



Better Buildings Neighborhood Program Workforce  
Peer Exchange Call: *Streamlining Service Delivery  
from the Customer's Perspective*  
*Call Slides and Discussion Summary*

August 30, 2012

- Call Logistics and Attendance
  - What unique activities is your program undertaking, if any, for streamlining service delivery from the customer's perspective?
- Program Experience and Lessons:
  - Connecticut: Madeline Priest, Neighbor to Neighbor Energy Challenge
  - Cincinnati: Lilah Glick, Greater Cincinnati Energy Alliance
- Discussion:
  - Are there other ways of streamlining service delivery you have been thinking of trying, but have not yet?
  - Have you received any customer feedback or suggestions for making the process run smoother on their end?
  - What roadblocks have you faced in streamlining delivery?

# Participating Programs

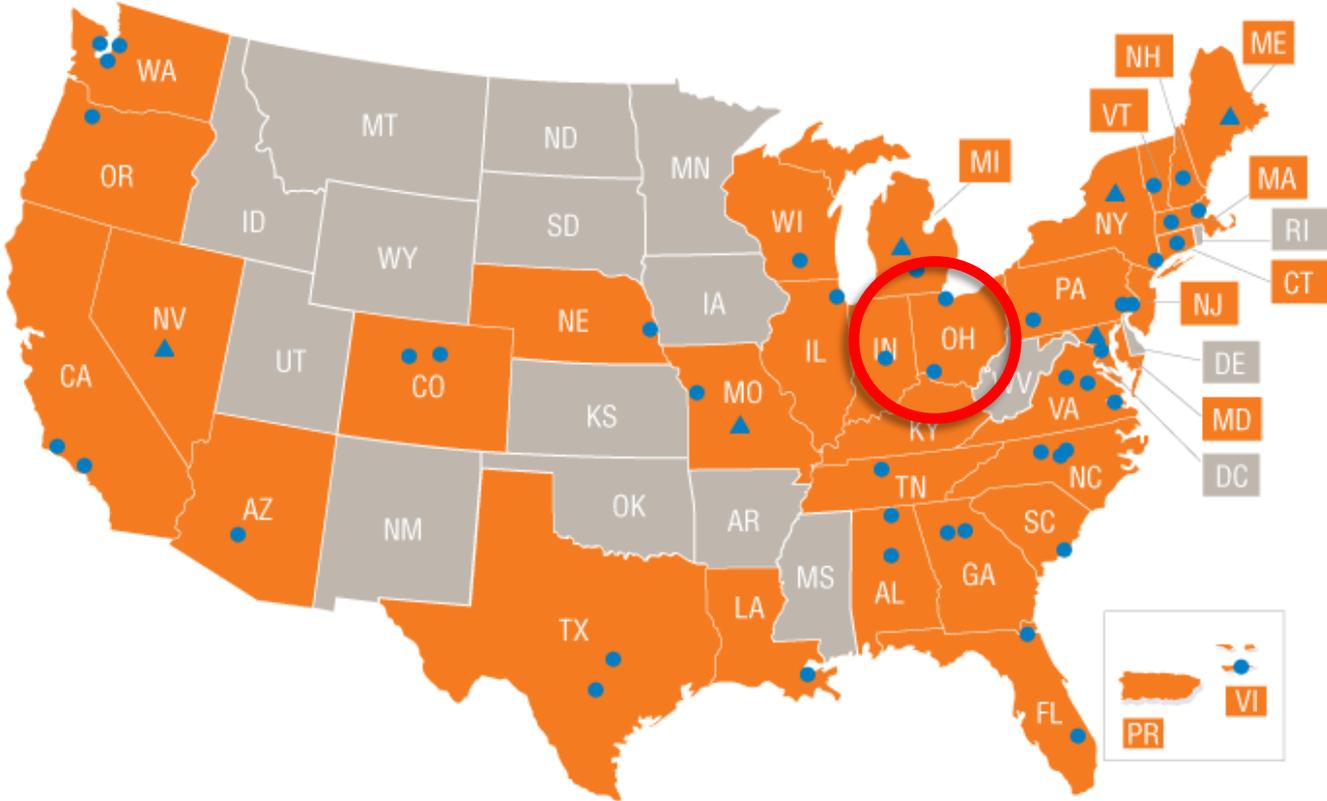
- Los Angeles County, CA
- Sacramento, CA
- Santa Barbara County, CA
- Boulder County, CO
- Eagle County, CO
- Garfield County, CO
- Connecticut
- Chicago, IL
- Maryland
- Michigan
- Carrboro, NC/Southeast Energy Consortium
- New York
- Cincinnati, OH
- Portland, OR
- Philadelphia, Pennsylvania
- Austin, TX
- Charlottesville, Virginia/Southeast Community Consortium
- Wisconsin



- Dove deeply to see where people getting lost in the cracks either not conducting an initial assessment or not conducting upgrades after the assessment
  - A lot had to do with the time of day people were called (in the middle of the workday is bad for response)
- Found a lot of things were originally out of the control of the program – decided to get them under the program’s control
- Companies were really confused and did not know how to use the reporting database; it was an additional step they had to do on top of reporting to the utility
- Two biggest areas of focus for change: who gets what information when and how the program is structured

- Grassroots effort with teams on the ground following-up
- Created a receipt for those showing initial interest that said exactly who would be calling to follow-up and for what – this boosted response rate tremendously
- Hired two Energy Advisors to act as contractor liaisons and catch issues
- Held monthly meetings with companies to share best practices; this led to Dale Carnegie sales trainings
- Created a scorecard that highlights the ability of a company to move folks from an initial assessment to upgrades; it's public so companies can see how they compare and top performers can see the value in the program partnership

# Cincinnati



Lilah Glick, Greater Cincinnati Energy Alliance



Greater Cincinnati  
**Energy  
Alliance**

Streamlining Service Delivery  
from the Customer's Perspective

8/30/2012

# Residential Program Design



## Home Performance with Energy Star Program

- Customer Engagement
  - Energy Alliance marketing
  - Contractor marketing
- Request assessment
  - \$50 energy assessment (\$400 value)
- Assessment delivered
- Customer invests in home energy upgrade
  - 35% retrofit cash incentive
  - 6.99% unsecured, 10-year loan, up to \$20,000
- Quality assurance
- Payment to contractor





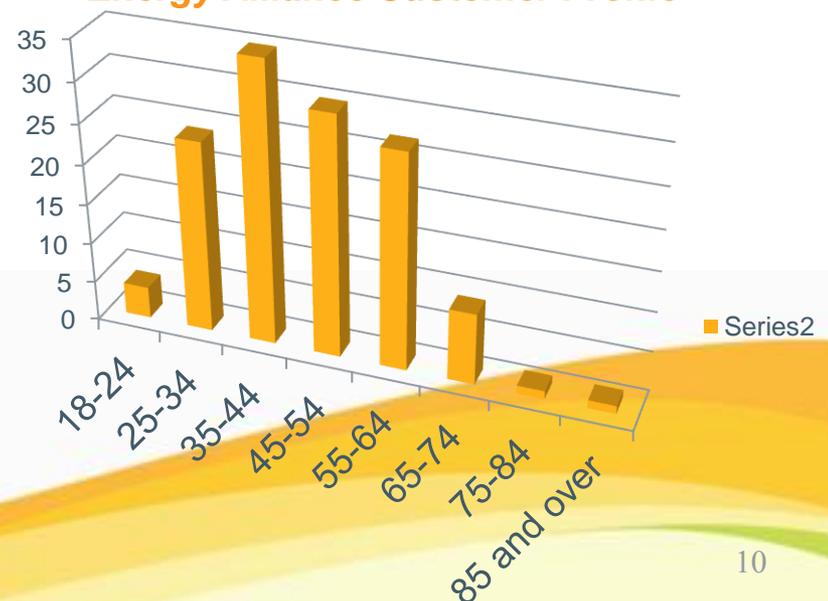
# Target Audience

- Home Owner  
(1-4 units)
- Older/ Historic Homes  
(Benefits all existing buildings)
- Middle – Upper Income Households
- Women
- Older Home Owners  
(78% over 34 years old)
- Green/ Sustainable Interests
- College Degree

## Outreach Targets:

Affinity groups, Municipal/ Community Leaders, Chamber of Commerce , Partner organizations, Neighborhood Groups, Realtors and Appraisers, Nonprofits, Corporations, Schools and Churches, Funders, Media, & Volunteers

*Energy Alliance Customer Profile*



# Selling the Program



## Key Sales/ Education Talking Points:

- **Save Time and Money!**
  - 20-30% average annual savings
  - 5-7 year pay back
  - Cash neutral or positive
  - One-Stop-Shop
- **Comfort and Safety**
  - Maintain a constant temperature throughout the home
  - Address moisture issues
  - Health and safety testing of combustion appliances
- **Quality Assurance**
  - Contractors are pre-qualified
  - Pre and post test outs
  - Energy Alliance 3<sup>rd</sup> party oversight
- **Deferred Maintenance**
  - Replace outdated mechanical equipment
  - Properly sized for weatherized homes
- **Testimonials!**



# Marketing Milestones



## Timeline:

- **January 2009** Founded
- **January 2010** hired 2 Community Outreach Advisors
- **April 2010** \$17 Million Better Buildings Grant
- **July 2010** Earned media campaign generating 750 leads
- **October 2010** hired Community Outreach Director
- **November 2010** Phone Blitz and Covington Canvass
- **December 2010** Rebranded Energy Alliance
- **February 2011** New Website, Compass, and Surveyor
- **October 2011** Marketing Strategic Plan
- **November 2011** First paid media campaign
- **December 2011** Hired Energy Advisor
- **2012** \$100K paid media investment, Hardware store pilot, ambassador program, & 2 new marketing team members

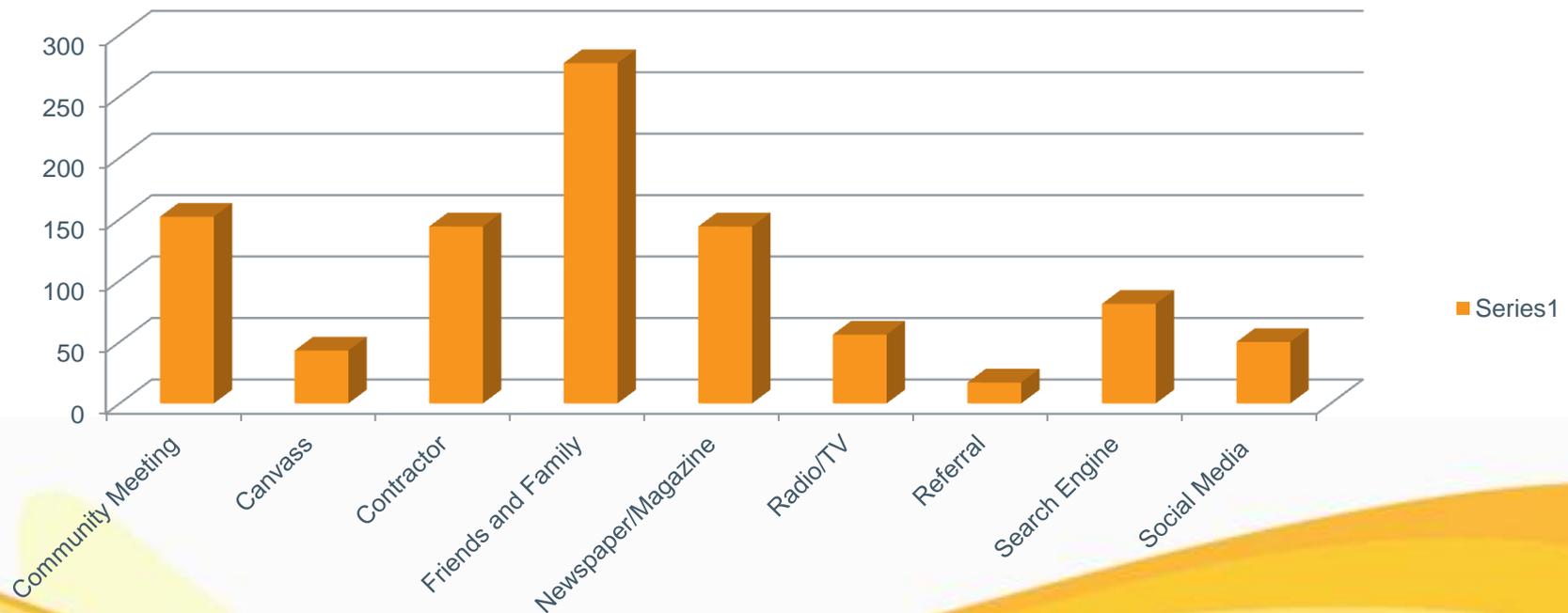


# Marketing Strategies



The Energy Alliance has taken a multi-pronged approach in marketing its residential program including both traditional and non traditional strategies.

## Energy Assessment Leads



# Marketing Activities to Date



## Deliverables:

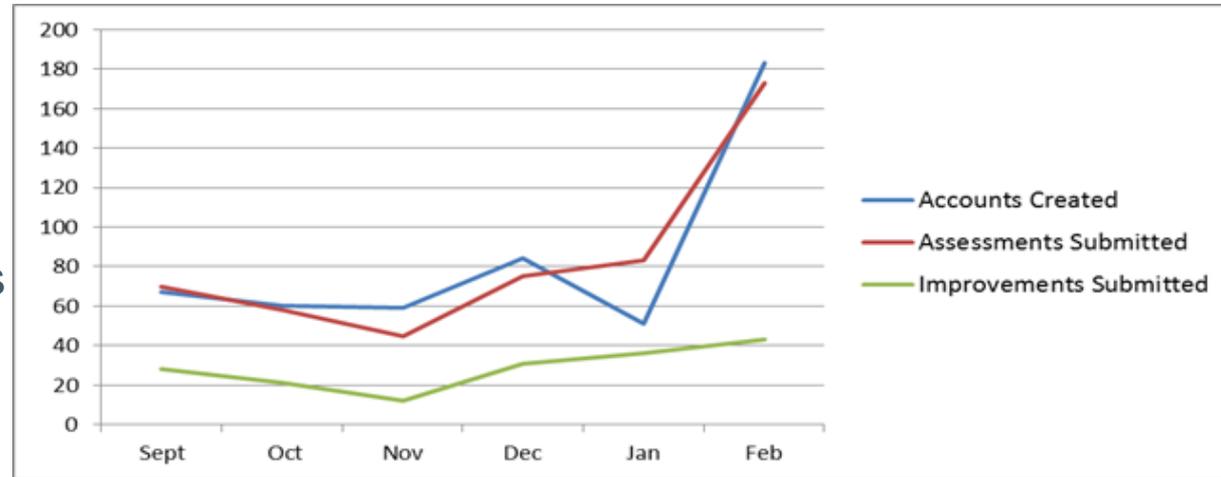
**15,000+** reached through  
Community Canvasses  
**180+** community events/  
workshops  
**30,000+** total unique visitors  
**1,264** Facebook fans  
**854** Twitter Followers  
**401** Linked In Members  
**19** Press Releases  
**85** Press Hits

## Paid Ad Campaigns:

November 2011- Federal Tax Incentive  
Cincy Chis Fashion Show and ad space  
Reds on Radio  
Cincy Magazine

**23,000** households received post card mailers

## Pipeline Production Trends (9/2011 – 2/2012)



## Overall Program Results to Date:

1,000+ Retrofits  
2,200 Assessments  
\$8,500 Average project Size  
60+ Approved Contractors

# Community Partnerships



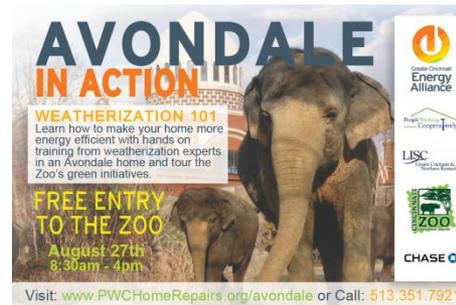
## Forest Park Residential Energy Efficiency Program



50% off home improvement projects in Forest Park

- Initial \$60,000 grant
- Renewed for \$20,000
- Completed over 50 home projects
- Potential for an additional 50+ homes
- 15%+ in home energy savings

## Community Partnerships Examples:



- **AmeriCorps Canvass** in cooperation with PWC, LISC, and Cincinnati Zoo
- **Green Your Home Contest** with Uptown Consortium, Cincinnati Zoo, and Tristate Wholesale
- **NKY Restoration Weekend** including city of Bellevue, Historic preservation Association, and private contractors

# Energy Advisor Program



## EA Role with Customer:

- Understanding GCEA offerings and services
- Registering for the program
- Selecting a contractor
- Interpreting Energy Assessment Report
- Improvement Road Map
- Accessing financial incentives
- Resolving customer complainers

The screenshot shows the 'Contact Us' page of the Greater Cincinnati Energy Alliance website. The page is divided into several sections:

- Contact Us (Sidebar):** Includes links for 'Volunteer' and 'Request a Community Presentation'.
- Request An Energy Assessment:** A section for signing up for a comprehensive home energy assessment, with 'Sign Up' and 'Login' buttons.
- Join Our Newsletter:** A section for receiving updates, events, and energy efficiency news, with an email address input field.
- Talk to Us:** A central section with the text 'Here are a couple ways to get a hold of us, we would love to hear from you.' It includes:
  - LiveChat:** A 'Chat with us Live' button.
  - Phone:** 513-621-GCEA (4232)
  - Fax:** 513-297-7299
- Our Location:** A map showing the location at 200 W 4th St, Suite 600, Cincinnati, OH 45202. The map is powered by Google and includes a 'View Larger Map' link.

## EA Job Duties:

- Reactive Calls
- Proactive Calls
- Instant Messenger
- Salesforce Account Management
- Customer Advocate
- Contractor Liaison
- Weekly Reports

# Energy Advisor Program Highlights

- Role = to catch people getting caught in the process
- Take both proactive and reactive calls – also serves the portion of the population that doesn't use computers
- Funnel the homeowner to the right contractor for their upgrade
  - 25% vs. 70% conversion rate when someone picks a contractor themselves through the website vs. calling in and being directed to the right contractor
- Educate consumers so they understand the contractor when they call and know it is not a scam
  - It's good for the Energy Advisor to have building science background; BPI certified would be great
- Resolving customer complaints generates even more referrals

# Energy Advisor Highlights Cont.

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- Sales Force or other software is highly recommended – allows setting reminders, understanding the consumer, and running reports to obtain a high level of accuracy about where the issues are
- Ryan Scalf – Energy Advisor

# Strategic Plan



The Energy Alliance provides quality education and outreach to the Greater Cincinnati region about the benefits of energy efficiency, with the goals of having 3,400 residential home energy improvements invested by May 2013.

## **Strategies to drive leads to invest in home energy improvements:**

- Retroactive Market
- Workshops and Events
- Traditional Media
- Social Media
- Partnership Opportunities
- Canvassing
- Workforce Development and Support
- Technology Investment and Training
- Advocacy For Energy Efficiency Policies

# Summary of New Initiatives



- Energy Advisor and Instant Messaging Online
- Paid Advertisement Campaigns: Cincinnati Reds, Cincinnati Magazine, WCET, Radio, online, Cincinnati Enquirer, etc.
- Nonprofit Fundraising Program
- Ambassador Program
- Real Estate Outreach
- Corporate Campaigns
- Homeowner Certificate of Completion
- Referral Cards
- Hardware Store Partnership

# Discussion Highlights

- Biggest roadblock = how to get people to realize these programs are worth their time, money, and interest
- Word of mouth is the best way of getting people on board – use testimonials
- Find places to leverage and partner
- Build marketing awareness in the community
- Many programs are thinking about an Energy Advisor role
  - Suggested future discussion on how to provide these services post Better Buildings grant funding (How do grantees continue this type of service without grant money? What options are people using (e.g., a fee per referral to contractors, a flat fee for advising, other)?)

# Potential Future Call Topics

- Fee Based Advisor Service (*see previous slide; suggested on the call*)
- Contractor Pricing: bid parties, set pricing
- Engaging and Growing Small Contractor Businesses
- 3rd Party vs. Contractor Audits—What is the Right Approach?
- Designing Contractor Friendly Programs
- Engaging Local Efficiency First chapters
- Strategies for Attracting Business Owners to Trainings
- Home Performance Training/ Mentoring
- Quality Control Inspections and Testing
- Recruiting HVAC and General Remodelers for Whole House