

# QUALITY & QUANTITY

Maintaining a Quality Rating System When Your Business is Scaling



# About EnergyLogic

This is where we started...



# HERS Company as a Quality Rating System



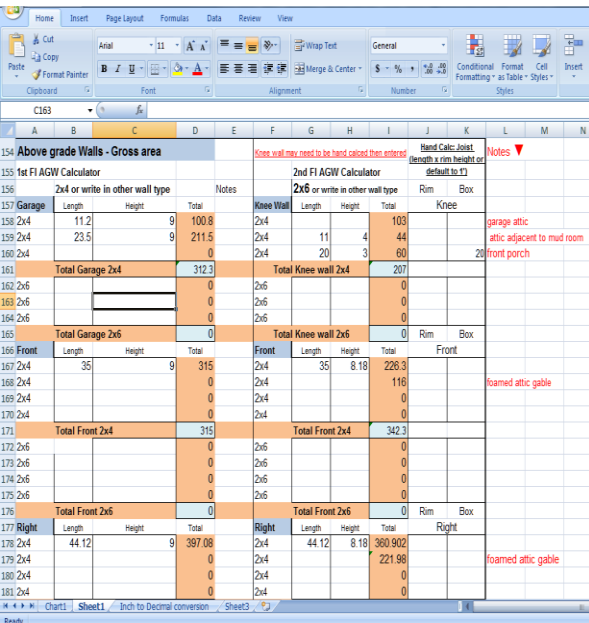
# HERS Company as a Quality Rating System

Overview of Topics to be covered  
in relation to Quality Systems:

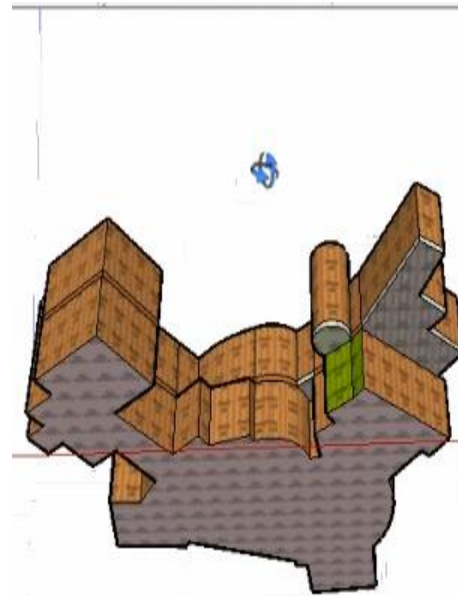
- Takeoffs/REM Inputs
- Maximizing Schedules
- Tips on Field Inspections
- Balance Customer Service with Client Management
- Systems Integration



# Process for “From Plans” Rating



	Length	Height	Total	Notes
<b>Garage</b>				
157	11.2	9	100.8	
158	23.5	9	211.5	
159				
160				
161				
162				
163				
164				
165				
166				
167	35	9	315	
168				
169				
170				
171				
172				
173				
174				
175				
176				
177	44.12	9	397.08	
178				
179				
180				
181				



Consistency

Accuracy

Customer Service

Quality Rating System

Efficiency



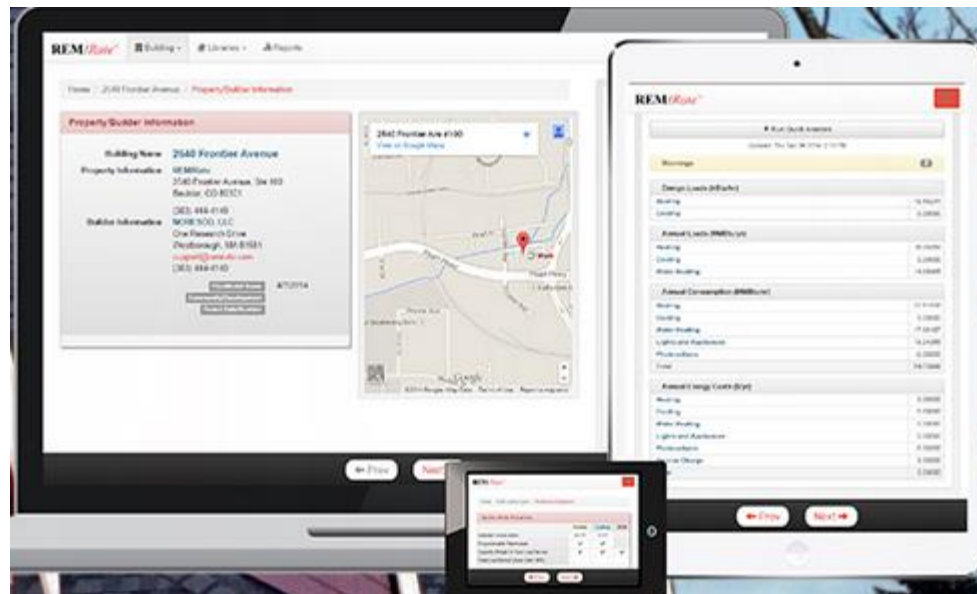
# REM/Rate™ Tips and Tricks

6. Using Fields in REM Rate as Calculator
5. Copy / Paste
4. Setting Up a Template File
3. Print Reports for Multiple Homes in One Swoop
2. Modifying Multiple Homes in One Swoop
1. Export Data for Compliance Reporting
0. Make use of reports to diagnose



# Field Staff Using REM Rate On-Site

- Adjustments to Issue Confirmed Rating on Site
- Window Takeoffs More Accurate from Site Built
- Determine Compliance before Moving to Next Job





# Scheduling Efficiencies

- Centralized Scheduling
- Clearly Defined Service Territory
- System that works for all employees



# Centralized Scheduling

Jobs Scheduled on Wednesday, February 11, 2015						
<< Previous   Next >> Go To Day 2/11/2015 Show For: All All Go						
Address	Lot/Block	City	Builder	Model	Job Type	Supervisor/Contact
Division: 0. Co. Sprgs.						
Phil Drotar	6.25					
3670 Tuscanna Grove						

- One number to call for inspections
- Less Interruptions to Tech Staff
- Opportunity to maximize drive time
- Online scheduling helps staff adjust to live updates to schedule



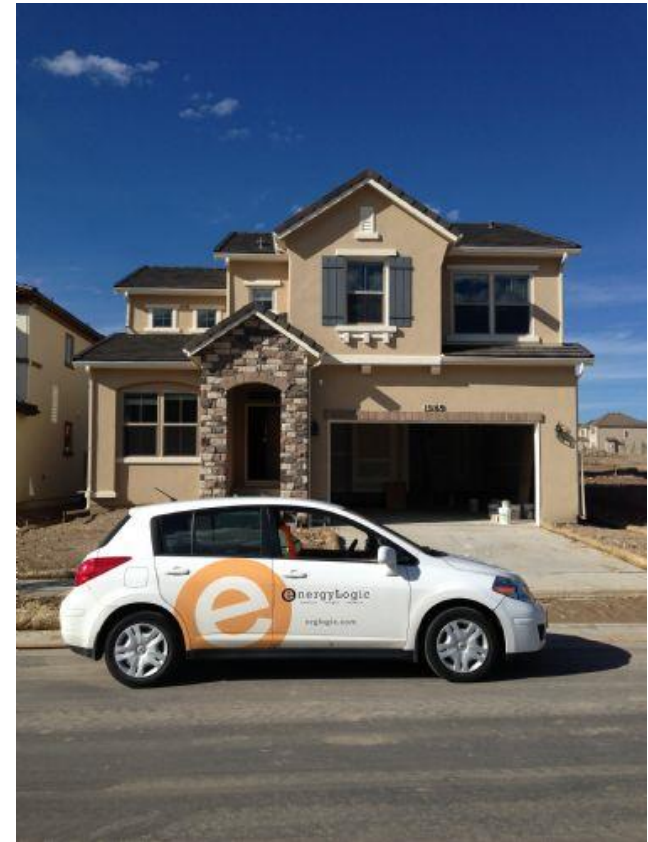
# Clearly Defined Service Territory

- Helps ensure pricing is right
- Staff with dedicated territories
- Overlapping territories with friendly competition?

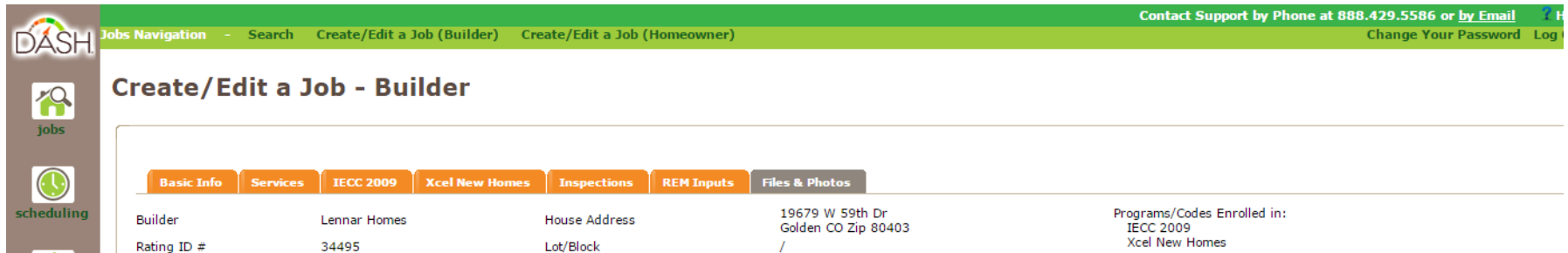


# Field Tips

- Easy Access to All Necessary Files
- Save Steps So You Don't Skip Steps
- Know What You're Inspecting



# Easy Access to All Necessary Files and Data



The screenshot displays the DASH Jobs Navigation interface. The top navigation bar includes links for 'Jobs Navigation', 'Search', 'Create/Edit a Job (Builder)', 'Create/Edit a Job (Homeowner)', 'Contact Support by Phone at 888.429.5586 or by Email', 'Change Your Password', and 'Log In'. The main heading is 'Create/Edit a Job - Builder'. Below this, there are tabs for 'Basic Info', 'Services', 'IECC 2009', 'Xcel New Homes', 'Inspections', 'REM Inputs', and 'Files & Photos'. The 'Basic Info' tab is active, showing fields for 'Builder' (Lennar Homes), 'Rating ID #' (34495), 'House Address' (19679 W 59th Dr, Golden CO Zip 80403), and 'Lot/Block' (/). On the right, it lists 'Programs/Codes Enrolled in: IECC 2009, Xcel New Homes'. On the left sidebar, there are icons for 'DASH', 'jobs', and 'scheduling'.

Builder	Rating ID #	House Address	Lot/Block	Programs/Codes Enrolled in:
Lennar Homes	34495	19679 W 59th Dr Golden CO Zip 80403	/	IECC 2009 Xcel New Homes

- Centralized Location for File Storage
- Template Files Version Control
- Forms that Flow with the Process
- All inspection data archived and available for aggregate reporting



# Save Steps So You Don't Skip Steps

- Carry Only What You Need for Initial Inspection
- Then Carry Everything You Need
- Verify Multiple Items at Once



# Know What You're Inspecting

- Forms that Cover Each Service
- Clear Scope of Services
- Communication on Consistency

**DASH** ENERGYLOGIX INC.

Job Navigation: Search | Create/Edit a Job (Builder) | Create/Edit a Job (Inspector) | Contact Support by Phone at 888.429.5566 or by Email | Help | Change Your Password | Log Out

### Final Inspection

**General Thermal Envelope** | Mechanical/Exhaustion/Exterior | Water Management | Energy Programs | Action Items | Reporting | IECC Final | Roof | Misc.

Builder	Lerner Homes	Gas Utility	Xcel	Programs/Codes Enrolled in:	return to job
House Address	18476 W 93rd Dr	Electric Utility	Xcel	IECC 2009	return to inspection info
City/State	Golden, CO 80403	Climate Zone	0	Xcel New Homes	Contractors
Community	Table Rock Ridge	Square Footage	4533		HVAC - Smth and Wills
Model	3003				Insulation (add)
Supervisor	Luke Hills	Rating ID #	34495		make changes
Supervisor Phone	720-412-1459				

**Builder Notes:** Copy and paste this text into your inspection email:  
This house needs to be re-inspected for a re-inspection which requires the following actions:  
1) 12 source items listed below have been received and are ready to be re-inspected?  
2) Call scheduling at 870-510-0233 to get your house on the schedule and to receive amount of reinspection fee.  
3) Submit an RPS request to your purchasing team and send RPS to EnergyLogic Scheduling (scheduling@energylogic.com)

**Inspection Details:**

Inspection Date: 02/03/2015 | Rater's Name: Mark Lane | Mark Lane: [dropdown]  
Number of HVAC Systems: 2 | LTO Required: Yes | LTO Required: [dropdown]  
Number of DRTH Systems: 1 | House Type: Single Family | House Type: [dropdown]  
Number of Bedrooms Above Grade: 4 | Foundation Type: Full Basement | Foundation Type: [dropdown]  
Number of Bedrooms Below Grade: 0 | House Orientation: S | House Orientation: [dropdown]

Gas Company: Xcel | Meter Number: 20514218 | Meter Number: [dropdown]  
Electric Company: Xcel | Meter Number: 1000411 | Meter Number: [dropdown]

Pass/Yes | Fail/No | N/A | Builder Sign Off | Action Needed | Comments | Note: Where/Description

House is ready for final inspection.

✓ IECC and Energy Star Air Sealing  
[show](#) / [hide](#)

✓ Insulation Inspection @ Final  
[show](#) / [hide](#)

✓ HVAC Inspections  
[show](#) / [hide](#)

✓ Environmental Programs/Codes  
[show](#) / [hide](#)

Solar  
[show](#) / [hide](#)

Water Management  
[show](#) / [hide](#)

[Inspection Log](#) | [return to job](#) | [return to inspection info](#) | [Save](#)

## Environmental Programs/Codes

This address must comply with the following:

IECC 2009 [details](#)  
Xcel New Homes [details](#)

## Program Sponsor Information

Show all sponsors used by this address.

Xcel / RSR [details](#)  
[add/remove sponsors](#)

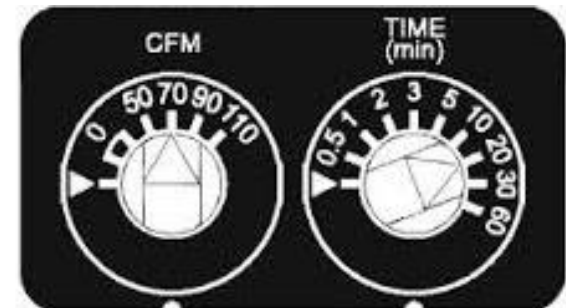
**DASH**  
ENERGYLOGIX INC.

© 2015 All Rights Reserved EnergyLogic Inc.  
DASH Software Version 7.0, Released 1/11/2015



# Balance Customer Service with Client Management

- Set Expectations Early On
- Scheduling of Extra Services in Advance
- Limit Re-inspects with Low Hanging Value Adds





# One System that Works for All Employees

The screenshot shows the DASH system interface. On the left is a sidebar with icons and labels for various functions: jobs, scheduling, billing, reports, training, qa, print, and registry. The main content area is titled 'Scheduling - Today's Schedule' and includes a navigation bar with '<< Previous | Next >>' and 'Go To Day 2/11/2015'. Below this is a table of addresses and schedules. A yellow callout box with a red border is overlaid on the table, containing the text: 'Something for Everyone--all linked together: Scheduling, Billing, Reporting, Printing, RESNET registry & QA'.

Address
Division: 0. Phil Drotar 3670 T Subdivi Map i
8:30AM Map i
12PM O
Division: 1. Aaryn Jacks 19408 Subdivi Map i
8796 E Subdivi Map i
KB Safe 49th Pl iC
Greg Downi 9007 E Subdivi Map i
9017 E 50th Ave Subdivision: Stapleton Map iCal
9027 E 50th Ave Subdivision: Stapleton Map iCal

System should cover:

- Scheduling
- Billing
- File tracking
- Reporting
- QA



# Systems Integration

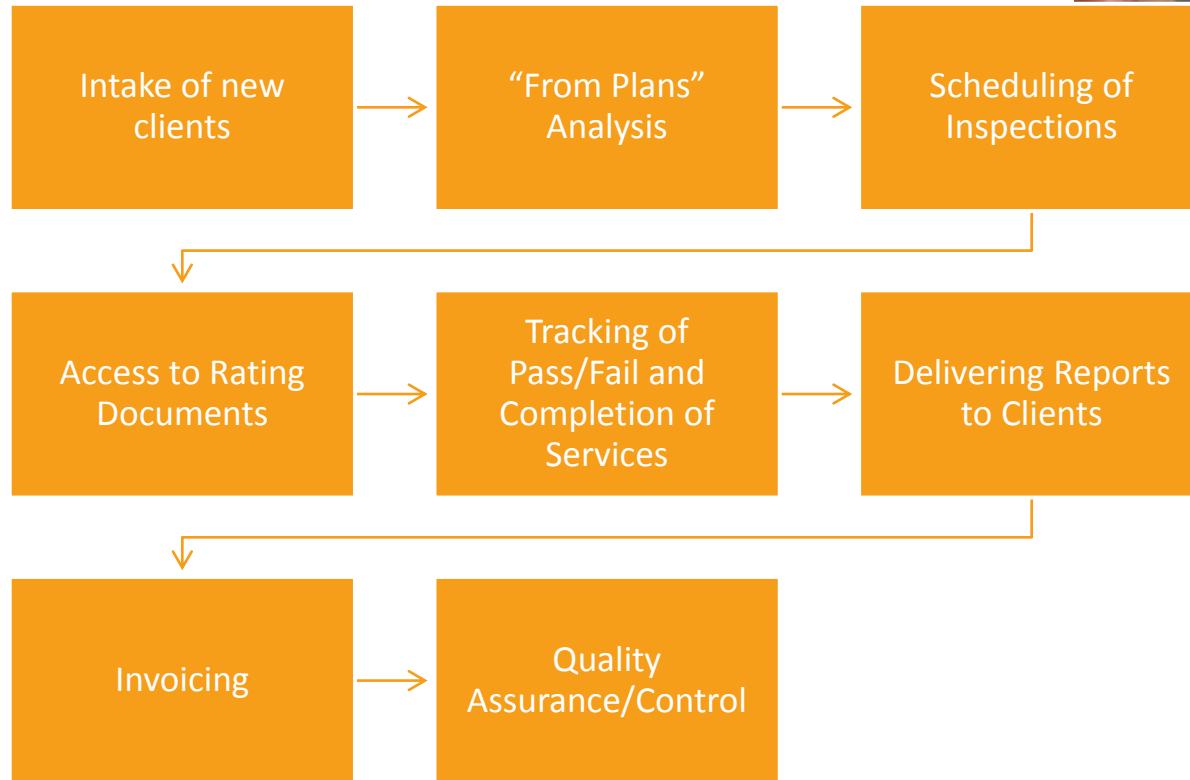
Your systems and Process should all tie together:



# Systems Integration

When Scaling up...

Your systems and Process should all tie together as seamlessly as possible:



  
DASH<sup>SM</sup>  
BY  
ENERGYLOGIC



# Questions?

- Steve Byers, Principal
  - [steve@nrglogic.com](mailto:steve@nrglogic.com)
- Robby Schwarz, Principal
  - [robbys@nrglogic.com](mailto:robbys@nrglogic.com)
- Glenn Pease, Manager of QA
  - [glenn.pease@nrglogic.com](mailto:glenn.pease@nrglogic.com)





# JOIN THE ADVENTURE.

7th Annual RaterFest!  
September 18-20, 2015  
Estes Park, Colorado

**Keynote: Mark LaLiberte**

Register Online  
[EnergyLogicAcademy.com](http://EnergyLogicAcademy.com)

[www.nrglogic.com](http://www.nrglogic.com)

