



# **Better Buildings Residential Network Peer Exchange Call Series: *Residential Energy Efficiency Customer Service Best Practices***

*Call Slides and Discussion Summary*  
January 22, 2015

# Agenda

- Call Logistics and Introductions
- Opening Poll
- Residential Network and Peer Exchange Call Overview
- Featured Speakers
  - Lauren Brois, Assistant Director of Residential Programs, Energize NY
  - John-Ryan Lockman, Energy Programs Manager, Energy Smart Colorado
  - Madeline Priest, Residential Programs Associate, Connecticut Green Bank (Clean Energy Finance and Investment Authority) – *Residential Network member*
- Discussion
  - What approaches has your organization used to improve (or sustain quality) customer service for residential energy efficiency work?
  - What feedback have you had from customers or contractors about what is most important to customer satisfaction?
  - What strategies provide the best “bang for the buck”?
  - What other lessons have you learned about what works well or doesn’t for keeping residential customers happy?
  - Other questions/issues related to customer service best practices?
- Closing Poll

# Call Participants

- City of Chula Vista, Conservation Section
- Clean Energy Works
- CLEAResult
- CMC Energy Services
- Connecticut Green Bank
- Center for Sustainable Energy
- Efficiency Nova Scotia
- Elevate Energy
- Efficiency Maine Trust
- Energy Smart Colorado
- Greater Cincinnati Energy Alliance
- Local Energy Alliance Program
- Northeast Energy Efficiency Partnerships
- Performance Systems Development
- Sonoma County Energy Independence Program
- South Burlington Energy Prize
- Spirit Foundation
- StopWaste
- Vermont Energy Investment Corp.

# Opening Poll Results

- What is your familiarity with customer service best practices for residential energy efficiency?
  - Familiar with my organization's customer service practices, not others – **47%**
  - Some familiarity with customer service practices of energy efficiency programs – **33%**
  - Very familiar with customer service practices of energy efficiency programs – **20%**
  - New to the topic – **0%**
  - Other (please explain) – **0%**

# 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](mailto: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

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### 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

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### 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?](#)

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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

[CleanEdison updated an event](#)

[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:
  - February 12, 12:30 ET Coordinating with Corporate and Institutional Affiliate Programs
  - February 12, 3:00 ET Financing Multifamily Energy Efficiency Upgrades
  - February 26, 12:30 ET Voluntary Initiative on Incentives: Toolkit Training Webinar
  - February 26, 3:00 ET Normalizing Weather Data to Calculate Energy Savings
- Send call topic ideas or requests to be added to the peer exchange call distribution list to [peerexchange@rossstrategic.com](mailto: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

20



## 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%

The screenshot shows the Home Energy Pros website interface. At the top, there's a navigation menu with links for Home, Invite, My Page, Members, Forum, Blogs, Groups, Photos, Videos, and Events. Below the navigation, there's a breadcrumb trail: "Back to Better Buildings Residential Network" and "All Better Buildings Residential Network Pages". The main heading is "Peer Exchange Archive: Program Sustainability". Underneath, there are several entries, each with a title, date, and a link to a PDF summary. The entries are: "Incorporating Behavior Change Efforts into Energy Efficiency Programs" (July 10, 2014), "Collaborating with Utilities on Residential Energy Efficiency" (June 12, 2014), "BBRN Voluntary Initiative: Partnering to Enhance Program Capacity" (May 8, 2014), "Complementary Energy and Health Strategies" (April 10, 2014), and "Mastermind: Jim Mikel, Spirit Foundation" (March 13, 2014).

*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: Energize NY

# Energize NY

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Better Buildings Residential Network  
for Peer Exchange Calls

## **Customer Service Best Practices**

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**LAUREN BROIS – ASSISTANT DIRECTOR, ENERGIZE NY RESIDENTIAL**

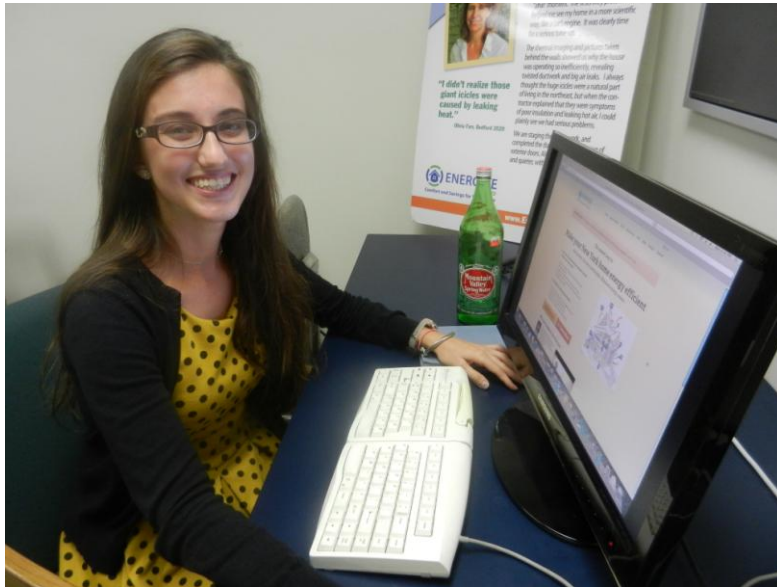
# Types of Interaction



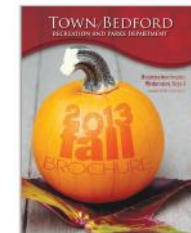
- Energize NY is the homeowner's (customer) main point of contact
- Homeowners can interact with Energize NY :
  - In person:
    - Tabling at Community Events & Libraries
    - Drop ins to Energize office
  - Virtually:
    - Phone
    - Email
    - Facebook/ Twitter/ Social Media

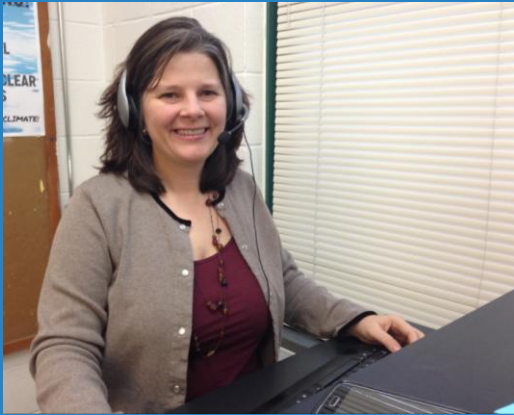


# Customer Service



- Patient, caring and supportive interaction
- All Energize NY staff members trained to answer basic questions
- Extremely knowledgeable about the Home Performance program, procedures, processes and systems
- Prompt courteous responses through all communications channels





# Trustworthiness



- Messaging sent from Municipalities
- Energy Coach
- Customer feedback surveys
- Contractor ratings & Energize Comfort corps

## Energize NY Comfort Corp • Home Performance Professionals

The Energize NY Comfort Corp. is a specially selected group of Home Performance contractors who meet the service and performance standards established by Energize NY.

These companies are accredited by the Building Performance Institute and in good standing with NYSERDA's (New York State Energy Research and Development Authority) Home Performance program. Each company has completed a substantial number of jobs in Westchester, has passed our homeowner surveys, and has at least 2 energy efficiency accreditations, as required by our program.

For more info, visit [www.energizeny.org](http://www.energizeny.org) to select your town, and then click on "Independent Contractor Ratings"

 BK Solutions LLC Insulation air sealing	BK Solutions
 BrightHOME ENERGY SOLUTIONS	BrightHOME Energy Solutions
 BRUNI CAMPISI	Bruni & Campisi Energy & Conservation Services
 Healthy Home Energy & Consulting, Inc.	Healthy Home Energy & Consulting
 New York Energy Conservation Co., Inc. Solutions for Saving Energy	New York Energy Conservation Company
 PHOENIX	Phoenix Mechanical

All Home Performance professionals in the Energize NY Comfort Corp. will perform the same comprehensive home assessment, as outlined by NYSERDA's Home Performance with ENERGY STAR program guidelines. Regardless of which contractor you choose, your assessment will include a blower door test, efficiency testing of all combustion equipment, health and safety analysis, and a visual inspection of the living area, attic, basement and crawl spaces.

When reaching out to contractors, please refer to our list of questions to ask your prospective home performance professional, found on the last page of this packet.

1



Energize NY Comfort Corp List

[http://www.youtube.com/watch?v=4Fvv\\_CkV3N0](http://www.youtube.com/watch?v=4Fvv_CkV3N0)

# Customer Feedback

*The homeowner is always heard*



## POSITIVE

- Testimonials shared
- Neighbor Outreach
- Customer Feedback Surveys

## CRITIQUES

- The voice and advocate for homeowners with NYSERDA and contractors
  - Policy to funnel comments to our Comfort Corp Contractors, in a positive way.
  - Intermediary to New York State



Jill Davis, Director, Hendrick Hudson Library  
Tyler Davis, Former Energize Intern

## The Davis Family

"We were skeptical when our son first approached us with the idea of having an energy audit done. We couldn't help but think that there had to be a catch, but there wasn't.

From the application to the completion of the work it couldn't have been easier. The contractor we used was professional, neat and the work was completed in the expected time frame.

**The work on our home was completed the first week of December 2013, right at the start of one of the worst winters on record for both snowfall and cold temperatures and we saved big! "**

# Customer Management



Energize NY

[Home](#) [Accounts](#) **[Contacts](#)** [Leads](#) [Reports](#) [Dashboards](#) [NYSERDA Log Entries](#) [+](#)

## Notes & Attachments

Action	Type	Title	Last Modified
<a href="#">Edit</a>   <a href="#">Del</a>	Note	<a href="#">MailChimp Stats for: New Year 2015</a>	1/6/2015 5:37 AM
<a href="#">Edit</a>   <a href="#">Del</a>	Note	<a href="#">MailChimp Stats for: November Thanksgiving 2014</a>	11/27/2014 5:36 AM
<a href="#">Edit</a>   <a href="#">Del</a>	Note	<a href="#">MailChimp Stats for: October 2014 Halloween</a>	10/31/2014 4:35 PM
<a href="#">Edit</a>   <a href="#">Del</a>	Note	<a href="#">MailChimp Stats for: Homeowner Invite to 500th Home Party (interested people)</a>	8/14/2014 4:35 PM
<a href="#">Edit</a>   <a href="#">Del</a>	Note	<a href="#">MailChimp Stats for: Garbage Warrior Featurette- Segment 1</a>	8/8/2014 12:38 PM
<a href="#">Edit</a>   <a href="#">Del</a>	Note	<a href="#">approval letter</a>	7/9/2014 5:01 PM
<a href="#">Edit</a>   <a href="#">Del</a>	Note	<a href="#">signed up again at the kat library</a>	7/8/2014 5:16 PM
<a href="#">Edit</a>   <a href="#">Del</a>	Note	<a href="#">sent info to HH</a>	7/3/2014 12:55 PM
<a href="#">Edit</a>   <a href="#">Del</a>	Note	<a href="#">waiting to be approved email</a>	7/1/2014 5:36 PM
<a href="#">Edit</a>   <a href="#">Del</a>	Note	<a href="#">wants to start again</a>	7/1/2014 5:10 PM
<a href="#">Edit</a>   <a href="#">Del</a>	Note	<a href="#">MailChimp Stats for: May Newsletter to Leads ONLY (copy 03)</a>	6/11/2014 6:38 AM
<a href="#">Edit</a>   <a href="#">Del</a>	Note	<a href="#">MailChimp Stats for: First Day of Spring- Newsletter 2014</a>	3/20/2014 2:39 PM
<a href="#">Edit</a>   <a href="#">Del</a>	Note	<a href="#">MailChimp Stats for: Late Winter E-Blast</a>	2/6/2014 1:39 PM
<a href="#">Edit</a>   <a href="#">Del</a>	Note	<a href="#">MailChimp Stats for: December Newsletter 2013</a>	12/27/2013 1:38 PM
<a href="#">Edit</a>   <a href="#">Del</a>	Note	<a href="#">Welcome &amp; GSC</a>	7/11/2013 9:41 AM



# Friendly Marketing



**HAPPY NEW YEAR!**  
Wishing you a warm, cozy  
and Energizing 2015!



-The Energize Staff



**120** homes in Bedford have  
Energized!



**Is Drafty the Snowman  
living in your house?**



# Energize NY – Presentation Highlights

## *Successful Customer Service Practices*

- Customers appreciate getting direct contact with program coordinators, who adhere to a strict 1-2 hr response time via email.
- Good record keeping is essential when multiple people are fielding calls.
- To encourage contractor growth, Energize NY provides contractors with negative feedback in the most constructive way.
- Customers can engage with the program's Energy Coach for free to receive a 3<sup>rd</sup> party perspective from a trusted expert.
- Energize NY engages with contractors on a regular basis to ensure excellent customer service:
  - Semi-annual contractor meetings
  - Quarterly contractor ratings, evaluated via customer feedback surveys, number of projects completed & accreditations
  - Daily interaction between Energy Coach & contractors
- The Energize NY list of approved contractors changes; the program is not afraid to revoke membership due to poor performance.

# Program Experience: Energy Smart Colorado



Customer service success stories  
from rural mountain communities

EnergySmart

COLORADO  
C O F O B V D O

*“Making energy improvements  
simple and affordable”*

John-Ryan Lockman

*Energy Programs Manager*

walking mountains<sup>™</sup>  
science center

# HISTORY

ARRA – Better Buildings

County collaboration

Partner nonprofits



# PROGRAM TERRITORY

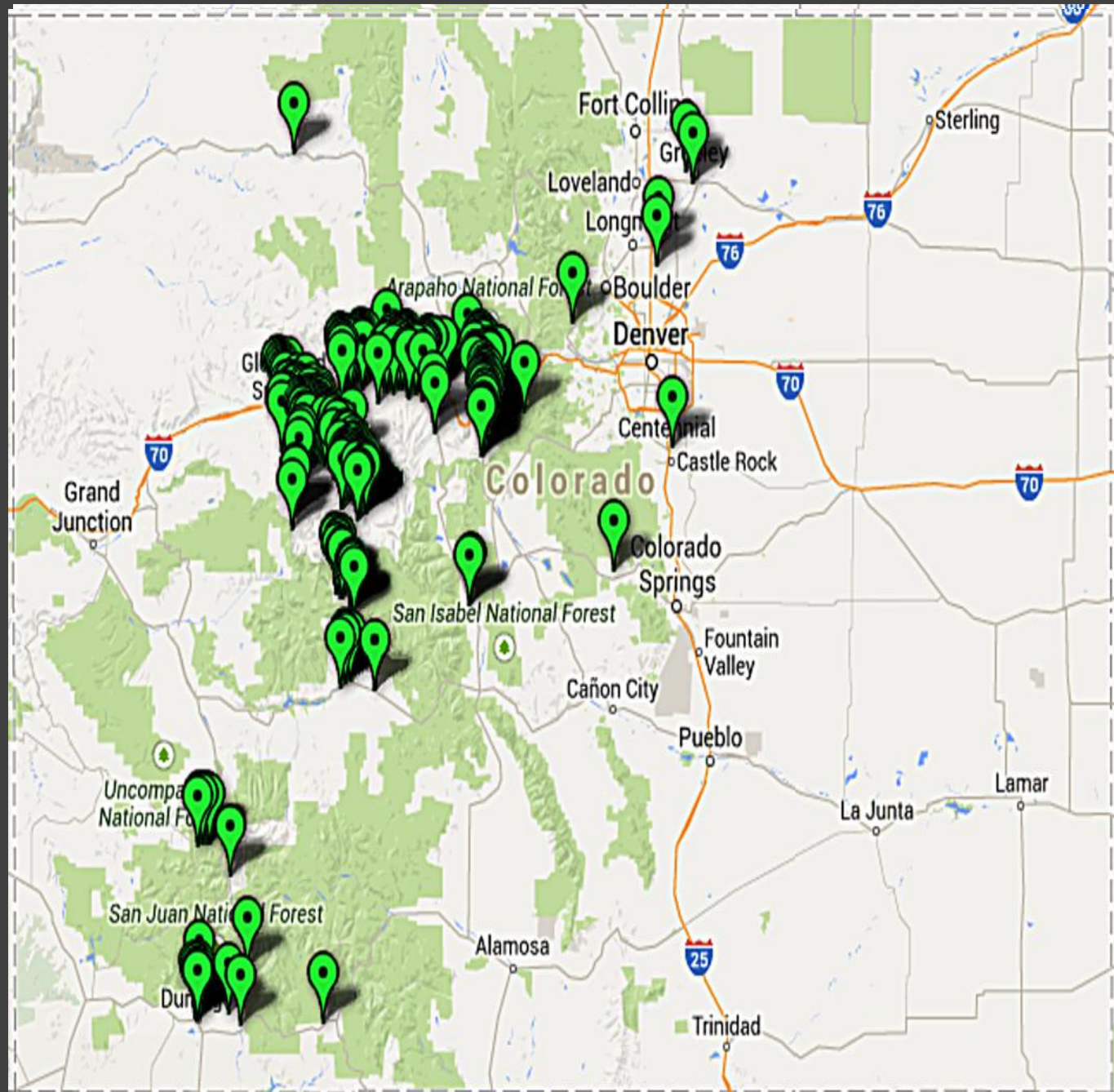
## Rural Mountain Communities

- Aspen
- Vail
- Summit County

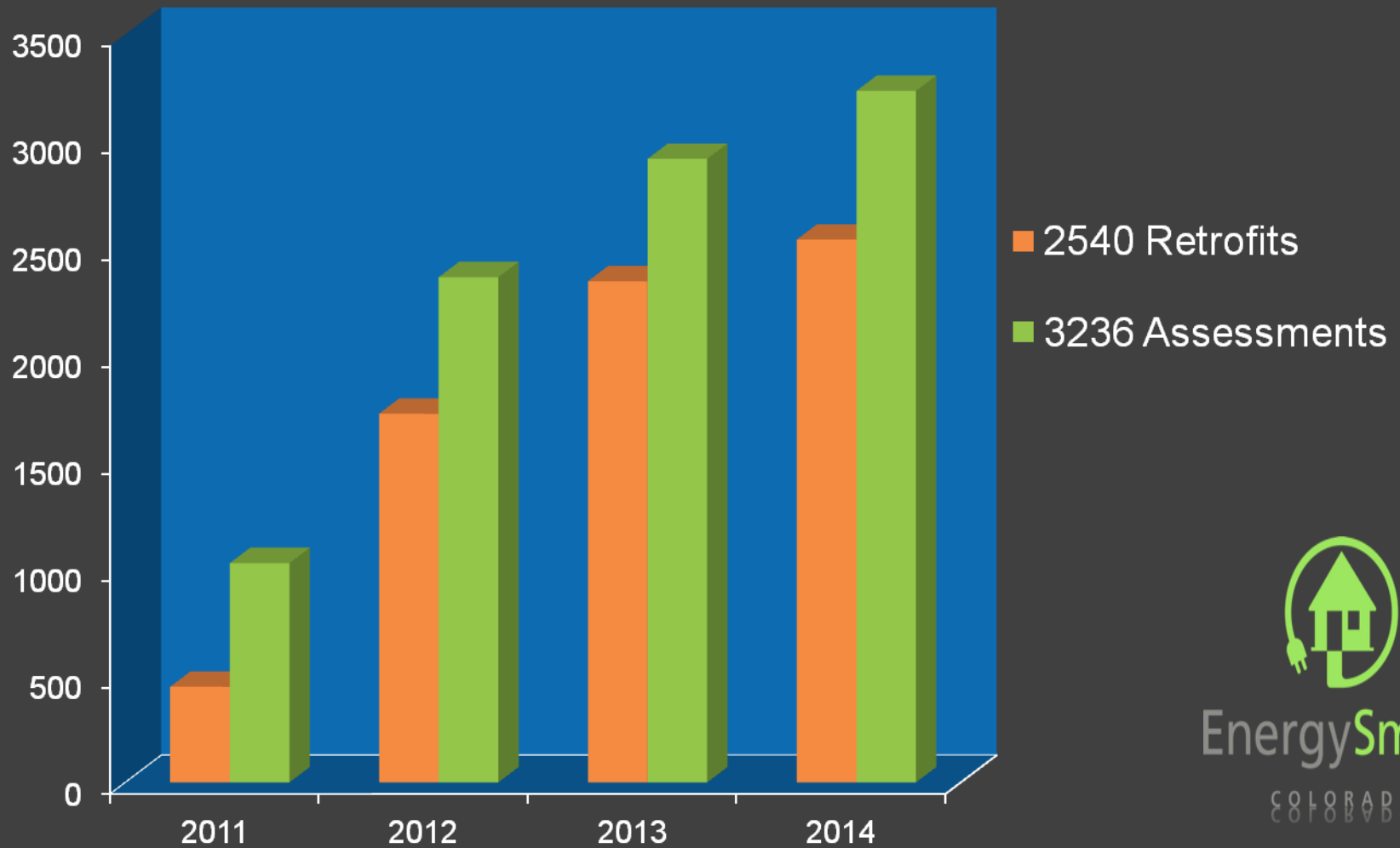


EnergySmart

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# PROGRAM GROWTH



# CUSTOMER SERVICE PRINCIPLES

- Quality not Quantity
- Knowing our customers
- Importance and roles of local non-profit partners
- Importance of QA
- Listen to feedback



EnergySmart

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# BEST PRACTICES

- Utilizing locally based, knowledgeable “Energy Coaches” that can take a customer through all of the stages:
  - Energy Assessment
  - Report review/coaching
  - Contractor referral/Bid review
  - Project facilitation / QA
  - Rebate Processing (one stop shop)
- 3<sup>rd</sup> party feedback / surveys
- Customizing scope of services for each client based on demand.



EnergySmart

888.888.8888

John-Ryan Lockman  
Energy Programs Manager  
Walking Mountains Science Center  
[www.energysmartcolorado.com](http://www.energysmartcolorado.com)

**THANK YOU**



EnergySmart

888.888.8888

# Energy Smart Colorado – Presentation Highlights

## *Successful Customer Service Practices*

- **Energy Smart Colorado's core principle of excellent customer service is to guide the homeowner through the program from beginning to end and maintain a personal connection.**
  - This hand-holding ensures that there are no barriers to program participation, from the enrolling process, to contractor communication, to incentives.
- **Knowing the customer is extremely important, especially in the rural, small town settings where Energy Smart Colorado operates.**
  - Many of the program customers sign up their 2<sup>nd</sup> homes, and therefore are not in town year-round. Energy Smart Colorado records when the homeowners plan to be back in town and when they are best reached.
  - Energy Smart Colorado customizes its outreach & email campaigns based on homeowner schedules, interests, etc. (e.g., if someone has already installed LEDs, that's a good sign that they'd be interested in deeper upgrades), and uses Salesforce & Mail Chimp to manage and connect with homeowners.
- **Local non-profit partners offer program trainings and co-branding, and are very important to Energy Smart Colorado's successful campaigns. Because they are entrenched in the local communities, they offer great connections to customers.**

# Program Experience: Connecticut Green Bank



Empowering you to make  
smart energy choices

January, 2015

# Residential Energy Efficiency Customer Service Best Practices Lessons from the Connecticut Green Bank

# Early Lessons from BB Grant

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**Always keep customer experience at the forefront when solving program problems**

- Example: Project completion rate for Neighbor to Neighbor program started at 26%
- Solutions incorporated customer service improvements:
  - Contractor RFQ
    - Service Level Agreement: Must contact customer within 3 business days
  - Programmatic:
    - Same day data entry into CRM
    - Identify hot leads to contractors
    - Receipts given to customers with contractor name
    - Automated reminder email
    - Contractor liaison monitors leads and contractors

# N2N Lessons Learned

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- CRM investment is an absolute necessity for contractors and for program
  - Extreme data transparency and market innovation
  - Contractor scorecard with key performance indicators that incorporate customer service – supports benchmarking across contractors
- Energy Advisor/Contractor Liaison critical to help customers and contractors navigate through the process
  - Reduced consumer confusion and uncertainty
  - Supported contractor sales processes
  - Advised contractors on customer service best practices

# Smart-E Loan

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- Giving the contractors the skills they need to support their customers
  - Not financing experts
  - Providing them with calculators
  - Marketing collateral
  - Charts to compare
- “Bundle” offer with a reduced interest rate – contractor doesn’t own the whole scope of work, this can create customer service issues
  - Contractor introductions
  - Lenders, customers, and the Green Bank support project



# Contacts

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- **Madeline Priest**, Associate, Residential Programs
- **Kerry O'Neill**, Director of Residential Programs

Connecticut Green Bank  
Clean Energy Finance and Investment Authority (CEFIA)  
<http://www.ctcleanenergy.com/>

# Connecticut Green Bank – Presentation Highlights

## *Successful Customer Service Practices*

- To improve a poor (26%) conversion rate from sign-up to project completion, Connecticut instituted both programmatic *and* contractor customer service requirements, focusing on expedient customer intake and warm hand-off from program to contractor.
- A customer relationship management (CRM) system is a necessity for both the program and the contractors. The CRM provides data transparency and the ability to generate a contractor scorecard.
  - The best indicator of successful contractor customer service was the number of days it took them to respond to homeowner sign-ups.
- Many contractors were start-ups or “mom & pop” organizations, so it was also important to help contractors with customer service training and advice.
  - For example, the Energize CT program provides contractors with clear and concise marketing materials for distribution, along with a financing chart just for contractors to compare the many different financing products in Connecticut.

# Discussion Questions

- What approaches has your organization used to improve (or sustain quality) customer service for residential energy efficiency work?
- What feedback have you had from customers or contractors about what is critical to customer satisfaction?
- What strategies provide the best “bang for the buck”?
- What other lessons have you learned about what works well or doesn’t for keeping residential customers happy?
- Other questions/issues related to customer service best practices?

# Customer Service Tips

- Get to know your customers and tailor outreach messaging and materials to each neighborhood/community.
  - Energize New York included photos of local homes of program participants on outreach leaflets.
  - Energy Smart Colorado customizes its outreach based on the homeowner's availability and project history.
- Use data to evaluate what works and does not, then inform programmatic changes.
  - The Connecticut Neighbor-to-Neighbor (N2N) program collected and evaluated the time contractors took to respond to homeowner sign-ups, and found that a maximum of three days was critical to success. The program invested in institutionalizing the three day maximum, and the conversion rate increased dramatically.
- Many successful programs utilize CRM software, such as Salesforce or EnergySavvy, to track customer interactions and program status.

# Customer Service Tips *continued*

- Consider offering the homeowner a 3<sup>rd</sup> party consultant, such as an “Energy Coach.”
  - The Connecticut N2N program provided a representative who acted as both an Energy Advisor to the customer and a Contractor Liaison, and who was critical in helping customers and contractors navigate the program.
  - To be successful, an Energy Coach needs to be accessible (timely and low or no cost to the homeowner), and must not undermine the contractor’s relationship with the homeowner or impede project scheduling.
- It is critical to empower contractors by providing them with sufficient program support (e.g. program outreach materials, program-related trainings, and customer service training if needed).
- Efficient rebate processing is important to leaving the homeowner with a positive experience.
  - Energy Smart Colorado processes rebates within one month, and includes a thank-you letter with the rebate check.
  - Other programs credit the discounts to the homeowner upfront, and collect the rebates and incentives themselves.

# Closing Poll Results

- After today's call, what will you do?
  - Evaluate potential changes to your customer service approach – **73%**
  - Tell a colleague or partner something you learned – **64%**
  - Try an idea or approach discussed on this call in your work – **36%**
  - Make no changes to your current approach to customer service – **0%**
  - Other (please explain) – **0%**