

Contractor Engagement & Workforce Development – Communicate Impacts

Description

After you [launch](#) your contractor engagement and workforce development activities, refine [your processes](#) and start to see positive results. It's time to capture these successes and share them with your partners and external stakeholders.

Sharing successes showcases the impacts of the work of your staff, contractor partners, and training partners. It can facilitate your marketing and outreach efforts by attracting new customers to upgrade their homes and recognizing the top performing contractors in your program.

Communicate impacts from contractor and workforce development activities and evaluation results from your program's [impact evaluation](#) so that program partners and stakeholders are aware of your program's successes. You should also plan to develop and share success stories and best practices that highlight the work of your contractor partners so they can use them for marketing and outreach.

You will develop your program's communication strategy at the [programmatic level](#). As part of this communication strategy, your program team will identify:

- Roles and responsibilities for program staff and partners
- External audiences for communicating program impacts
- Channels and products for communication.

This handbook provides you with steps to communicate impacts of your contractor engagement and workforce development activities as part of your program's communication strategy. They are:

- Highlight contractor and workforce development successes
- Communicate program impacts to contractors and training provider partners.

Contractor Engagement & Workforce Development

Stages:

[Overview](#)

1. [Assess the Market](#)
2. [Set Goals & Objectives](#)
3. [Identify Partners](#)
4. [Make Design Decisions](#)
5. [Develop Implementation Plans](#)
6. [Develop Evaluation Plans](#)
7. [Develop Resources](#)
8. [Deliver Program](#)
9. [Assess & Improve Processes](#)
10. **Communicate Impacts**

Find related information across other program components:

- **Market Position & Business Model – Communicate Impacts**
Publicize benefits and lessons learned resulting from your organization's success in the market.
- **Program Design & Customer Experience – Communicate Impacts**
Develop a strategy for communicating program impacts and benefits to key audiences to create and sustain support and engagement.
- **Evaluation & Data Collection – Communicate Impacts**
Communicate pertinent results of evaluations to program staff, partners, and stakeholders.
- **Marketing & Outreach – Communicate Impacts**
Communicate marketing and outreach results internally and to partners.
- **Financing – Communicate Impacts**
Communicate the results of your financing activities to internal and external partners.

Step-by-Step

As part of your **program's communication strategy**, you will want to identify contractor and workforce development successes to share with customers and external stakeholders, as well as overall program results to share with contractors and training provider partners.

Highlight contractor and workforce development successes

Success Stories, Case Studies, and Lessons Learned

As you **deliver your program** and maintain communication with contractors, homeowners, and training provider partners, identify success stories for your program's contractor engagement and workforce development activities. Success stories, or case studies, are important for marketing and outreach, as they provide real-world examples of how the program works. They can also help customers understand the benefits of the program in tangible ways.

Audiences for these stories include:

- Homeowners, to help market energy upgrades
- Potential contractor partners, to show contractors the value of working with your program
- Other partners and stakeholders (e.g., local officials and nonprofit board members interested in how your program is creating jobs and training technicians to succeed in them).

Success stories can be oriented to address different marketing and outreach needs. Contractor-oriented success stories will be the most helpful for individual contractors because these stories can help them market themselves, and they can emulate the successes of others. They can be combined with other types of stories, as follows.

- **Program-oriented success stories**, focusing on the overall benefits and impacts of the program, possibly with stories from customers and contractors. For example, technicians who found new work through training and employment assistance provided by your program and its training and workforce development partners.
- **Contractor-oriented success stories**, highlighting the services and results of particular contractors and their participation in your program. For example, contractors who were able to expand their business and hire new technicians because they participated in your program. See additional examples in the box below.
- **Customer-oriented success stories**, describing how the program and perhaps a specific contractor helped a particular type of customer (e.g., middle-income family or an apartment building property owner). For example, homeowners who saved money and improved the comfort and energy efficiency of their homes through home energy upgrades provided by your contractor partners.

- **Solution-oriented success stories**, featuring particular types of energy upgrade solutions or other parts of your program, such as energy assessments, financing, or incentives, which worked for the homeowner. For example, homeowners who discovered new ways to save energy through energy assessments delivered by your program.

All case studies and success stories should have a narrative—with a protagonist (typically the homeowner), a problem, a solution found by your contractors and other partners, and results that will resonate with your audience, as described further in [Program Design – Communicate Impacts](#).

Case studies can also highlight lessons and best practices you and your partners have learned through implementation. If your program has had negative customer feedback and learned from it, case studies can help potential customers and stakeholders see how you've been responsive to that feedback and are now seeing greater success.

[Surveys of homeowners and contractors](#) and periodic [meetings with your contractor partners](#) are effective ways to collect ideas for success stories. You should also encourage open, informal, and ongoing input from your contractor and workforce development.

Capture lessons learned to help other programs benefit from the approaches that have worked well for your program, as well as those approaches that have not worked well. Be sure to record insights that you have about your contractor engagement and workforce development efforts that might benefit someone who is attempting to use the same approach in the future.

All case studies, stories, and lessons learned should be passed on to your program's communication team, to better promote your successes.

Contractor Success Stories

Success stories that feature individual contractors are helpful for highlighting both the work of your contractor partners and the energy savings and benefits they provided to homeowners. This helps contractors market themselves and helps your program bring in more business. You can use success stories as one way to help contractors by bringing them positive publicity. Examples of contractor-focused success stories include:

- [Los Angeles County Participating Contractor Case Studies](#) highlight contractors that have either adapted or built their business models around the Energy Upgrade California program and have found success in the industry. These case studies illustrate successful marketing strategies and business models that have resulted in numerous whole house upgrades, significant energy savings, and job creation.
- The New York State Energy Research and Development Authority's [Contractor and Residential Project Case Studies](#) showcase successes from the Home Performance with ENERGY STAR program. Some case studies focus on particular participating contractors, while others feature families and individuals who benefited from energy upgrades.
- [Home Energy Magazine](#) features question-and-answer-style success story blog posts by [Home Performance with ENERGY STAR Century Club Award winners](#). For example, in 2012, *Home Energy Magazine* profiled one Century Club Award winner that completed more than 850 home upgrade projects the previous year in Arizona and California, working with Energize Phoenix and Energy Upgrade California.
- [Home Performance with ENERGY STAR Contractor Success Stories](#) highlight examples of participating contractors that use the Home Performance with ENERGY STAR approach to help homeowners improve the energy efficiency, comfort, and durability of their homes, while lowering utility bills. These stories feature winners of U.S. Department of Energy's 2013 [Housing Innovation Awards](#).

Data Trends

Use positive trends in your program's contractor and workforce development metrics—tracked through your continuous improvement efforts and implementation of your [contractor and workforce evaluation plan](#) and your [overall program evaluation](#)—to identify and highlight contractor and workforce development successes to customers and stakeholders. You should also monitor areas for improvement that are highlighted by your contractor and workforce development metrics, and engage partners to address those issues.

Data trends that can quantify the success of your contractor engagement and workforce development activities include:

- Increases in energy assessments completed
- Increases in home energy upgrades installed
- Increases in the percentage of customers that install upgrade measures
- Percentage of upgrades meeting quality standards on first inspection
- Percentages of customers reporting "satisfied" or "very satisfied" in surveys

- Increases in the number of contractors enrolled in the program, meeting all eligibility requirements, and ready to work
- Increases in the number of technicians certified
- Increases in the number of new jobs created.

Work with your contractor and workforce development partners and evaluation team to collect these positive data trends, and pass them on to your program's communication strategy lead to incorporate into outreach materials.

Communicate program impacts to contractors and training provider partners

During your interactions with contractors and training provider partners, share positive data trends, program impacts, and contractor and homeowner success stories. These [ongoing interactions](#) include one-on-one conversations between your account manager and contractors, as well as regular contractor forums for communicating updates, discussing potential program changes, and hearing contractor feedback.

Communicating your program's successes will help demonstrate its positive impact in your community and the role of participating contractors and workforce development partners in contributing to that success.

Program-wide impacts to consider communicating to your contractor and workforce development partners include:

- Total assessments and upgrades completed
- Number of participating contractors, number of jobs created, and contractor work hours
- Energy saved per upgrade and total energy saved
- Energy cost savings per homeowner and total cost savings
- Conversion rates between home energy assessments and upgrades completed
- Types of upgrades homeowners are completing through your program
- Customer satisfaction with your program's offerings and their experience working with your program
- Successful marketing and outreach initiatives undertaken by your program Types of financing that homeowners are using to complete energy upgrades, the average loan amount, and the loan default rate
- Market transformation effects on the home performance industry in your community. For example:
 - Greater awareness of opportunities and benefits of home energy upgrades among homeowners, contractors, lenders, and other market actors
 - Larger, more comprehensive upgrade projects being undertaken
 - Greater quantity and quality of upgrade projects completed

Contractor Awards and Recognition

Along with case studies highlighting individual contractors' successes, awards and recognition are a useful way to motivate contractor partners to improve their performance and reward top performers. Awards and other performance-based incentives can be part of the overall package of [contractor-focused incentives](#) in your program. Combine the awards with publicity for biggest effect, such as by organizing awards ceremonies and producing press releases and success stories associated with the awards.

Motivating Superior Performance with Awards and Recognition

Sometimes a morale boost is all it takes to motivate a workforce to go from good to great. Some programs use awards and recognition to motivate contractors and other program staff who are putting in the extra effort to achieve deep energy-efficiency upgrades. Programs can evaluate top performers based on field inspection scores, customer feedback, and other performance metrics, including energy savings and assessment-to-upgrade conversion rates.

- [Enhabit](#), formerly Clean Energy Works Oregon, singled out its contractors quarterly with honors such as the "James Brown Award" for the contractor with the most completed upgrades, the "Megaphone Award" for success in promoting upgrades, and the "Promoter Award" for the greatest increase in completed upgrades.
- In Charlottesville, Virginia, the [Local Energy Alliance Program](#) (LEAP) presented a "Blower Door Boss" award to the contractor performing the best energy assessments, while the "Thermal Rock Star" title was bestowed upon the best insulation company serving homeowners in Central Virginia. Other awards included "Ruler of the Retrofits" for the home performance contractor with the most positive customer feedback and quality assurance reviews and "Rising Star" for the most successful new home performance contractor.

- [Efficiency Maine](#) commends commitment and extends gratitude to its best contractor, supplier, energy advisor, customer, and retailer during its annual dinner and awards ceremony. They also highlight the largest lighting and mechanical upgrade project. The program provides plaques and media attention.
- The [Greater Cincinnati Energy Alliance](#) hands out awards and recognition to its contractors at an annual contractor forum, as well as maintaining regular communications with contractors throughout the year.
- New Jersey's Clean Energy Program uses [customer testimonials and awards ceremonies](#) to recognize participating contractors for the amount and quality of their home performance work.

DOE Housing Innovation and Home Performance Awards

The U.S. Department of Energy (DOE) provides [Housing Innovation Awards](#) that recognize the very best in innovation on the path to zero net-energy ready homes. These awards include:

- Home Performance with ENERGY STAR participating contractor awards, for contractors that have demonstrated innovative business practices that mark them as leaders among peers
- Challenge Home Builder Awards, for home builders who are leading a major housing industry transformation to zero -energy-ready homes
- Excellence in Building Science Education Award, which is awarded to individuals who advance the state of building science curricula in the United States and Canada
- Building America Top Innovations, which include recognition for advanced technologies and practices, business case for house-as-a-system improvements, guidance and tools, and infrastructure development.

In addition, DOE and the U.S. Environmental Protection Agency provide [Home Performance with ENERGY STAR Century Club Awards](#) to contractors that completed 100 or more projects in a calendar year and are in good standing with their local sponsor programs.

Tips for Success

In recent years, hundreds of communities have been working to promote home energy upgrades through programs such as the Better Buildings Neighborhood Program, Home Performance with ENERGY STAR, utility-sponsored programs, and others. The following tips present the top lessons these programs want to share related to this handbook. This list is not exhaustive.

Establish a clear system and process for ensuring quality work

A residential energy efficiency program's success is dependent on the quality of work that contractors conduct in customers' homes. Indeed, an in-depth [examination](#) of selected program strategies found that effective quality assurance and quality control programs provided a foundation for quality upgrades and were achieved through numerous program design and implementation decisions and follow-through. Many Better Buildings Neighborhood Program partners and Home Performance with ENERGY STAR Sponsors found that tiered and onsite quality assurance strategies, in addition to file reviews of upgrades reported to the program, worked well. Most programs use a tiered approach, in which a program inspects the first several upgrades completed by a new contractor and then inspects a specified percentage of subsequent projects. Onsite quality assurance is a useful strategy, both as a way of gathering feedback and as a training opportunity.

Programs conduct a broad range of verifications, including checking contractors' certifications regularly, implementing a mechanism to re-check certifications, and verifying home performance professional safety skills (e.g., combustion training). In addition to inspections and feedback, some program also identified standards for ensuring quality work, including standards for technical work, for diagnostic tools and installed equipment, and for professionalism and customer service. Setting those expectations helped allow contractors to understand what was expected of them and better enabled them to help programs be successful from the beginning.

- In New York, [NYSERDA](#) uses a tiered approach for quality assurance. Inspection rates vary based on the contractor's status in the program (see [NYSERDA's QA Procedures](#)). The program inspects the first three projects that all contractors complete. After these initial projects, the program inspects 15% of a contractor's completed projects, and at least one project annually. Customers may also request that field inspections be conducted within one year of the contractor's work. If contractors have repeated QA/QC issues, NYSERDA increases the field inspection sampling rate, generally to 50% or more. If problems persist and are not resolved, NYSERDA sometimes suspends contractors from the program according to its QA procedures.
- The [RePower program](#) on Bainbridge Island, Washington, created a standardized process for quality control inspections. Energy upgrades completed under the RePower program could be randomly selected for quality control inspections, and were rated "Pass," "Needs Minor Corrective Action," or "Needs Major Corrective Action" based on the current [RePower Weatherization Specifications Manual](#). If problems were found to require corrective action, contractors were required to perform the corrective actions at no additional cost to the customer. Repeated occurrences of an individual problem or serious problems resulted in a performance improvement plan or suspension from the RePower program. The program randomly selected 10% of their rebate applications for quality control inspection, and RePower staff worked to schedule an appointment with the homeowner within one week of selection.
- The [NeighborWorks of Western Vermont program](#) in Rutland County, Vermont, designed a quality assurance approach as a means to gather feedback and incentivize improvement. The program produced monthly contractor performance reports that compared contractor conversion rates, and then provided incentives to top performers. This approach was a productivity driver that encouraged contractors to make improvements to their business practices. During monthly one-on-one meetings, the program checked on each contractor's client status list, made sure that no customers fell through the cracks, and gathered contractor feedback during the conversation. The program also set a timeline by which contractors must submit assessment reports to homeowners, with penalties in place for late reports. Using this approach, wait times dropped from four months to three weeks. See the [Concierge Programs for Contractors webinar](#) for more information. This approach has given contractors and the program the opportunity to improve over time.
- The [Town of University Park, Maryland's STEP-UP program](#) worked to address variability in the quality of work that its contractors provided. The program approached this problem in two ways. First, STEP-UP issued a request for proposals for contractors that met specific performance benchmarks. From those proposals, the program then selected contractors with whom they had worked well in the past and began listing them as "preferred" contractors on their website. Ninety-nine percent of customers began selecting contractors from this list. Second, the program employed an energy coach for participating homeowners, to provide regular quality assurance of contractors' work. The coach provided intermittent inspections at customers' request, when they had concerns or when they chose to assist the program by allowing them to check on the contractors' performance. The energy coach reviewed work proposals for scope and price; as a result, customers were reassured that they were getting the work they needed at a reasonable market price and therefore were getting fair value. By playing these roles, the coach gave customers assurance that they were receiving high value work from contractors and incentivized contractors to do quality work.

Recognize and reward good contractor performance

Many programs used the information they gathered through their quality assurance efforts to recognize contractors that deliver consistent, high-quality work. Rewarding good contractor performance can help you build trust, strengthen partnerships, and boost workforce morale. You can incentivize contractors to work for these awards by posting them on your website, announcing them at awards ceremonies or other events, recognizing them in newsletters, and encouraging contractors to post the awards on their websites.

- [Enhabit](#), formerly Clean Energy Works Oregon, singled out its contractors quarterly with honors such as the “James Brown Award” for the contractor with the most completed upgrades and the “Promoter Award” for showing the greatest job growth from one quarter to the next.
- The annual Charlottesville, Virginia, [Local Energy Alliance Program](#) (LEAP) “Blower Door Boss” award went to the contractor performing the most energy assessments while scoring the highest on customer surveys. The “Ruler of the Retrofits” title was bestowed on the company that scored the highest on customer feedback surveys and quality assurance reviews on home performance upgrades in Central Virginia.
- [Maryland’s Be SMART program](#) used awards and public recognition of accomplishments to help motivate home performance contractors that worked hard to realize significant energy savings. Be SMART gave awards to top performers that completed the most upgrades. The program presented awards for the greatest number of HVAC and home performance upgrades, the highest assessment-to-upgrade conversion rate, and the “Accuracy Award” for best rebate paperwork submission.

Provide information to help customers pick the right contractor

Early on, many Better Buildings Neighborhood Program partners focused on providing customers with a range of contractors to choose from, while providing contractors with access to customers. Customer feedback received by some programs, however, indicated that customers were confused or overwhelmed by the choices. A comprehensive [evaluation](#) of selected program strategies implemented by Better Buildings Neighborhood Program partners found that programs were more successful when they provided customers with lists of pre-approved contractors; however, offering long lists of contractors without differentiating their products and services often led to inaction. To help customers distinguish between contractors and choose a qualified one, many programs provide customers with information about contractor skills, quality of past performance, proximity, and other factors. Some programs matched individual contractors directly with individual customers.

Customers can provide valuable information about the quality of contractors’ performance, and this feedback can supplement other information, such as field inspections, used to differentiate contractors based on their performance. Many Better Buildings Neighborhood Program partners incorporated customer ratings into the order in which they list contractors online, to help future customers select a contractor. Some programs also used rankings to evaluate contractors, support disciplinary actions, allocate benefits, and identify retraining needs. Through this approach, contractors had the opportunity to improve their standing and reap the rewards when customers saw that they could be relied on to do high-quality work.

- On [Maryland’s Home Performance with ENERGY STAR website](#), homeowners can rate and review their contractors. Some contractors choose to reach out to their customers to encourage them to provide reviews. These customer reviews, along with contractors’ accreditations and services, are published on the website as part of each contractor’s information page. Users of the website can search for contractors and sort the results based on homeowner ratings and by geographical location. Users can also narrow their results according to which contractors participate in the customer’s local utility rebate program.
- [Efficiency Maine](#) provided customers with a “[Find a Residential Registered Vendor](#)” locator on its website. This locator listed the services each contractor offered, sorted the list by distance from the homeowner, and differentiated contractors based on number of projects completed and customer satisfaction. All contractors were added to the list when they met the program’s requirements. The list was sorted by location closest to the customer and number of completed projects, and also noted what services the contractor provides. The website also listed [questions](#) a homeowner could use to interview and evaluate contractors, such as “How soon can you begin?” and “How quickly will my work be completed?”
- The Town of Bedford’s [Energize New York program](#) learned that selecting a contractor was the primary barrier for homeowners interested in home performance upgrades. The program addressed this challenge by developing a rating system to differentiate high- and low-performing contractors. Contractors’ ratings were calculated using a combination of customer survey results, the number of BPI certifications held by their technicians, and their number of completed upgrade projects. Some contractors were dissatisfied when they received low ratings, and in follow-up discussions, program staff reminded contractors that they would have an opportunity for their score to be updated quarterly and reviewed the scoring criteria. As a result, many of those contractors decided to improve their overall score. The program also set a minimum standard of completed projects (i.e., six completed projects over the last four quarters) for contractors to be included in the program. This narrowing of available contractors made it much easier for customers to select one without being overwhelmed.

- Seattle's [Community Power Works](#) began matching homeowners one-on-one with certified contractors to create the best fit based on homeowner needs, contractor skills, and contractor availability. The program found that its past approach of suggesting two or three contractors led to indecision and that the potential price advantage of competition among these contractors was not an important factor in homeowner satisfaction.
 - Programs should be transparent about the process of matching individual contractors to customers and ensure that all qualified contractors have the chance to participate in the program by competing for upgrade projects.
 - While Community Power Works did not encounter any issues, programs should recognize that this approach can limit competition among contractors and discourage the growth of new contractors in the market. Most programs, including [Enhabit](#), [Austin Energy](#), [Energy Impact Illinois](#), and many others, mitigate this by allowing contractors who bring their own customers to the program to keep them, providing an incentive for the contractor to market themselves instead of relying on the program to generate demand.

Have clear rules and systems for identifying and remedying contractor problems

Even with the best contractor partners, a program may sometimes encounter difficulties that require remediation. Consistent with Home Performance with ENERGY STAR program principles, many Better Buildings Neighborhood Program partners discovered that they could address these difficulties by establishing contractor requirements to set standards for quality work, a transparent remediation process, and measures for dismissing underperforming contractors. They found that the key is to make contractor requirements clear from the beginning of your program. Contractor participation agreements and codes of conduct for interactions with customers can help ensure understanding of standards and provide a rule of thumb for when issues needed to be addressed. Not all contractors are equally skilled or customer-service oriented. These programs learned that, in order to preserve their reputation, they needed to be able to confidently recommend any contractor on their list. It is important to apply corrective actions as needed in response to problems and deficiencies, as well as a procedure to respond to serious or recurring problems such as probation or dismissal from the program. By setting the bar high and dismissing contractors that failed to meet program requirements, these programs helped ensure consistent, quality customer service.

- [Efficiency Maine](#) developed a [Contractor Code of Conduct](#) that contractors sign, stating that they will respect the homeowner's property, minimize disruption to the homeowner, and leave the home in as good or better condition as it was found. It lists 15 things that contractors will and will not do relating to communications, onsite behavior, and work practices. To assure quality in the program, a minimum of 15% of upgrade projects are subject to random and/or targeted onsite inspections, covering the pre-installation, installation, and post-installation phases. [Efficiency Maine's Program Manual](#) outlines clear procedures that program staff will follow in the event that the inspections reveal errors, omissions, or inconsistencies. The manual also outlines procedures for removing a contractor from the program's registered vendor list for repeated failure to correct deficiencies.
- [Omaha and Lincoln, Nebraska's reEnergize Program](#) furnished its contractors with an Energy Upgrade Contractor Protocol and General Scope of Work, which governs contractor work processes and customer interactions. This protocol was intended to serve as a supplement to contractors' technical training. It provided rules that contractors were required to follow to achieve customer satisfaction throughout the upgrade process and also outlined basic safety requirements. Topics covered everything from how to greet the customer to cleanup steps once the upgrade was completed. The protocol was an important tool for ensuring that all homeowners had a pleasant experience with the program through their interactions with contractors. It helped the program achieve over 1,300 residential energy upgrades over a 3 year period that included program launch.
- The [Southeast Energy Efficiency Alliance](#) Better Buildings Chapel Hill WISE program in North Carolina discovered that even though contractors might have met the required program criteria and had qualifying credentials, the quality of their work and their understanding of building science varied substantially. To address these issues, Chapel Hill engaged an external training partner that worked with contractors on the quality of their work and the implementation of quality control mechanisms to improve future work. The program developed and implemented a contractor probationary and debarment policy and corrective action plan. Under that plan, contractors were subject to a [corrective process](#) that included a preliminary review of concerns, probation, specific requirements to return to the pre-qualified list after probation, and dismissal from the program. This policy helped the program systematically approach the issue of alerting contractors whose work fell short of the program's quality standards, and to dismiss contractors who were unable to improve the quality and consistency of their work.

Contractors are your sales team – educate and empower them with the skills to sell home energy upgrades

Many home performance programs have confronted the challenge of how to reach out to more customers and to improve conversion rates of customer interest into completed upgrades. Realizing that the contractor is a primary face-to-face link between customers and the program, some Better Buildings Neighborhood Program partners took steps to empower contractors to market program services through co-marketing and sales training. A comprehensive [evaluation](#) of over 140 programs across the United States found that successful programs have contractors who are skilled at helping customers understand the benefits of home energy improvements. Because contractors are often the main point of contact with participants, contractors must be trained to persuade homeowners to move forward with potentially costly projects.

Some programs were able to empower contractors by co-marketing and co-branding with them to reach new homeowners. Co-marketing can help both contractors and programs; a cooperative advertising model allows programs to share the costs to develop and distribute marketing materials. Co-marketing helps programs leverage contractor resources to increase their market presence, and extends contractors' ability to market themselves even if they have limited resources.

In Their Own Words: Empower Contractors by Building Sales and Business Skills



Source: [In Their Own Words: Empower Contractors by Building Sales and Business Skills](#), U.S. Department of Energy, 2012.

Programs have found that offering sales training to home performance professionals can significantly boost sales and improve customer experience and conversion rates. During sales training, technicians can learn about the program's upgrade process, how to sell it using non-technical communications with customers, and other techniques for transforming assessments into upgrades. Programs saw benefits from offering free or reduced-cost sales training as a partnership benefit for contractors. Taking the resources to offer this training to contractor staff helped programs ensure that technicians understood and could promote program benefits, rebates, and other incentives available to customers. For many programs, contractor sales training resulted in more effective sales approaches, increased rates of conversion from assessment to upgrade, and increased revenues for contractor businesses.

- [Efficiency Maine](#) boosted conversion rates with [sales training](#), which helped contractors communicate with customers more effectively. Through monthly webinars and professional development courses, the program has helped contractors improve their skills in targeted communication and selling program options, thereby increasing home energy upgrade conversions. After conducting a two-day sales training course for contractors, coinciding with additional homeowner incentives and a filing deadline, Efficiency Maine's average monthly rate of energy upgrade conversions increased from 10% before the training to 60% a few months afterward.
- [Energy Upgrade California in Los Angeles County](#) provided marketing materials and sales training to contractors. Having learned that contractors often do not have the time or experience to create marketing tools, the program developed an online resource center with customizable marketing kits for contractors. Frequent networking events for contractors also provided training on specific aspects of marketing. Because contractors had limited budgets, Energy Upgrade California established an online, on-demand print center that contractors can use to print and deliver program marketing materials. The marketing materials raised the visibility of home performance professionals, helped homeowners find qualified contractors, and ensured a consistent message about the program.

- Connecticut's [Neighbor to Neighbor Energy Challenge](#) found that contractors frequently have limited marketing capabilities to sell upgrades. The program hired energy advisers to help contractors move customers through the process from assessment to upgrade. Analysis showed that contractors valued the energy advisers and other program staff who provided small business support and development assistance. This support and assistance included sales training, sales process development, data management, and data analyses. These analyses included a scorecard and online dashboard showing how leads had progressed through the pipeline, contractors' rates for assessment completion and their upgrade rate, and contractors' marketing activity. Contractors benefited from the marketing tools to support home energy upgrades. The program also found value in requiring participating contractors to agree to a whole home performance orientation and well-defined sales process, as conditions to their participation in the program. The Neighbor to Neighbor Energy Challenge found that their upgrade rates improved after implementing these tools and tactics.

Establish collaborative partnerships with contractors and communicate with them early and often

Contractors are more likely to serve as program champions when the program engages with them throughout program design, delivery, and improvement. Your contractors are the primary contact points with your customers, and the quality of their interactions and services strongly influences how customers view your program. Many Better Buildings Neighborhood Program partners found that gathering contractor input during the program's planning phase helped ensure that the program would create value for contractors as well as for customers. The programs built personal relationships with contractors by demonstrating interest in their business concerns and needs. Indeed, an [evaluation](#) of over 140 programs across the United States found that programs were more successful when they fostered relationships with their contractors and communicated frequently with them.

In Their Own Words: Engage with Contractors From Day One



Source: [In Their Own Words: Engage with Contractors From Day One](#), U.S. Department of Energy, 2012.

By communicating regularly (e.g., via a monthly breakfast meeting, other outreach events) with a core group of contractors, programs were able to better monitor program implementation and receive suggestions for improvement. These programs elicited feedback from contractors about how customers perceived program offerings, as well as input about what was working and what was not for both contractors and customers. Some programs surveyed contractors to collect a regular stream of information about how program implementation was going and to get feedback before rolling out new offers or program design changes.

- [NeighborWorks of Western Vermont](#) maintained steady lines of communication with its network of contractors to help ensure that barriers to getting work done in a timely manner were identified early and that solutions were collaborative. The program held monthly one-on-one meetings with each contractor to review client status and progress and to identify any problems and potential training opportunities. The program also organized bimonthly group contractors meetings focused specifically on sharing new techniques or products. NeighborWorks used regular contractor communications, performance feedback, and contractor incentives and competitions to help contractors improve their assessment-to-upgrade conversion rates. By engaging contractors and including them from the start on any proposed program revisions or promotions, NeighborWorks was able to improve program delivery.

- [Enhabit](#), formerly Clean Energy Works Oregon, program is charged with saving energy and supporting clean economic growth. Much of its success has come from engaging contractors in a continual learning and improvement process. Enhabit solicits feedback from contractors at meetings every two weeks and uses this feedback to guide improvements. With support from the Energy Trust of Oregon, a few contractors collaborated to create the [Home Performance Contractors Guild of Oregon](#), which enables contractors to organize their opinions into a unified voice and have a more formal role in program and regional policy discussions. When Enhabit engaged a new financing partner, the program asked the Guild to examine the loan product and approval process. Input from the Guild helped ensure that the product was something that contractors would be able to explain and promote to customers.
- In Washington State, the [Repower Kitsap](#) program started in a region where the home improvement market was fragmented and under-developed. Contractors were initially wary of one another, tended to work only in their specialty, and often did not have working relationships with one another. The program established monthly brown bag meetings to discuss program goals and requirements and to gather contractor input on the program. The monthly meetings helped contractors get to know and trust one another and develop productive working relationships. Many contractors even shared leads with other contractors who specialized in the types of projects they could not or did not want to handle.
- The [Long Island Green Homes](#) program began consulting with contractors during program design and continued to do so as the program launched and began full service operations. The program established contact with a core group of contractors it trusted, meeting with them regularly to review program status and direction. In particular, the program made it a priority to engage with contractors when rolling out program changes, asking them about their needs, concerns, and current state of business. In this way, the program ensured that program offerings were adding value for the home performance industry and that program requirements were manageable for contractors. For more information on the Long Island Green Homes' launch and other pilot programs, visit the [October 2011 Better Buildings Residential Network Peer Exchange Call Summary](#).

Examples

The following resources are examples from individual residential energy efficiency programs, which include case studies, program presentations and reports, and program materials. The U.S. Department of Energy does not endorse these materials.

Case Studies

[A Business Case for Home Performance Contracting \(9 MB\)](#)

Author: Pacific Northwest National Laboratory

Publication Date: 2012

This report contains information on the market for home performance upgrades and the opportunities that exist for new home performance contractors; start-up needs and costs for firms entering the home performance contracting industry; home performance business approaches; and how established home performance contractors attract customers. It also contains detailed profiles of eight successful home performance firms across the United States.

[Home Performance with ENERGY STAR Contractor Stories](#)

Author: U.S. Department of Energy

These case studies highlight examples of participating contractors who have employed Home Performance with ENERGY STAR to help homeowners improve their home's comfort and lower their utility bills.

[Home Performance: Growing Exponentially in Uncertain Times](#)

Author: Chad Ruhoff, Neil Kelly Company

Publication Date: 2012

This article, part of a series sponsored by Home Performance with ENERGY STAR, details the successes and lessons learned of the Neil Kelly Company. Over the past 63 years, the Neil Kelly Company has successfully navigated several economic downturns and has revamped its home performance division to emerge as a leader of sustainable building practices.

[LaborWorks@NeighborWorks of Western Vermont Focus Series \(385 KB\)](#)

Author: U.S. Department of Energy

Publication Date: 2012

LaborWorks@NeighborWorks is a nonprofit temporary labor pool developed by NeighborWorks of Western Vermont (NWWVT) to assist professional contractors involved with the NeighborWorks Home Energy Assistance Team (HEAT). In the first of this Focus Series, DOE interviews Melanie Paskevich, HEAT Squad coordinator, to get details on why NeighborWorks set up the temporary labor pool, how workers are recruited, and lessons learned for other programs to consider.

[NYSERDA Home Performance Case Studies](#)

Author: New York State Energy Research and Development Authority

Publication Date: 2013

Links to case studies of residential projects and contractors under the New York State Energy Research and Development Authority (NYSERDA)'s Home Performance with ENERGY STAR program.

[Spotlight on Austin, Texas: Best Offer Ever Produces Upgrades in Record Time \(555 KB\)](#)

Author: U.S. Department of Energy

Publication Date: 2011

With its Best Offer Ever promotion, Austin Energy completed comprehensive energy upgrades in a record 564 homes in only six months--more than 10 times the utility's typical participation rate. To quickly develop momentum for BetterBuildings-Austin Energy's Clean Energy Accelerator program with homeowners, Austin Energy leveraged its existing Home Performance with ENERGY STAR infrastructure, experience, and contractor base but added a comprehensive rebate/financing offer for a finite launch period. Demand soared, and due to thoughtful planning, Austin Energy and its contractors were able to keep up with requests for energy assessments, inspections, improvements, and loan origination, while learning valuable lessons along the way.

[Spotlight on Austin, Texas: Let Your Contractor Be Your Guide for Big Rewards \(445 KB\)](#)

Author: U.S. Department of Energy

Publication Date: 2011

This case study discusses strategies that Austin Energy, a municipally owned utility, used to collaborate closely with building contractors to launch a new Best Offer Ever promotion quickly and effectively.

[**Spotlight on Fayette County, Pennsylvania: Developing the Skills and Tools for Workforce Success**](#) (412 KB)

Author: U.S. Department of Energy

Publication Date: 2012

This case study discusses strategies that Fayette County, Pennsylvania used to provide Building Performance Institute (BPI) certification and business skills training to aspiring energy efficiency contractors.

[**Spotlight on Maine: Contractor Sales Training Boosts Energy Upgrade Conversions**](#) (411 KB)

Author: U.S. Department of Energy

Publication Date: 2012

This case study explains how Maine provided contractor sales training to boost upgrade conversions.

[**Spotlight on Portland, Oregon: Making the Program Work for Contractors**](#) (536 KB)

Author: U.S. Department of Energy

Publication Date: 2011

As a program charged with saving energy and supporting economic growth, Clean Energy Works Oregon (now Enhabit) balances contractors' work priorities with the program's need to enforce quality standards, track results, and ensure good customer service. This case study discusses Clean Energy Works Oregon's (now Enhabit's) strategies for actively engaging contractors to make the program successful.

[**Spotlight on Seattle, Washington: Community Partnerships Work to Extend Program Reach**](#) (5 MB)

Author: U.S. Department of Energy

Publication Date: 2011

This case study shares how Seattle's Community Power Works engaged a vast network of partners to build on existing capacity and knowledge, extending the reach of its program in a short period of time.

Program Presentations & Reports

[**Austin Energy Workforce Development and the Contractor**](#)

Author: Jill Maness, Austin Energy

Publication Date: 2011

An introduction to Austin Energy's workforce development program, which helps engage contractors in efforts to make homes more energy efficient.

[**Contractors as Clients: Data Collection Made "Easy"**](#)

Author: Cynthia Adams, Local Energy Alliance Program

Publication Date: 2011

This presentation provides an overview of the process and tools the Local Energy Alliance Program (LEAP) of Charlottesville, Virginia uses to collect and report customer and contractor data on projects.

[**Energy Efficiency Workforce Development in Maryland**](#) (447 KB)

Author: Lauren Swiston, Maryland Energy Administration

Publication Date: 2010

This presentation discusses workforce development experiences with residential energy efficiency programs in Maryland, including early successes, work with moderate-income populations, partnerships with utilities and colleges, challenges, and lessons learned.

[**Going Deep Green: A Whole House Approach: Lessons Learned**](#)

Author: Kellie Stickney, SustainableWorks

Publication Date: 2012

Presentation on the SustainableWorks non-profit general contractor model for supporting energy upgrades in Washington state and lessons learned for implementing a whole house approach.

[**High Road Outcomes in Portland's Energy Efficiency Upgrade Pilot**](#)

Author: Stacy Ho and Jeremy Hays, Green For All

Publication Date: 2011

This report highlights the impact of investment for Portland, Oregon in terms of high-quality job creation, equitable hiring, inclusive business opportunities, standardized training, and energy conservation.

Market Transformation in Connecticut: Integrating Home Performance into Existing Trades

Author: Jane Bugbee, The United Illuminating Company

Publication Date: 2012

This presentation highlights the Connecticut Energy Efficiency Fund's efforts to integrate HVAC contractors, builders, and remodelers into its home performance program, which expanded its customer base and significantly scaled up the program. It includes lessons on outreach strategies for integrating these types of contractors into the program.

Program Materials

None available at this time.

Toolbox

The following resources are available to help design, implement, and evaluate possible activities related to this handbook. These resources include templates and forms, as well as tools and calculators. The U.S. Department of Energy does not endorse these materials.

Templates & Forms

None available at this time.

Tools & Calculators

None available at this time.

Topical Resources

The following resources provide additional topical information related to this handbook, which include presentations, publications, and webcasts. Visit [Examples](#) for materials from and about individual programs.

Topical Presentations

[Contractor Outreach: Design & Implementation for Residential Retrofit Programs](#)

Author: Jared Asch, Efficiency First

Publication Date: 2011

This presentation describes strategies for outreach to energy contractors and auditors, including contractor incentives.

[The Contractor-Participation-Inducing Home Performance Program Design Recipe Part 1](#)

Author: Mike Rogers, OmStout Consulting, LLC

Publication Date: 2012

Presentation summarizing the important elements needed to induce and sustain contractor participation in home performance programs.

[Five Steps to a Profitable Contractor Base](#)

Author: Courtney Moriarta, SRA International, Inc.; Emily Levin, Vermont Energy Investment Corporation; Tiger Adolf, Building Performance Institute; Brad Geyer, Fayette County Better Buildings Initiative; Sammy Chu, Suffolk County Department of Labor; Sam Flanery, Building Science Academy

Publication Date: 2012

Presentation on five steps to building a profitable contractor base. The steps include sensible program design and administration, certification and credentialing, communicating with contractors, contractor requirements (business vs. trade), and training and sales support.

[High Road Agreements: A Best Practice Brief by Green For All](#)

Author: Green For All

Publication Date: 2012

This report covers how to create high road standards and use the momentum of energy sector projects to create safe, well-paying, long-term careers for a diverse group of people. It includes case studies on Community Power Works in Seattle, Washington, and Clean Energy Works Oregon's (now Enhabit's) efforts to use community high road agreements.

Publications

[Energy Efficiency Job Creation: Real World Experiences](#)

Author: American Council for an Energy-Efficient Economy

Publication Date: 2012

This report illustrates concrete ways in which energy efficiency has, in recent years, stimulated the creation of direct, indirect, and induced jobs. This report provides examples of job creation that have resulted from energy efficiency by profiling programs, policies, investments, partnerships, and business models that have catalyzed regional increases in employment.

[For HVAC Contractors, Home Performance Delivers a Year-Round Blast](#)

Author: Leah Thayer, Home Performance Magazine

Publication Date: 2012

This article highlights contractors adding home performance to their HVAC businesses.

[Incorporating Home Performance into HVAC](#)

Author: Thomas Dolan, Home Performance Magazine

Publication Date: 2012

This article explores the opportunities for HVAC contractors to move into home performance and includes discussion from contractors and industry experts.

Webcasts

Concierge Programs for Contractors - They're Not Just for Consumers Anymore

Presentation (1 MB)

Author: Jonathan Cohen, U.S. Department of Energy; Ryan Clemmer, Clean Energy Works Oregon (now Enhabit); Melanie Paskevich, NeighborWorks; Jay Karwoski, ICF International

Publication Date: 2012

This webcast includes slides and information on programs' use of concierge programs to support contractors. It highlights two program examples: Clean Energy Works Oregon (now Enhabit) and Vermont NeighborWorks.

