

12-Step Roadmap to Contractor Network Development and Management

Rocky Mountain Utility Efficiency Exchange

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12-Step Roadmap Chronology

Months 1-3

Step 1 – Identify prospective contractors/stakeholders to invite into your contractor network (survey/outreach)

Step 2 – Deliver webinars on business development topics

Step 3 – Produce Contractor Exchange workshop(s)

Months 4-6

Step 4 – Conduct Program Participation Webinars/Workshop(s) (coordinating committee)

Step 5 – Enroll and Screen Interested Contractors for Program Participation

Step 6 – Establish Contractor Web Portal (key account mgmt)

Step 7 – Establish Homeowner Web Portal

Step 8 – Administer Contractor and Homeowner Incentives

Step 9 – Conduct Quality Assurance

Months 7-9

Step 10 – Conduct Home Energy Makeover Contest (awareness/network/champion/collaboration)

Step 11 – Produce Homeowner Workshops (mentoring marketing/sales)

Step 12 – Conduct Community Energy Exchange (field mentoring)



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First Phase - Months 1-3

- Identify
- Educate
- Prepare
- Develop prospects to recruit



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Step 1 - Identify Prospective Contractors to Invite Into Your Contractor Network

- Identify firms/programs that already exist in marketplace
- Have demonstrated interest/capability/capacity to deliver/scale for growth
- Prominent contractors
- BPI certified and accredited contractors (and EGIA, NATE, LEED, etc.)
- Past contractor participants in utility/government initiatives
- Avoid tendency to start with just new market entrants
- Include:
 - Contractor/builder/rater associations of related trades
 - Chambers of commerce / Code and Permitting Office
 - Related product suppliers and manufacturers

Outcome: Radical Inclusion



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Step 2 - Deliver Webinars On Business Development Topics

- Provide webinars on topics of interest to contracting firm owners to improve their business profitability
- Webinar approach is low-risk/low-cost way to reach out to contractors rather than in-person meetings
- Added benefit of attracting not just owners but contractor's key staff
- Record so they can watch on-demand
- Offer CEUs

Outcome: Align program with contractors' goals to grow business



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Step 3 – Produce Contractor Exchange Workshop(s)

- Focused 1-2 day workshop on Growing Your Business in a Difficult Market
- Target audience: owners, managers, and contractors of companies focused on residential and small commercial remodeling and replacement
- Panels with local industry experts and successful contractors
- Offer an “advance preview” of the program
- Pre-/post event for steering committee of utilities, agencies and non-profits
- Invite distributors to host pre- and post-events

Outcome: Contractor Community Engagement



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Second Phase - Months 4-6

- Enroll
- Engage
- Begin implementation
- Work out the kinks



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Step 4 – Conduct Program Participation Webinars/Workshops

- Conduct workshops in locations convenient to the target audiences
- Record as webinars for on-demand viewing
- Spotlight successful contractors (top producers)
- Guest speakers from overlapping programs
- Program updates from utility sponsor
- Target enrolled contractors and let prospects “listen in”
- Be candid about what you are doing to fix what is not working
- Hangmen high

Outcome: Initiate Dialogue



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Step 5 - Enroll and Screen Interested Contractors for Program Participation

All contractors should be required to pass a screening process:

- Contractor License
- Insurance and Bonding
- Time In Business
- Tax Compliance
- Background Check
- Training and Certification
- Contractor Participation Agreement

Sustained compliance should be verified annually/quarterly

Goal: Set the Bar High – Clear Expectations for Consumer Confidence



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Step 6 – Establish Contractor Web Portal

- Comprehensive, program-branded website with:
 - marketing tools
 - brochures
 - video links
 - Logos
 - Resources
 - Co-branding requirements
- Contractor Knowledge Center:
 - FAQs
 - Forms
 - handbook/training manuals
 - work specifications/standards/guidance
- Password access requirement

Goal: One Stop Shop for Contractors



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Step 6 – Contractor Web Portal (cont.)

- Training archive (webinars, workshop handouts/presentations)
- Reasons to come back:
 - Referrals to peer programs within the region
 - Business development allies
 - Summary of available incentives/trainings
 - Economic/workforce development grant opportunities
- Key-account management with Concierge-style service
- Provide small businesses support for success

Example: Visit <http://www.builditgreenutility.org/> to see an example

Goal: Ongoing Engagement



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Step 7 –Homeowner Web Portal (cont.)

- **List participating contractors** (screened and approved, ranked if possible)
- **Incentive Availability**
 - Customized program summaries and key contact Information
 - Related programs (energy and/or utility sponsored programs for renewable energy, demand response, links to tax credits, etc.)
- **Contractor Referral**
 - Local, pre-screened and properly licensed businesses understand and support the program initiatives
 - Note specialization in comprehensive and/or single measure solutions
 - Follow-up communications (homeowner requests and contractor(s) follow through
 - Verify customer expectations are met and participating programs are properly positioned



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Step 7 –Homeowner Web Portal (cont.)

- **Personal Concierge/Coach**
 - Offer assistance via dedicated email or phone contact for tracking details
 - Prompt responses from program staff should include a “warm” transfer/referral to a subject matter expert
 - Homeowner guide to interviewing contractors
- **Rebate Application Assistance:**
 - Facilitate payment processing of ALL utility/govt/manuf/retailer energy efficiency, renewable energy, demand response, etc. incentives



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Step 7 – Homeowner Web Portal (cont.)

- **Financing Program Referral**

- Provide pre-screened financing program providers
- Program subsidized solutions as well as market rate alternatives
- Assist in calculating value and cash flow (energy and non-energy benefits)
- Assist with application preparation and submittal

Example: <https://energyupgradeca.org>

Goal: Homeowner one-stop shop and resource center



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Step 8 – Administer Contractor and Homeowner Incentives

- Offer incentives choices:
 - Homeowner incentives (performance/prescriptive rebates, loan interest rate buy downs)
 - Contractor-direct payments (training/equipment grants, cooperative marketing assistance)
- Streamline forms for easy processing
- Encourage online over snail mail
- Prompt, professional response on status of incentive applications
- Provide on demand reports and “reservation system” to avoid surprises when program funding ends

Goal: Reduce admin burden/delays



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Step 9 – Conduct Quality Assurance

Two main parts:

- Contractor Mentoring
- Homeowner Surveys

Contractor Mentoring

- Feedback and open communication are essential
- Clear QA standards – share the QA form in advance
- Qualified QA inspectors – people who are certified and experienced in performing the work they will be inspecting
- Try to schedule QA inspections with job completion/test-out – use it as a mentoring session for future improved performance

Goal: Document Contractor Success Stories



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Step 9 – Conduct Quality Assurance

Homeowner Surveys

- Telephone and email surveys to gauge program satisfaction and identify interest in other programs
- Document energy efficiency improvements achieved from program activities (direct or indirect)
- Mine surveys as a case study resource for follow-up
- Capture program savings benefits that might otherwise go “unclaimed” by EMV
- **Homeowner assessments of contractor performance should be integrated into contractor mentoring – plan for continuous improvement**

Goal: Document Homeowner Success Stories



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Third Phase - Months 7-9

- Promote
- Accelerate
- Create continuous improvement
- Position for ongoing “raising the bar” in manageable steps



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Step 10 – Conduct Home Energy Makeover Contest

- Innovative way to shine a light that mimics program in a single home
- Modeled after reality television shows
- Takes a B.S. approach to select home that **best demonstrates potential for energy savings**
- Products and services donated by local suppliers to showcase *Participating Contractors*
- Media invited to tour newly-improved, winning home
- Winning home owners make a compelling case to traditional/social media
- All about “the losers” learning how to conduct their own energy makeover

Goal: Engage Community To Demo Program Success



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Step 11 – Produce Homeowner Workshops

- Offer insight on energy savings and other benefits
- Put together homeowners with contractors and get the heck outta the way
- Agenda sessions should feature winning homeowners with contractors who worked on their homes.
- Teach contractors how to sell and homeowners how to buy

Goal: Champion Early Adopter Contractors and Homeowners



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Step 12 – Conduct Community Energy Exchange Mentoring

- Create partnerships with experts and new market entrants
- Improve energy efficiency of community buildings that model program
- Provide safety and energy-efficiency solutions to non-profit homes and buildings, state and national parks, disabled, seniors and veterans
- Learn and apply whole-house building science during in-the-field and on-the-job building science mentoring
- Sponsors engage contractors with demonstrations on energy efficient upgrade products and processes during real-time building improvement and mentoring
- New market entrants gain experience in real-world buildings

Example: Visit <http://www.ableideas.net/CommunityEnergyExchange.html>

Goal: Mentor New Market Entrants



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