



## Spotlight on Maine: Contractor Sales Training Boosts Energy Upgrade Conversions

### Key Takeaways

- Make sure contractors have the skill sets they need, including sales and interpersonal skills, to help homeowners through the decision-making process
- Give contractors tools to learn homeowners' specific needs and determine their motivations when conducting assessments
- Support contractors directly or through other organizations to provide ongoing professional development



The Better Buildings Neighborhood Program is a U.S. Energy Department program that is improving lives and communities across the country through energy efficiency.

To learn how the Better Buildings Neighborhood Program is making homes more comfortable and businesses more successful and to read more from this Spotlight series, visit [betterbuildings.energy.gov/neighborhoods](http://betterbuildings.energy.gov/neighborhoods).

When Efficiency Maine launched a new residential tiered rebate program in January 2010, offering homeowners thousands of dollars to complete a home energy upgrade, program staff expected a tremendous response. Initial interest in the offering was high, with the program receiving 10,000 leads through its call center and website, but by June 2010, contractors had only completed 72 upgrades. Following efforts to ensure that contractors were equipped with the tools and training necessary to close a sale with homeowners, Efficiency Maine's assessment-to-upgrade conversion rate grew from 10% to 60%.

Multiple approaches have assisted contractors in successfully selling home energy upgrades in Maine. Efficiency Maine has provided dedicated sales training, offers contractors a standard assessment checklist to help them communicate with homeowners, organizes monthly program webinars for contractors, and works with partners to continue offering professional development courses for contractors.

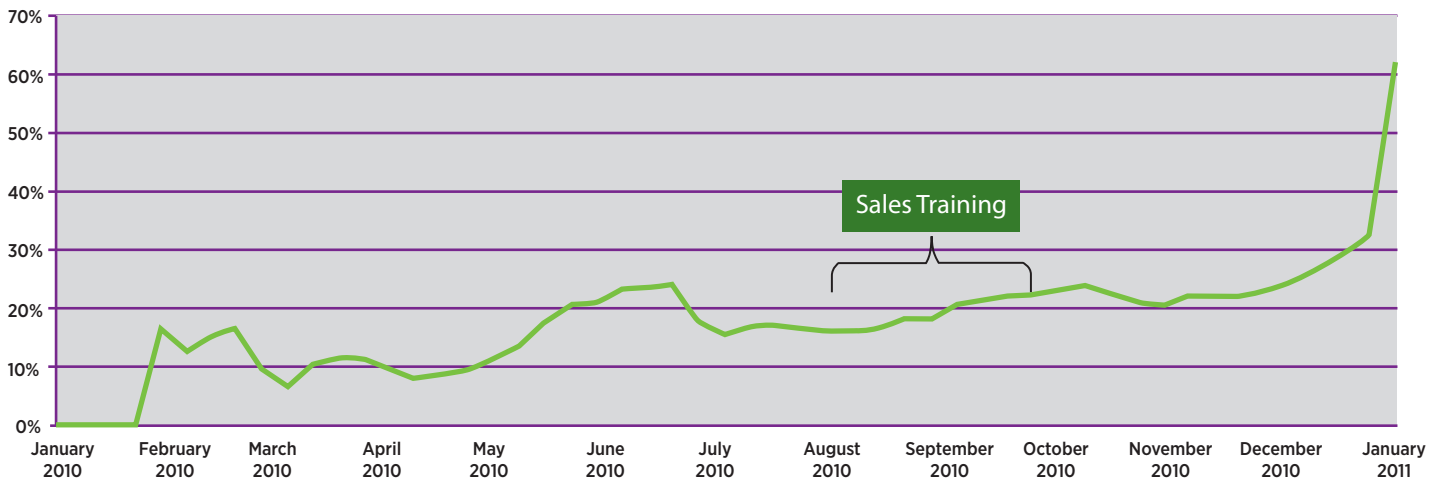
### Tailor Sales Training to Fit Energy Professionals

In summer 2010, program managers began shadowing contractors on home visits in an effort to identify the source of the disconnect between leads and upgrades and, as a result, gained critical insight on why more homeowners were not upgrading their homes. The home performance contractors were focused on demonstrating their building science expertise, using technical language to describe energy efficiency issues they were finding in the home. Complex terminology often alienated homeowners, deterring them from undertaking upgrades and derailing the sales process. While program staff provided contractors with technical training, they realized that the contractors needed other training and tools to communicate effectively with homeowners.

**Contractors are the primary point of contact during the residential energy efficiency upgrade process. They not only need skills in building science, but also in communicating with consumers and selling program options.**

In August 2010, Efficiency Maine decided to offer sales training to its participating contractors, as one approach to addressing its low conversion rates. The program conducted a nationwide search and selected Dale Carnegie Training, a professional skills training program with a strong presence in Maine. Recognizing that contractors did not want to think of themselves solely as salespeople, Efficiency Maine collaborated with Dale Carnegie Maine to customize its training model into a two-day course that blends selling

Figure 1: Upgrades as Percentage of Assessments



techniques with building science. The program’s unique home performance sales model focuses on homeowner needs and addresses the various developmental stages in the contractor-homeowner relationship, including:

- Prospecting for and conducting energy assessments
- Selling whole-home upgrades
- Ensuring customer satisfaction upon completion
- Getting referrals for new customers

By fall 2010, more than 30 contractors had taken the program’s voluntary training. The assessment-to-upgrade conversion ratio hovered around 10% before the training was initiated. By the end of December, 60% of homeowners who underwent an energy assessment were also taking the next step to upgrade their homes. At the close of 2010, contractors completed a total of 1,800 home energy upgrades with an average energy savings of 29%.

### Provide Tools to Facilitate Positive Contractor-Homeowner Interactions

Efficiency Maine offers contractors a standard assessment checklist, which includes questions to qualify customers interested in upgrades, and a template proposal that emphasizes assessing homeowner needs and interests, rather than building science. For example, the contractor asks the homeowners to rate, on a scale of 1 to 10, their motivations for upgrading their homes (e.g., saving energy, saving money, increasing comfort). The questionnaire even reminds the contractors to establish rapport by smiling, complimenting the home, and offering to remove their shoes.

Contractors are asked to sign the program’s code of conduct, reminding them that how they conduct themselves can have significant impacts on their customers, before they can be listed on Efficiency Maine’s website.<sup>1</sup> Contractors, who were initially skeptical, found value in the training and have reported changing the way they approach and interact with customers as a result of the sales training.

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<sup>1</sup> See [www.energymaine.com/at-home/hesp\\_program/downloads\\_forms](http://www.energymaine.com/at-home/hesp_program/downloads_forms) for a sample Code of Conduct form. Visit [www.energymaine.com/at-home/hesp\\_program/find\\_an\\_energy\\_advisor](http://www.energymaine.com/at-home/hesp_program/find_an_energy_advisor) for the contractor registry.

**“Initially, contractors were very skeptical and didn’t think they needed it. After the first group went through, word spread through the grapevine, and people realized that going to the class was really good for their business.”**

–Dana Fischer,  
Efficiency Maine

## Support Ongoing Contractor Training as the Program Evolves

Efficiency Maine’s elevated energy efficiency rebates to homeowners expired in December 2010, and sales training for participating contractors has continued to be a critical factor in driving demand for the program and maintaining conversion rates from assessment to upgrade. According to Residential Program Manager Dana Fischer, although there was a huge spike in upgrades at the end of 2010 (see Figure 1), the sales training has helped to keep interest in the program strong as incentives evolve.

“Even though we don’t have the incentives we had at the beginning of the program, we continue to see more than 70 energy audits come in per month,” Fischer said. Monthly conversion rates from assessment to upgrade continued to average 50% in spring 2011, although some of that success can be attributed to a limited-time rebate offer that required homeowners to commit to upgrades by May 2011.

Efficiency Maine transitioned from its earlier incentives to a secured loan program known as PACE in April 2011 and provides sales brochures to contractors to help promote the PACE financing option. To help the workforce market Efficiency Maine’s loan offerings, Fischer holds early morning, monthly webinars with contractors across the state to explain the available incentives, discuss what is working for contractors, and talk about what could be improved. He answers questions and encourages their marketing efforts. Efficiency Maine posts the recorded webinar online, so contractors who cannot participate can still benefit from the exchange.

## Work With Partners to Promote Professional Development

Although Efficiency Maine’s free contractor sales training was only offered in 2010, the program used its relationships with other groups in the state to make the service available for more of Maine’s energy professionals. Coastal Enterprises, Inc. (CEI), a nonprofit community development organization, had been working with Efficiency Maine on financial offerings for program participants, but when CEI officials heard about the Dale Carnegie training for energy efficiency professionals, they immediately adopted it as part of their overall workforce development efforts with a variety of companies, including energy efficiency and solar firms. With a grant from the U.S. Department of Labor, CEI has offered the Dale Carnegie training to more than a dozen employees of energy efficiency and solar energy companies in the state, in addition to a course focused on communication and interpersonal skills.

CEI is planning to conduct a survey with training participants in the second half of 2012 to gather formal feedback on its professional development efforts. Anecdotally, contractors have expressed appreciation for the training, citing the value and focus on customer relations as paramount to transforming upgrade proposals into signed contracts, said CEI Program Developer Christa Baade. In initial evaluation interviews with a dozen chief executive officers (CEOs) from various firms involved in the CEI program, more than half said they felt their revenues improved after the training, and the majority of workers who took the training received wage increases (including several of the energy efficiency and solar industry participants).

**“The sales training and marketing experience in our company means we don’t need incentives to be successful in the long term.”**

–Richard Burbank,  
Evergreen Home  
Performance

CEI is continuing to refer interested contractors to Dale Carnegie Maine for energy-related sales and professional training courses, and Dale Carnegie now offers sales training geared toward energy efficiency professionals nationwide.

### Inspire Contractors to Build Their Business

Efficiency Maine has taken a market-based approach to cultivating the state’s energy efficiency services market. Its residential program defines requirements for participating contractors, but does not prescribe pricing for energy improvements, assign contractors to homeowners, or dictate particular business models. Participating contractors offer services ranging from energy assessments to turnkey home performance packages. As of summer 2012, the program has more than 100 participating Building Performance Institute certified contractors in its network.

Many contractors who initially were skeptical of sales training have been converted to the idea of good communication helping to build business. Richard Burbank, president and CEO of Evergreen Home Performance, was so impressed with the free Efficiency Maine training that he has subsequently paid for all of his auditors to learn about sales and marketing. “A year after the rebates ended in Maine, we were selling more with no rebates,” Burbank said. “The bottom line is that our company is thriving because of this program.”

Efficiency Maine, meanwhile, continues to evolve its services to meet homeowner needs in addition to those of contractors. The program’s online listing of energy advisors now helps homeowners differentiate among contractors by including customer satisfaction ratings and the number of upgrades completed in its contractor listings—further inspiring contractors to keep their customers happy.



## Maine

### Program Accomplishments

*From October 2010 through March 2012*

Home energy assessments completed: 3,598

Home energy upgrades completed: 1,949

Home loans provided: 198 (with a value of nearly \$2.3 million)

### For More Information

Efficiency Maine  
[www.energymaine.com/](http://www.energymaine.com/)

Contractor Listing  
[www.energymaine.com/at-home/hesp\\_program/find\\_an\\_energy\\_advisor/](http://www.energymaine.com/at-home/hesp_program/find_an_energy_advisor/)

### Additional Links

CEI Maine  
[www.ceimaine.org/](http://www.ceimaine.org/)

Dale Carnegie Maine  
[maine.dalecarnegie.com/](http://maine.dalecarnegie.com/)

### Efficiency Maine

Efficiency Maine is an independent trust dedicated to promoting the efficient and cost-effective use of energy in order to save money for Maine residents and businesses, grow the economy, and create jobs. Established in 2002, Efficiency Maine is primarily funded through the system benefit charge included in electricity rates, as well as the Regional Greenhouse Gas Initiative and various other funding sources.<sup>2</sup>

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<sup>2</sup> Efficiency Maine was formed as a result of “An Act to Strengthen Energy Conservation” by the State Legislature in 2002. [www.energymaine.com/faqs](http://www.energymaine.com/faqs)