

Example Phone Survey for Contractors

Prepared by Research into Action for the U.S. Department of Energy

Designed as Phone Survey

Interviewee Name:

Date:

Interviewer:

Hi, my name is _____ calling from _____ on behalf of _____. May I please speak to _____?

I'm hoping to ask you about 15 minutes of questions about your experiences with _____. Is this a good time?

Installer Background

1. First, I'd like to get a general idea of the types of work that your firm does. Does your firm do [Ask all]:
 - a) Installation ____
 - b) Repair ____
 - c) Maintenance ____
 - d) Other: _____
2. How many people are employed by your firm? _____
3. When was your business established?
4. What is your installation territory- the geographical territory you cover?

Program Awareness and Interactions

5. How did you first hear about the program?
6. What motivated you to participate in the program?
7. Have you interacted with program staff?
8. [If yes] How responsive was program staff? (1 to 5)

9. Are there any additional resources the program could provide for you?

10. How does the program design fit with your overall business model?

11. Have you visited the program website?

a) How helpful was the program website?

Marketing and Outreach

12. What types of marketing have you done for the services you provide through the program?

13. What strategies have been useful to you?

14. Do you employ the neighborhood sweep approach?

a) If yes: Is this approach working for you? Have you run into any problems with income qualification?

15. Have you used any of the marketing resources provided through the program?

16. Are there any marketing resources that could be useful to you?

17. What features of the program are most appealing to your customers? [check all that apply]

- a) ☒ X
- b) ☒ X
- c) Replacing existing equipment
- d) ☒ X
- e) Incentives
- f) Other: _____

18. If any, what initial concerns do customers typically have about the program?

- a) ☒ x
- b) ☒ x
- c) ☒ x
- d) ☒ x
- e) Other, please specify: _____

Optional elaboration: _____

19. [If any concerns given] How do you respond to these concerns?
20. What problems are your customers typically looking to solve by participating in the program?
21. How often do customers participate in the initial measures but not move forward to complete a project?
22. What, in your view, is the most common reason they do not move forward?

Energy Advocates/Advisors

23. Can you describe for me your typical interaction with the Energy Advocates/Energy Advisors?
24. What is your understanding of the role of the Energy Advocates/Advisors?
25. How do Energy Advocates support projects?
26. Does the presence of an Energy Advocate/advisor ever hinder projects?

Participation

27. What measures are most participants looking for when they get involved in the program?
28. Are there any measures that customers are typically reluctant to consider?
29. Are there specific things you look for when assessing the likelihood that a given participant will ultimately agree to participate in the program? [These could be physical factors such as specific home features, or they could be social or economic factors that participants might reveal to the contractor.]
30. How long does it typically take to get commitment from the homeowner? [What is the shortest time you've seen, what is the longest?] Are there any factors that increase or decrease this time?
31. In your experience, why do participants drop out (fail to move forward)

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32. How do you identify those that will not move forward? [When do you know? How do you deal with it?]

Satisfaction

33. How would you rate your overall satisfaction with the program. Please use a 1 to 5 scale where “1” means “very dissatisfied” and “5” means “very satisfied”

34. Do you have any comments- positive or negative- about the program - that you would like the Program sponsors to hear?

Thank you for your time.