



Better Buildings Residential Network Peer Exchange Call Series: *Generating Energy Efficiency Project Leads and Allocating Leads to Contractors*

Call Slides and Discussion Summary

February 26, 2015

Call Participants

- Build It Green
- City of Chula Vista
- City of Philadelphia
- Civic Works/Retrofit Baltimore
- Clean Energy Durham
- Clean Energy Works
- Community Office for Resource Efficiency
- Dr. Energy Saver
- Efficiency Maine
- Efficiency Nova Scotia
- Energy Efficiency Specialists, LLC
- Energy Pioneer Solutions
- Greater Cincinnati Energy Alliance (GCEA)
- Holy Cross Energy
- Home Performance Guild of Oregon
- Impact Marketing
- North Carolina Building Performance Association
- Performance Systems Development Consulting
- Philadelphia Gas Works
- Spirit Foundation
- St. Francois County Courthouse
- Sustainable Living Center
- Terracel Energy/ResiSpeak
- The Environmental Center
- TRC Solutions

Opening Poll #1: Lead Generation

- **What approaches does your organization use to generate leads for energy upgrades?**
 - Targeted, community-based marketing (e.g., at events)—**82%**
 - Printed and online materials; direct mail—**71%**
 - Contractor-driven lead generation/outreach—**71%**
 - Word of mouth / customer referrals—**65%**
 - Other (please explain)—**12%**

Opening Poll #2: Allocating Leads to Contractors

- **What experience does your organization have with allocating energy upgrade customer leads to contractors?**
 - Have experience & familiar with other approaches—**31%**
 - Have experience, but not familiar with other approaches—**25%**
 - None or N/A: My organization does not allocate leads—**25%**
 - Other (please explain)—**19%**
 - Limited: Leads are assigned randomly or 1st-come, 1st served — **13%**

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

<http://homeenergypros.lbl.gov/group/better-buildings-residential-network>

Better Buildings Residential Network Group on Home Energy Pros Website



Better Buildings Residential Network

Created by Better Buildings Support

[Send Message](#) [View Groups](#)

Information



The Better Buildings Residential Network connects energy efficiency programs and partners to share best practices and learn from one another to increase the number of American homes that are energy efficient.

Website: <http://betterbuildings.energy.gov/bbm>

Latest Activity: 8 hours ago

Join the conversation in the discussion forum below. You can use the "Follow" link at the bottom of the forum to receive an email whenever a new discussion is posted.

Open the table of contents below and follow the links to access topical materials and resources.

Helpful Links

- Table of Contents
- Better Buildings Residential Network
- Better Buildings Neighborhood Program Website
- Home Performance with ENERGY STAR
- Home Energy Score



Table of Contents



+New Discussion



Peer Exchange Call Archive



Better Buildings Network View



Tools



Related Events

Discussion Forum



Attend Today's Peer Exchange Calls on Program Sustainability and on Workforce

Don't miss today's calls. "Collaborating with Utilities on Residential Energy Efficiency" begins at 12:30 p.m. Eastern and "Engaging Efficiency First Chapters and Other Trade Associations in Energy Efficiency Programs" begins at 3:00 p.m. Eastern.

Continue

Tags: Peer Exchange Calls

Started by Better Buildings Support 8 hours ago.



Register for Upcoming DOE Webinar About On-Bill Financing

Sign up to attend the DOE State and Local Energy Efficiency Action Network (SEE Action) webinar, "Case Studies: Financing Energy Improvements on Utility Bills," taking place June 11, 2014, from 2:00 to 3:30 p.m. Eastern. To learn more on this topic, read

[Send Message to Group](#)

[Leave Group](#)

Members



[Follow New Members](#)

[+ Invite More](#)

[View All](#)

Pages (15)

[Tools](#)

[Better Buildings Network](#)

[View](#)

[Peer Exchange Call Schedule and Archive](#)

[Peer Exchange Call Schedule and Archive](#)

[Peer Exchange Archive: Marketing and Outreach](#)

[Peer Exchange Archive: Marketing and Outreach](#)

[Peer Exchange Archive: Marketing and Outreach](#)

[Peer Exchange Archive: Marketing and Outreach](#)

[Sign Out](#)

[Inbox](#)

[Alerts](#)

[Friends - Invite](#)

[Settings](#)

Home Energy Pros

Home Energy Pros was founded by the developers of Home Energy Saver Pro (sponsored by the U.S. Department of Energy,) and brought to you in partnership with Home Energy magazine.

Latest Activity

[What brings you here?](#)

[Share](#)

Tucker Henne commented on David Byrne's blog post Does Aereoseal work? An auditors review

"I would like to begin with a disclaimer that I am an Aereoseal contractor. One of the reasons I..."

16 minutes ago

TJ Alexander posted a blog post

So many homes have fiberglass insulation that is poorly installed in New Hampshire and elsewhere

Doing testing of existing homes it is typical to see mottled patterns of surface temperatures with...

See More

1 hour ago

[0](#)

CleanEdison updated an event



Entry Level Solar Photovoltaic at Cotuit, MA

September 30, 2012 to

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:
 - March 26, 12:30 ET: Voluntary Initiative on Incentives: Toolkit Training Webinar
 - March 26, 3:00 ET: Fostering Behavior Change in the Energy Efficiency Market
 - April 9, 12:30 ET: Residential Energy Efficiency Messaging
 - April 9, 3:00 ET: The Future is Here: Smart Home Technology
- Send call topic ideas to peerexchange@rossstrategic.com

Peer Exchange Call Summaries

Discussion: Challenges and Solutions

- Overcoming Challenges - Solutions:
 - Access trusted, local messengers
 - Engage your satisfied customers as champions to turn them into "lifetime customers"
 - Invite people to make a pledge with a few simple EE activities they can take
 - Connect with the right local partners (Connecticut conducted "community asset mapping")
 - Directly involve the homeowner through DIY work or as energy efficiency demonstration homes to help them feel engaged (San Diego demonstration homes)
 - Minimize paperwork to make it easier to participate



Poll Results

Participant Poll: Which of the following best describes your program's experience with energy efficiency behavior change efforts?

- Currently implementing: 31%
- Planning to implement: 31%
- Thinking about it: 19%
- Haven't thought about it: 0%
- Not applicable: 19%

8

The screenshot shows the homepage of 'HOME ENERGY PROS' with the tagline 'Connecting home energy professionals'. The navigation menu includes Home, Invite, My Page, Members, Forum, Blogs, Groups, Photos, Videos, and Events. Below the navigation, there are links to 'Back to Better Buildings Residential Network' and 'All Better Buildings Residential Network Pages'. The main content area is titled 'Peer Exchange Archive: Program Sustainability' and lists several call summaries with their dates and PDF links:

- Incorporating Behavior Change Efforts into Energy Efficiency Programs**
July 10, 2014
[Presentation and Discussion Summary \(PDF\)](#)
- Collaborating with Utilities on Residential Energy Efficiency**
June 12, 2014
[Presentation and Discussion Summary \(PDF\)](#)
- BBRN Voluntary Initiative: Partnering to Enhance Program Capacity**
May 8, 2014
[Presentation and Discussion Summary \(PDF\)](#)
- Complementary Energy and Health Strategies**
April 10, 2014
[Presentation and Discussion Summary \(PDF\)](#)
- Mastermind: Jim Mikel, Spirit Foundation**
March 13, 2014
[Presentation and Discussion Summary \(PDF\)](#)

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.

Residential Program Solution Center

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/>

**Program Experience:
Robert McCracken
Greater Cincinnati Energy Alliance**



Greater Cincinnati
**Energy
Alliance**

Robert McCracken

<http://greatercea.org>

About the Energy Alliance



- Better Buildings Neighborhood Program
 - Commercial and residential programs
- Current offerings
 - Commercial PACE
 - Residential financing
 - Home Performance with ENERGY STAR
 - Home performance contracting service
 - Solarize

Generating and Allocating Leads



Better Buildings Program

- Word of mouth
 - Relied on referrals to generate leads
- Media – print and radio
 - Message focused on incentives or our organization
- Community outreach
 - Targeted farmer's markets and other events
- Contractor driven
 - Contractor base generated its own leads

Generating and Allocating Leads



Better Buildings Program

- Homeowners could select their own contractor
 - Large drop rate during the registration process
- Energy Alliance contacted homeowners after they registered to connect them with a contractor
 - Utilized an Energy Advisor to contact homeowners
 - Lead allocation based on the contractor's capacity, location, and complexity of the issue
 - Resulted in more completed registrations

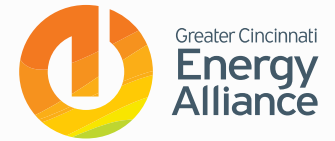
Generating and Allocating Leads



Better Buildings Program – What we learned

- Message is everything
 - Identify the product that you are providing
- Homeowners are not familiar with home performance contractors
 - An Energy Advisor is able to qualify the lead and connect the homeowner with an appropriate contractor
- Make process simple for homeowners

Generating and Allocating Leads



Current Program

- Word of mouth
- Phone bank
- Media
- Community meetings
- Home and Garden Show

Generating and Allocating Leads



Current Program

Working with a smaller number of contractors and will scale over time

Lead allocation based on:

- Number of projects brought through program
- Participation status
- Homeowner need

Greater Cincinnati Energy Alliance

Program Highlights: Lead Generation

- **To generate leads, GCEA messaging emphasizes the importance of EE and focuses on selling home energy assessments.**
 - Original messaging around incentives for EE upgrades did not create an appealing enough hook for homeowners; home energy assessments provided a discrete, "gateway" product to generate leads.
- **Simplifying the homeowner intake process turned more leads into projects.**
 - GCEA observed a significant drop-off in leads when customers had to choose their own contractor in a web portal. Simple intake forms followed by a call to obtain enough information to match homeowners with a contractor to do the project were more effective at retaining leads.
- **Word-of-mouth marketing generated more leads than other resource-intensive marketing strategies (e.g., phone banking, door-to-door outreach, media ads, etc.).**
 - GCEA recognized “clusters” of leads in neighborhoods generated through word-of-mouth from satisfied customers.
 - Ensuring a positive experience for the customer is key to generating leads by word-of-mouth referral.
 - In the past, GCEA has provided postcards for customers to share EE upgrade information with friends and family.

Greater Cincinnati Energy Alliance Program Highlights: Lead Allocation

- **GCEA allocates leads based on location preference of the contractor, the skill required, and the number of leads a contractor brings to the program.**
 - This structure motivates contractors to generate their own leads rather than solely relying on the program to generate leads.
- **The program matches contractors to homeowners, which requires in-depth knowledge of the contractor's skill set.**
 - Some contractors are better at different types of jobs (e.g., upgrades to older homes, etc.).
 - GCEA does not track performance metrics for the contractors. Contractors are evaluated for quality and customer service through follow-ups with homeowners.
- **GCEA saw a decrease in the contractor pool after the incentive program ended and demand for upgrades decreased.**

**Program Experience:
Michael French
Clean Energy Works (Oregon & Washington)**

CLEAN ENERGY WORKS LEAD GENERATION AND ALLOCATION

Better Buildings Residential Network Peer Exchange

February 26, 2015



Clean Energy Works

- The Pacific Northwest's largest non-profit home performance provider
- Serve single family, owner-occupied properties
- Our contractors upgrade for efficiency, seismic protection, solar, indoor air quality
- Package upgrades with financing, rebates and quality assurance

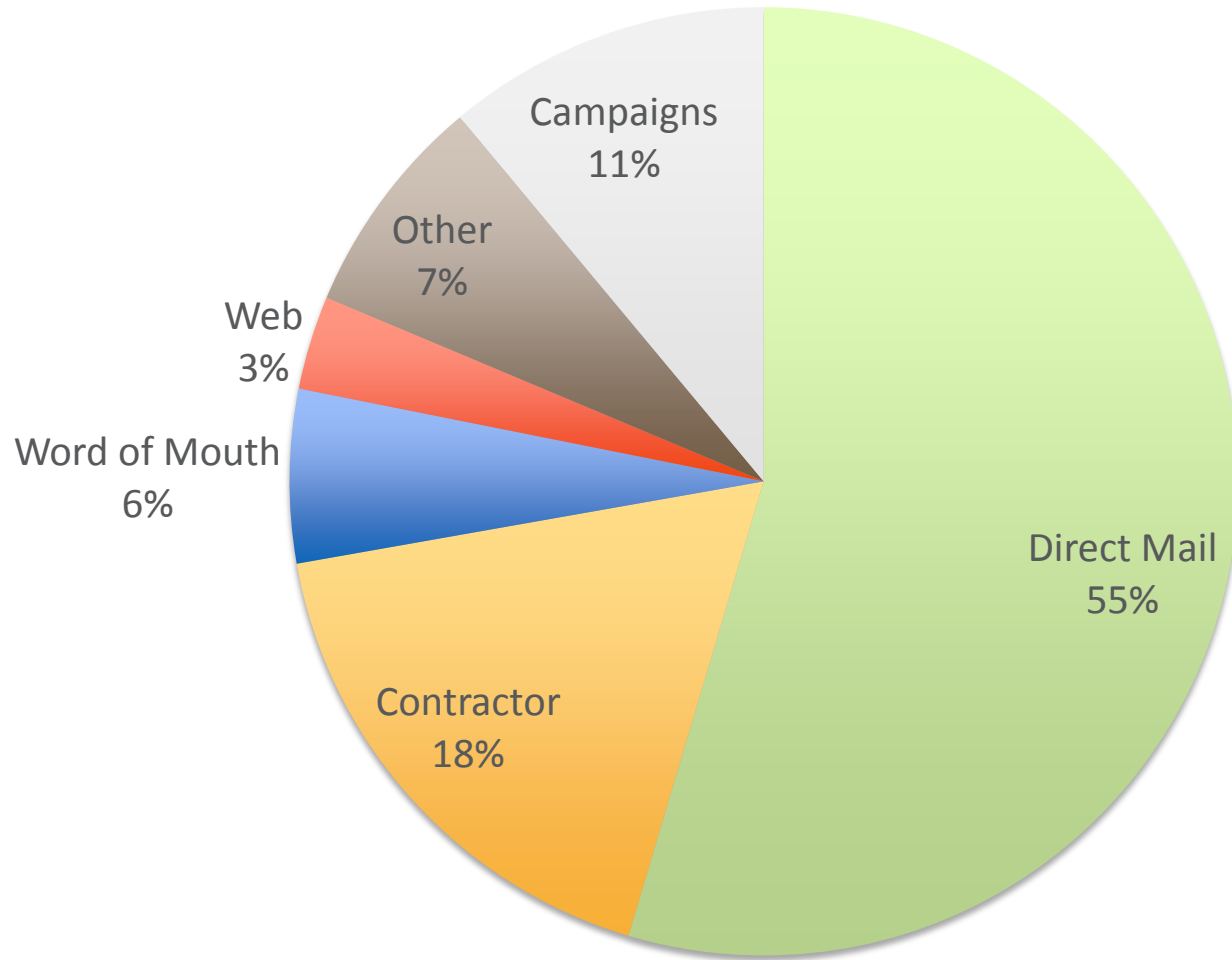




4,000+ projects completed since 2009
Typical result: 15% to 30% energy savings

I. Lead Generation

2014 Leads by Channel



Direct Mail

- 20,000+ addresses every month
- Data model targets suitable households
- Limited-time offer with bonus rebate
- Partner co-branded whenever possible
- Overall 1.5% response rate, up to 4.8% with some co-branded mailers



Other Channels

- Ad campaigns: TV, radio, print, digital banners
- Google AdWords grant: \$10,000/month
- Public relations
- Social media, paid and organic
- Partners – governments, lenders, community organizations

INDOOR
SURVIVALIST
TIP #18:

LAWN CHAIR KINDLING



OR PERHAPS A LESS CHOPPY PATH TO COZY.

Just visit getcomfy.org and take a quick online home eValuation. It's a smart snapshot and savvy step toward year-round comfort.

Lessons Learned

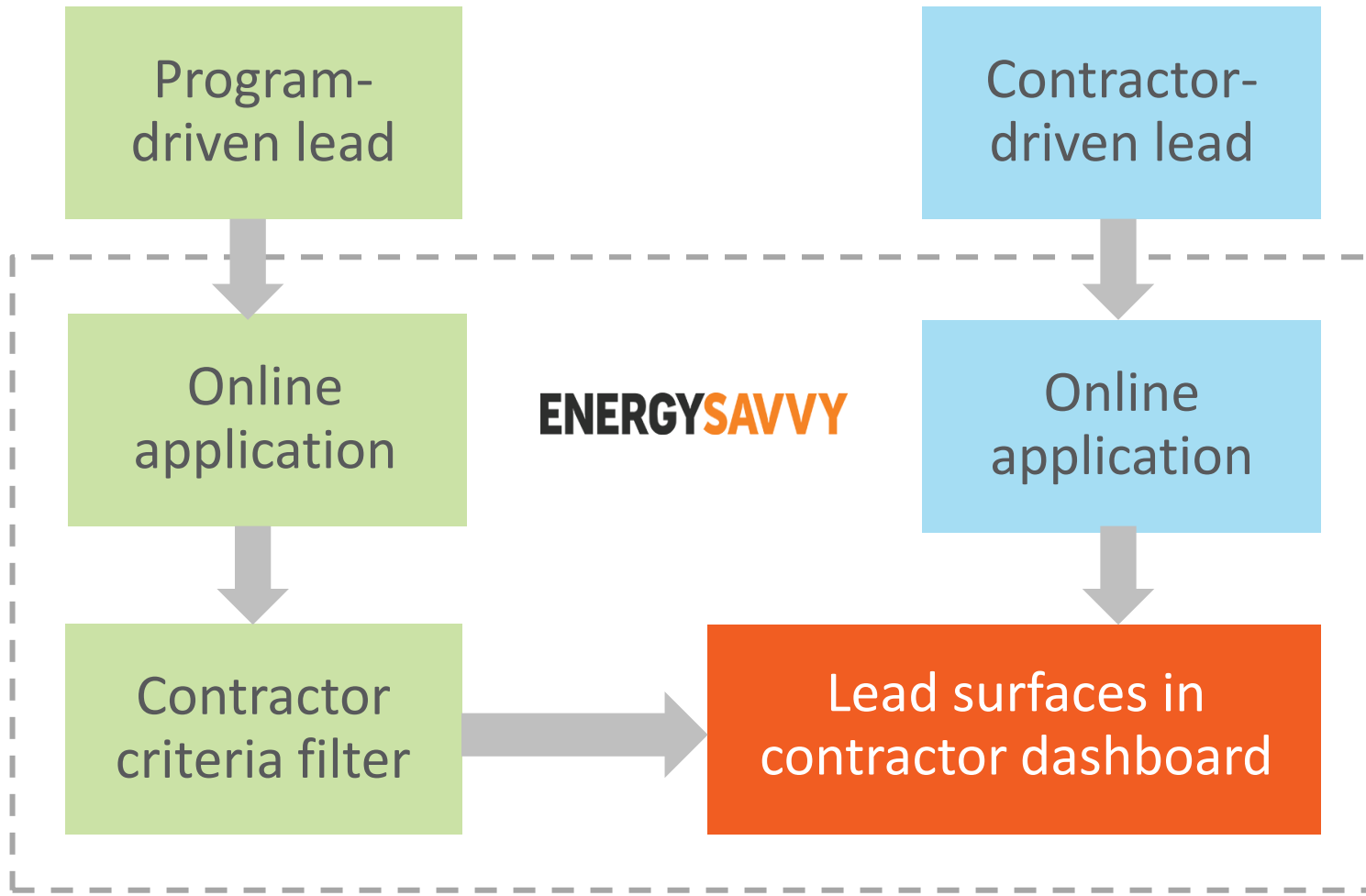
- Local partners are crucial to direct mail success
- TV, print, radio, digital ads build awareness but are not significant drivers of leads
- Develop referral channels
- More community-based efforts in 2015



II. Lead Allocation

- 400-600 leads per month
- 27 contractors

Lead Allocation Pathways



5 Lead Allocation Criteria for Program Driven Leads

1. Applicant falls within geographic area serviced by contractor
2. Upgrades contractor performs match homeowner interests
3. Equity status of contractor – policy to support minority and women-owned businesses

About Your Project

Help us pair you with the contractor that best meets your needs by answering the following questions.

What is the *main* reason you want to get started with Clean Energy Works? *

- Energy efficiency/weatherization
- Earthquake readiness
- Solar panels
- Radon testing & mitigation

I'm also *seriously considering* these additional upgrades: *

- Energy efficiency/weatherization
- Earthquake readiness
- Solar panels
- Radon testing & mitigation

5 Lead Allocation Criteria for Program Driven Leads

4. Contractor scheduling availability
5. Lead volume, contractor lead order count and relative size of contractor business



Mechanics of Lead Allocation

- First half of leads allocated in a “round robin” style up to 50% of total monthly lead order, ensuring equitable distribution to small and large businesses alike
- Second half of leads allocated in proportion with contractors’ lead order counts, supporting viability of larger businesses



Mechanics of Lead Allocation

- To date, allocated manually via spreadsheet
- Moving to automated online allocation on EnergySavvy Optix platform, March 2015



Lessons Learned

- Getting lead allocation right is not easy
- Need to balance needs of large and small contractor businesses
- Automate for efficiency



THANK YOU

Michael French, Marketing and Production Manager

cewo.org



Clean Energy Works Program Highlights: Lead Generation

- **CEW generates the most leads through direct mail.**
 - The large geographic service area of CEW prevents a "boots-on-the-ground" approach to marketing (e.g., door-to-door outreach, phone banking, attending community events).
- **Local partnerships are crucial to the program's success.**
 - The program co-brands mailings with partners for local name recognition
 - CEW often partners with local utilities, governments, lenders, and non-profit organizations.
- **Contractors also brought in a significant number of leads to the program.**
 - The program does not require that contractors bring leads. CEW estimates contractors generally bring in 20-25% of program leads; but the percentage is smaller for smaller contracting businesses.
- **A grant for Google AdWords marketing directed homeowners to CEWO.**
 - With Google AdWords, the CEW program appeared when someone in the CEWO service area does a Google search for relevant search terms (e.g., heating or solar systems).

Clean Energy Works Program Highlights: Lead Allocation

- **EnergySavvy customer relationship management (CRM) software matches applicants to contractors.**
 - Contractor-generated leads come in through the same portal but with a code automatically assigning the lead to that contractor.
 - Requirements:
 - Must fall within a geographic area
 - Alignment with contractor interests, skills, and availability
 - Equity status of contractor (i.e., supports minority & women-owned businesses)
 - Lead volume; the number of leads a contractor signs up for per month.
- **Balancing large and small businesses can be challenging.**
 - Larger businesses need more leads to support their business. Smaller businesses need fewer leads, but also generate fewer leads than larger contractors.
- **For quality assurance, all contractors entering the program must have sufficient certification, apply through the application process, and work face-to-face with CEW staff.**
 - Generally, the program only adds contractors when expanding to new geographic areas.
- **Contractors pay for leads; these purchases fund marketing for the program.**

Discussion Questions – Lead Generation and Allocating Leads to Contractors

- What approaches does your organization use for generating customer leads for home energy upgrades?
 - What approaches are most /least effective? What gives the best “bang for the buck”?
- How can energy efficiency programs better support contractors’ lead-generation efforts?
- If applicable – how does your program assign or allocate leads to contractors? What criteria or process do you use?
 - What feedback have you heard from contractors and/or customers about this approach?
- Other questions/issues related to generating or allocating leads to contractors?

Discussion Highlights: Generating and Allocating Leads to Contractors

Generating Leads

- Use messaging to enhance homeowners' understanding of the importance of energy efficiency.
- Sell a discrete product.
- Make the process easy.
- Motivate word-of-mouth marketing.
- Electronic postcards and social media could provide low-cost opportunities to facilitate word-of-mouth marketing.
- Form local partnerships.

Allocating Leads

- Document how leads are allocated to maintain transparency.
- Balance the volume needs of large and small businesses.
- Consider customer service, quality, and social equity factors in lead allocation.
 - Retrofit Baltimore has a point-based contractor ranking system where 50% of points are awarded on customer service and quality control, and 50% on social factors, including wages, benefits, whether the job is transit-accessible, equity in hiring and ownership, etc. The program requires contractors sign a community standards contract.

Closing Poll

- **After today's call, what will you do?**
 - Consider changes to how you generate and/or allocate leads—**56%**
 - Tell a colleague or partner something you learned—**44%**
 - Try an idea or approach discussed on this call in your work—**33%**
 - Make no changes to your approach to generate or refer leads—**22%**
 - Other (please explain)—**11%**

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