
Call Slides and Discussion Summary
June 25, 2015
Agenda

- Call Logistics and Introductions
- Residential Network and Peer Exchange Call Overview
- Participant Poll
- Featured Presenters
  - Amy Beley, Senior Program Manager, Build it Green
  - Sam Flanery, Founder, Building Science Academy
- Discussion
  - What kind of sales/business training is most useful for contractors?
  - How can residential energy efficiency programs best support contractor training?
  - What do we know about the impact of training on sales and customer satisfaction?
- Closing Poll
Call Participants

- Albert Nahman Plumbing and Heating
- BPI
- Build It Green
- Building Science Academy
- Center for Energy and Environment
- Center for Sustainable Energy
- City of Holland
- City of Plano
- CLEAResult
- Efficiency Works
- Energy Efficiency Specialists
- emPower Central Coast
- Fruitfull Energy
- Greater Cincinnati Energy Alliance (GCEA)
- Honeywell
- Michigan Saves
- Midwest Energy Efficiency Alliance (MEEA)
- Opportunity Council
- Yolo County Housing
Call Participant Locations
Better Buildings Residential Network

- **Better Buildings Residential Network**: Connects energy efficiency programs and partners to share best practices to increase the number of American homes that are energy efficient.
  - **Membership**: Open to organizations committed to accelerating the pace of existing residential upgrades. Commit to providing DOE with annual number of residential upgrades, and information about benefits associated with them.
  - **Benefits**:
    - Peer Exchange Calls
    - Tools, templates, & resources
    - Newsletter updates on trends
    - Recognition: Media, materials
    - Optional benchmarking
    - Residential Solution Center

For more information & to join, email **bbresidentialnetwork@ee.doe.gov**.

- **Better Buildings Residential Network Group on Home Energy Pros**
  Join to access:
  - Peer exchange call summaries and calendar
  - Discussion threads with energy efficiency programs and partners
  - Resources and documents for energy efficiency programs and partners

Peer Exchange Call Series

- Calls are held the 2nd and 4th Thursday of every month at 12:30 and 3:00 ET
- Calls cover a range of topics, including financing & revenue, data & evaluation, business partners, multifamily housing, and marketing & outreach for all stages of program development and implementation
- Upcoming calls:
  - August 13, 12:30 ET: Assessments: The Good, the Bad, and the Ugly (301)
  - August 13, 3:00 ET: Tailored Marketing for Low-Income and Under-Represented Population Segments (201)
  - August 20, 12:30 ET: Staged Upgrade Initiative Program Design (201)
  - September 10, 12:30 ET: Mastermind (201)
  - September 10, 3:00 ET: The Other 15%: Expanding Energy Efficiency to Rural Populations (301)
- Send call topic ideas to peerexchange@rossstrategic.com.
How do you eat an elephant? One bite at a time. A slight shift in perspective goes a long way.

Understanding how EE can solve a financial, public relation, or customer service problem for the utility is the right place to start.
Web portal of residential EE upgrade program resources, & lessons learned to plan better, avoid reinventing the wheel.

- **BB Neighborhood Program, Home Performance with ENERGY STAR Sponsors+**
- **Provides:**
  - Step-by-step guidance
  - Examples
  - Tools
  - Templates
  - Lessons learned
  - Best practices
  - Tips
- Continually add content to support residential EE upgrade programs—**member ideas wanted!**

[https://bbnp.pnnl.gov/](https://bbnp.pnnl.gov/)
Opening Poll

Which of the following best describes your organization’s experience with contractor sales and business training?

- Some experience/familiarity—43%
- Very experienced/familiar—21%
- No experience/familiarity—21%
- Limited experience/familiarity—14%
- Not applicable—0%
Amy Beley, Senior Program Manager, Build it Green
Contractor Engagement
Strategies that work

Amy Beley
June 25, 2015
The Program Problem:

We need more projects in the programs
What Contractors need:

A clear roadmap to success
Our Contractor Engagement Strategy engages with high impact/high potential companies

80/20
A Proactive strategy can lead to higher productivity

Job Volume by Contractor Type

- Enrolled Contractors
- Key Contractor Accounts
- Concierge Contractors

122 Contractors
30 Contractors
11 Contractors
Customized Mentoring makes a big impact

It focuses on the end goal – transforming the marketplace
Ben wanted to do better. He and his team *WANTED* to sell more.

So, we enrolled them in Concierge Mentoring in February 2014.
Oasis Home Upgrade/Advanced Home Upgrade Projects 2012-2015

Annual Home Upgrade/Advanced Home Upgrade Projects

And this is just Q1-Q2
Thank you!

Amy Beley,  Build It Green

LinkedIn: https://www.linkedin.com/pub/amy-beley/5/b68/263

To learn more about Build It Green:

http://www.builditgreen.org
http://www.homeupgrade.org
http://www.greenpointrated.com
Build It Green identified a tiered System for Managing Contractors:

- **Concierge Contractors:** high-volume contractors; 11 contractors produce 25% of the contracts from the program.
- **Key Contractors:** Contractors that have not taken the full leap into a home performance business model; 30 contractors producing 52% of projects.
- **Enrolled Contractors:** Contractors who submit only a few jobs a year; 122 contractors producing 20% of projects.

- **80/20 Rule:** Most of the program's resources were going to supporting “problem” contractors that were not completing projects for the program.

The program focuses contractor training on business development, sales and marketing, and quality management to help the most productive high impact/high potential contractors be more efficient and even more successful.

- For example, helping a contractor set up a tool inventory system or organize their work truck helps them complete more projects and deliver a more profitable program.

- **The Bottom Line:** Energy efficiency programs need more projects and contractors need to turn a profit. If contractors are making money, they are producing more projects.
Sam Flanery, Founder, Building Science Academy
Lessons Learned: Building Science Academy

- **Key question:** how can a program help contractors get from third base to home?
  - **First Base:** Identify prospective customer
  - **Second Base:** Set up a home visit
  - **Third Base:** Complete the home visit
  - **Home:** Contract for the project

- Not all homeowners can afford a $12-15K retrofit, even with financing. The key to real impact with residential EE is making home performance projects affordable – what does a program or contractor service have to offer that can start a homeowner down the right path that they can afford?

- “Closing Sale” mentoring helps contractors get to home base with a strong sales dialogue.
  - Until a program and contractor get to home base, all that has been spent is time and money. First through third bases do not generate profit and do not generate EE benefits.
Discussion Questions

- What kind of sales/business training is most useful for contractors?
- How can residential energy efficiency programs best support contractor training?
- What do we know about the impact of training on sales and customer satisfaction?
Discussion: Ideas for How Programs can Better Support Contractor Sales

- The ideal salesperson has both a technical understanding and people skills. They can communicate the job and interact with the customer to make the sale. A contractor and salesperson could tag team, but it would add more cost to the project.

- Selling audits presents a useful gateway to engage your customer. Giving an audit away for free doesn’t create homeowner buy-in, and the final sale is more difficult.
  - Energy Efficiency Specialists in New York sells audits for $750 and sees a closing ratio on projects of 80%.

- Contractors that can look at the whole home and offer feedback to the homeowner as well as information on utility incentive programs increase customer confidence that the contractor is working in his or her best interest.

- Midwest Energy Efficiency Alliance offered one-day training classes for contractors, but experienced limited attendance. Charging a nominal fee as opposed to a free class may have increased the likelihood that contractors would show up.
Top Tips

- **Put resources toward results.** Focus mentoring, training, staff time, and program resources on contractors who are delivering projects for the program.

- **Offer a customized approach to support contractors**, such as helping contractors develop systems to be more efficient in completing projects.

- **Training takes time.** Programs don't often give people enough time to be trained and contractors end up thrown into the field.

- **Create customers for life.** If you sell someone a new air conditioner, create a service plan for additional improvements in the future. Figure out what the consumer can afford now and there may be additional budget to do further improvements later.

- **Sell solutions.** Homeowners aren't motivated by energy savings, they're motivated by solutions.
  - Rebates can be a barrier to sales as they often take the focus off of the solution in the sales pitch. Rebates can be a way to get a customer to reach further for a better home improvement solution that will offer greater energy savings.
Closing Poll

- After today's call, what will you do?
  - Seek out additional information on one or more of the ideas—78%
  - Consider implementing one or more of the ideas discussed—22%
  - Make no changes to your current approach—0%
  - Other—0%

Please send any follow-up questions or future call topic ideas to:
peerexchange@rossstrategic.com