



THE “PINS”:

1 Customer Satisfaction

Meet or exceed expectations by setting and managing them

Which customer? (all of them!)

2 Customer Engagement

Audit-to-Action™

3 Customer Follow-through

It's not the “Never Ending Story”, but...

Bowling for Success

Best Practices for Efficient Energy Audits

WHICH CUSTOMER? ALL OF THEM!

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If you are in the energy industry (and reading this paper), you are intimately familiar with the term, “Energy Efficiency Audit.” Assuming this is true, you are probably in the business of delivering energy audits in some fashion. Whether you are a sole proprietor energy auditor or a program manager for a large utility company program, the efficient delivery of services is one of the key drivers of whether or not you will make a profit, meet program goals and ultimately, succeed. This paper explores best practices for efficient delivery of energy audits. Some of these practices are common sense and some are hard won lessons learned over years of delivering energy audits in the energy marketplace.

THE PINS

These “Pins” are not presented in any particular order. But, like bowling, you don't get a “Strike” if you don't knock down all the pins. They just aren't optional. Kind of like the physics relationship to building science.

We've grouped this first set of best practices under the first pin, **Customer Satisfaction**. If we can't achieve Customer Satisfaction, we can't make it to the next steps:

Engagement and **Follow-through**. For better or worse, we operate in an education role in the delivery of most energy audit experiences. Some may call it marketing—or even sales—but ultimately, whether the delivery method is couched in education, sales or marketing, it should always be an attempt to move homeowners from *Audit-to-Action*.

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CUSTOMER SATISFACTION

Which Customer? (...All of them!)

In this installment of the series, we turn our attention to the nature of your customer. If you don't understand your customer(s) how can you possibly satisfy them? If you think that you're working for just one client, you may want to think again. If there are multiple occupants in the same house, you're working for *all of them*. If you are working audits in a program, you're working for a whole pack of people!

THE KALEIDOSCOPE OF CUSTOMERS

Homeowners

We think of homeowners as a sort of monolithic group of customers. But are they? Well, there are occupants that aren't owners. That group inherently comes with another *homeowner* group called *Landlords*. What about the different needs and types of people that live in homes? Husbands? Wives? Children? Big kids? Little kids? You may not be working directly for each of these groups, but you are working for them in some way.

How about the demographics of homeowners? Older? Younger? Retired? Approaching retirement? Overwhelmed with raising kids? Perhaps they are DINKs—*Dual Income No Kids*. Knowing and assessing the homeowners is a critical step in achieving customer satisfaction. We're not suggesting you conduct a Myers-Briggs Personality test for each client, but paying attention to each is an excellent idea. *You get there by listening.*

That starts with your call center and continues throughout the entire audit and retrofit process. Does your call center staff make notes in the files on your customers? Is every reason they're calling for an audit get noted for the auditor? You are *missing opportunities* if they aren't. Are your auditors trained to conduct excellent interviews with customers? *Customer satisfaction starts and ends with listening.* We are blessed with having auditors who listen well and naturally. If you or yours don't listen, you may want to invest in some training along those lines. Please take a moment to read this excellent short article from the [Harvard Business Review](#) on listening that you can share with staff.

As important as knowing who your customer is, is understanding why your customer is calling in the first place. Of course, there are many reasons for any call, but they can be broadly categorized as follows:

1. Money \$aver
2. Tree Hugger
3. Comfort Seeker
4. Safety First!
5. The DIYer

THE "PINS":

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It's not the "Never Ending Story", but...

- 1 The Homeowner(s) and their many facets
- 2 The Landlord
- 3 The Utility Company
- 4 The Trades

These are broad categories, and most folks actually fit in multiple or even all of these categories. Ultimately, however, there is a primary objective that motivates them. Your initial reaction might be that it's too difficult to know this much about the customer. We have a secret way of getting to this information that we've used and perhaps you use as well. We ask them. Yes, you may get a skewed answer, but even if you do, you at least know what the customer thinks their primary motivation may be!

Often, during the course of an audit, further or even contradictory motivations will come to the surface. Almost all of us who have worked in the energy industry for a number of years have experienced the phenomenon of having clients change their mind about additional testing during the course of an audit.

Let's look at each of my mini-demographics in turn...

Money \$aver

This may seem sort of obvious, but there are a lot of permutations to this category of customer. This customer wants to save money, but why? We all want to save money, but are they on a fixed income? Are they struggling in some way with bills? Knowing these things must influence your recommendations to the client. Or, not that it happens often, is money no object? The means, objectives, and commitment of the customer are all keys to satisfaction.

Tree Hugger

Clients that are motivated by environmental concerns are often the best educated clients when it comes to energy issues. This doesn't necessarily mean that they will be more likely than others to actually follow through with action, but it does give you a sense of a willingness to entertain a broad spectrum of recommendations, particularly behavioral recommendations.

In some cases, customers are actually looking for validation of things that they have already done. That's great if they have done a good job. Not so great if you have to break the news to them about a poor choice!

Comfort Seeker

There is a large segment of energy audit customers that are motivated by a comfort perspective. These customers have likely suffered for years in uncomfortable homes and are looking to an audit to diagnose their problems. This is both good and bad as comfort seekers are typically highly motivated, but the diagnosis is often beyond the scope of many audits, especially in program contexts.

Diagnosing comfort problems is also often beyond the skill set of inexperienced or poorly trained energy auditors. It is important to know if you are sending auditors into situations they can not handle. Don't set your people up for failure!

Safety First!

This segment of customers is concerned about some aspect of safety in their home. Most often, this will be an indoor air quality concern or suspicion. It could involve a family member that is suffering from a respiratory ailment or other chronic condition. Moisture and mold concerns are also common concerns. Just as for comfort problems, most audits don't cover these assessments and most auditors are not trained or qualified to tackle these sorts of issues. However, for both comfort and safety, even the most basic building science training can (and should) help to begin diagnosing a home performance problem.

REAL WORLD EXAMPLE

“I once did an audit for a gentleman who was very proud to tell me about his new ground-source heat pump. It cost him about \$25,000. I had to tell him that in his 1940/50's home he really should have started with basic insulation and air-sealing first. Those are not comfortable conversations!”

REAL WORLD EXAMPLE

“An older lady called for an energy audit of her apartment. During the audit the customer mentioned that she could no longer earn her living as a voice teacher as she’d lost her voice recently. After a bit of discussion, the auditors linked recent work in the attic to her voice loss. Inspecting the attic, the auditors found that return ductwork had been damaged during insulation installation. Following the trail, they then found fiberglass insulation dust in the apartment.”

That’s going the extra mile!

PERSPECTIVE

“A friend once explained to me the spot that a utility DSM manager finds themselves in. He said, “If they do too good a job, the utility is mad at them. If they do too poor a job, the regulators are mad at them. The only thing they can do to win is hit the targets dead on!”

The DIYer

This category can encompass all of the other categories. The Do-it-yourself aficionado is looking for guidance and support in doing as much as they can themselves. While this is highly admirable, the concern for an auditor or a program is ensuring that the well-intentioned homeowner doesn’t do more harm than good. There are many improvements that a homeowner can do themselves. It is imperative, though, for the energy professional to clearly communicate those things that must be addressed by a professional.

For more on this please check the [blog](#) and the excellent work done by Shelton Group.

BE PREPARED

All of this work about who the client is, what motivates them and what they expect, results in a well informed auditor. While this is one piece of the puzzle, the auditor’s observation skills are another. Being prepared helps an auditor prepare to succeed. However, the auditor’s listening and observation skills are also critical.

An excellent auditor has the ability to pick up on subtle details in the home that can help guide their work, their recommendations and open the door to the opportunity to truly excel. This can take any number of forms, from making connections that a less attentive auditor might miss to working around physical disabilities and other challenges a homeowner may face.

ANOTHER BIG CLIENT

If you perform audits for a program, then you have a rather important additional customer. Depending on the program design, you might be serving the needs of a program manager, a program implementer, the utility company itself or all of these at the same time. Often, this puts the auditor in a position of mediating between program design criteria and the expectations of the customer and these two aren’t always aligned!

This goes back to part of the discussion from the first paper in this series about customer expectations ([available here](#)). Setting expectations at the beginning of the customer service cycle is key to achieving excellent customer satisfaction. It is up to the call center and the auditor to manage any disconnects between program design and client expectations. Hopefully, all of the other parties involved in program delivery are also engaged in managing this issue, but it is not always the case.

Whether a program is operating in a regulated or an unregulated environment, someone is ultimately responsible for paying for the audit and answering to ratepayers. It’s important to keep in mind that in a regulated utility environment, there is typically a regulatory oversight body that the utility must report. The job of being a utility DSM manager is not a particularly enviable one as there are so many competing stakeholders involved (*see sidebar*).

You may also find yourself working in a municipal or other program that will have similar goals even if it is not a regulated utility. It may well be your own community that you are working. In a sense, that makes every person in your community a client! No pressure though!

FIRST CONTACT!

Though we addressed this in our first report, it is valuable to go even deeper on this topic. The first human contact with a client is typically the call center. If there is one under recognized, unheralded, underused secret weapon in your arsenal for achieving superlative customer service, it is your call center. We have all had bad call center experiences. When you have a good experience it stands out and that is an opportunity. We work hard to recruit the right people, and then train them well so that they have a platform for success with the clients.

This has given us a top notch call center staff that has a deep understanding of not just the programs that they are helping to manage, but the actual building science that is the foundation for the work we do.

Our call center is the beating heart of our organization and their work is the foundation for the proven success that we enjoy with regard to customer satisfaction. These employees are basically call center superheroes and deserve a great deal of credit for the work they do.

I solicited our staff for their recommendations on this paper, thinking that we would incorporate their thoughts. But instead of summarizing the staff's thoughts, I think that a verbatim transfer of their wisdom is best. I think you'll see why:

EnergyLogic Customer Service Practices

As written by EnergyLogic staff

- Treat each customer with warm, positive regard.
 - Friendly
 - Always courteous and patient-- Clients can be angry, difficult, rude, hard of hearing, talkative, etc.
 - Empathetic-- Clients often have home damage/issues or share personal problems (death of spouse, divorce, illness, etc.)
- Knowledgeable
 - Solid understanding of services provided
 - Solid understanding of communities and regions serviced
- Prompt
 - Return every call, email, or inquiry promptly
 - Address client issues as quickly as possible, keep clients informed of progress
- Clear and Constant Customer Communications
 - Explain services and process
 - Work with client's scheduling needs, accommodate as able
 - Confirm appointments
 - Provide contact information for questions, cancellation, etc.
 - Problem solve -- Go the extra mile. Provide additional information, referrals, help as needed
 - Acquire detailed and accurate information from client
 - Provide staff with heads up on clients that are difficult or have shared personal information to which they need to be sensitive
- Mistakes— Although mistakes that have an impact on a client are rare, when a mistake is made:
 - Take accountability
 - Offer apology
 - Rectify problem
- Understanding Customer Demographics— Tailor manner/questions as appropriate for each client. Examples include:
 - Senior Citizens: Often unfamiliar with terminology, have physical limitations, may be suspicious of people coming in their home
 - Working Professionals: Educated, under time constraints, may be more demanding
- Humor! When used appropriately can disarm client and build rapport
- Identify with the customer. Don't simply treat each in the manner we expect to be treated, treat them better than even that.



HANDS ON...

EnergyLogic's call center staff is all trained to understand the field and understand homes. They typically attend HERS Rater or BPI BA training and at a minimum go to the field with field staff to ensure they understand the challenges that field staff face. This equips them to answer questions far more deeply than would otherwise be possible.



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HOME, SWEET HOME

Of course, at some point, a field inspector is dispatched to the home. We addressed best practices for the auditor in our first paper about customer expectations (*available here*). Many of the ideas in that report echo the ideas from our call center professionals' practices above. At the end of the day, common sense, common courtesy and professionalism are a solid foundation for success.

Finally...

I'm sure that I've missed some client groups in this summary. There are certainly manifold variations of programs and delivery models that involve other important groups. But the point is that you have a variety of clients you are serving in almost every case. Knowing each unique client and their unique circumstances, then working to ensure that you are setting the stage for success all through the process is extraordinarily important.

From first contact with your call center, through the completion of the audit, each step is critical to the overall destination that is customer satisfaction.

Please stay tuned for our next white paper on:
Customer Engagement—Audit to Action™



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