

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. Following are some of the key lessons learned from these programs. Learn more by exploring the Better Buildings Residential Program Solution Center and joining the Better Buildings Residential Network.

Keep the program simple for your customers.

With all of the other things that compete for your audience's time and attention, program participation needs to be straightforward and easy. Programs have found that too much complexity makes it hard for interested homeowners to complete home energy upgrades. Successful programs have focused on streamlining services, requiring as few steps as possible for customers, and keeping the message about the upgrade process simple.

Clean Energy Works Oregon provided a "One-Stop Shop" Home Energy Remodel process to guide customers through a four-step process: apply, assess, finance, and transform. This simple process gave customers access to a comprehensive package of services that included free energy assessments, assistance from an independent energy advisor, low-interest financing and rebates, and the option to repay loans through their monthly heating utility bills. Between program launch in March 2011 and December 2013, the program's straightforward approach resulted in more than 3,000 upgrades.

Provide customers with a single point of contact to help them through the upgrade process.

Often, only a small percentage of homeowners who receive energy assessments also continue through the process of completing home energy upgrades. To overcome this challenge, multiple programs across the country have provided customers with dedicated program staff, often called energy advisors or concierges, as their single point of contact to guide homeowners through the entire upgrade process. This approach has produced higher conversion rates and more satisfied customers than many past efforts.

The EnergySmart program in Boulder County, Colorado, found that having an energy advisor assigned to each customer through the upgrade process was a key to program success. Energy advisors built trust with the customer during an initial home visit and maintained a one-on-one relationship throughout the process. The relationship endured even after the upgrade, as program participants frequently stayed in communication with energy advisors about additional projects and questions. Through customer surveys, Boulder found that 97% of customers rated their energy advisor as professional, knowledgeable, and timely. These customers agreed that "working with my Energy Advisor has been worth my time and effort." In Boulder, around 60% to 70% of homeowners enrolled in the program have taken action to upgrade their homes.

Conduct one-on-one outreach where people gather and help them take action right away.

Programs that conducted one-on-one outreach found that certain community events provided good opportunities for the program and its partners to connect and build credibility with potential customers. Particularly valuable events were ones that attracted the program's target audience to participate in something aligned with the program's offerings—such as an Earth Day celebration, home improvement expo, or green fair. Programs found events to be the most successful when the program provided the opportunity for interested homeowners to take action (e.g., sign up for an information session, schedule a home energy assessment) right on the spot.

Energize Phoenix held a community energy efficiency exhibit and contractor fair at the local library to promote its “One Day Only” financial incentives of up to \$3,000 per home. Sixteen out of 25 approved contractors participated. More than 500 people attended; 125 homeowners signed up for a home energy assessment on the spot; and the program noted an impressive 58% conversion rate from home energy assessments to home energy upgrades.

Motivate action through financial incentives and time-limited offers.

Incentives can be the easiest approach to overcome motivation barriers and attract customers’ and contractors’ attention, as long as the upgrade and reimbursement processes are simple and easy to follow. Numerous programs found that incentives of various sizes help entice customers to complete upgrades, particularly during limited time offers when a deadline further motivates action. Because incentives can be expensive for programs, determining the minimum level needed to achieve your goals or offering incentives for limited periods can be important strategies for success.

BetterBuildings for Michigan ultimately focused its incentive dollars on completion of home energy upgrades rather than on energy assessments and direct install measures. They experimented with various incentive designs from November 2010 through March 2012. When they adjusted the program’s incentive structure in this way, program staff saw the conversion rate from assessments to upgrades increase, depending on the neighborhood, from a range of 5% to 25% up to 30% to 60%. Learn more in the U.S. Department of Energy case study, *Spotlight on BetterBuildings for Michigan: Experiment to Find the Right Mix of Incentives*.

Measure and evaluate performance at key points in the process.

Measuring performance at key points in the upgrade process has helped programs understand where their processes are working smoothly and where they are not. Information about customer and contractor status during the assessment, financing application, upgrade, quality assurance review, and more helps programs continuously improve their design and implementation. To monitor progress, successful programs have combined information from their project tracking systems with customer surveys, information from call centers, and feedback from contractors and lenders to understand the customer experience.

Connecticut’s Neighbor to Neighbor Energy Challenge used qualitative contractor and customer feedback combined with quantitative data to evaluate how well its outreach efforts converted to home energy assessments. Contractor and customer feedback alerted program managers that relatively few interested customers were having assessments conducted on their homes. The program analyzed data to diagnose the problems. In response, the program improved its process to connect contractors to homeowners within two days; created a “receipt” for interested customers outlining next steps; and set up a system to call non-responsive leads after two weeks. By implementing these and other steps, the program increased its assessment completion rate by 35% in one month.

 The Better Buildings Residential Program Solution Center (energy.gov/rpsc) is a repository of key lessons, resources, and examples collected from the experience of hundreds of communities working to promote energy efficiency upgrades in homes. It helps program administrators and their partners plan, operate, and evaluate residential energy efficiency programs.

Join the Better Buildings Residential Network (betterbuildings.energy.gov/bbrn) to connect with fellow energy efficiency programs and partners. Share best practices and learn from one another through regular peer exchange calls, an online discussion forum, and other resources.