

Energy Advisor Program Helps Homeowners Go the Extra Mile in Mile-High City

A Better Buildings Neighborhood Program partner in Denver, Colorado, launched the Denver Energy Challenge in 2011 with a “neighborhood blitz” model focused on door-to-door outreach. In early 2012, after experiencing difficulty scheduling energy assessments and converting them to upgrades, Denver Energy Challenge revamped the program and ultimately upgraded more than 5,900 homes by enlisting energy advisors who helped customers through each step of the home upgrade process. Following is an abridged transcript of an interview with Elizabeth Babcock, community sustainability and energy administrator for the City and County of Denver.

How did you decide to use energy advisors as a central part of your program?

Before the energy advisor model, our program focused on neighborhood-based engagement. We recruited volunteers to go door to door discussing energy upgrades and signing people up for energy assessments. But it was a labor-intensive process that didn’t identify people who were really interested in getting energy upgrades, just people interested in the free sustainable products we were offering. We had energy advisors at that time, but their role was limited to helping customers get rebates after they had already completed home energy assessments. We decided to redesign the program to have “one-stop” energy advisors guide customers through the whole process and make it easier for them to upgrade their homes. We put out an RFP (request for proposals) for organizations that employ residential energy advisors, and we hired our own commercial energy advisors.

What outreach strategies were successful in getting customers to contact energy advisors?

We used targeted mailings, traditional advertising, earned media, and social media for marketing campaigns emphasizing how energy advisors make the home upgrade process easier. For example, one ad campaign featured a woman with lipstick on her teeth, with the message, “Oblivious? We can help.” The idea is that if you don’t know anything about energy efficiency or aren’t sure where to start, our advisors can help you, and there’s no catch! In addition to focusing our messaging on free energy advisors instead of emphasizing home energy assessments, we found a big difference in customer responsiveness when we changed our approach from canvassing neighborhoods to



targeting specific segments of homeowners across the region, such as those with historic homes. Downloading the city assessor’s database into our customer management system enabled us to tag each home by neighborhood and by city council district to facilitate this targeting.

How did energy advisors impact your program’s success?

The fact that 80% of customers enrolled in the advisor program completed at least one upgrade speaks to how effective the advisors are. The percentage of homes that completed a major building upgrade was also high—around 37%. The advisors were critical to getting customers to move forward with home energy upgrades. When homeowners first hear about utility rebates, they can be confused about

the application process or overwhelmed by the number of potential contractors. Energy advisors can help explain these processes and answer questions along the way. For people already thinking about upgrades or an assessment, the advisor service can be what pushes them to take the next step. When customers made a good connection with an energy advisor, they would refer the program to friends and neighbors.

How did customers connect with advisors?

We tried to make it as easy as possible for homeowners to contact an advisor. Interested customers could call our hotline or sign up online, and an advisor would return their call within one business day. We offered both in-person and phone advising; about 70 to 80% of our advising occurred over the phone. Advising sessions typically lasted 30 minutes to one hour depending on the customers' needs and the number of questions they had.

How did energy advisors assist customers with the upgrade process?

After the first advising session, advisors could help customers in a number of different ways. Homeowners might elect to have a full home energy assessment done, but a lot of customers didn't want a full assessment; they have identified one thing like insulation, and that's all they want. So

eventually, we developed a different type of assessment called an Energy Action Plan. Based on their initial conversation with the homeowner and past program experience, the advisor could recommend the top five energy upgrades for the home without a full assessment.

Based on upgrades homeowners decided to make, advisors would help customers identify qualified contractors, evaluate bids (we suggested they get three different bids), and answer questions about specific products. While advisors weren't able to give customers specific recommendations for contractors, they could provide a list of suggested contractors, chosen based on objective criteria.



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The Denver Energy Challenge is a free residential and commercial energy program provided by the City and County of Denver.



Did advisors help homeowners with rebates or financing?

Advisors could connect customers to a local credit union that offered low-interest loans and help ensure upgrade measures complied with loan terms, historic preservation requirements, and other important factors. If a customer was interested in do-it-yourself measures, or wanted to know more about solar energy, advisors could provide guidance in those areas as well. Advisors also informed customers about rebates they may be eligible to receive. From February 2012 until November 2012, our program provided an average of \$327 per home in rebates, which drove high participation rates. We decided not to offer our own rebates after that, and the program was still very successful without them. I think the advisors helped those people who were just thinking about upgrades take that extra step.

What skills or qualifications did you seek for energy advisors?

We offered training to both our advisors and contractors, and now our program administrator provides building science training and sales training to all new advisors. We also covered social marketing topics in a series of initial trainings for energy advisors. Some advisors came from technical backgrounds, while others had strong interpersonal and customer service skills. The latter tended to be more successful at conversions than the former!

How were energy advisors evaluated on their performance?

We instituted a quality assurance system for customer management. A manager would listen in on random calls to give advisors feedback on their performance. We also set up a number of dashboards in Salesforce and maintained metrics for each energy advisor, including his or her average conversion rate over a given time period. We tracked the status of accounts, too, to ensure projects were moving along and to prevent a backlog of projects in the queue. We also asked customers to rate their energy advisor by completing a satisfaction survey, and we looked closely at these results.

Did you have many repeat customers?

We saw multiple conversions over time as advisors helped people complete deeper upgrades. Some customers aren't ready to dive into multiple projects right away, but because they can always come back to their advisor for help, they may undertake upgrades in stages. When customers decide they want to take the next step or need some advice, they can call our hotline or go to the website to reach their advisor. Even if their initial advisor left the program, a replacement still had access to all of their previous conversations, which are tracked in our system, and can continue providing good customer service.

What advice would you give programs interested in trying your energy advisor approach?

- ▶ Take the time to understand each customer's motivation. It's critical to understand where each person is coming from. Why are they calling? Are they uncomfortable in their home? It's all about understanding what they need—why they called you—and helping them achieve their goals. We've tried to eliminate every barrier possible and make it easy for the customer.
- ▶ Build strong relationships with the contractor community. Contractors are crucial to the equation: they were one of our biggest sources of referrals.
- ▶ Design a consistent customer experience. Setting expectations and being closely involved with training and tracking advisors will help you address any issues that may arise and create more uniform customer satisfaction.
- ▶ Integrate additional advisor services where possible. Since advisors are already familiar with a customer's account, we could have had them manage the utility rebate process for the customer and contractor, which would have reduced hassle and avoided potential miscommunication among the customer, advisor, and rebate processor.
- ▶ Hire one administrator for the program. Initially, we hired several different organizations to provide energy advisors, but now we have just one, which ensures consistency. When selecting an administrator, find out their customer approach. If you're designing a very specific campaign, consider working with an organization more tailored to that type of work, which will allow you to move forward without experimenting with multiple companies or organizations.

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