



**Better Buildings Residential Network Peer Exchange:
*Strengthening the Front Lines: Sales Training and
Continuing Education for Contractors***

Call Slides and Discussion Summary

June 25, 2015

Agenda

- Call Logistics and Introductions
- Residential Network and Peer Exchange Call Overview
- Participant Poll
- Featured Presenters
 - Amy Beley, Senior Program Manager, Build it Green
 - Sam Flanery, Founder, Building Science Academy
- Discussion
 - What kind of sales/business training is most useful for contractors?
 - How can residential energy efficiency programs best support contractor training?
 - What do we know about the impact of training on sales and customer satisfaction?
- Closing Poll

Call Participants

- Albert Nahman Plumbing and Heating
- BPI
- Build It Green
- Building Science Academy
- Center for Energy and Environment
- Center for Sustainable Energy
- City of Holland
- City of Plano
- CLEARresult
- Efficiency Works
- Energy Efficiency Specialists
- emPower Central Coast
- Fruitfull Energy
- Greater Cincinnati Energy Alliance (GCEA)
- Honeywell
- Michigan Saves
- Midwest Energy Efficiency Alliance (MEEA)
- Opportunity Council
- Yolo County Housing

Call Participant Locations



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

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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/bbrn>

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 Byrnes's blog post Does Aeroseal work? An auditors review](#)

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

16 minutes ago

[T.J 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:
 - August 13, 12:30 ET: Assessments: The Good, the Bad, and the Ugly (301)
 - August 13, 3:00 ET: Tailored Marketing for Low-Income and Under-Represented Population Segments (201)
 - August 20, 12:30 ET: Staged Upgrade Initiative Program Design (201)
 - September 10, 12:30 ET: Mastermind (201)
 - September 10, 3:00 ET: The Other 15%: Expanding Energy Efficiency to Rural Populations (301)
- 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%

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HOME ENERGY PROS Connecting home energy professionals

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Peer Exchange Archive: Program Sustainability

Program Sustainability | Workforce/Business Partners | Financing and Revenue | Data and Evaluation | Multifamily/Low Income Housing | Working with Utilities | High Road Workforce Agreements | Marketing and Outreach | Other Calls

Peer exchange call summaries are listed below as available. Please check back periodically for new summaries.

- 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 – We Want Your Input!

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/>

Opening Poll

- Which of the following best describes your organization's experience with contractor sales and business training?
 - Some experience/familiarity— **43%**
 - Very experienced/familiar— **21%**
 - No experience/familiarity— **21%**
 - Limited experience/familiarity— **14%**
 - Not applicable—**0%**

Amy Beley, Senior Program Manager, Build it Green



Contractor Engagement Strategies that work

Amy Beley

June 25, 2015



Build It Green: Smart Solutions from the Ground Up



- About
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How Green Is Your Home?

FOR HOMEOWNERS

SIGN IN

BOTH WORLDS.

...remodel or new home meets your ideals, saves you money, ...eneration. [More](#)

- ### Benefits of a Green Home
- Energy Efficiency
 - Water Conservation
 - Indoor Air Quality
 - Resource Conservation
 - Community

Find a Contractor

Could your home save you money?

Calculate It!



- HOME
- GREENPOINT RATED
- TRAINING & EVENTS
- DIRECTORIES & RESOURCES
- PARTNER PROGRAMS
- ABOUT
- CONTACT

Charting California's Energy Policy

Build It Green's Bruce Mast analyzes the CEC Draft Energy Efficiency Action Plan

[LEARN MORE](#)

BUILD IT GREEN IS A MEMBER SUPPORTED NON-PROFIT ORGANIZATION WORKING TO EXPAND THE MARKET FOR GREEN HOMES IN CALIFORNIA. [LEARN MORE >](#)

NEWS

June 9, 2015
Builder Guidance for Emergency Water Mandate

EVENTS

June 18 | 1 p.m. - 2 p.m.
FREE Multifamily Property Management Webinar: Part III

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<http://www.builditgreen.org>



The Program Problem:

We need more projects in the programs



What Contractors need:

A clear roadmap to success

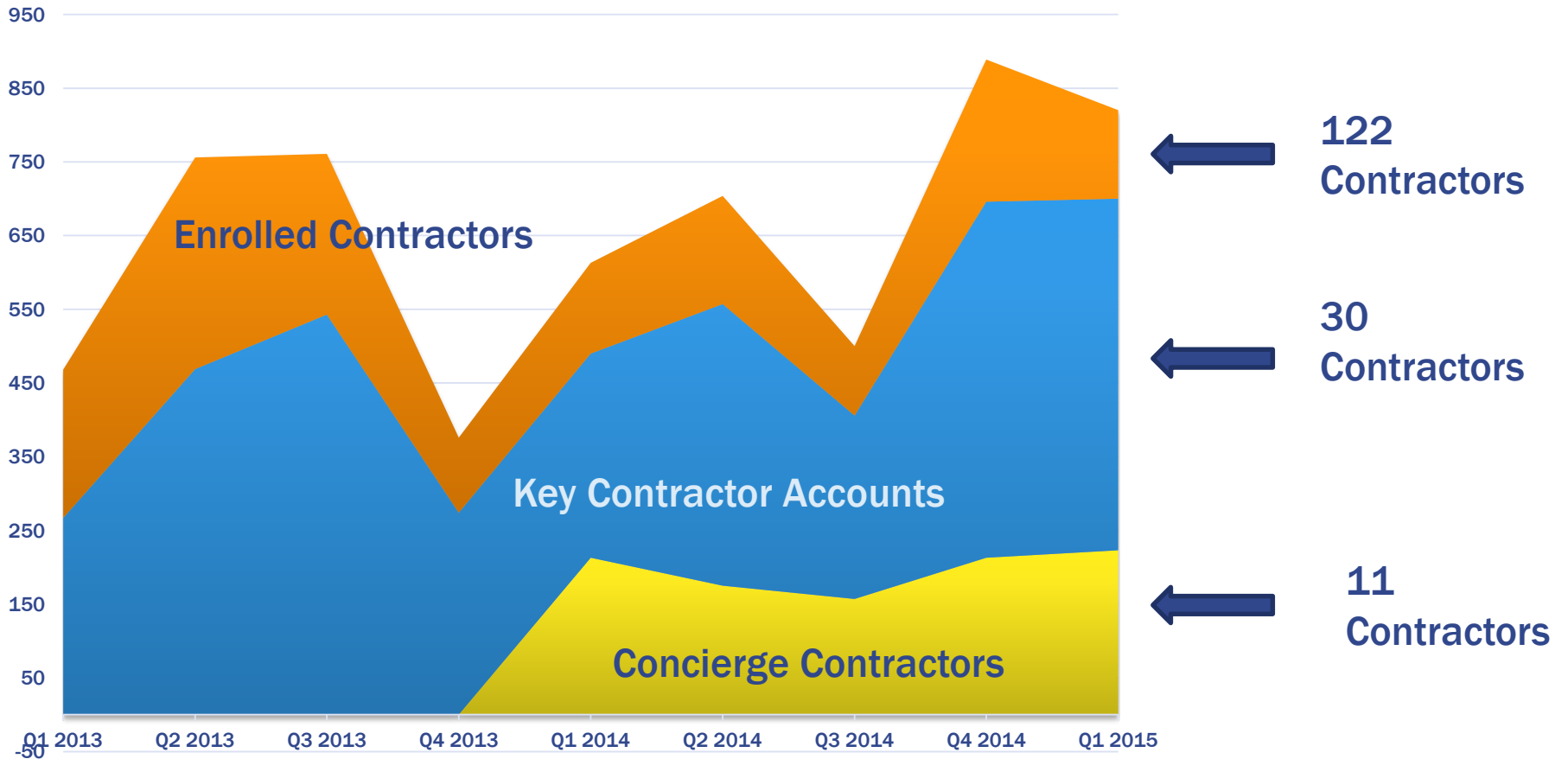


**Our Contractor Engagement Strategy engages
with high impact/high potential companies**

80/20

A Proactive strategy can lead to higher productivity

Job Volume by Contractor Type





Customized Mentoring makes a big impact

It focuses on the end goal – transforming the marketplace





Helping Contractors Make Money Doing the Right Thing



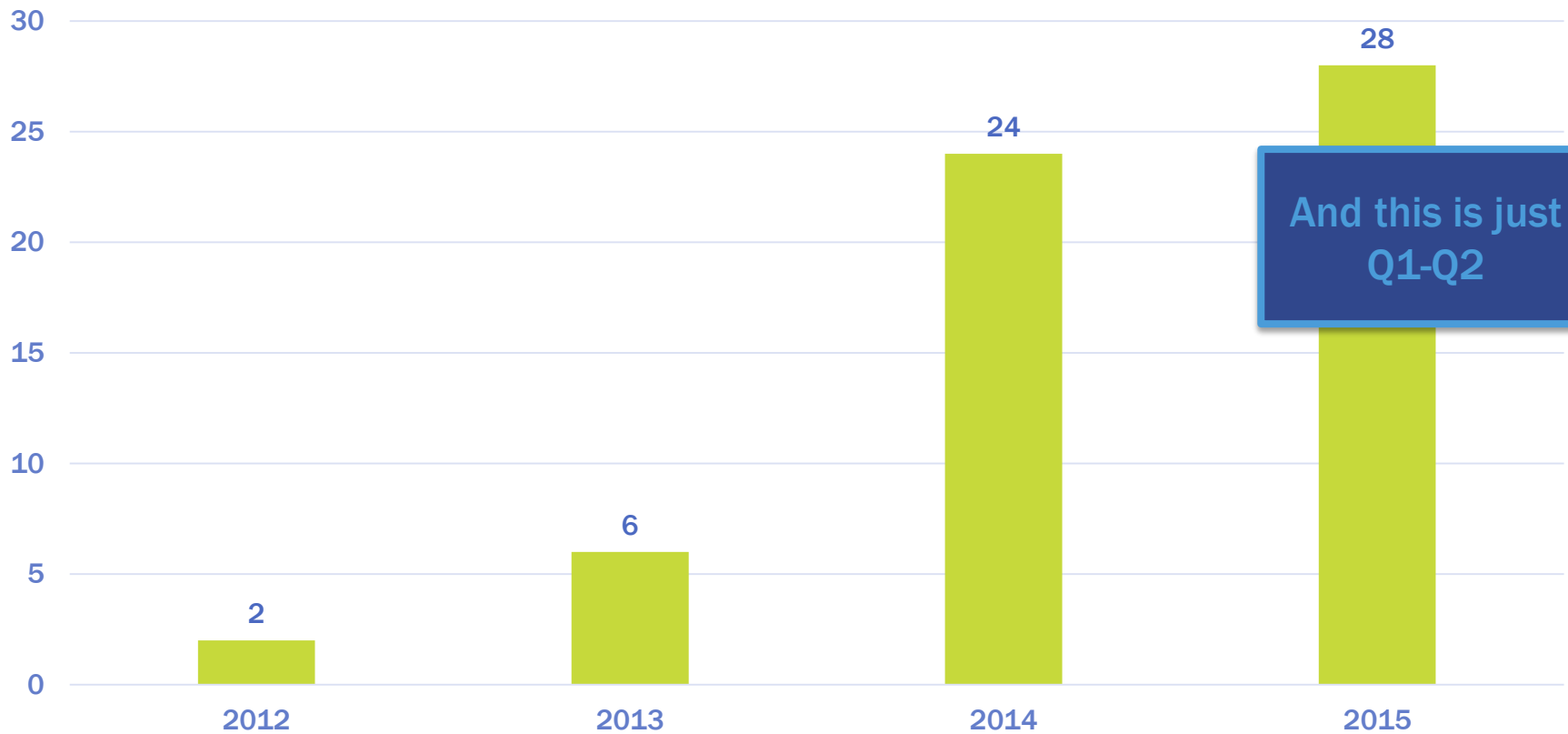
Ben wanted to do better. He and his team *WANTED* to sell more

So, we enrolled them in Concierge Mentoring in February 2014

Oasis Home Upgrade/Advanced Home Upgrade Projects 2012-2015



Annual Home Upgrade/Advanced Home Upgrade Projects





Thank you!

Amy Beley, Build It Green

LinkedIn: <https://www.linkedin.com/pub/amy-beley/5/b68/263>

To learn more about Build It Green:

<http://www.builditgreen.org>

<http://www.homeupgrade.org>

<http://www.greenpointrated.com>

Program Experience: Build It Green

- Build It Green identified a tiered System for Managing Contractors:
 - **Concierge Contractors:** high-volume contractors; 11 contractors produce 25% of the contracts from the program.
 - **Key Contractors:** Contractors that have not taken the full leap into a home performance business model; 30 contractors producing 52% of projects.
 - **Enrolled Contractors:** Contractors who submit only a few jobs a year; 122 contractors producing 20% of projects.
- **80/20 Rule:** Most of the program's resources were going to supporting “problem” contractors that were not completing projects for the program.
- The program focuses contractor training on business development, sales and marketing, and quality management to help the most productive high impact/high potential contractors be more efficient and even more successful.
 - For example, helping a contractor set up a tool inventory system or organize their work truck helps them complete more projects and deliver a more profitable program.
- **The Bottom Line:** Energy efficiency programs need more projects and contractors need to turn a profit. If contractors are making money, they are producing more projects.

Sam Flanery, Founder, Building Science Academy

Lessons Learned: Building Science Academy

- **Key question: how can a program help contractors get from third base to home?**
 - First Base: Identify prospective customer
 - Second Base: Set up a home visit
 - Third Base: Complete the home visit
 - Home: Contract for the project
- Not all homeowners can afford a \$12-15K retrofit, even with financing. The key to real impact with residential EE is making home performance projects affordable – what does a program or contractor service have to offer that can start a homeowner down the right path that they can afford?
- “Closing Sale” mentoring helps contractors get to home base with a strong sales dialogue.
 - Until a program and contractor get to home base, all that has been spent is time and money. First through third bases do not generate profit and do not generate EE benefits.

Discussion Questions

- What kind of sales/business training is most useful for contractors?
- How can residential energy efficiency programs best support contractor training?
- What do we know about the impact of training on sales and customer satisfaction?

Discussion: Ideas for How Programs can Better Support Contractor Sales

- The ideal salesperson has both a technical understanding and people skills. They can communicate the job and interact with the customer to make the sale. A contractor and salesperson could tag team, but it would add more cost to the project
- Selling audits presents a useful gateway to engage your customer. Giving an audit away for free doesn't create homeowner buy-in, and the final sale is more difficult.
 - Energy Efficiency Specialists in New York sells audits for \$750 and sees a closing ratio on projects of 80%.
- Contractors that can look at the whole home and offer feedback to the homeowner as well as information on utility incentive programs increase customer confidence that the contractor is working in his or her best interest.
- Midwest Energy Efficiency Alliance offered one-day training classes for contractors, but experienced limited attendance. Charging a nominal fee as opposed to a free class may have increased the likelihood that contractors would show up.

Discussion: Contractor Sales Training

Top Tips

- **Put resources toward results.** Focus mentoring, training, staff time, and program resources on contractors who are delivering projects for the program.
- **Offer a customized approach to support contractors,** such as helping contractors develop systems to be more efficient in completing projects.
- **Training takes time.** Programs don't often give people enough time to be trained and contractors end up thrown into the field.
- **Create customers for life.** If you sell someone a new air conditioner, create a service plan for additional improvements in the future. Figure out what the consumer can afford now and there may be additional budget to do further improvements later.
- **Sell solutions.** Homeowners aren't motivated by energy savings, they're motivated by solutions.
 - Rebates can be a barrier to sales as they often take the focus off of the solution in the sales pitch. Rebates can be a way to get a customer to reach further for a better home improvement solution that will offer greater energy savings.

Closing Poll

- After today's call, what will you do?
 - Seek out additional information on one or more of the ideas—**78%**
 - Consider implementing one or more of the ideas discussed—**22%**
 - Make no changes to your current approach—**0%**
 - Other—**0%**

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