

Marketing Tactics Worth Stealing

Ed Thomas, EGIA, (970) 209-8347, ethomas@egia.org



www.egia.org

Who Is EGIA?



Contractor Services

- *Residential Financing
- *Commercial Financing
- *Sales & Marketing Training
- * Discounted Business & Insurance Services



Manufacturers Distributors & Energy Partner Programs

- *Residential Financing
- *Commercial Financing
- *Sales & Marketing Training
- * Discounted Business & Insurance Services



Homeowner Services

- *Home Makeover Contests
- *Approved Contractor Referral Program
- * Energy Store



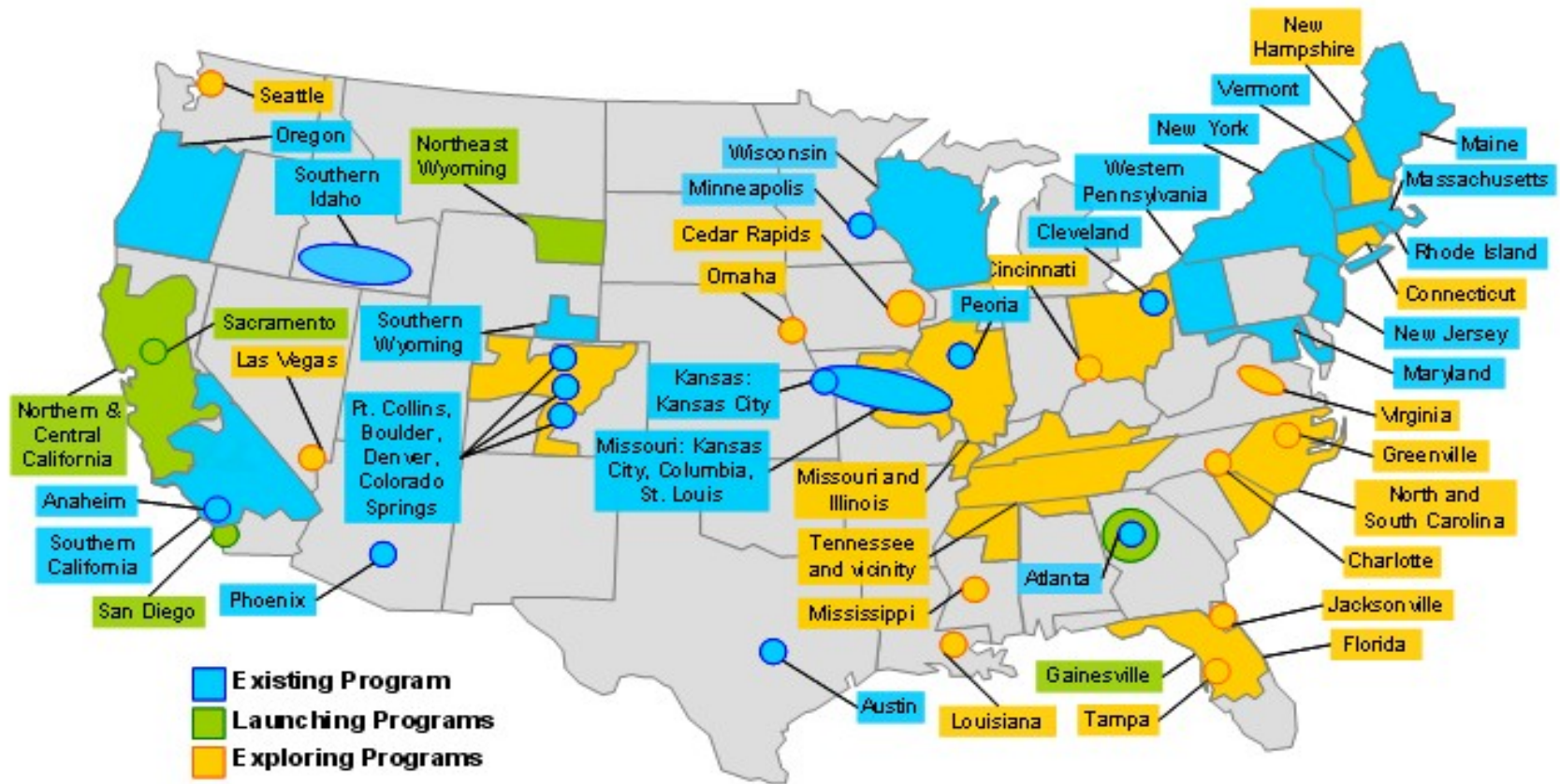
Utility & Government Program Administration

- *Rebates
- *Financing
- *Field Services
- * Utility Exchange



Home Performance Nationwide

National HPwES Program Activity



Advanced Home Energy, Berkeley

- **Started in 2006** as insulation-only company
 - Expanded to “whole house” to avoid being the low-cost bidder
- **Then and Now:**
 - 1 crew with \$1200-\$1500 jobs
 - 7 crews with \$7,000 - \$10,000 jobs
- **Biggest threats:**
 - High customer expectations
 - Organizational complexity
 - More work than we can handle



News photo by Mike DiCarlo
Ori Skloot of Advanced Home Energy told members of the Rossmore Residents Association how they can help reduce their energy consumption.

ABC Cooling and Heating, Fresno

- Differentiates our business
- Increases our margins
- Higher average tickets
- Customers for life
- Reduces Seasonality
- Reduces Callbacks



Brower Mechanical

BROWER MECHANICAL, INC.

HEAT • AIR • SOLAR • INSULATION • RESIDENTIAL • COMMERCIAL



- **Pathway**

- Started in Started in 1978 as HVAC Service Company
- Embraced building science in 2006 as a way to reduce callbacks
 - *“Why doesn’t 3-ton work for all 1500 sq. ft. homes?”*
- Participate in PG&E and SMUD programs
- June 2011 was busiest month in company’s history

- **Biggest Challenges:**

- Management must “own” the process
- Need to go slow to modify pricing, operations
- Utility rebates validate to homeowners that whole house is the right approach

Hartman-Baldwin, Los Angeles

**HARTMAN
BALDWIN**
design/build

- Remodeler integrate Whole House into every job
- Average job size \$60,000
- Open Houses at completed projects
- “Home Remodelers' Survival Guide” Workshop



**HARTMAN
BALDWIN**
design/build

IS YOUR HOME A HUMMER OR A PRIUS?

Home may be where the heart is, but a home is also a complex mechanical system that often runs inefficiently costing you money, polluting your home's air and leaving you uncomfortable year-round.

HOW WE DO IT

HartmanBaldwin is certified by Energy Star and the Building Performance Institute to evaluate your home from attic to basement with the latest in green technology to check the efficiency of your home's windows, insulation, Heating Ventilation and Air Conditioning system (HVAC), as well as the CO safety of all gas appliances.

SUSTAINABLE BUILDING PRACTICES

Our commitment to high quality construction includes implementing the best practices of sustainable building and its emerging technologies. A whole-system approach results in durable, comfortable and beautiful homes that are energy efficient and environmentally responsible.

DID YOU KNOW?

- A bigger air conditioning unit alone isn't the answer.
- Installing solar panels alone isn't the answer.
- Changing windows alone isn't the answer.
- Proper insulation alone isn't the answer.
- Proper installation and integration of all of these components is the answer; we can show you how.

SCHEDULE A FREE HOME ASSESSMENT IF YOU'RE CONSIDERING THE FOLLOWING HOME IMPROVEMENT PROJECTS:

- Solar Panels
- Roof repair or replacement
- HVAC repair or replacement
- Major Remodeling

CALL 907.679.1344 TODAY

100 West Foothill Blvd., Claremont, CA 91711 T 909.679.1344 / 626.484.9518 www.hartmanbaldwin.com



Top-Tier Contractor Traits

1. Diversification- Sells more than one product to help prevent seasonality and drive more profits through add-on sales.

2. Sales Consistency- Has pitch book or laptop in-home presentation that keeps salespeople consistent and helps overcome hidden objections.

3. Diverse Marketing- Spend money on mix of traditional advertising and social media outreach with a clear call-to-action message.

4. Sales Culture- Start with receptionist to installation team

5. Financing- Offer low monthly payment and/or “same as cash” options

***Top-Tier Contractors have
the tools and training to close the sale
“at the kitchen table”***



Build-Your-Own Marketing Plan

Define Success!

- Where do you want to **go** in 2011?
- Where do you want to **be** in 2012?

Create a 90-Day Plan to Get There!

1. Define Yourself
2. Introduce Yourself as the Subject Matter Expert
3. Get into the Community
4. Celebrate your Customers
5. (Repeat application as needed)

1. Expand Business Card Use

- Full color and professionally designed
- Mini-ad for your business
- Drive people to your website to learn more
- Everyone in the company needs a card
- Magnet for the refrigerator
- Peel-and-stick for HVAC system
- Rubber stamp special offers on the back
- Leave extras with:
 - Trade allies
 - Past customers
 - EVERYWHERE



People Buy from People

Customers can view a tech's credentials via an e-mail, which includes a photo, license number and personal information.

**Your WINNING
service team!**



BRIAN NIERODE

Master Plumber #187242



**PLUMBING • HEATING • COOLING
DRAIN CLEANING • ELECTRICAL**
Repair Services for the Homeowner

You won't find a more knowledgeable or professional team anywhere else. Our licensed technicians are carefully background-checked and drug-tested. We guarantee they will treat you, your family and your home with the highest level of respect. And, it is our commitment to every customer we serve that we'll do the job right the first time.

ABOUT BRIAN...

- Master Plumber #187242
- Years of Experience: 15+
- Married since 2007
- Father of one little girl
- Likes going to sporting events with his family -especially hockey
- Enjoys skiing, snowshoeing and hiking
- Is proud of becoming a Master Plumber at age 23, and of being a great dad
- Dreams of seeing his daughter graduate from college

"What I like most about being a Master Plumber is being a hero for my customers. And, the new challenges I face everyday."



2. Work Your Customer Referrals

- “The analysis you provided on our 100-year-old home gave us the information we needed to make our decisions with confidence. The work you provided went far beyond our expectations of quality.”
Harold & Linda – Homeowners, Your Town
- “We installed new equipment and the energy savings more than pay for it! We had immediate positive cash flow, decreased maintenance costs, and increased property value; it was a no brainer.”
Walter – Apartment Complex Owner – Your Town
- “Between the insulation and the furnace, it is a very different house. If you have an older home or are contemplating buying one, this kind of work is an amazing way to make the cost of ownership much lower.”
Simon & Tracy – Homeowners – Your Town

***Word-of-mouth marketing is
the most believable***



Winning Home Case Studies [Insert Your Name Here]



Root Home in Rockville, Maryland

Mrs. Root grew up in this 1800 square foot Cape Cod style home built in 1912 and purchased it from her widowed mother in 2002. Today, she is retired from the Federal government and lives here with her daughter. There have been no major home improvements to the home in over 25 years. A recreation room was added onto the back of the home in 1999. The side house was further expanded in 1968 with the addition of a dining room and a laundry room.



- Cape Cod style 2-story with crawlspace
- Built in 1912
- 1800 square feet
- Occupied by 2 adults
- \$170 a month on average, combined energy utility bills (total annual cost \$1,200 in electricity and about \$1,300 in gas)

Their Home Energy Makeover

Comprehensive Energy Analysis

The owner of the Home Energy Detective conducted a comprehensive home energy analysis using diagnostic equipment. The analysis looked at how the different components of the home energy system worked together compared to national "whole house" energy efficiency and safety standards. They found the home to be a "mixed bag" with about 43 air changes per day, more than 7 times what should be expected, through the outside walls, attic and central crawl space. They determined what improvements would have the greatest impact for energy savings, health and safety, and comfort.

Edger Energy, another local home energy audit firm, did similar analysis on other nearby homes in the area. Comprehensive national standards are set by the Building Performance Institute.

Heating and Air Conditioning System

Edger provided a system tune-up for the gas furnace and electric air conditioner. The home has an additional gas heater in a room addition, and two portable air conditioners in both upstairs bedrooms due to comfort issues.

Sealing and Insulation

In the attic, ACEI Insulation used spray-on urethane product to air seal all leaks where conditioned air could exit the home, and then re-insulated the attic for an overall insulation value of R-49. Also, they insulated the attic hatch to prevent heat from entering or escaping through the door area.

In the vented crawl-space, ACEI insulated the inside of the foundation walls, sealed the crawl-space and added a ground cover to reduce moisture entering the home and reduce energy losses through the floor. ACEI Insulation also insulated all exterior pipes to prevent insects as well as unwanted air from entering the home.

In addition, Atlantic Duct Cleaning applied Aerasol duct sealant to the interior of all the existing ductwork in order to be sure the conditioned air was delivered efficiently through each vent.



Colbert Home in Fort Washington, Maryland

The Colbert's have lived for 28 years in their 2500 square foot home built in 1973. They now have two children attending nearby colleges. Their uncomfortable family room and bedrooms, and high energy bills, led them to add an attic fan to rid replace their heater's exhaust and bring a couple of years ago. But their energy bills didn't get lower - in part because of their 13-year-old air conditioner and poor insulation.



- 2-story with partially finished basement
- Built in 1973
- 2500 square feet
- Occupied by 2 adults and 2 adult children attending college nearby
- \$245 a month on average, combined energy utility bills (total annual cost \$1,900 in electricity and about \$1,000 in gas)

Their Home Energy Makeover

Comprehensive Energy Analysis

Just before the Home Energy Detective conducted a comprehensive home energy analysis using diagnostic equipment. The analysis looked at how the different components of the home energy system worked together compared to national "whole house" energy efficiency and safety standards. Scott found that air leakage through the home's outside walls, attic and crawl-space was over two times greater than should be expected. Scott determined what improvements would have the greatest impact for energy savings, health and safety, and comfort. Comprehensive national standards are set by the Building Performance Institute.

Heating and Air Conditioning System

Edger replaced the home's 18-year-old 80% efficient gas furnace and 12-year-old 8 SEER air conditioner with a Lennox 95% efficient insulating furnace and Lennox H21 SEER air conditioner. They also installed a hospital grade air filtration system to help with flu.

Colbert's ductwork problems, which cause her to take medication weekly.

Sealing and Insulation

In the attic, Southland Insulators removed the existing insulation, and used Johns-Manville products to spray a layer of foam insulation over the entire attic floor to seal all leaks where conditioned air could exit the home, and then re-insulated the attic for an overall insulation value of R-49. Also, they insulated the attic hatch to prevent heat from entering or escaping through the door area.

Southland also insulated the inside of the foundation in the basement, and added additional insulation to an outside wall of the family room. Southland Insulators also sealed all exterior pipes to prevent insects as well as unwanted air from entering the home.

In addition, Atlantic Duct Cleaning applied Aerasol duct sealant to the interior of all the existing ductwork in order to be sure the conditioned air was delivered efficiently through each vent.

Water Heater

Bankless Concepts replaced the existing 40-gallon natural gas storage water heater with a Rheem 30-gallon condensing tankless water heater with a 95% thermal efficiency.



Lockett Home in Ashburn, Virginia

The Locketts and their two pre-school aged children have lived for 10 years in this 1700 square foot home built in 1984. They realized that the home was too hot in summer and too cold in winter, especially in the child's room upstairs. They knew their energy bills were too high to be this uncomfortable in a newer home.



- 2-story with crawlspace
- Built in 1984
- 1700 square feet
- Occupied by 2 adults and 2 children
- \$275 a month on average, combined energy utility bills (total annual cost \$3,300 in electricity and about \$1,200 in gas)

Their Home Energy Makeover

Comprehensive Energy Analysis

Robert Brown of VaHome conducted a comprehensive home energy analysis using diagnostic equipment. The analysis looked at how the different components of the home energy system worked together compared to national "whole house" energy efficiency and safety standards. Robert found that air leakage through the home's outside walls, attic and crawl-space was two and a half times greater than should be expected. Robert determined what improvements would have the greatest impact for energy savings, health and safety, and comfort. Comprehensive national standards are set by the Building Performance Institute.

Heating and Air Conditioning System

Edger replaced the 18-year-old 80% efficient gas furnace and 10 SEER air conditioner with a 95% efficient furnace and a Lennox Performance Comfort System which controls air energy and electricity to reduce peak demand on home electric usage. They also installed a hospital grade air filtration system to help improve indoor air quality, and they added a zoning system so that the Locketts could separately control the temperature of the upstairs and downstairs with a single heating and cooling system. At the author's suggestion, the homeowners trimmed the bushes around outside air unit so it would work properly.

Sealing and Insulation

In the attic, McMillan air-sealed all recessed lights, fans and vents that are accessible from the attic. They moved insulation around to seal a crack where conditioned air could exit the home easily. Then they added about 1000 square feet of R-19 insulation to the attic for an overall insulation value of R-39. Also, they added an insulated attic hatch to prevent heat from entering or escaping the closet area.

On the home's outside and lower floors, McMillan air-sealed all exterior pipes with foam to prevent bugs and pests as well as unwanted air from entering the home. In the crawlspace, McMillan insulated the side walls, sealed the crawlspace and installed a ground cover to keep out moisture and mold. They also air-sealed all visible ducts to make them air tight.

Water Heater

The existing water heater was just 4 years old so no change was made.

See examples at www.wjla.com/homeenergy
See template at www.encyfirst.org



3. Leverage Your Credentials




Your house is trying to tell you something.

But don't fear. Now you can get up to **\$4,000** in **REBATES** and **INCENTIVES** for Energy Upgrades.


Learn more:
EnergyUpgradeCA.org
 Bay Area Call Center (855) 464-8484




energy upgrade CALIFORNIA



Get Comfortable with Energy Savings
 Rebates up to **\$4,000!**



Upgrade your home. Conserve. Save money.



BPI Accredited Contractors get it done right—the first time.

We deal with home performance issues like:

- Comfort Problems
- Mold and Mildew
- Poor Indoor Air Quality
- High Energy Bills

We're in your neighborhood. Ask us what we can do for you.

CONTRACTOR DEFURMATION

Raising the bar in home performance contracting.



4. Draft a News Release

- About you as local expert
- First customer! 100th customer!
- Local representative for your state program, BPI, etc.
- Free resources and case studies on your website
- Available to speak to groups



Chris Maki from Green Build Technology uses a blower door to depressurize a home and test the estimated cost of air leakage during a home energy audit.
Ben Woloszyn/Boomerang photographer



Photography: Abbott
Dave Bunn, owner of Green Build Technology from Laramie, performs a blower door test on the second house built by students in the EWC Construction Technology program. The program uses environmentally-friendly building practices such as Energy Star and LEED.

5. Distribute the News Release

- Media and Search Engines via www.marketwire.com or www.businesswire.com
- Everyone you know via www.mailchimp.com
- Friends and Family via Facebook and LinkedIn

APRIL 24, 2002

BUSINESS TIMES

THE ITHACA TIMES / 29

EFFICIENCY EXPERTS

CONSULTANT HELPS CURB ENERGY COSTS

By M. Tim Waters

Businesses call it overhead. Homeowners call it being expensive. Either way, energy costs are as burdensome as they are tickle, and no one can fix rates.

Yet, many owners of residential and commercial properties are making one-time investments that, they believe, will reduce energy costs over the long term.

A local company that specializes in energy efficiency, Performance Systems Development, conducts energy audits to help owners make buildings more efficient. But what makes the company unique is that it has also developed the model which several government energy authorities are adopting to assess a building's energy efficiency.

Working with Niagara Mohawk, PSD developed the first model for what it calls "home performance" in the country. This

was adopted by the New York State Energy Research and Development Authority (NYSERDA) for its own energy efficiency program, and PSD is advising the development of energy programs in several other states. "Now the Environmental Protection Agency has picked it up to roll it all out nationally," says Greg Thomas, president of PSD.

PSD employs a "whole-house" treatment, which involves checking living environments for health, safety, comfort, indoor air quality, durability, and the relationship between them.

"A building is an interconnected system," Thomas says. "We're not just prescribing a drug to remove one problem when the body is sick underneath."

PSD, along with local firm Talen Engineering, participates in a NYSERDA program as "eligible technical contractors," con-

ducting energy audits for half price if business owners integrate some of the recommended measures. NYSERDA will pay for the remaining cost of the audit. "If anybody is serious about doing an energy audit, the audit is free and will help guide your improvement," Thomas says.

Also with Talen Engineering, PSD is developing energy analysis software that New York is using for its energy programs. This software was recently demonstrated nationally to an enthusiastic response.

PSD, whose focus is on consulting and training, recently developed a subsidiary, Performance Systems Contracting, which conducts audits locally and develops proposals to implement the company's recommendations.

John Harrod, manager of the PSC, says that, while conducting energy audits, the company focuses on indoor air quality because many illnesses are linked to living environments.

The term "sick house syndrome" came into use in 1976 and 1980s because homes of his period were built more "tight" to withstand heat, but with inadequate ventilation, creating excess moisture, mold, dust mites and other problems.

Services conducted by PSC include a "blower door test," which

involves setting up a big fan in a door way to see how much fan flow it takes to depressurize a house. This assesses a home's tightness.

Safety tests for heating equipment can determine air-safe levels of carbon monoxide. Heat recovery ventilators are often recommended to maintain that tricky balance of heat efficiency and adequate ventilation.

"It's truly amazing to see how many homes there are in Ithaca that have ancient, inefficient heating equipment and little to no insulation," Harrod says.

For high-use houses, some improvement measures will pay for themselves in roughly three years or less, Harrod says. Partially improved houses will see added measures pay off in five to 10 years.

NYSERDA also recently introduced a program called "home performance with energy star," which provides low interest loans for home improvements that save energy, such as solar panels and improved insulation. "That way,



DOLLAR SAVER: John Harrod helps homeowners achieve energy efficiency.

homeowners can get their savings right away and spread costs out," Harrod says.

Some measures out of the range to those with below average income can receive cash subsidies for the improvements, in addition to loans.

"There are hundreds and hundreds of people in Ithaca living in older houses, not making lots of money but who want to do the right thing environmentally," Harrod says.

And, in case you're wondering, PSD practices what it preaches, maintaining its offices in the local beacon of low-energy use living—EcoVillage.

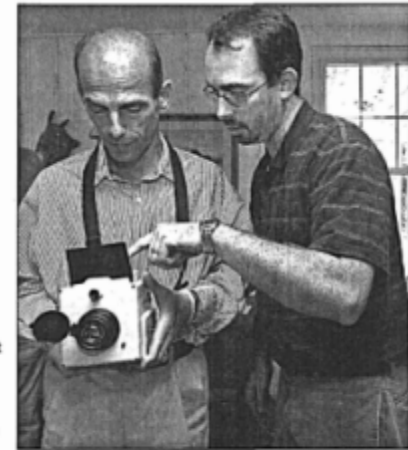
Local Dispatches

CAPE ELIZABETH Energy-saving program now available statewide

A state program to help Maine homeowners make their homes healthier and more energy-efficient is now available across the state, the Governor's Office of Energy Independence and Security announced during a demonstration of the program at a Cape Elizabeth home Tuesday.

Available in a few counties for the past year, the Maine Home Performance with EnergyStar program links homeowners with specially certified contractors who perform a \$200 to \$600 evaluation.

Inspectors look at potential problems, such as excess air leakage and mold and mildew contamination, and recommend



Gregory Rex/Staff Photographer

Stephen Carr shows Gov. John Baldacci, left, how an infrared imaging camera works at a Cape Elizabeth home. The governor visited Tuesday to promote a program that is meant to help Mainers make their homes more energy-efficient.

EGIA

6. Produce a Customer Open House

- During and after current customer project
- Email invites
- Door hangers
- Yard signs
- “Impromptu”



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- Roof repair or replacement
- HVAC repair or replacement
- Major Remodeling

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DID YOU KNOW?

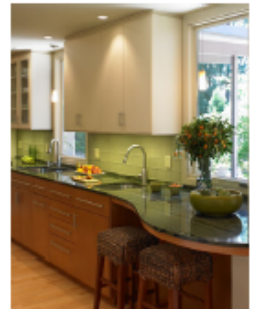
A bigger air conditioning unit alone isn't the answer

Installing solar panels alone isn't the answer

Changing windows alone isn't the answer

Proper insulation alone isn't the answer

Proper installation and integration of all of these components is the answer, we can show you how.



7. Get on the Speaker Circuit

Topical and “How To” Speakers are needed at:

- Rotary Club and other Civic Organizations
- Home Owners Associations
- Chambers of Commerce
- Adult Learning Centers
- Realtors and Code Officials
- Business and Trade Groups

***Download Brochure and
Presentation Template at
www.encyclopediafirst.org***




8. Produce Your Own Workshop

- 20-45 min. on “10 Tips to Save Money, Be More Comfortable and Make Your Home More Earth Friendly”
- 1-2 hours on “Whole House Improvements: How to Do it Yourself and/or Manage Your Contractors”

Efficient & Healthy Home
Sponsored by
Cluster County Citizens For Climate Protection - 4CD

Wednesday, March 4, 2009
7 pm - 9 pm
West Chester Borough Hall - Room 140
401 East Gay Street, West Chester, PA 19380

Invest an evening in learning about home energy audits
and healthy home indoor air quality



Improve Your Planet
Improve Your Health
Save Money Every Month
Slow Global Warming
Improve the Security of Your Nation

Points to be covered ...

- Components of an Energy Audit
- BPI & RESNET certifications - why they are important
- Typical items identified during an audit
- I've had my audit, now what?
- What homeowners can do to reduce their energy use
- Federal & State tax incentives/credits
- Improving your home's indoor air quality

Evening Schedule ... 7:00 - 8:15 Speakers
8:15 - 8:45 Q & A Session

Carbon Footprint 09

A Free Class in Walking Scilly and Saving Wisely ...

Saturday, March 7, 2009
Gaynedd Friends Meeting in Gaynedd, PA 19436
8:30 am - Coffee & Tabletop Information
9 am - 1 pm Class
Class size limited to 50
Registration Required: www.hometowngreen.com click on Green Schools

Invest a Morning in Understanding the Relationships
Between You, Energy, the Planet, and Money



Improve Your Planet
Improve Your Health
Save Money Every Month
Slow Global Warming
Improve the Security of Your Nation
Model Right Relationship for Others

Come learn why energy costs are rising and begin to develop long term strategies for keeping your family budget on track through reducing energy and materials use. Join others from your community and learn how to add up the impact of your energy use on the planet. Learn how simple it is to reduce your use and to help and encourage others to do the same. Create an environment of empowerment, change, and stewardship.

Registration Required:
www.hometowngreen.com and click on Green Schools



9. Produce a Newsletter

- Your news releases
- Customer stories
- Latest on federal/state/utility incentives
- Reprints from other sources
- Distribute in print at health food stores, Chamber/Rotary meetings, etc
- Distribute online via Constant Contact and watch who click-thrus



10. Make the Most of Home Shows

- Cross-telling is Cross-selling
 - *Yellow boiler “as seen on energystar.gov”*
 - *Solar? Home Performance is first step..”*
 - *Whole House poster is key talking point*
- Homepage on laptop
- Showcase case studies & presentations
- Live radio interviews
- Clipboard with “lead sheets”
- Bring your appt. book!



Your Marketing Launch

1. **Email and call all your local papers, radio and TV stations** and ask if they need your help to produce a story on what local people can do to save energy, be more comfortable and reduce carbon emissions
2. **Email and call all local civic groups** and ask if they need your help to make a presentation on what local people can do to make their homes perform better
3. **Position yourself NOW to be the local “go to” home performance expert** to leverage local media outlet when they decide to run a story about something related to home energy/performance (i.e. Energy Upgrade California, utility rate increases, cold/hot weather records, global warming concerns).
4. **Don't build your business to rely on federal/state/utility incentives.** Sell the fact that your services are worth paying full price.. for savings, comfort, efficiency, health/safety...



Learn More at Leadership Academy

Workshops produced online or in-person by EGIA are designed to help contracting company owners and key management staff grow their business. Industry topics include:

- Internet Marketing for Contractors
- Home Show and Community Event Marketing for Home Improvement Contractors
- The Internet – In Your Own Hands
- Developing Listening Skills To Increase Sales
- Getting Quality Leads from Your Website

Free Archive Access at www.egia.org/acioffer

