacity to treble revenue

INTRODUCTION

Optify is an energy transformation consultancy operating across the domestic and commercial energy markets helping homeowners and businesses cut energy costs and carbon footprint through solar, battery storage, EV charging, heat pumps, and smarter tariffs.

Before engaging Carter Loxworth to build the Optimiser, giving a homeowner a genuinely complete picture of their energy cost saving options meant working across several separate, non-integrated estimating tools, one for solar, another for battery sizing, another for EV charging economics, and **manually pulling the results together by hand**.

This case study is the story of how we built a single, AI-powered tool that replaces that fragmented process with one quicker and more accurate, integrated assessment, positioning Optify as an independent, trusted adviser rather than another installer with a product to sell.

AT A GLANCE



Optify's revenue ceiling was low due to very time consuming manual client assessment process



Saves roughly 2 hours of manual, cross-tool analysis per assessment



Trebles sales team capacity by reducing manual work enabling average monthly revenue to grow from £7,500 to £22,000



AI-generated analysis tailored to each household's specific circumstances, not a generic template



Tiered access, from a free on-screen summary through to a full report that Optify monetise



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BACKGROUND

Optify are energy advisors with a mission to help homeowners and businesses find the most appropriate ways to pay less for their energy. Being completely independent means Optify act as a trust layer between clients and the energy and renewables sectors and advise on the most effective solutions for the client rather than them having to rely on biased advice from installers who are incentivised to sell their specific solution.

Optify's domestic proposition centres on being the independent voice a homeowner can trust. Someone advising on the full range of energy cost reduction options, not steering them toward one product because of who's paying commission. That positioning depends on being able to look at a household's full energy picture at once: solar, battery, EV, heat pump, diverter, and tariff, together, not one at a time.

Optify's approach is unique in the market but the legacy manual process that was run across several disconnected estimating tools was slow and very time consuming meaning the proposition wasn't particularly scalable.

<https://www.optifygroup.com>

CURRENT SITUATION

Before the Optimiser, assessing a household's full range of options meant working through several separate tools and manually reconciling the outputs, a process that could easily take a couple of hours per household, with real room for inconsistency between the different calculators. The length of time this manual process took severely limited the volume of potential clients their team could progress in a day.

As part of a wider push to scale Optify's domestic proposition, the business wanted a more efficient way of delivering integrated, accurate and personalised assessments at greater scale whilst keeping enough capacity in the small team to be able to deliver won work for clients.

THE CHALLENGE

Optify needed a way to:

- Speed up assessments to build stronger pipeline
- Bring solar, battery, EV charging, heat pump, solar diverter, and tariff analysis together into one coherent, accurate assessment
- Deliver a genuinely personalised report, not a generic one-size-fits-all calculation
- Make the whole process fast enough to offer to a much larger number of homeowners without a proportional increase in manual effort
- Reinforce Optify's independent, trusted-adviser positioning rather than reading like a sales tool

KEY FEATURES



Guided multi-step wizard captures property and energy details



Six integrated calculation modules provides unique analysis



Instant branded PDF report with AI-generated narrative tailored to the client



Tiered access model, from free summary to paid options

Try the Home Energy Optimiser

OUR SOLUTION: AUTOMATED AI-POWERED ENERGY OPTIMISER

We designed and built the Home Energy Optimiser; a guided, wizard-style web application that walks a homeowner through their property and energy use, then runs a full assessment across all six modules together, rather than one calculator at a time, reducing sales team manual work to allow them to focus more on closing deals.

This delivers something unique in the market. It provides the client with an independent, unbiased, technology agnostic view of what they could do to minimise their home energy costs.

The analysis looks at whether solar is worth it, whether battery storage would improve or worsen the ROI, what impact a heat pump and EV charging would have on costs and whether a different grid supply tariff structure would impact anything.

The AI layer goes beyond calculation: each report includes narrative sections generated specifically for that household's own numbers and circumstances, so the explanation reads as considered advice rather than a templated printout.

Access is tiered, from a free on-screen summary through to a fully detailed report, with higher tiers adding the ability to re-run the assessment against different scenarios and, at the top tier, a personal consultant phone call, giving homeowners a natural path from a quick first look to a fully worked-through plan.

For a homeowner looking at home energy solutions, **the Home Energy Optimiser is the ideal first step before talking to an installer, engineer or energy company.**

BUSINESS IMPACT

The Optimiser is now central to Optify's domestic proposition, with a target of 5,000 homeowners using it in its first year.

It directly enables their sales team to scale up activity that generates revenue. Now instead of filling the days completing manual assessments they now spend full productive days following up with prospects and closing deals.

Beyond the direct homeowner assessments, the tool's credibility is helping Optify open conversations with local authorities and installation partners that it wouldn't otherwise have been in the running for, turning what started as an internal efficiency project into a genuine business development asset that builds trust.

Optify's feedback from clients on the optimiser has been positive and it is helping them build their reputation as the company with the clients interests at heart.

It's starting plenty of new client conversations meaning Optify is helping more clients get the right energy solution for them and their families, not end up with the solution that an installer wanted to sell them.



WHY THIS WORKS

An integrated, AI-powered assessment tool like this one:

- **Scales without losing quality:** what used to take roughly two hours of manual cross-referencing per household now happens in minutes, with no drop in the depth of the assessment enabling sales teams to re-focus effort onto activities that really matter
- **Builds trust fast:** a homeowner gets a complete, independent, considered picture in one sitting, not a series of biased estimates
- **Increases accuracy:** running all six modules together, shows homeowners how various energy solutions can work together
- **Opens doors:** a credible, independent tool like this gives Optify a stronger story when approaching local authorities and installation partners, opportunities that would be harder to access without it

NEXT



[Try the Home Energy Optimiser for yourself and see how much you could save](#)



[Talk to us about building something similar for your business](#)