



Generating Hot Leads for Home Performance

The Coach Approach



February 16, 2015

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Center for Sustainable Energy™

- Independent non-profit organization
- Our mission: To accelerate the transition to a sustainable world powered by clean energy
- Programs discussed in this presentation funded by San Diego Regional Energy Partnership

Things to know about the San Diego area...

- Heating fuel is cheap
 - Mostly natural gas used for space/water heating
- Water is expensive
- Electricity is expensive
 - Residential tiered pricing structure ranges from ~15 cents to ~37 cents per kilowatt-hour
- Mild climate
 - Coastal homes often have minimal heating load and no air conditioning
 - Inland homes have significant air conditioning loads (but little humidity)

Things to know about the San Diego area...

- Energy Upgrade California™ Home Upgrade offers rebates ranging from \$1,000 to \$6,500
 - Administered locally by San Diego Gas & Electric
 - Projects must be performed by participating (BPI-certified) contractor
 - Projects must include attic insulation, air sealing or duct sealing/replacement
 - Home must have central heat
 - Average project cost is around \$12,000
 - Average rebate is around \$1,600

Things to know about the San Diego area...

- PACE (property assessed clean energy) financing programs have exploded in the last year
- At least three local credit unions offer loans for energy efficiency and/or solar



Home Performance Lead Generation

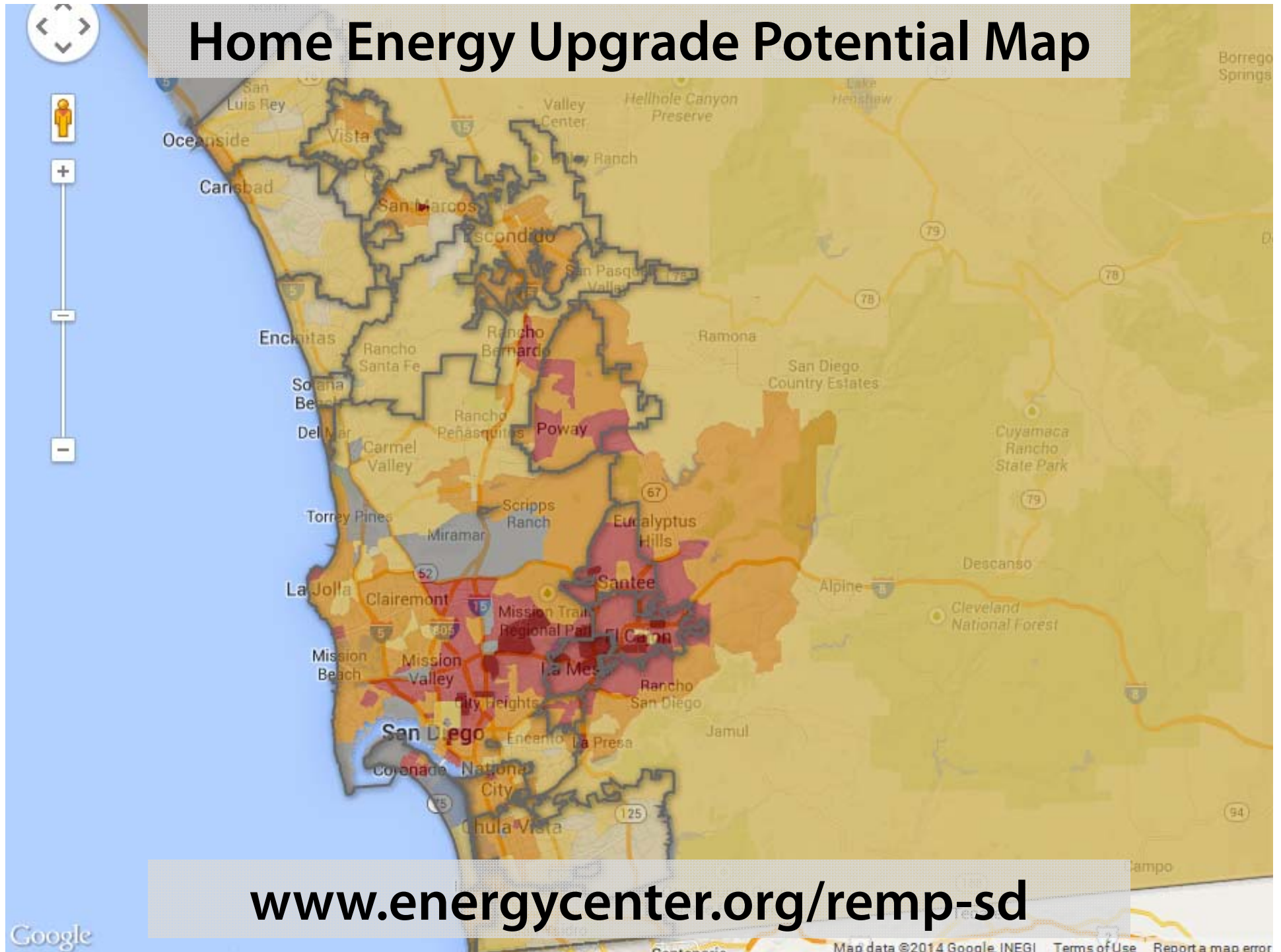
- Community Workshops
- Energy Efficiency Home Tours
- Home Energy Coach: Employee Program





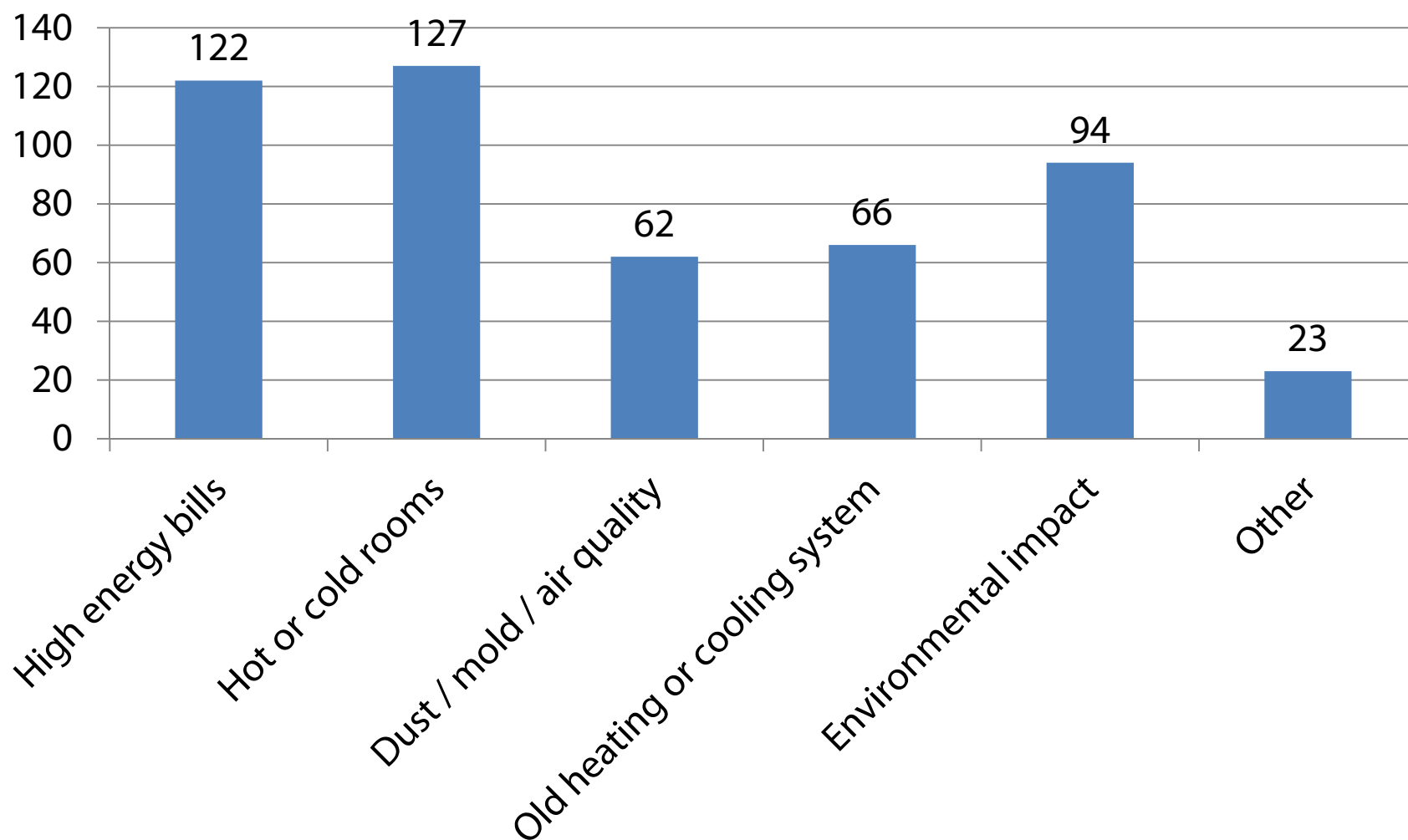
Goal: Sign up for an assessment

Home Energy Upgrade Potential Map

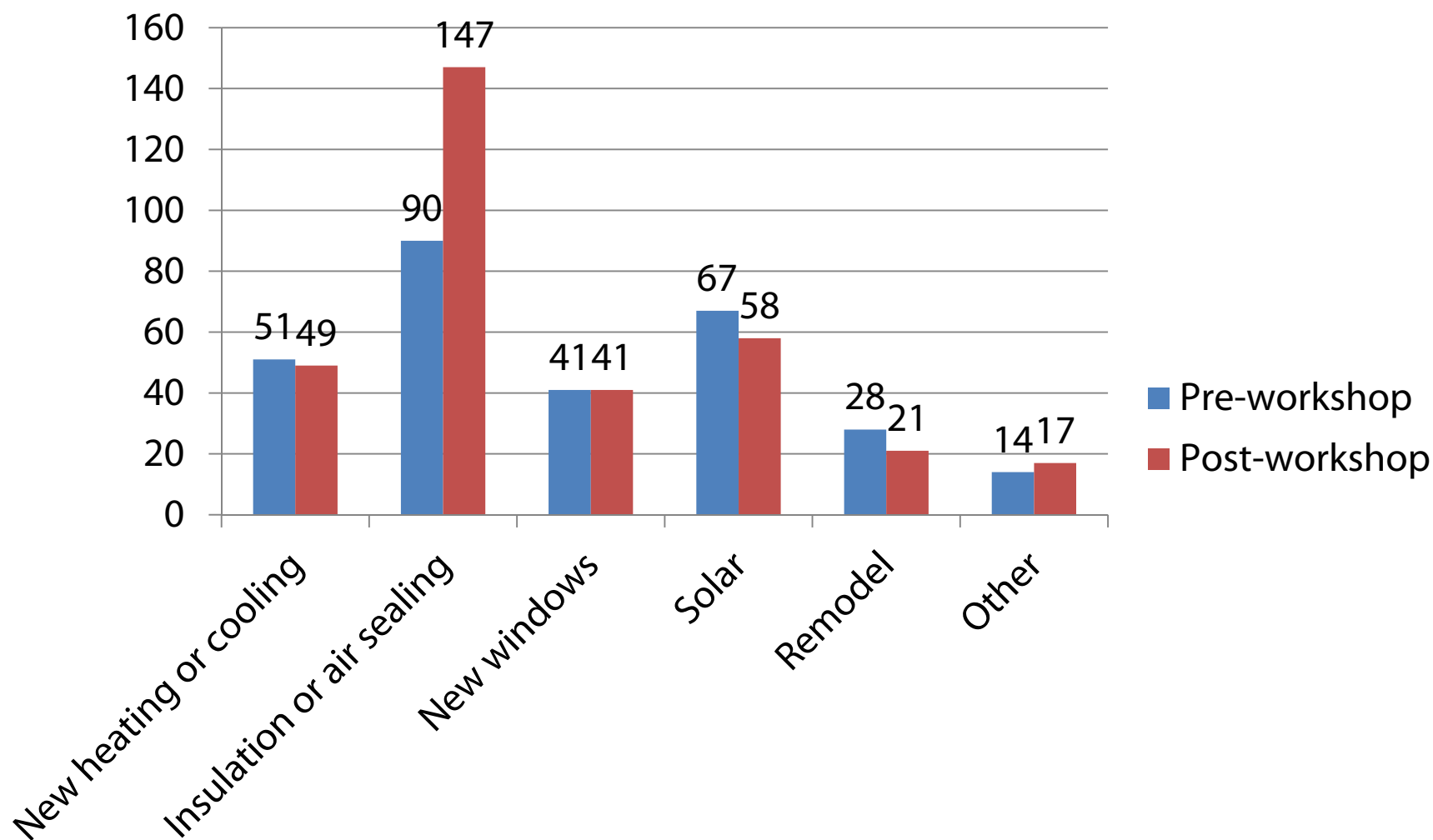


www.energycenter.org/rem-p-sd

What concerns do you have about your home?



What is your top priority for home improvements?



Home Performance Lead Generation

- Community Workshops
- Energy Efficiency Home Tours
- Home Energy Coach: Employee Program















Goal: Sign up for an assessment





comfortable. During summer, the house
had to wear extra socks and

“Before the upgrades, we were so uncomfortable. During summer, the house would heat up and never cool down. In winter, we had to wear extra socks and sweatshirts. With the upgrades, we can truly enjoy our home.”

– Chris Anderson, Spring Valley homeowner

*“The house used to be so dusty —
the air is much cleaner now.”*

– Susan Anderson

Home of Chris & Susan Anderson

Home Profile:

Year Home Built 1960
Square Footage 2,000
Number of Floors 1



No endorsement for any company or services is intended or implied. This is a project of the San Diego Regional Climate Collaborative. More information on the Climate Collaborative can be found at www.climatecollaborative.org. The Center for Sustainable Energy is an independent nonprofit that accelerates the adoption of clean and efficient energy solutions. Energy Upgrade California is managed locally by utilities and regional energy networks and directed by the California Public Utilities Commission in collaboration with the California Energy Commission. Funding comes from utility customers under the auspices of the California Public Utilities Commission. Programs may be modified or terminated without prior notice. Home Upgrade California. Trademarks are property of their respective owners. All rights reserved. © 2014 Energy Upgrade California.

Start your upgrade today! Visit www.energycenter.org/homeupgrade

...of our air ducts and the numerous leaks until
the upgrades, with the sealed attic and
new ducts, airflow is clean and temperatures are consistent throughout the house."
Escondido homeowner

"We didn't know about the poor quality of our air ducts and the numerous leaks until the energy assessment informed us. Now after the upgrades, with the sealed attic and new ducts, airflow is clean and temperatures are consistent throughout the house."

– Tyler Ademy, Escondido homeowner

"The upgrades give us peace of mind because we no longer worry about the quality of the air inside our house, especially with a new baby in our home." – Carolina Negoli

The Ademy Family Home

Home Profile:

Year Home Built 1969
Square Footage 1,665
Number of Floors 1



Energy Upgrade California is a program of the California Public Utilities Commission in collaboration with the California Energy Commission, the California Department of Industrial Relations, the California Department of Housing and Community Development, and the California Department of Energy. The program is a voluntary program for homeowners to upgrade their energy efficiency. The program is a voluntary program for homeowners to upgrade their energy efficiency. The program is a voluntary program for homeowners to upgrade their energy efficiency.

Start your upgrade today! Visit www.energycenter.org/home

...fugas de gas o por la posibilidad de
...menores, y esto era nuestra
Beth Sánchez, propietaria

Ya no nos preocupamos por fugas de gas o por la posibilidad de una explosión. Tenemos dos hijos menores, y esto era nuestra principal inquietud.

– Beth Sánchez, propietaria

Estamos muy agradecidos, sin los reembolsos y los préstamos no habríamos podido realizar estas mejoras en nuestro hogar.

El hogar de la familia Sánchez

Perfil del hogar:

Año de construcción de la casa..... 1977

Pies cuadrados 1,858

Número de pisos..... 2



¡Comience a realizar mejoras en su hogar! Visite www.cse.org



Home Upgrade

Home Performance Lead Generation

- Community Workshops
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Workshop



Assessment

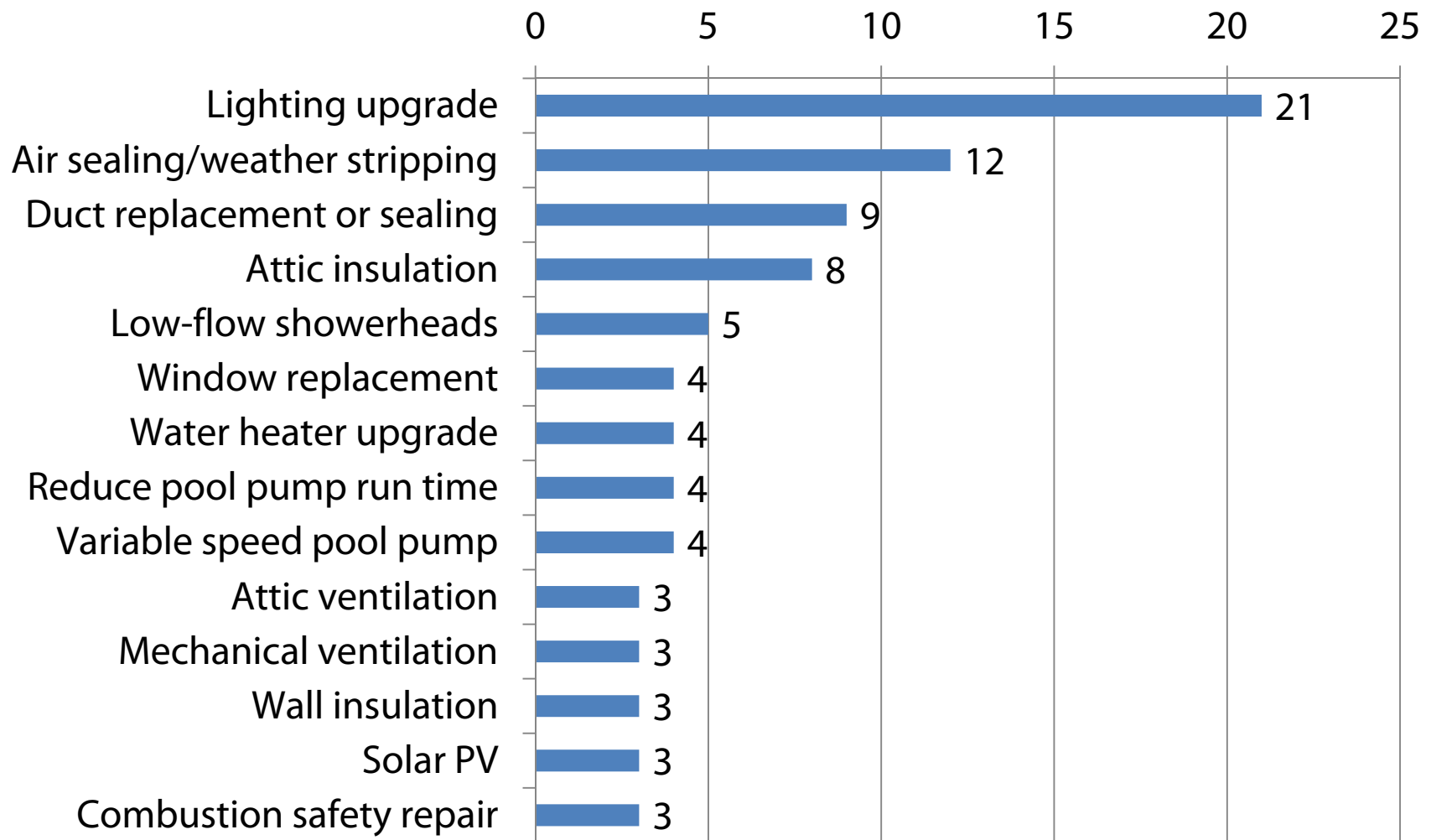


Consultation

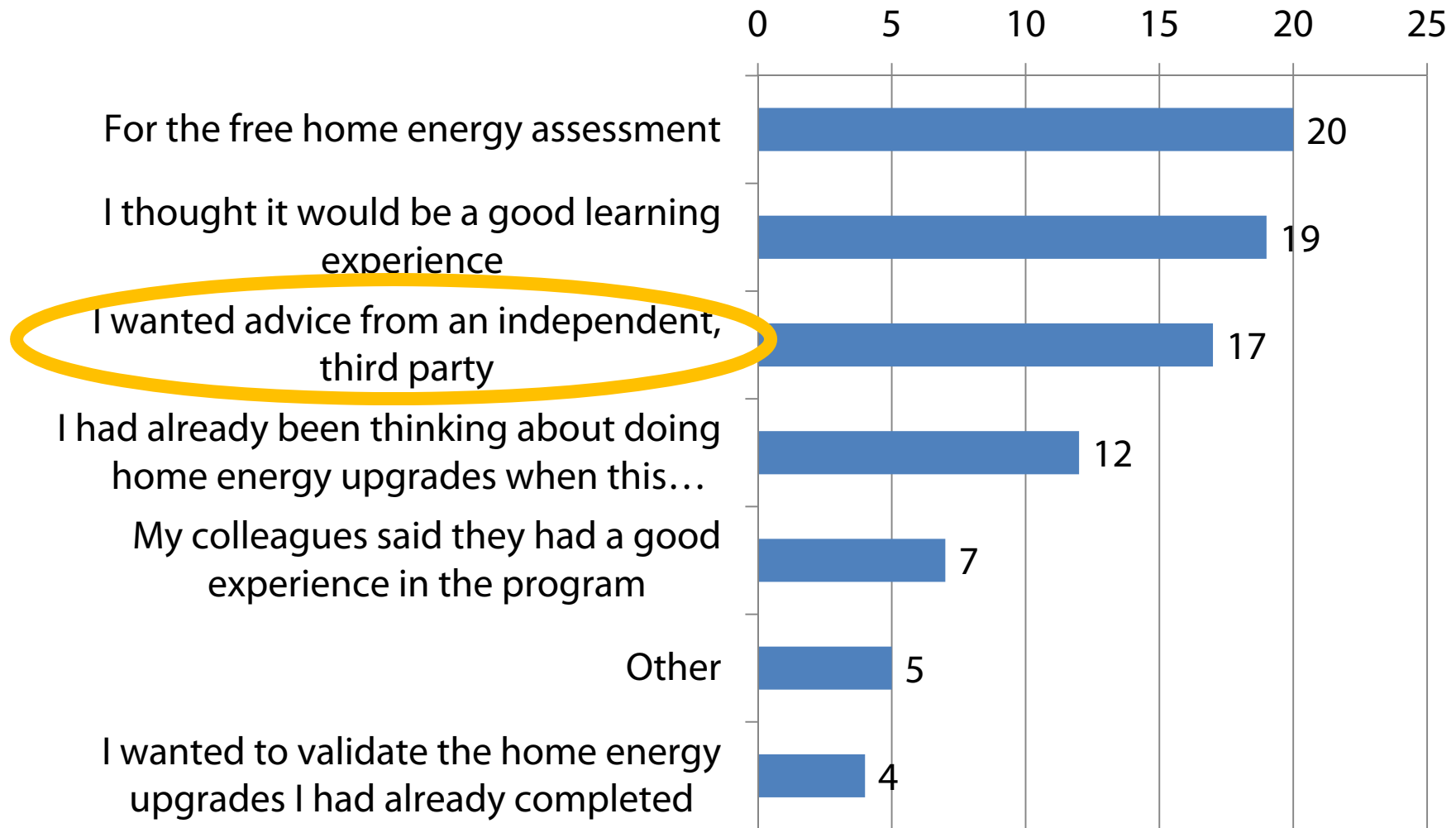


Upgrade

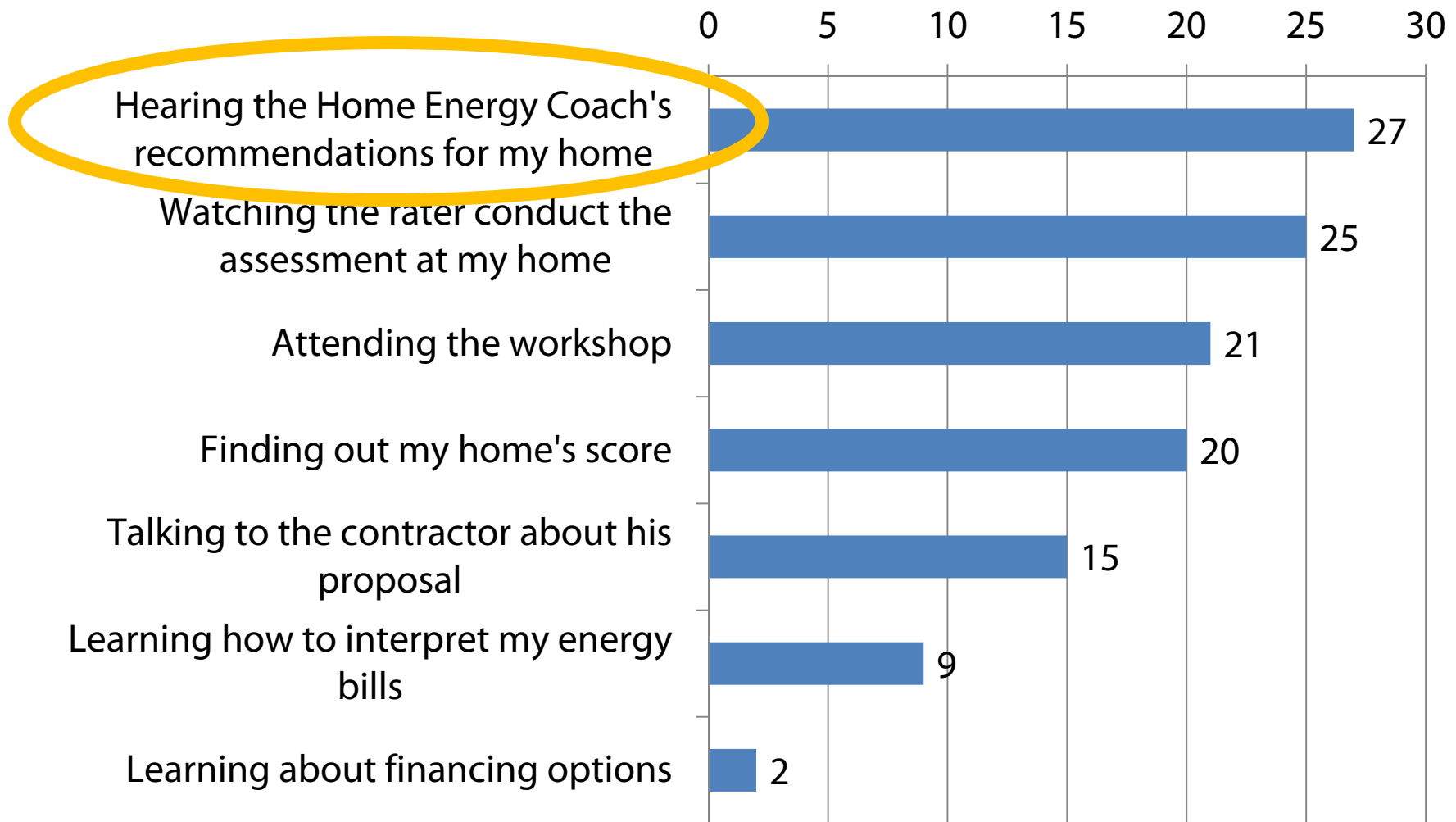
Most popular measures completed



What motivated you to participate in the program?



Which parts of the program did you find valuable?



Plan for 2015



Lessons Learned

- Homeowners are hungry for independent, third party advice
- Home Energy Coaches (non-profit or utility employees) are one option
 - Ideally have knowledge of building science, rebates and financing; relationships with contractors; and customer service/sales skills
- Other options are prior customers, influencers within community groups / workplaces, or raters
- The third party should focus on connecting homeowners directly to contractors as soon as trust and basic knowledge is established

Lessons Learned

- Ask your most satisfied customers for testimonials, pictures and permission to share their stories
- Focus messaging on comfort
- Present high quality proposals (proofread!)
- Schedule time for multiple touches
 - Implement a system for tracking interactions
- Evaluate effectiveness of lead generation strategies through:
 - Homeowner surveys
 - Contractor/rater feedback
 - Tracking conversion rates

Thank You

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