

DOE Technical Assistance Program

U.S. DEPARTMENT OF
ENERGY | Energy Efficiency &
Renewable Energy



The Parker Ranch installation in Hawaii

Workforce Development and Sales Training for EE Contractors

Elizabeth Stuart, LBNL

March 22, 2011

What is TAP?

DOE's Technical Assistance Program (TAP) supports the Energy Efficiency and Conservation Block Grant Program (EECBG) and the State Energy Program (SEP) by providing state, local, and tribal officials the tools and resources needed to implement successful and sustainable clean energy programs.



TAP offers:

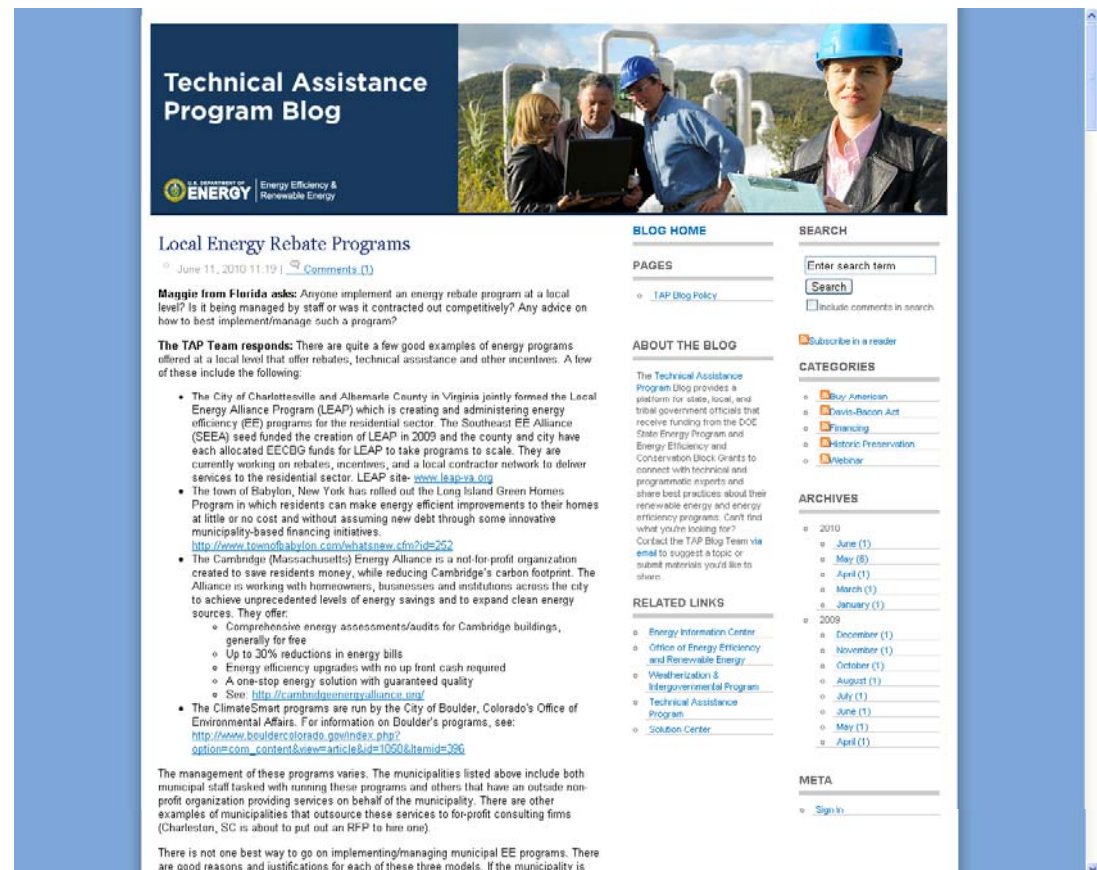
- One-on-one assistance
- Extensive online resource library, including:
 - Webinars
 - Events calendar
 - TAP Blog
 - Best practices and project resources
- Facilitation of peer exchange

On topics including:

- Energy efficiency and renewable energy technologies
- Program design and implementation
- Financing
- Performance contracting
- State and local capacity building

Access the TAP Blog!
<http://www.eereblogs.energy.gov/tap/>

Provides a platform for state, local, and tribal government officials and DOE's network of technical and programmatic experts to connect and share best practices on a variety of topics.



Technical Assistance Program Blog

U.S. DEPARTMENT OF ENERGY Energy Efficiency & Renewable Energy

Local Energy Rebate Programs

June 11, 2010 11:19 | Comments (1)

Maggie from Florida asks: Anyone implement an energy rebate program at a local level? Is it being managed by staff or was it contracted out competitively? Any advice on how to best implement/manage such a program?

The TAP Team responds: There are quite a few good examples of energy programs offered at a local level that offer rebates, technical assistance and other incentives. A few of these include the following:

- The City of Charlottesville and Albemarle County in Virginia jointly formed the Local Energy Alliance Program (LEAP) which is creating and administering energy efficiency (EE) programs for the residential sector. The Southeast EE Alliance (SEEA) seed funded the creation of LEAP in 2009 and the county and city have each allocated EECBG funds for LEAP to take programs to scale. They are currently working on rebates, incentives, and a local contractor network to deliver services to the residential sector. LEAP site: www.leap-va.org
- The town of Babylon, New York has rolled out the Long Island Green Homes Program in which residents can make energy efficient improvements to their homes at little or no cost and without assuming new debt through some innovative municipality-based financing initiatives. <http://www.townofbabylon.com/subsites/new.cfm?id=252>
- The Cambridge (Massachusetts) Energy Alliance is a not-for-profit organization created to save residents money, while reducing Cambridge's carbon footprint. The Alliance is working with homeowners, businesses and institutions across the city to achieve unprecedented levels of energy savings and to expand clean energy sources. They offer:
 - Comprehensive energy assessments/audits for Cambridge buildings, generally for free
 - Up to 30% reductions in energy bills
 - Energy efficiency upgrades with no up front cash required
 - A one-stop energy solution with guaranteed quality
 - See <http://www.cambridgeenergyalliance.org/>
- The ClimateSmart programs are run by the City of Boulder, Colorado's Office of Environmental Affairs. For information on Boulder's programs, see: http://www.bouldercolorado.gov/index.php?option=com_content&view=article&id=1050&Itemid=386

The management of these programs varies. The municipalities listed above include both municipal staff tasked with running these programs and others that have an outside non-profit organization providing services on behalf of the municipality. There are other examples of municipalities that outsource these services to for-profit consulting firms (Charleston, SC is about to put out an RFP to hire one).

There is not one best way to go on implementing/managing municipal EE programs. There are good reasons and justifications for each of these three models. If the municipality is

BLOG HOME

PAGES

- TAP Blog Policy

ABOUT THE BLOG

The Technical Assistance Program Blog provides a platform for state, local, and tribal government officials that receive funding from the DOE State Energy Program and Energy Efficiency and Conservation Block Grants to connect with technical and programmatic experts and share best practices about their renewable energy and energy efficiency programs. Can't find what you're looking for? Contact the TAP Blog Team via email to suggest a topic or submit materials you'd like to share.

RELATED LINKS

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- Weatherization & Intergovernmental Program
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- Solution Center

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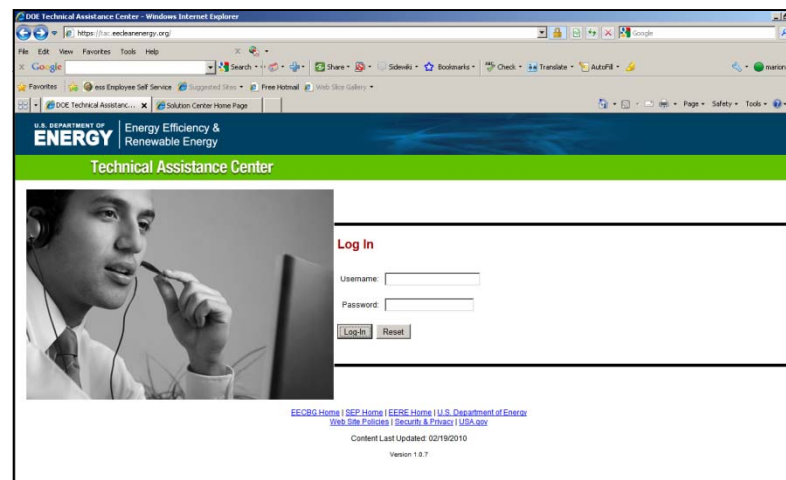
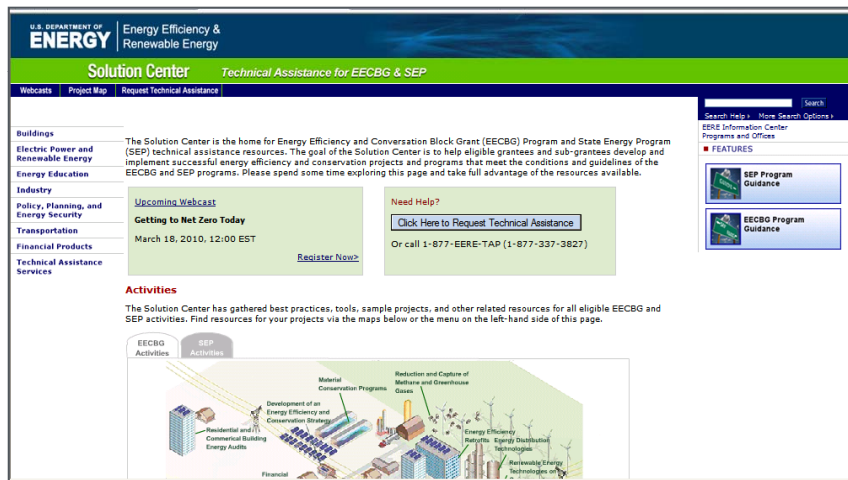
META

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1-877-337-3827 or email us at
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1. LBNL

- EESS Workforce Size, Expectations for Growth and Training Needs

2. Logan Brown – Efficiency Vermont

- Home Performance Workforce Development

3. Andy Meyer/David Stearns – Efficiency Maine

- Weatherization Sales Training

4. Jay Gentry – Con-Com-T

- Enabling Contractors to Succeed

5. Q&A



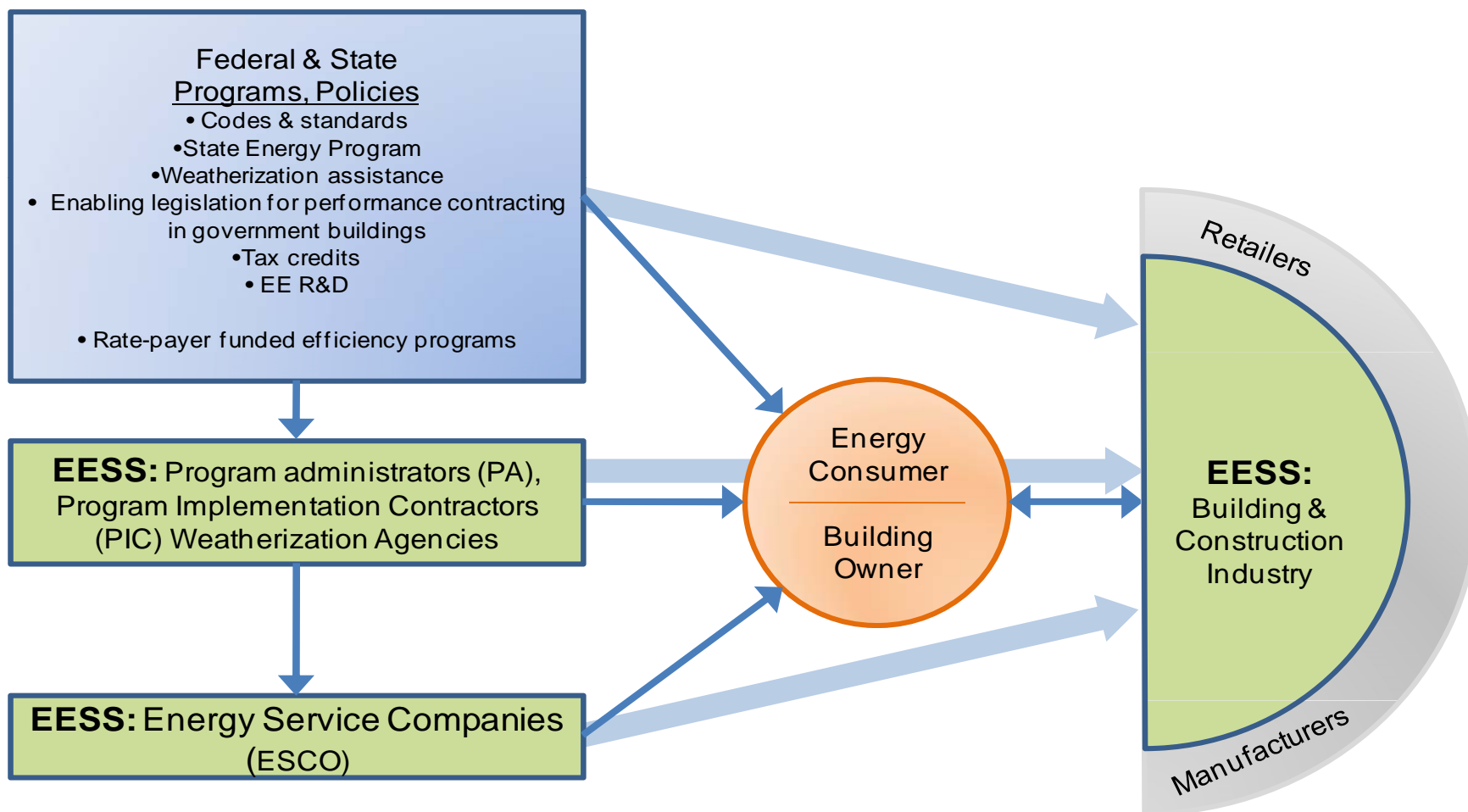
Energy Efficiency Services Sector: Workforce Size and Growth Estimates and Education and Training Needs

Charles A. Goldman, Merrian Fuller, Elizabeth Stuart
Lawrence Berkeley National Laboratory

The EESS is Driven by Policy



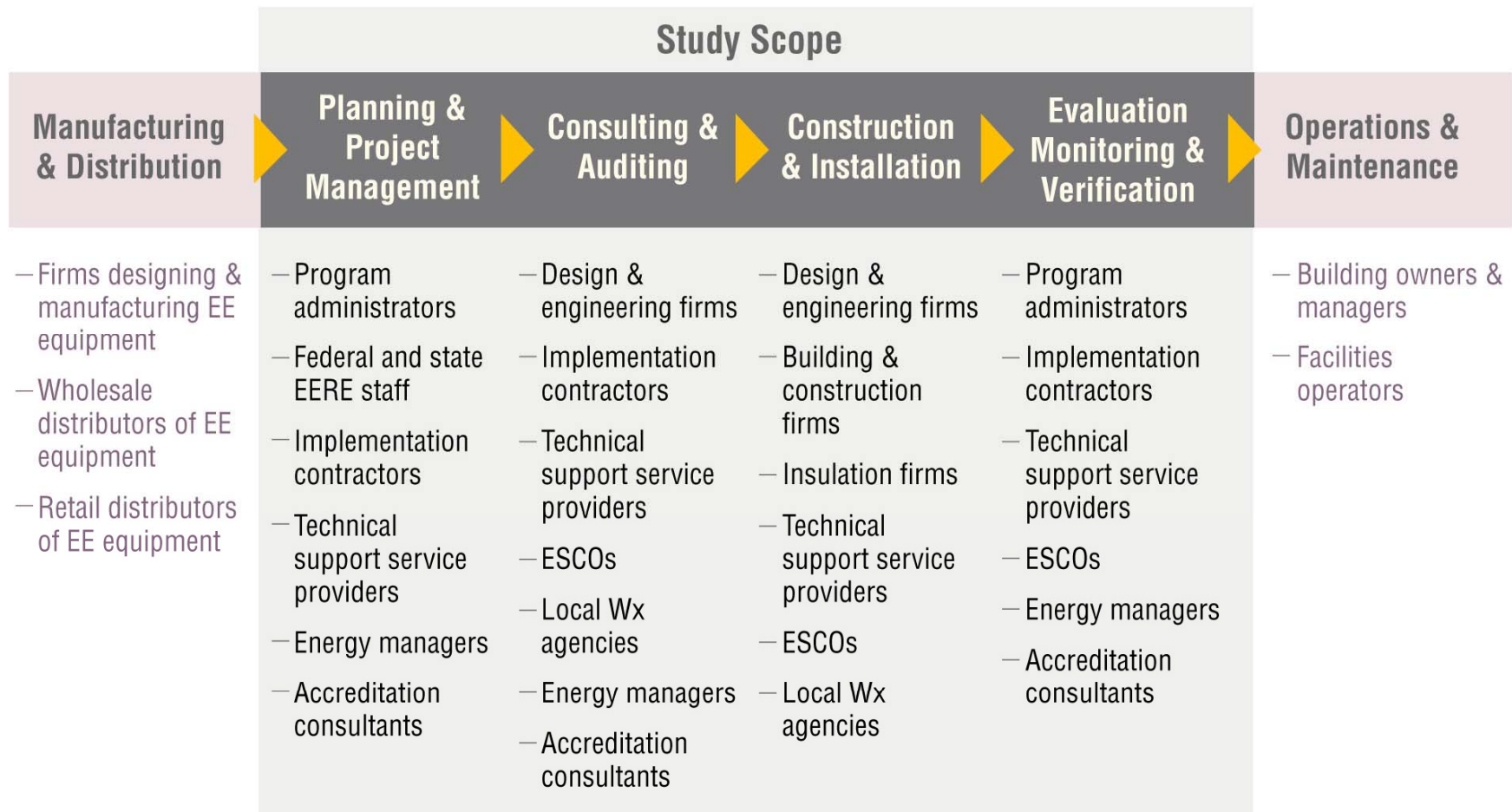
Historically, a majority of the activity in the EESS is spurred directly and indirectly by government policies and ratepayer-funded programs.



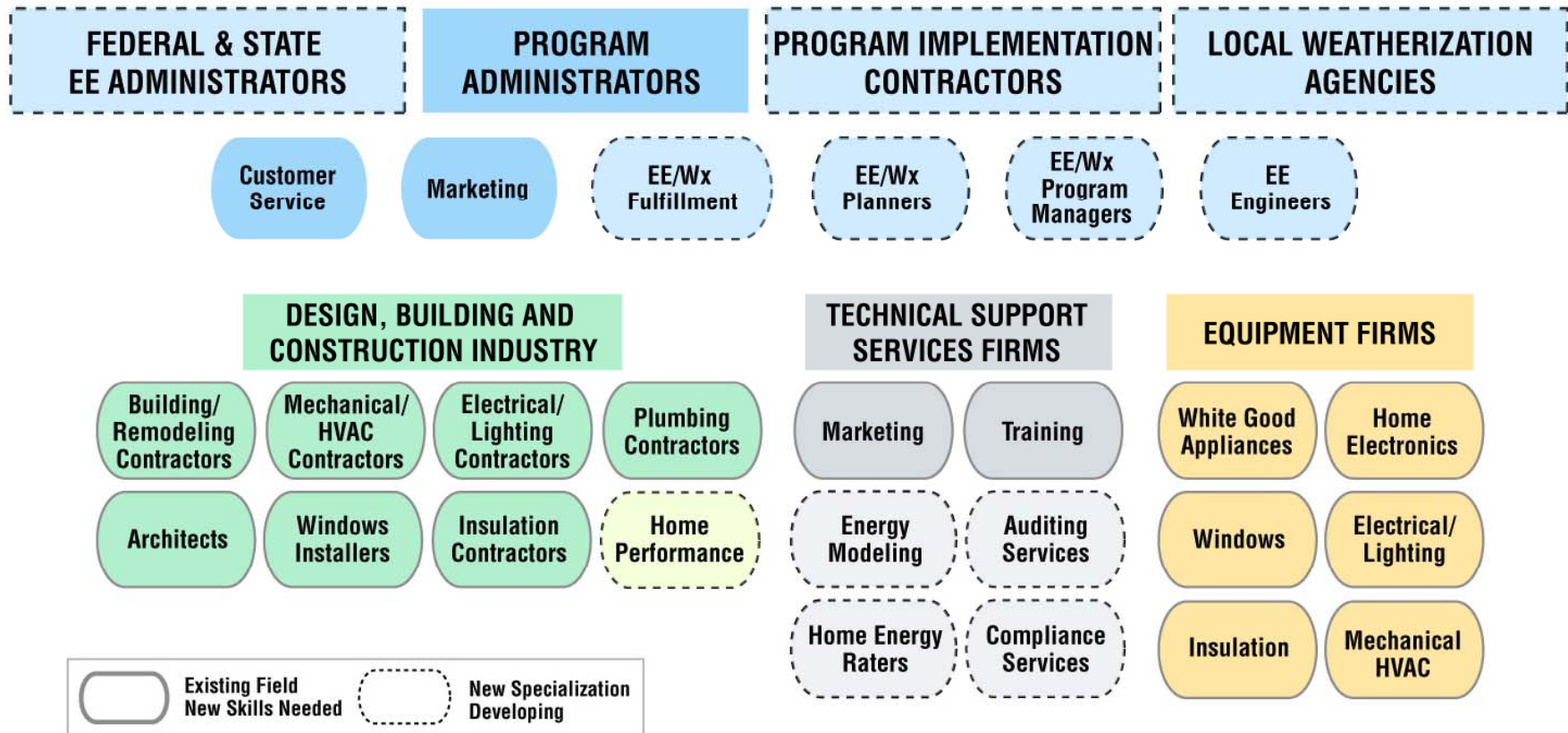
Defining the EESS



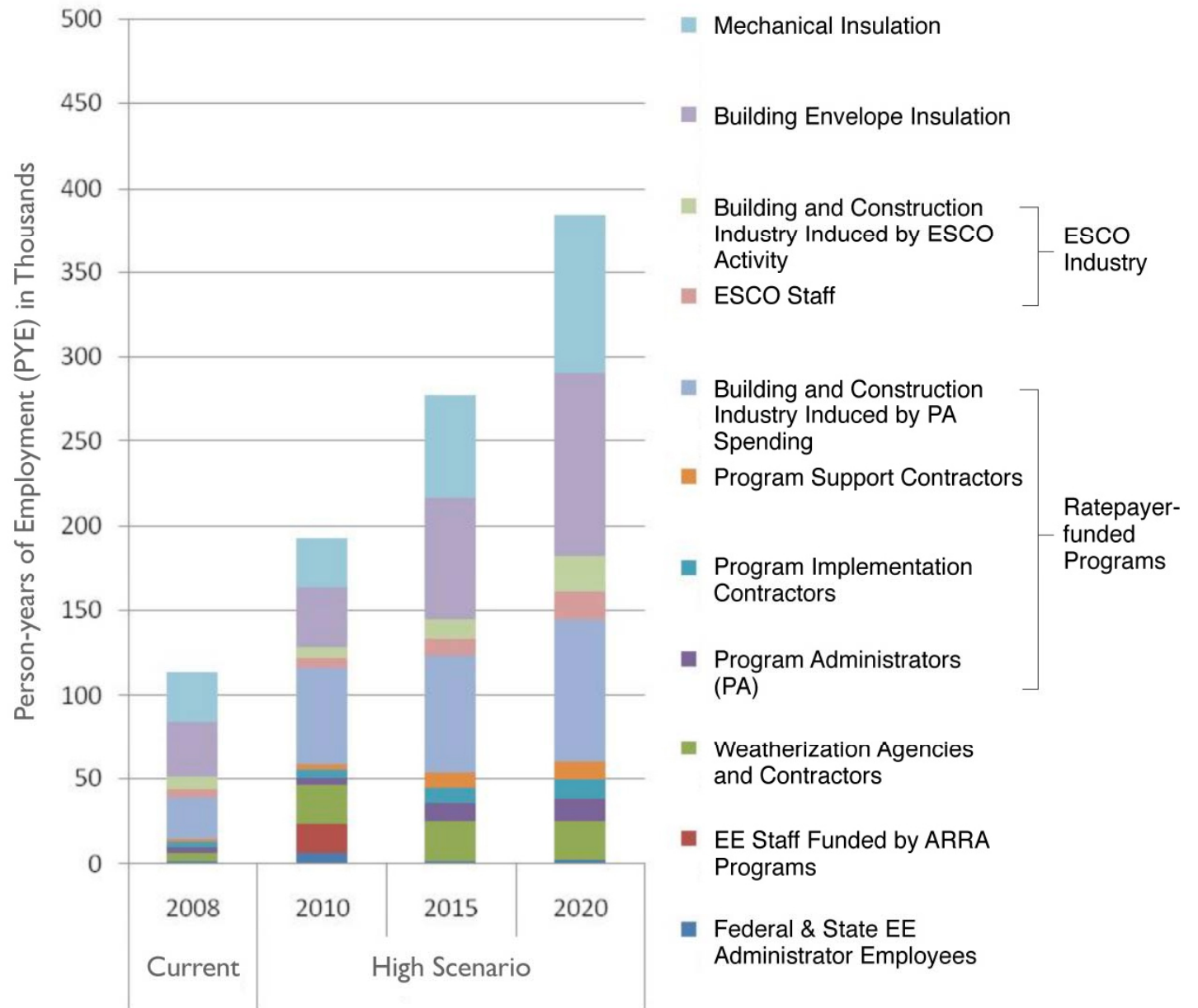
This study includes the portion of the EESS market supply chain that focuses on deployment and installation of energy efficiency products and measures. Within this, we further limit our scope to those EE products and services whose demand is driven *primarily* by the energy savings.



Residential EESS



**Energy
Efficiency
Services Sector
Workforce Size:
Current and
projected levels
of employment
in PYE**



EESS Workforce Size



Estimated Size in 2009:

- 114,000 person-years of employment (PYE)
- Approximately 380,000 individuals employed

Projected Size in 2020:

- Approximately 400,000 PYE (high-growth scenario)
 - Up to 1.3 million individuals employed
- A projected 2-fold (low-growth scenario) to 4-fold (high-growth scenario) increase in employment by 2020
-

Key Challenges for EESS Workforce Growth



- Shortage of management-level applicants with experience in energy efficiency
- Shortage of experienced energy efficiency engineers
- **Building and construction industry:**
 - Limited awareness that the EESS is poised to expand significantly & their skills will be needed – especially in states ramping up EE
 - Retirement is a growing concern
 - Limited number of skilled trainers for EE



The Evolving EE Training Landscape



- **BPI, RESNET certification**
- **AESP, ASHRAE, AEE**
- **Weatherization Assistance Program (WAP)**
- **Ratepayer-funded Programs**
- **ARRA-funded initiatives and collaborations**
- **Some community colleges**
- **Some four-year programs**
- **Union apprentice programs**



New DOE Tools for Standardization



- **WAP Standardized Curricula**
 - For experienced and new trainers
 - <http://www.waptac.org/Training-Tools/WAP-Standardized-Curricula.aspx>
 - **Workforce Guidelines for Home Energy Upgrades**
 - Voluntary Guidelines to define quality and increase consistency nationwide
 - Developed with extensive industry input
 - http://www1.eere.energy.gov/wip/retrofit_guidelines.html
-

Recommendations



- **DOE Workforce Guidelines for Home Energy Retrofits**
 - **EE Workforce Development as separate programmatic element in EE program plans**
 - **Target EE training for the Trades (65% of EESS workforce)**
 - **Increase short-duration, applied EE trainings**
 - EE-specific training for managers, engineers and others
 - **Include focus on “training the trainers”**
 - Growth rates strain current capacity
 - **Prepare the next generation of EESS Professionals**
 - Increase EE-specific curriculum, including college and university level
 - Develop building science and EE policy/planning centers
 - **Conduct EE Workforce Training & Needs Assessments**
-

Contact



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Energy Efficiency Services Sector: Workforce Education and Training Needs

<http://eetd.lbl.gov/EA/EMP/reports/lbni-3163e.pdf>

Energy Efficiency Services Sector: Workforce Size and Expectations for Growth

<http://eetd.lbl.gov/EA/EMP/reports/lbni-3987e.pdf>



Home Performance Workforce Development

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Program Achievements To Date

	2005	2006	2007	2008	2009	2010
# Active contractors	3	9	28	40	72	75
# Whole-house jobs	7	44	123	322	471	600
Customer investment	\$35,800	\$193,200	\$950,700	\$1,953,000	\$2,521,600	\$3,704,365
KWH savings (annual)	7,087	33,903	109,980	160,143	280,923	295,151
MMBTU savings (annual)	389	1,584	7,623	10,233	21,105	23,264

Workforce Development

Driven by our desire to:

- Earn contractor loyalty
- Meet expanded program goals
- Move beyond tweaking incentive levels
- Complement new comprehensive marketing approach
- Capitalize on word-of-mouth successes

Guided by:

- Today's program needs, tomorrow's projected needs
- Customer feedback and goals

Customer Feedback

Most complaints we handle are not related to work quality or technical issues

Most complaints address basic customer service issues

- Billing
- Returning calls
- Scheduling
- Timeliness

We're confident that basic technical skill development is covered through existing trainings/certifications

- Our challenge is to train and develop beyond the technical

Development Approach

Sales Today

- How do we help contractors close more sales
- What can we do as administrators to help close the sale
 - Address the audit gap

Tech today- what support is needed for today's field activities?

- In-depth heating system information/CO testing
- IR Camera use

Development Approach

Tech Tomorrow

- Multiple-blower door testing

Sales Tomorrow

- Business management

Development Specifics

Partnering with internal and external resources to deliver training:

- Efficiency Vermont
- Snell Infrared
- Dale Carnegie Institute

Some Current Challenges

Old timers vs. new comers

- Should we distinguish that in the marketplace?

Audit fee, audit format

- What to charge, what to deliver, and what to standardize

Business models

- Audit only?

Contractor marketing

- Leveraging our efforts

Weatherization Sales Training



Background



- Market-based program
- Goal
 - 4,000 homes in 2 yrs
 - 25% energy savings
- Started 1/1/10
- Painfully slow 1st 6 months
 - 10,000 leads
 - 72 upgrades
- Extensive market research



Advisor

- Justify my \$500 fee for 4-hour visit?
- Show my “building science” expertise?



Homeowner

- Did I buy the right home?
- Have I maintained it properly?



National Sales Trainer Search



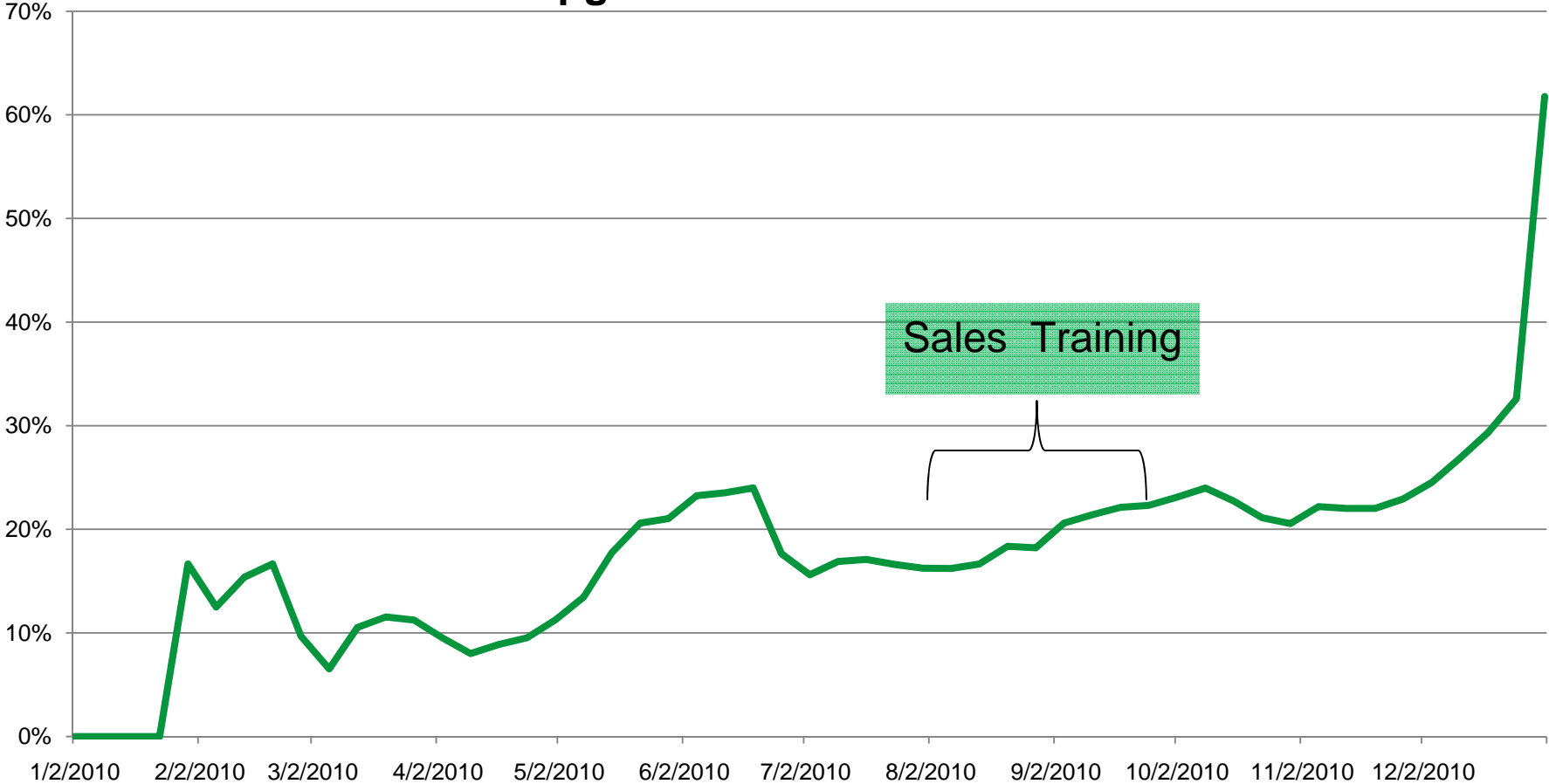
	No professional sales model	Professional sales model
Doesn't know weatherization	many	many
Knows weatherization	many	2 in US - San Diego - Maine



Results



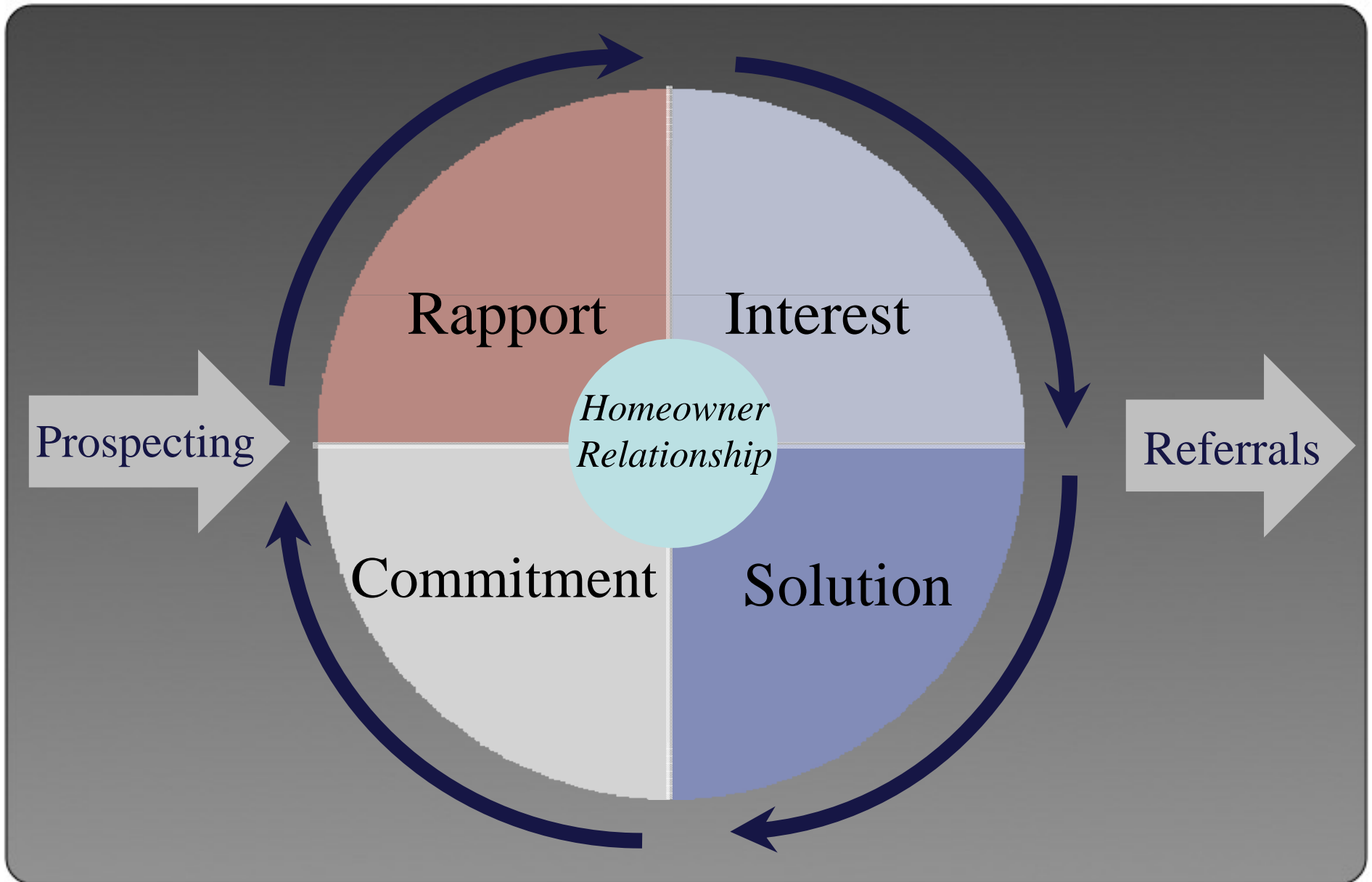
Upgrades as % of Audits



Weatherization Sales Process



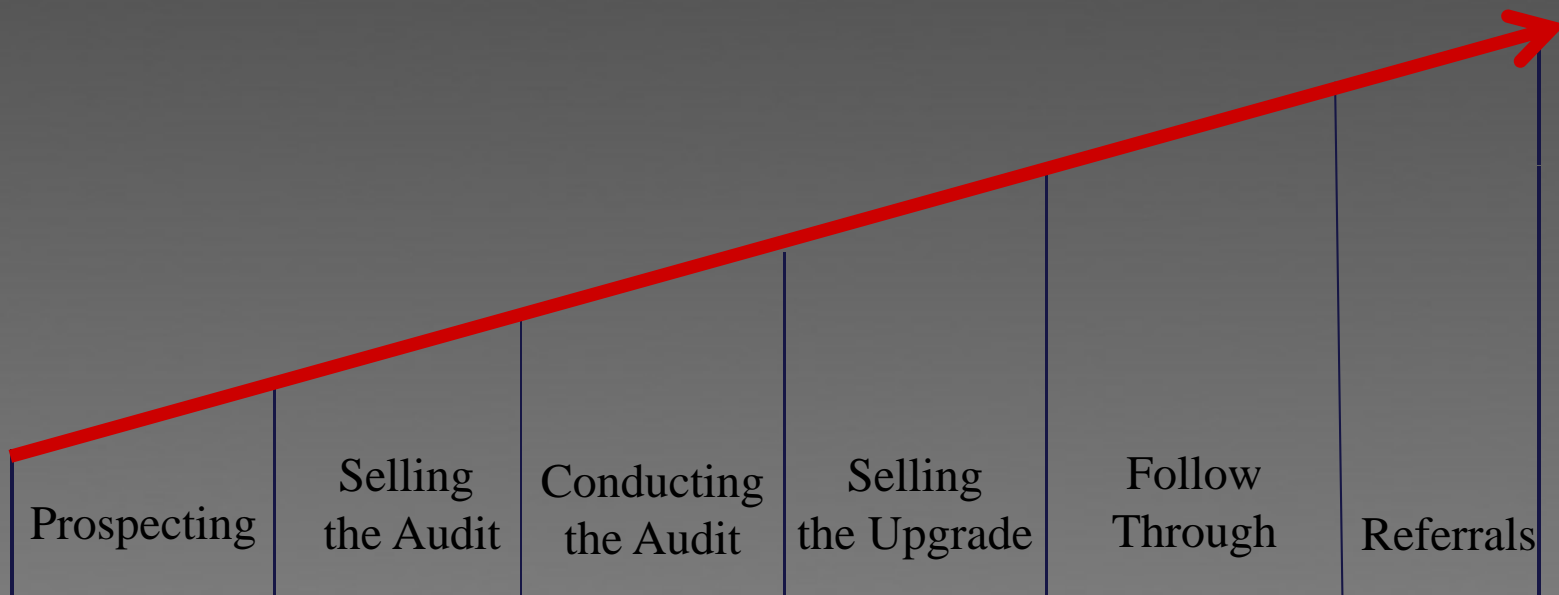
DALE CARNEGIE®
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Weatherization Continuum



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Dale Carnegie Sales Model



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- **Homeowner needs based**



- **Integrated with operational tools**
 - energy audit checklist
 - Comfort to CFM50
 - proposal template
 - Measures and homeowner interests



Dale Carnegie Contact



DALE CARNEGIE®
TRAINING

Bill Bertolet
VP of Global Sales
Dale Carnegie Training

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Jay Gentry – Con-Com-T Inc.



- ❑ Owner/President
- ❑ 30+ years Sales/Marketing Consultant
 - HP, GE, HMI, InFocus, Tech Data
 - LP, AMI, Window World
 - Home Improvement and Design/Build Companies/Contractors
- ❑ Sales, Marketing, and Business Management Training
 - California Building Performance Contractor's Association (CBPCA)
 - NARI
 - EGIA

About Today's Webinar

Program Managers – Responsible for Results

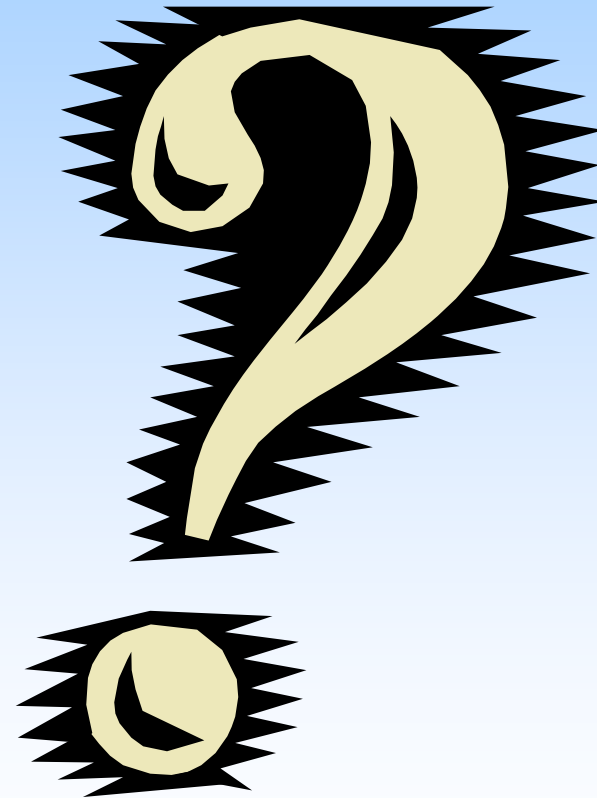
Three Topics

- ❑ The importance of enabling contractors to find, win, and grow business
- ❑ In 2011... Question centered sales process, educate customers on their needs and wants
- ❑ Choosing and managing a training development resource

Objectives – AHAs, Choices, Actions

Consider This...

Why do such a high percentage of Contracting Businesses fail... or never even get started?



Not Because They Can't Do the Work

They typically fail because...

- Unable to reach enough prospects
- Unable to sell the prospects they find
- Unable to make sufficient profit to grow

Failure of Marketing, Sales, and/or,
Business Management

The Gap... Marketing and Sales

- ❑ Large pool of potentially successful home improvement contractors... lots of interest in this emerging industry
- ❑ Money and programs to train these contractors in building science and home performance upgrades
- ❑ Increasing public awareness/support of energy efficiency and environmental responsibility
- ❑ A variety of incentives for homeowners to act now
- ❑ Still... in order to succeed a contractor needs to
 - Find and qualify a stream of prospective customers
 - Educate and sell a reasonable percentage of those customers
 - Deliver on expectations... with sufficient margins

Answers to the Questions...

What Business am I in?

What should I be tracking/managing?

Am I selling effectively?

What questions do I ask to uncover needs?

What is the right solution?

When do I ask for the order?

Am I making money?

How do I grow?

Who is my Target Customer?

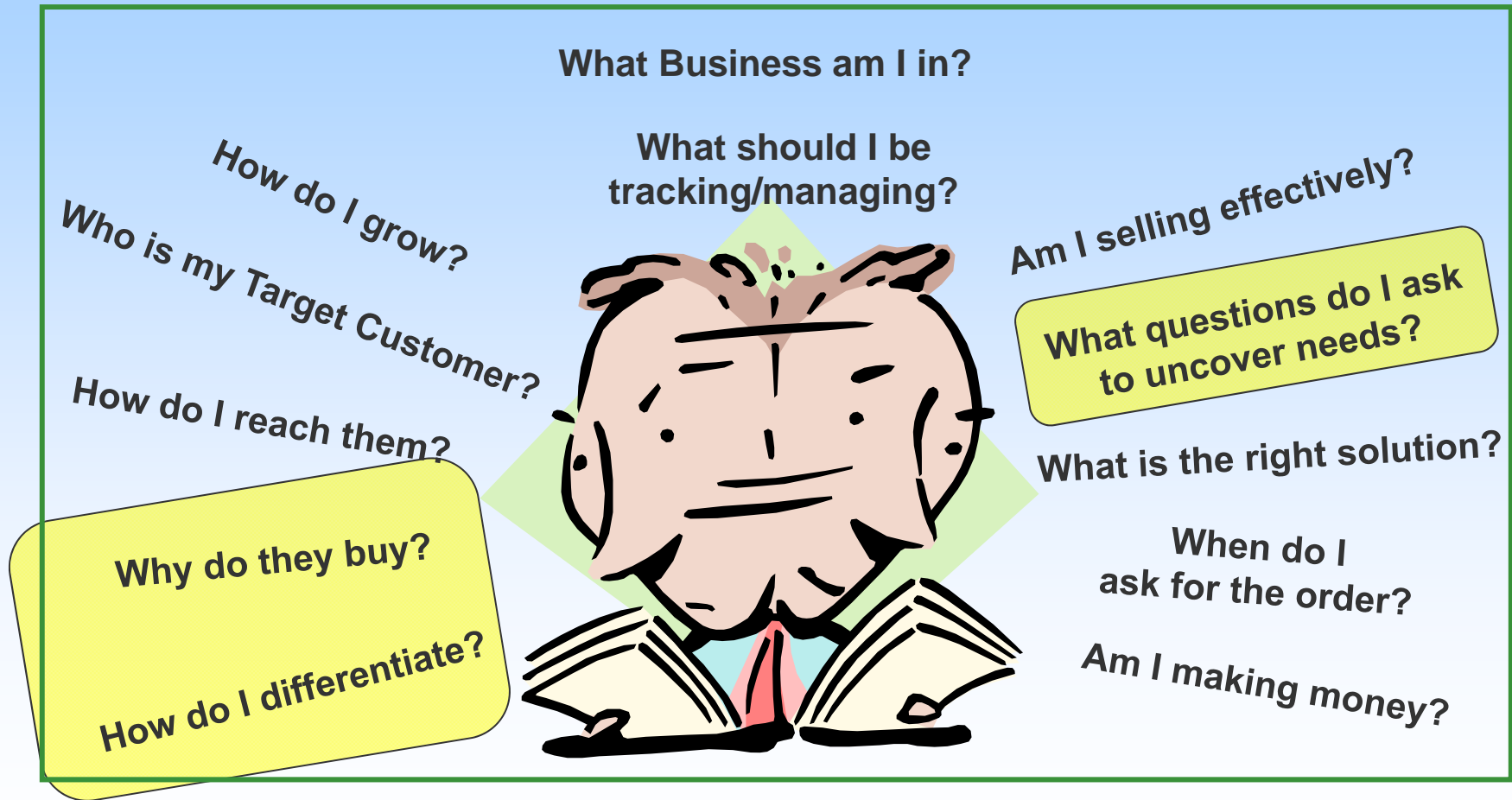
How do I reach them?

Why do they buy?

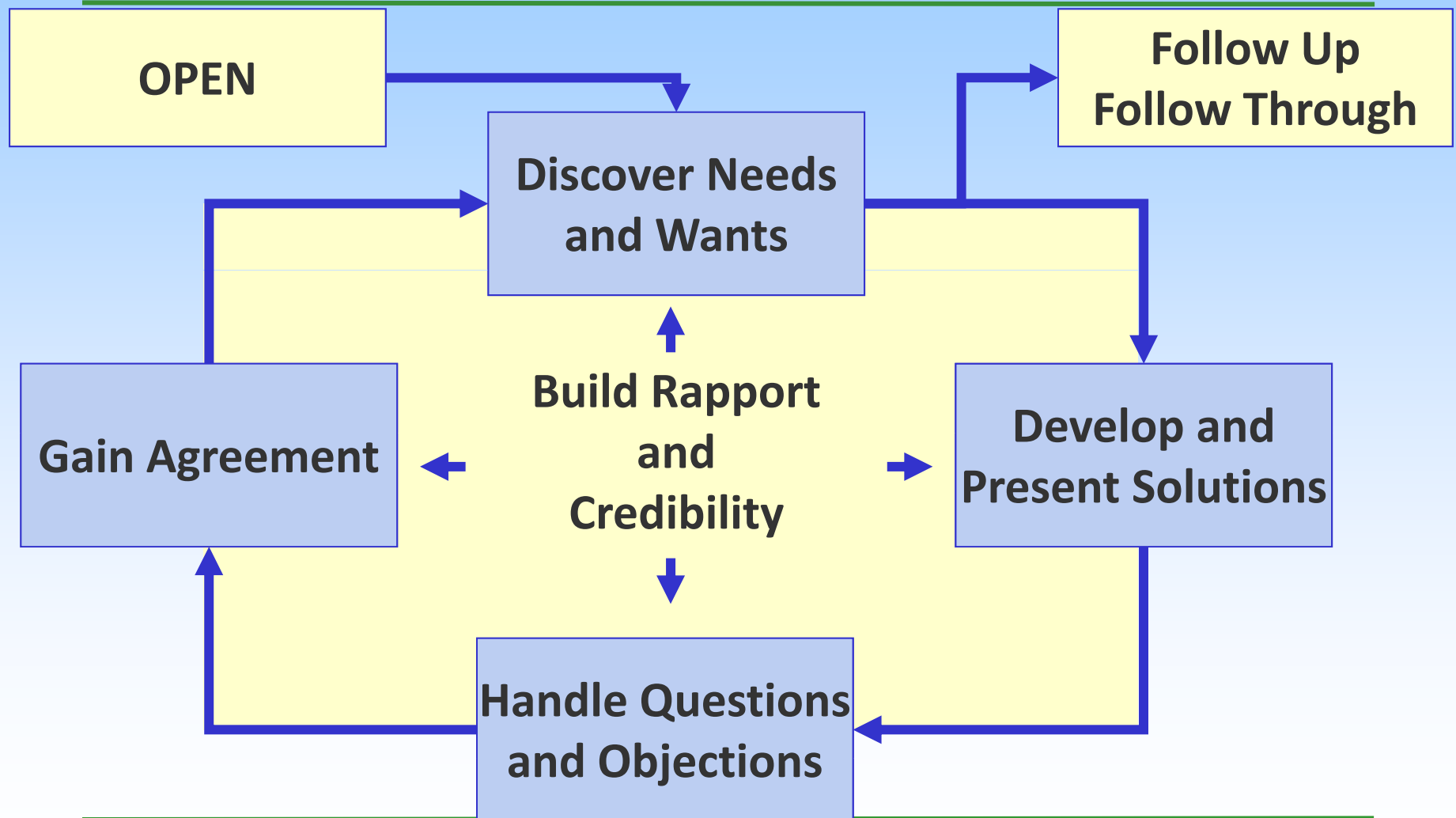
How do I differentiate?



“Listening Your Way to the Order”



Consultative Selling Process



It's All About Total Bases

Number of At Bats

- If you get in front of more Prospects – revenue will increase

Batting Average

- If you raise your close ratio or winning percentage – revenue will increase

Slugging Percentage

- If you increase the average value of your contracts – revenue will increase



Customer Decision Making Process

I have a need

I need information

I will listen

I will share information

I would buy from you

I will buy (specific) now

No Need

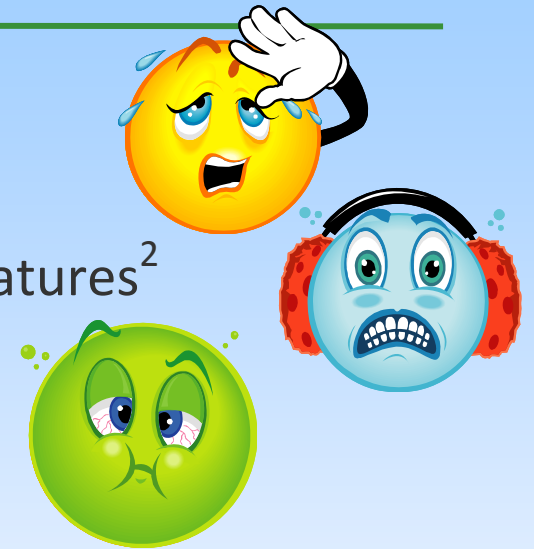
No Trust

No Hurry

Categories of Need

Home Performance Issues/Needs

- Lack of Comfort...
 - Too Hot, Too Cold, Drafty, Uneven Temperatures²
 - Mold, Moisture, Smells
 - Health Worries... Allergens, VOCs
- Too Expensive...
 - Heating and Cooling... Can't Afford to Keep Comfortable
 - Electric and/or Gas Consumption
 - Water Bills
- Believe... *"We Should be Able to Live More Comfortably"*



Categories of Need

Financial Opportunities

- ❑ Save \$ Short Term.. Every Month
- ❑ Avoid Expected Increases in Utility Bills
- ❑ Make \$ Long Term... Sell Faster and for More
- ❑ Rebates, Credits, PACE



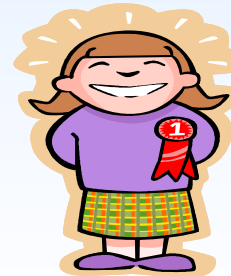
Believe in the Concepts

- ❑ Do the Right Thing, Do Their Part, Save the Planet
- ❑ Advance the Industry, Employ Green Collar Workers



Image with Friends/Neighbors

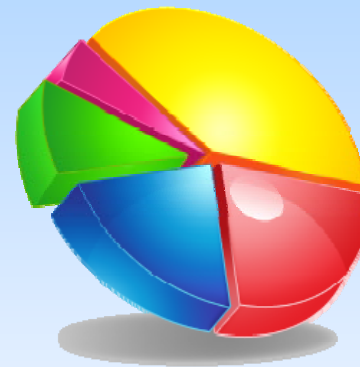
- ❑ Appear “Green” or “Smart”
- ❑ Be a Leader in Their Community



Categories of Need

Every Customer will have a Different “Need Profile”

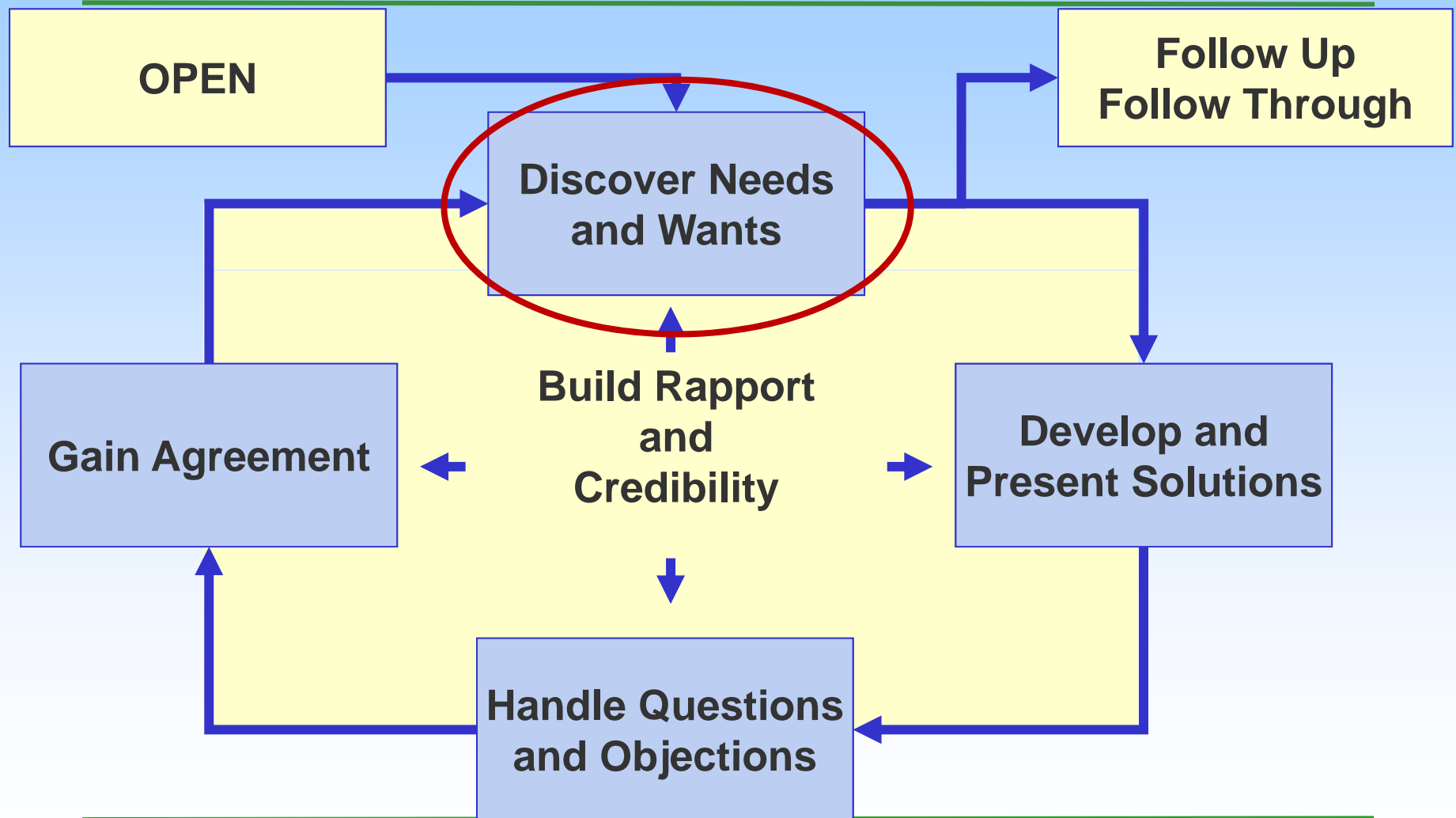
- ❑ Performance (Lack of Comfort and/or Expensive)
- ❑ Financial
- ❑ Do the Right Thing
- ❑ Image



So How Do We Explain Categories of Need to Homeowners?

Actually, We Don't... We Ask Questions Instead

Consultative Selling Process



Strategic Discovery

- ❑ Begin with deciding what you want to learn
- ❑ Observation provides clues
 - To Homeowner Needs and Priorities
 - Questions that you want to ask
- ❑ Draw from a set of Topic Questions
 - What you want to learn
 - What you have observed
 - Opportunities for differentiation

Consider What You Want to Learn

- ❑ What do you want to know about:
 - The home itself
 - The homeowners
 - Perceived problems/needs/priorities
 - Financial situation or issues
 - Decision process
 - Other issues



Strategic Questioning

Why did you choose to attend today?

- ❑ What responsibilities do you have in your program?
- ❑ What has changed in the last few months or year?
- ❑ This Web Exchange will have been perfect if...?

Give information... then ask a question

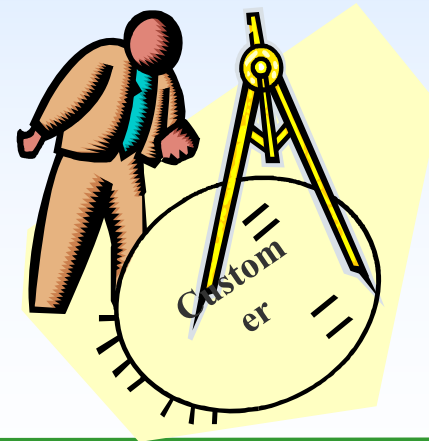
- ❑ Most programs that I talk to are... How about you?
- ❑ Many contractors are... Is that happening with you?
- ❑ It seems like... Does that make sense to you?

Strategic Questioning Concepts

- ❑ The Change Question
 - What has changed or What is different
- ❑ Topic and Follow-up Questions
 - The Customer Conversation
- ❑ Earn to Learn Question Format
 - Provide Context/Show Expertise/Introduce Topics
- ❑ Problem – Cause – Impact
 - Establish Importance

Start with “The Change Question”

- ❑ When you ask people “What has changed”
 - What has changed with your home/situation?
 - What changes are you expecting in the future?
 - If you could change one thing, what would it be?
- ❑ They will tell you what they perceive as the problems or challenges they are facing
- ❑ Your “Value” will be found in helping solve or deal with the problems/challenges



The Change Question: Example

You have the opportunity to interview a Homeowner

After introductions you open the conversation with the Change question

“What has changed about your home or situation that has caused you to consider an energy upgrade at this time?”

And he/she answers...

“Our energy bills have gone through the roof”

What do you ask next?

The Change Question: Example

- You could ask...
 - How big is “through the roof”?
 - What do you suppose is causing this?
 - What kind of actions is that forcing you to take?
 - What, specifically are you considering?
 - Etc.
- If he/she had said...

“We are going to have a baby... or my grandmother is moving in with us?”

What would you ask next?

The Change Question: Example

- You could ask...
 - What are concerned about when they/the baby arrives?
 - Why is that important... or an issue for you?
 - How is that effecting your priorities regarding your home?
 - Have you considered any specific actions?
 - Etc.
- If he had said...

“A neighbor just did an energy upgrade and is very happy”

What do you ask next?

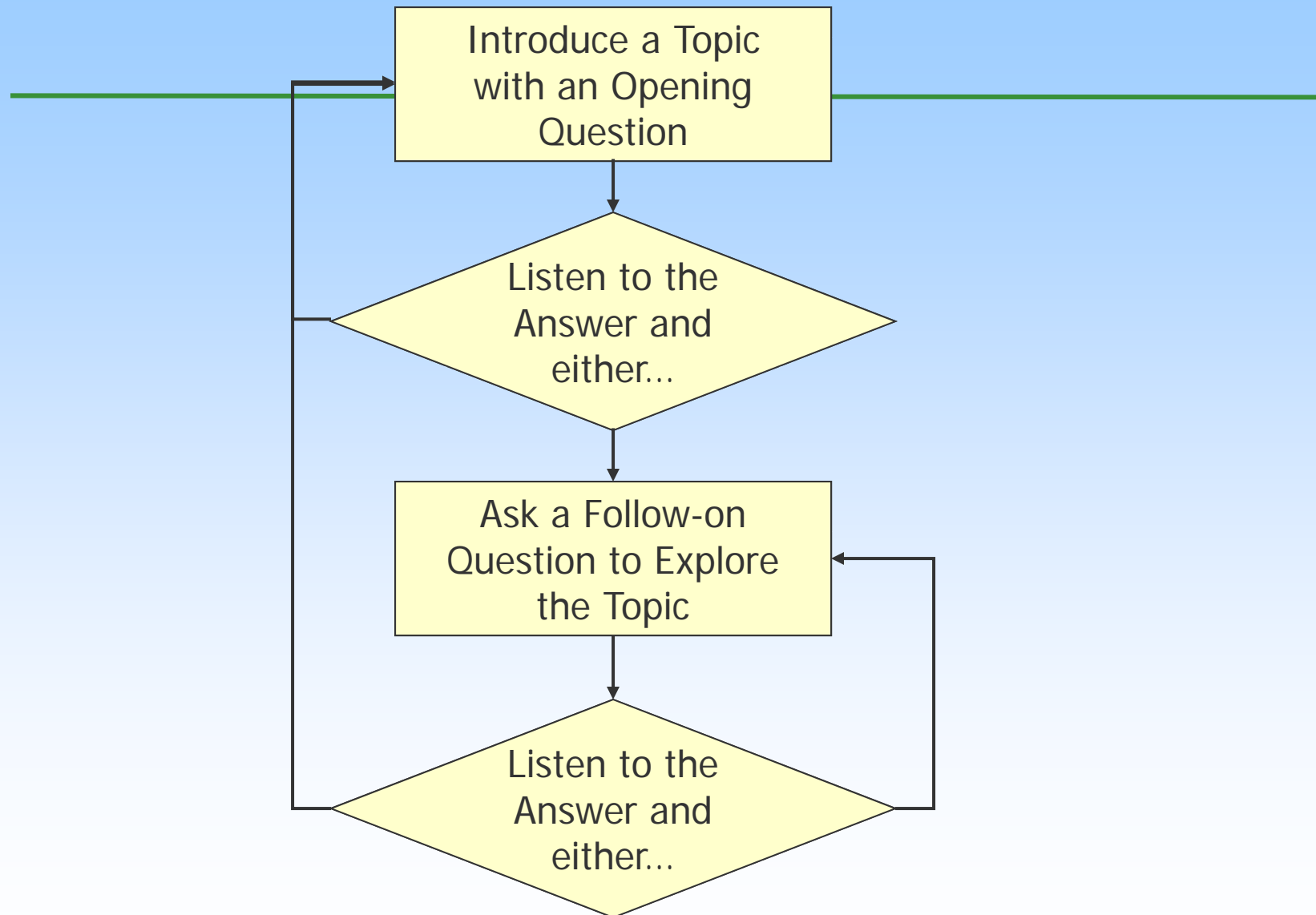
The Change Question: Example

- You could ask...
 - When you say “an upgrade” what do you mean, specifically?
 - What is it that they are they happy about?
 - In what positive ways are the changes effecting them?
 - How are your priorities similar to theirs?
 - Etc.
- We have been practicing “The Customer Conversation”

Topic... and Follow-up Questions

- ❑ Introduce a topic with a question
 - Related to Categories of Need
 - Suspected Areas of Interest for the Homeowner
 - Something that Differentiates Your Business
- ❑ Listen to the answer and, based on the answer, ask follow up questions
- ❑ The homeowner will lead you to their problems, perceptions, and priorities

The Customer Conversation



Problem – Cause – Impact

- ❑ When questions uncover Problems... your value is Solutions
- ❑ Ask the perceived Cause...
What do you believe is causing that?
 - Will tell you if you can help
 - Opportunity to provide expertise
- ❑ Ask about the Impact
How is that impacting you or your family?
 - Will tell you if it is important... and how important
- ❑ Ask about Done, Doing, Considering
What have you done, are you doing, or considering
 - Surface opportunities... and avoid negative perceptions

Strategic Questioning... Realities

- ❑ The person asking the questions is in control
- ❑ Develop your own list of Topic Questions
 - Need Categories
 - Known Opportunities
 - Differentiators
- ❑ When you hear a Problem... Ask about Cause, Impact and Done/Doing/Considering

Selecting a Resource

Philosophical Match with Your Program/POV

- ❑ Concepts, Models, and Tools
- ❑ Development and Implementation Process

Value of Understanding/Experience

- ❑ Home Performance Industry
- ❑ In-Home Selling... 2011

The Right Business Model and Investment

- ❑ Development/Tailoring of Materials
- ❑ Launch, Ramp up, Ongoing

For More Information

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<http://go.to/funpic>

Thanks for Listening

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Please join us again:

Title: **Developing Low-Interest Retrofit Loan Programs for the Multifamily Sector**

Host: Sarah Busche and Karlynn Cory, NREL

Date: March 23, 2011

Time: 3:00 - 4:15 PM EDT

Title: **Qualified Energy Conservation Bonds (QECBs): Updates From the Field**

Host: Mark Zimring, LBL

Date: March 28, 2011

Time: 2:00-3:30 PM EDT

Title: **Ask the Expert: Energy Savings Performance Contracting**

Host: Meg Giuliano, ICF; Karl Berntson and David McGeown, SRA; and Doug Dahle (NREL)

Date: March 24, 2011

Time: 1:30 - 3:00 PM EDT

Title: **Developing an Evaluation, Measurement, and Verification Plan: Residential Retrofits**

Host: Julie Michals, NEEP

Date: March 29, 2011

Time: 2:00 - 3:00 PM EDT

For the most up-to-date information and registration links, please visit the Solution Center webcast page at www.wip.energy.gov/solutioncenter/webcasts

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