



Converting the Assessment into an Upgrade: Resources for Program Managers & Contractors

Lawrence Berkeley National Lab

May 2011

What's included here...



- Problem/Barrier Definition
- Resources for Program Managers
- Resources for Contractors
- Tips for Contractors in the Home

Barriers to Increasing Conversion Rates



- Program managers and contractors alike are concerned about increasing conversion rates from energy assessment to energy efficiency (EE) upgrade
 - Communication gaps and a need for more homeowner education are often cited as a barrier to converting an assessment to an upgrade
 - Contractors are usually the face of an EE program to a homeowner and are largely responsible “making the sale”
 - Homeowners frequently require more information about the process, costs, recommendations & necessity for completing EE upgrades
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Conversion Rates and Sales Training

(the importance of the kitchen table discussion)



- How do we resolve some of those barriers?
 - Develop a program website, hotline, and/or an Energy Advisor/Coach position to assist the homeowners with the education & decision process
 - AND –
 - Give contractors the tools and training to:
 - Listen & communicate effectively with homeowners
 - Address the education/information needs of homeowners
 - Build trust & long-term relationships with homeowners
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Resources for Program Managers

DOE TAP Webinars



- The DOE Technical Assistance Program hosts webinars for energy efficiency program managers
 - A good source of info on what other programs are doing
 - Check out the [Solutions Center](#) for past [webinars](#) & other resources
- Webinars to check out:
 - Workforce Development and Sales Training for Energy Efficiency Contractors ([slides & audio](#), [slides](#))
 - Driving Demand: Working With & Learning from Contractors ([slides and audio](#) and [slides only](#))

Professional Sales Training Programs



- Two companies have started developing programs specifically for energy efficiency/home performance contractors
 - Working with state & local programs to develop customized, program sponsored training for local contractors
 - Dale Carnegie Sales Training
 - Bill Bertolet, VP of Global Sales
 - 212-836-0757, bill.beretolet@dalecarnegie.com
 - Conceptual Communications & Training, Inc.
 - Jay Gentry, President
 - 831-626-1340, Jaycct@gmail.com
 - Website: <http://concomt.com>
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Resources for Contractors

Opportunities and resources for contractors to gain access to training & tools to support their business

EGIA – Leadership Academy



- Electric & Gas Industries Association (EGIA)
 - www.egia.org
 - A non-profit organization dedicated to advancing energy efficiency and renewable energy solutions through a nationwide network of contractors, distributors, manufacturers and utility companies.
- Resources for contractors, including sales training, financing, business & marketing tools... [here](#).

EGIA Electric & Gas Industries Association

Efficiency First – America's Home Performance Workforce



- A national nonprofit trade association that unites the Home Performance workforce, building product manufacturers and related businesses and organizations.
 - www.encyfirst.org
- Webinars, marketing resources, sales training and other resources (available [here](#))
 - [Sales & Lead Generation](#)
 - June 16th, 2011 @ 12:30pm EST/9:30am PST.
 - Is your conversion rate from audit to retrofit not as high as you want? Are you relying solely on a government funded program's marketing campaign to get you through? Is your average job less than \$8,000 per home? Then this is the Webinar for you. Learn from sales professionals about increasing your lead generation and improving your bottom line. Learn how to build relationships with lead generation sources including real estate professionals, single measure contractors, etc.



ACI Conferences & Workshops



- Affordable Comfort Institute (ACI) is a not-for-profit organization that has become the go-to resource for information, education and best practices in the home performance and weatherization industry.
 - www.affordablecomfort.org
- ACI hosts national and regional events featuring speakers on the latest tools, policies and business practices.
 - Upcoming conferences ([here](#)) and presentations from past events ([here](#))
- There are frequently sessions and special courses specifically on sales training and marketing for contractors



Home Energy Pros



- **Home Energy Pros** is a global social network and community dedicated to Home Energy professionals.
 - Blogs from industry leaders and peers
 - Interactive discussion forum
 - Calendar of upcoming industry events
 - Library of resources about home energy efficiency.
 - <http://homeenergypros.lbl.gov/>

HOME ENERGY PROS

Connecting home energy professionals

Tools & Software Packages



- Several local government or utility programs have developed custom software to streamline the reporting process for program participation
 - Make sure contractors are aware of these tools and know how to use them
 - There are also several tools designed for contractors that are commercially available, here are links to a few (this is not an endorsement)
 - [Recurve](#)
 - [ClearEstimates & RemodelMAX](#)
 - [EPS Auditor Software](#)
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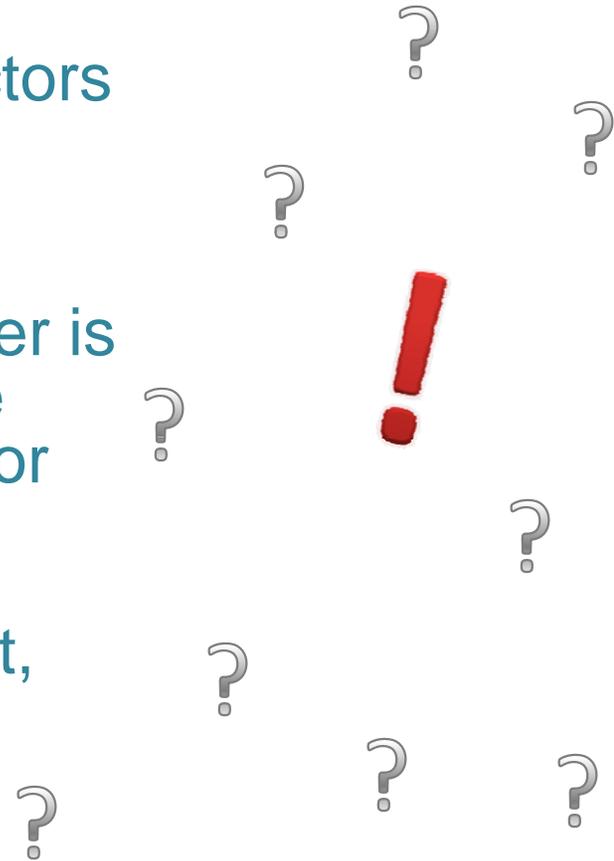
Tips for Contractors in the Home

(and programs thinking about
building a sustainable workforce)

Tips for Contractors



- The following are some tips we've picked up from talking with contractors and participating in sales training courses
- Every market and every homeowner is different... be flexible, not all of the following tips may be appropriate for the person you are dealing with
- This is by no means a complete list, it's just a starting point with some ideas to think about



Key Takeaways & Things to Remember



- Polite, Professional and Punctual
 - Most complaints to programs aren't about the work being done by contractors, they are about the timeliness of home visits & audit reports, and the behavior of the contractors in the home
 - Begin building trust by answering the phone professionally, returning calls when you say you will, treating the home like it's your own, and delivering reports on time
 - This is an education process for the homeowner...
 - If the homeowner doesn't understand *why* they need specific measures, they definitely won't want to pay a lot of money for it!
 - This is an education process for the contractor...
 - Listen to, and be able to address, the homeowner's needs (grandma's coming to live with us and her room is cold)
 - Understand and be able to communicate the local & federal rebates, financial options & local program offerings
 - Make it simple and easy for the homeowner
 - Present a proposal while you are still in the home and can answer questions, sign a contract & set a start date
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Hello, you've reached...

(first impressions help establish trust)



- Be polite and professional when answering the phone
 - Include your name and the name of the business
 - If you can't answer, make sure your message tells the customer when you'll get back to them (within 2 hours, 1 business day, etc.), and make sure you do!
 - Prescreening your potential customers over the phone is a great way to save time and money
 - Start a conversation, find out a bit more about the homeowner and the problems with their house. It can help you determine whether the customer is serious about having work done, looking for a lot of quotes, or just curious
 - Most contractors make money on the upgrades, not the audits... try to separate the folks looking to kick the tires (lots of quotes, or lacking the ability to pay for upgrades) from those who have an immediate need
 - Prioritize your time/schedule to focus on those who have a higher probability of moving forward (you were recommended by someone they know, they've been in their house for many years, they aren't collecting a lot of quotes)
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Homeowner Education 101



- Make sure that all decision makers will be home when you conduct the walk through and audit
 - Ideally, you don't want to have to educate the homeowners more than once (avoid multiple home visits and misinformation)
 - Actively engage the homeowner in conversation during the visit (and listen to what they're saying!)
 - Explain what you are doing, and why it's important to the homeowner. This is an opportunity to educate the homeowner about their home and home performance/energy efficiency
 - This is also an opportunity to understand their needs better
 - Use terms and phrases that a homeowner will understand
 - If you use a highly technical term, define it for the homeowner, they don't have the same training you do
 - If possible, have the homeowner participate in the assessment
 - Hand them an infrared camera, let them see with their own eyes what's going on and explain why it's a concern
 - Make the problems real and apparent to the homeowner and reassure them that they're solvable
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The Kitchen Table



- After the walk through, sit the homeowner down in the kitchen and discuss some of the results
 - It's a friendly space and you can lay informational materials on the table
 - Ask if they have any questions
 - If you can prepare a proposal at the same time, including costs & a timeline, you are in a stronger position to discuss “next steps” and a path to move forward
 - There are a number of tools & software packages available to help contractors standardize pricing and quickly prepare bids
 - If a homeowner isn't able or willing to complete all recommended upgrades at once, help them think about it as a long term plan
 - Prioritize “biggest bang for the buck” upgrades first, and plan on having a yearly check-in with the homeowner to decide on the next upgrade
 - This will help you establish a long-term, ongoing relationship
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Follow up



- If you don't close the sale at the kitchen table, follow up with the homeowner later (a few days or a week)
- If you didn't leave the homeowner with a report & proposal, tell them when to expect it and deliver on, or before, that date (then follow up later!)



Organizations and Resources



Affordable Comfort Institute (ACI)	National and regional events providing speakers and information about the latest tools, policies, business practices and technical best practices for the home performance and weatherization industry	www.affordablecomfort.org/
Efficiency First	A nonprofit trade association for home performance professionals that gathers information on industry best practices and champions policy initiatives aimed at advancing the industry	www.efficiencyfirst.org
Electric & Gas Industries Association (EGIA)	A nonprofit organization dedicated to advancing energy efficiency and renewable energy solutions through a nationwide network of contractors, distributors, manufacturers and utility companies	www.egia.org
Home Energy Pros	A social network and community for home energy professionals to exchange ideas, best practices and seek out advice	http://homeenergypros.lbl.gov/
Mike Gorman	Conducts contractor sales training workshops at ACI conferences	http://www.techknowledgeonline.net/

LBNL Contact



Additional Questions or Resources?

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