

Follow through with customers

Following up on leads that result from your marketing and outreach efforts quickly and consistently will help your program convert them from interested parties to satisfied customers. Many programs found a sizable drop-off in action if they or their contractors were not able to follow up within a few days to a week. Additionally, contacting initially interested participants regularly (e.g., through a monthly email, with a phone call every few months) was also a successful strategy for turning potential customers into paying customers.

One successful approach programs used to maintain this connection was through energy advisors who followed up with homeowners after their initial interest and coached them through the home energy upgrade process.

- The [Greater Cincinnati Energy Alliance](#) [1] (GCEA) realized that many of the homeowners who signed up to learn more about the program were getting stuck between creating their online profile to initiate program participation and completing a home energy assessment, and then between the energy assessment and home energy upgrade stages. Instead of accepting these customers as losses, GCEA had its full-time energy advisor make phone calls to each of these customers to learn why they were not completing their home energy assessments or upgrades and to explain to customers how to move on to the next stage. By explaining the entire upgrade process to individuals, GCEA was able to ensure that potential customers did not drop out of the program simply because their questions were not answered, they did not understand how the program worked, or they forgot that they signed up in the first place. Of the customers the energy advisor contacted, 50% who completed assessments followed through to complete home energy upgrades.
- The [Denver Energy Challenge](#) [2] provided customers with [free energy advisors](#) [3] who recommended energy improvements and guided participants through the process. The program found that those advisors with a background in customer service had a better conversion rate than those whose expertise focused on building science. Overall, three out of every four customers who worked with an energy advisor went on to complete a home energy upgrade. Although not all participants made all of the improvements recommended at once, because Denver's energy advisors kept in touch with participants, program staff reported that many homeowners completed additional upgrades later on in the process.
- Connecticut's [Neighbor to Neighbor Energy Challenge](#) [4] used energy advisors and a customer management database to help ensure that their contractors were following up on leads and following through with customers in a timely manner. Through weekly meetings with contractors and daily monitoring of contractor activities, the program's energy advisors made sure contractors were leading potential customers through the program's next steps. The program set up its database to send automatic reminders to contractors when they needed to take a new step with the homeowner. This regular follow-up helped ensure that homeowners heard back from contractors within a certain number of days, depending on where they were in the process.
- [Michigan Saves](#) [5], formerly BetterBuildings for Michigan, saw more homeowners undertake upgrades in cities where it held a neighborhood sweep and followed the sweep with a city-wide offering a year later. While the program initially planned for a timeframe of four to six weeks for homeowners to decide whether or not to undertake a home energy upgrade, following up with customers after giving them time to better understand the program's offer helped Michigan Saves achieve success. Based on the success of the initial follow-up offers, Michigan Saves lengthened the time for each sweep to a full year. Overall, the program was able to complete nearly 8,000 home energy assessments and more than 6,300 home energy upgrades.

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Source URL: <https://rpssc.energy.gov/tips-for-success/follow-through-customers>

Links

[1] <http://greatercea.org/>

[2] <http://www.denverenergy.org/>

[3] <http://energy.gov/eere/better-buildings-neighborhood-program/downloads/focus-series-denver-energy-advisor-program>

[4] <http://energy.gov/eere/better-buildings-neighborhood-program/connecticut>

[5] <http://michigansaves.org/>