



Better Buildings Neighborhood Program  
Workforce Peer Exchange Call: *Contractor Sales Training*

*Call Slides and Discussion Summary*

January 19, 2012

- Call Logistics and Attendance
  - Does your project provide any sales training assistance to contractors? (Or, are you thinking about doing so?)
- Program Experience and Lessons:
  - Nancy Hohns, EnergyWorks, Philadelphia
  - Mary Templeton, Better Buildings for Michigan
  - Andy Meyer, Efficiency Maine
- Discussion:
  - Has sales training impacted the conversion of assessments to upgrades?
  - What are barriers to, and incentives for, contractor sales training?
  - How should programs assess training providers and programs?

# Participating Grant Programs

- Austin, TX
- Chicago, IL
- Jacksonville, FL
- Los Angeles, CA
- Maine
- Maryland
- Michigan
- New Orleans, LA
- New York
- Oregon
- Orlando, FL
- Philadelphia, PA
- Virginia
- Wisconsin
- West Rutland, VT

- Goal: Strengthen contractors' ability to sell the program
- Held 2 separate contractor sales trainings, 3<sup>rd</sup> planned
  - First training in November was not well attended: ~100 invited, ~7 attended
  - Second training in January held in conjunction with Home Show had better results: 18-20 contractors, very positive response
  - Third training may occur before start of summer business
  - Each 3 hour session costs ~\$1900
- Hired trainer with some industry experience
  - Taught abbreviated version of Sandler technique
- Content of training was basic sales techniques:
  - How to draw people in, turn objections around, improve the close rate
  - Get prospective customers to talk about their pain – talk in terms of homeowner interest
  - Contractors given information on their selling and conversation styles
- Contractors were receptive
  - Intrigued by converting energy assessments into potential money-making opportunities

- Goal: Increase the amount of deeper retrofits rather than number of audits
  - Marketing and outreach people do initial review, audit, some air sealing, then hand off
  - Contractors responsible for whole energy assessment and deeper retrofit
- 2-day training and 2 ½-day follow-up sessions over 12-week period
  - High-touch, high frequency - gave people the chance to practice in field and reinforce the techniques with the trainer
  - \$700/person
  - The program built accountability into process with weekly calls between outreach staff and contractors to talk about results and commitments
- Hired *Sales Partners* (national organization) of Troy, MI
  - Worked on “elevator speech”
  - Taught participants to listen to customer, identify what’s important to them and respond
  - Taught participants to overcome objections through listening and redirecting
  - Taught “Little voice” mastery (e.g. contractor assumes homeowner can’t afford \$10K package, so doesn’t offer)
- Results
  - Teams improved their conversion rates (audits to deeper work) from 6-8% to 28-57%
  - Outreach staff and contractors acting in best interest of collective team - increased level of teamwork and better hand-offs
  - Important to note that training was one of several factors that may have influenced results

- Goal: Improve close rate
  - State-wide public relations effort led to 10,000 leads in six months, but only 72 upgrades; this highlighted the need for training
- 2 one-day courses two weeks apart
  - \$5000 for 2-day class, 20 students each
  - Continued to modify based on feedback – now in 5<sup>th</sup> generation
- Customized Dale Carnegie sales model
  - Similar to Sandler method; focus is on talking with people about their interests
  - Emphasized the difference between what we sell (12” cellulose) and what people buy (warm bedroom)
  - Follow-up assignment for 2<sup>nd</sup> class: Contractor gives feedback on what they put into practice and results
- “Spectacular” results
  - The number of closes increased from 20% to 60%
  - 3000 whole house energy upgrades in 12 months

# Suggested Strategies for Overcoming Contractor Reluctance to Training

- Incentivize: Philadelphia made training mandatory for any contractors staffing the EnergyWorks booth at the Philadelphia Home Show
  - Contractors got the work they “sold” at the Home Show
  - Provided additional incentive for contractor with the most energy efficiency assessments
- Make it about the contractors and their success
  - If they succeed, they are potentially making customers for life
- Show them the data (e.g. close rates of those who attended training vs. others)
- Use enthusiastic converts to convert others
- Communicate intentions: Why, why now, and what to expect
- Use other language to overcome hesitation to “sales training”
  - Philadelphia had success calling it “Home Show Orientation”

# Other Lessons Learned

- Identify an appropriate sales trainer
  - Many trainers are costly, are not willing to do a shorter version of their training program, and/or are too slick and unapproachable for a contractor audience
  - Philadelphia opted for someone with technical expertise but who could build rapport with the contractors
  - MI and ME went with sales experience over technical experience; the trainer was able to provide the homeowner perspective
- Successful aspects of training
  - Role-playing
  - Follow-up sessions for accountability
- Target the training to your audience
  - Approaches and needs differ for outreach staff (who provide the initial contact) and contractors (who need to build an ongoing relationship)
- Reduce size of homeowner report and focus on customer needs
  - Instead of a 60-page report focused on everything that's wrong with the house, provide a short proposal that points out the customer's interests, how the work will address those interests, and the payback



# Potential Future Call Topics

- Working with the Real Estate Sector
- Mentoring and Job Training in the Field for Newly Trained Contractors
- Streamlining Service Delivery
- 3rd Party vs. Contractor Audits—What is the Right Approach?
- Designing Contractor-Friendly Programs
- Engaging and Growing Small Contractor Businesses
- Strategies for Aligning Program Demand with Contractor's Seasonal Fluctuations
- Engaging Local Efficiency First chapters
- Contractor Pricing
- National Energy Auditor Certifications
- QA/QC Programs
- Developing a Contractor Financing Program for Equipment and Training Costs
- Collaboration with Suppliers
- Contractor Marketing Resources and Support