



“But I’m Not a Salesman!”
Energy Efficiency Contractor Sales Training Success Stories

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Agenda



- Background
- Changing Behavior
- Case Studies
- Lessons Learned



Massive Investment in Energy Efficiency



- State EERS & ratepayer-funded programs
- Initial ARRA funds for residential EE Programs
 - EECBG and SEP more than \$2.5 billion 2009-2012
 - Better Buildings Neighborhood Program
 - 40 state/local grantees
 - \$508 million over 3 years (ends Sept 2013)
 - Significant investments in workforce development



The Missing Link



- Technical training not enough
- Industry-wide need to increase conversion rates from energy assessment to EE upgrade
- Contractors are largely responsible for making the sale yet don't want to be "sales people"
- Need for contractors to bridge the divide between understanding building science and understanding customers



Systemic Behavior Change



- Programs
 - Understanding contractors are their “front line” in helping overcome homeowner barriers to EE upgrades
 - More fully engaging with contractors, help them recognize the need to change “business as usual”
 - Shift from standard utility rebate program
- Contractors
 - Building scientist vs. salesman
 - Modifying interactions with customers
 - Business model shift from ‘reactive’ single technology to proactive whole home approach



Efficiency Maine



- 2010: 1st 6 months: 10,000 leads, 72 upgrades
- 100 BPI-certified contractors
- Shadowing revealed contractors often derailed the upgrade sales process
- Partnered with Dale Carnegie
 - 2 day training addressing the stages and opportunities to sell the upgrade
 - Focused on homeowner needs
- Integrated with tools used statewide
 - Audit checklist w/customer qual questions
 - Proposal template w/ customer needs section up front



“ Before we weatherized, even when our living room was warm, our kitchen was cold. Nose-dripping cold. Now we can walk around the entire house in our socks, and be really comfortable.”
Stuart & Jane, Warren

Sales Training Results



Date	Conversion Rate (average)
Jan. 2010 - June 2010	~10%
Oct. 2010	~30%
Dec. 2010	~60%
May 2011	~50%
Current*	~30-40%

- Observations:
 - Contractors changing the way they do business
 - Program managers observe contractors speaking differently with homeowners
 - Contractors sent other employees to subsequent classes

* The Efficiency Maine program currently offers financing but is not offering any additional rebates for whole home upgrades.

BetterBuildings for Michigan



- Program outreach focused on getting an assessment, not an upgrade
- 12 week training for both outreach staff and contractors included:
 - Refining the elevator speech
 - Listening to customers
 - Overcoming objections
 - Post-audit follow through
- Followup:
 - Weekly accountability calls



Michigan's training – Results



- Encouraging results:
 - One team converted ~6%; after training ~50%
- Lessons learned:
 - Clarify program goal to both outreach staff and contractors
 - Communicate early & often about how the training benefits the contractors and staff
 - Accountability is important → contractors were motivated by (and held responsible for) the goals they set



HEAT Squad – Rutland Vermont



- Contractor engagement to overcome resistance
 - Training was “mandatory” + asked contractors for input
 - Multi-point promotion; show results of other programs
- Carnegie training focused on basic good business practice
 - Engage the customers as people (don’t just talk to the husband!)
 - Give yourself deadlines and stick to your promises
 - Schedule follow-up during the audit
 - Ask for customer referrals
- Results
 - Conversion rates higher in those who attended
 - Chance for contractors to take a breather, take stock



EnergyWorks - Philadelphia



- First voluntary training Nov. 2011 – low turnout
 - 2nd training mandatory ½ day workshop prior to major regional home show
- 2nd time – used the right framing
 - Named it “orientation” not sales training
 - Used a messenger who could connect with contractors
 - Garnered positive feedback - wanted more



EnergyWorks Kansas City



- Program training objectives
 - Contractors needed basic program information
- Challenges
 - Short RPF period; low response from potential training providers
 - Short time frame - low attendance
- Lessons Learned
 - Know your trainer – need to be able to connect with contractor audience
 - Understand/cover what the contractors need
 - Provide tools / follow-up materials
 - Elicit contractor input for the trainings



Insights From A Trainer



- Multi-focus: sales, marketing, business
 - Tout training benefits early/often
 - What worked for contractors
 - Had them do homework in advance
 - Taught concepts using contractors' own current marketing material – gave direct feedback
 - Coached them to listen, to be educators, not salespeople
 - Lessons
 - IL: Track metrics post-training
 - CA: Understand contractor needs/barriers
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Illinois Home
Performance



Contractor Feedback



- Most contractors found trainings extremely useful despite initial resistance – both the sales training and general business training
- Getting feedback on current marketing materials was very helpful (Illinois)
- Basics of customer service extremely valuable and immediately applicable
- Contractors appreciated the opportunity to take a break, take stock and think about their business model



Lessons Learned



- Overcoming resistance to contractor attendance
 - “Playing” the mandatory card depends on the program/contractor relationship
 - Giving contractors input/ownership of how the training is offered helps get them engaged
 - Offer “carrots” for getting training, and for performance in the field
 - For Successful Training
 - Provide ‘homework’ in advance and if possible offer direct feedback they can apply immediately
 - Understand and address contractors’ needs and challenges
 - Provide follow up materials and tools
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Thanks!



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