

# 5 Tips to Clearly Communicate Home Energy Assessment Results

## How to meet your customers' expectations through simple, face-to-face conversation.

Recent NYSERDA research shows that one of the most critical points in the sales process is the review of the home energy assessment results. Many customers reported being confused, overwhelmed, or distrusting of their contractors when their assessment results were presented. Considering the complexity of home energy efficiency assessments, it's no surprise that information gets lost in translation. Use these tips and tools to help you clearly communicate the findings of your assessment face-to-face, through simple conversation.

**Have a conversation.** Mailing the results of your energy assessment report without any follow-up can feel cold and impersonal, and leaves the potential for customers to get confused by data and details. A better way to communicate results is through a face-to-face interaction, where you'll have the chance to break down results for the customer and answer any questions they may have, all while making a positive impression through great customer service.

**Tie recommendations to customer concerns.** An energy assessment is thorough, complex, and highly detailed. Instead of overwhelming your customers with every detail of your assessment, call out their most urgent issues and assign a clear, concise recommendation for each. It will limit the anxiety associated with decision-making and earn you more confidence and trust.

**Drop the lingo.** Most customers have enough to process during an energy assessment without having to learn new jargon. Try to explain assessment results in layman's terms, and do your best to break down complex technical processes into simple, true-life scenarios. Most importantly, ask the customer if they understand what you're saying – and if they don't, politely walk them through it again. The more they feel that you truly want them to understand, the more trust you'll earn from them.

**Provide context.** When walking customers through your findings, be sure to provide a frame of reference. Don't just give a measurement; give an idea of what's "good," what's "bad," and how it applies to their everyday lives.

**Prioritize and phase.** Two of the most common reasons people don't execute contractor recommendations are that there's too much work to be done, and that it will cost too much. In Step 7 of Mike Gorman's 8 Steps to Winning the Job, Mike provides some strategies to help you sell your entire set of recommendations. However, when a customer doesn't move forward with the all of your recommendations, try prioritizing and phasing your recommendations.

- **First, prioritize** your recommendations so the work builds towards a logical completion. As you know, you wouldn't replace an HVAC system before you fix any worn out or leaking ducts. Explaining the sequence will help customers understand your recommendations and processes.
- Second, recommend a **phased approach** to major long-term projects so that the customer can approach them in the proper sequence in order to make the greatest impact possible on building performance. This provides customers with a tangible blueprint that's much more likely to be acted upon.

*See next page for our Communication Simplification checklist, with dos and don'ts for communicating assessment results.*

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## Communication Simplification Checklist

Use this checklist of dos and don'ts to clearly communicate assessment results and drive more sales.

### DO

- Have a face-to-face conversation to review assessment results
- Summarize issues in easy to understand terms
- Provide context of why data is “good” or “bad” compared to the norm
- Make no more than five clear, concise recommendations
- Prioritize recommendations
- Offer a phased plan for implementation
- Highlight financing options
- Tell customers how upgrades will improve their everyday lives

### DON'T

- Mail an assessment report without follow-up
- Read complex lines of data
- Assume customers understand data at face value
- Overwhelm with a laundry list of to-dos
- Leave customers wondering where to start
- End the conversation with a hefty price tag
- Talk only about rational benefits

For more sales and marketing insights, look for the Selling Efficiency Series blog posts on your NY Home Performance Portal dashboard.