

U.S. DEPARTMENT OF  
**ENERGY**

Office of  
ENERGY EFFICIENCY &  
RENEWABLE ENERGY

# Weatherization Assistance Program

## Client Relations

September 2019



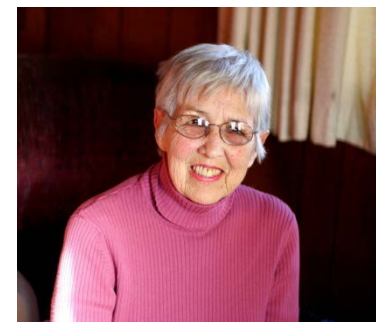
# Learning Objectives

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## **By attending this session, participants will be able to:**

- Describe some typical client issues WAP encounters.
- Name some fundamental aspects of a good client relations policy.
- Access tips for dealing with difficult clients.

# Who are our clients?



*Anyone can be a weatherization client!*



# Issue #1 – Complete Client Information

## Intake Staff Attributes:

- Personable
- Detail-oriented
- Tactful
- Flexible
- Must maintain client confidentiality



*Photo courtesy of Billy Brown/Community Center of St Bernard*

# Issue #2 - The Waiting List

Be sure your agency establishes clear criteria for priority on the waiting list.

## Priorities Created by Statute and/or Regulation

- » Elderly persons
- » Persons with disabilities
- » Families with children
- » High residential energy users
- » Households with high energy burden

# Issue #2 - The Waiting List (continued)

Additional waiting list considerations of an organizational nature:

- » Priority Point System
- » Certified Application Date
- » Geography
- » Native Americans
- » Coordinating activities with other funding sources
- » Prioritizing by Housing Type not allowed

# Issue #3 – Auditor's Communication Skills



Photo courtesy of US Department of Energy



Photo courtesy of Cincinnati Hamilton County CAA



Photo courtesy of WV Weatherization Assistance Program

*The weatherization energy auditor plays an important role in establishing a good relationship with the client.*



# Issue #4 – Stranger Anxiety



*Crews and field staff should provide good customer service to the clients in addition to performing the best work product possible.*



# Issue #5 – Possession Anxiety



*Photos courtesy of US Department of Energy*

*Client homes and items should be protected before any weatherization work begins.*

# Issue #6 – Invasion of Privacy



*It is important to respect the client's privacy.*

# Respect, Respect, Respect!

## Field Staff, Installers & Contractors:

- Treat the client as they would wish to be treated.
- Treat the home as they would treat their own home.
- Replace anything that gets broken.
- Clean anything that gets dirty.
- Remove all junk and trash generated on site.
- Leave the home “broom clean” after work each day.

## Field Staff, Installers & Contractors SHOULD NOT:

- Use drugs.
- Use profanity.
- Smoke on client property.
- Buy anything from clients or sell anything to them.
- Conduct side deals for extra work.



# Client Relations Policy

## Code of Conduct for Workers

- Respect for others.
- Conflicts of interest.
- Privacy of clients.

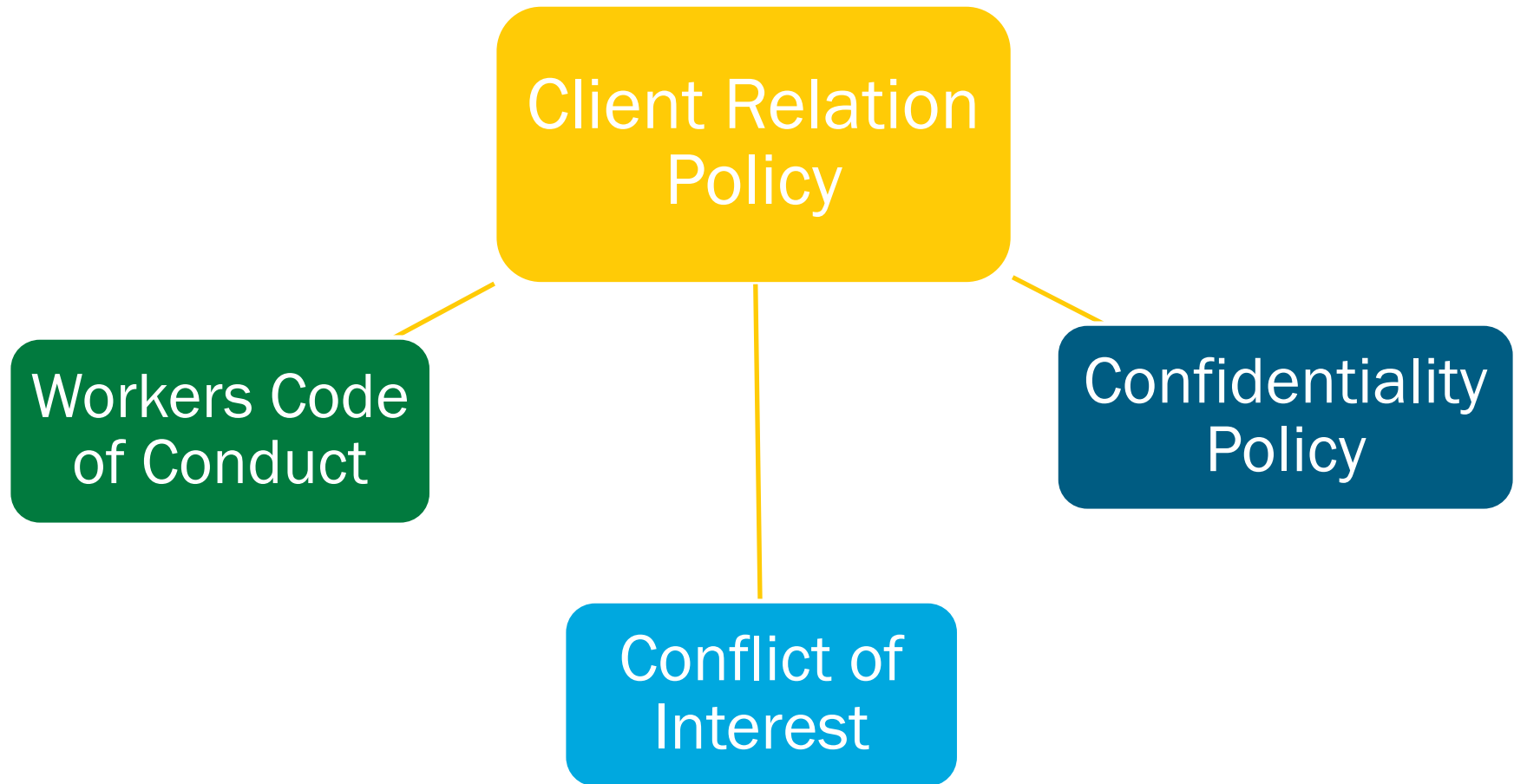
## Grievance Process for Clients

- When things go wrong.



*Photo courtesy of Salt Lake Community Action Program*

# Client Relations Policy | Code of Conduct



# Client Relations Policy – Grievance Process



*Photos courtesy of US Department of Energy*

*It is crucial to identify any potential issues or “off limit” areas with the client before work begins.*



# Dealing with Difficult Clients #1

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## A difficult client may be one who:

- Believes weatherization workers should do more work to the home than called for by the energy audit or priority list.
- Maintains that the installers did not complete the job even when the Work Order defined by the audit is complete.
- Appeals to higher authorities that they are not receiving service fast enough.
- Feels “wronged,” slighted, or taken advantage of.
- Simply won’t take “No” for an answer.

# Dealing with Difficult Clients #2

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**A difficult client WILL be persistent. Use these tips:**

- **When your agency is wrong, admit it and rectify the problem.**
- **If you are in the right:**
  - Be attentive and listen to the client's complaints.
  - Remain calm. Never show anger toward the client.
  - Know your facts and diplomatically stand your ground.
  - Follow up on every conversation in writing and document all correspondence in the client file.

# If all else fails...

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- If all reasonable attempts to resolve problems with a difficult client fail, the Subgrantee PM should notify the Grantee PM.
- The Grantee PM should follow the same tips outlined on the previous slide.
- Passing the client from the Grantee PM to the DOE Project Officer is usually only done if:
  - The Grantee PM feels that the client is a physical threat or likely to create extremely adverse publicity.
  - The client specifically asks to speak to someone at a level higher than the Grantee's office.



# Summary

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- Train all staff to treat clients and their property with respect.
- Be sure Subgrantee intake workers are well-versed in client confidentiality requirements.
- Have and communicate a clear priority policy to establish an order of service and always follow the policy to the letter.
- Have a written client grievance policy with clear channels to follow, especially regarding difficult clients.
- Remember, and stress to field staff, that the client is the reason the program exists!