



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

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If you are in this industry (and reading this paper), you are intimately familiar with the term “*Energy Efficiency Audit*”. If this is true, then, in some way you are likely in the business of delivering energy audits. Whether it's as a sole proprietor energy auditor or as the program manager for a large utility company program, the efficient delivery of services is one of the key drivers of whether 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 by years of delivering energy audits across the spectrum of the 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

There are many facets of customer satisfaction, but there are a few that experience has repeatedly shown us are important. Here is a short list of important customer satisfaction attributes:

- 1 Timeliness
- 2 Setting and meeting expectations
- 3 Knowledge
- 4 Helpfulness

All of these are important. Get one wrong—and all the others right—and guess what? You're still wrong. So, how do you, either as individual auditor or as program administrator, ensure that this basic set of factors is reliably fulfilled? Some of it is personal. Some of it is professional. And some of it is technical. *All of it can be trained, and all of it can be achieved.*

Timeliness and Expectations

Timeliness and expectations are primarily met by having thoughtful, well-conceived systems that allow good staff to do a great job. With poor systems, great staff may achieve something adequate... but rarely will it be great. Poor systems put Call Center staff (even if you are the Call Center, the Auditor and the cleaning crew!) behind the eight ball, searching for information and making best guesses at critical points in the process of managing and administering audit and retrofit programs. We'll return to this critical topic later.

Knowledge and Helpfulness

Knowledge and helpfulness are more personal traits, but they are absolutely trainable. Do the reputations for service and going the extra-mile at retailers known for this trait (think Nordstrom's) happen just with good hiring? No, it's part of the Nordstrom's DNA. Knowledge happens with attitude and training and the capacity to dispense that knowledge in a helpful way is part of that training.

We often make the mistake in this industry of thinking of knowledge in a strictly technical way; *the knowledge of building science and program protocols*. Having the knowledge however, is only half the battle. Delivering the knowledge in a useful and helpful way to non-experts is just as much of a challenge. That, too, can be trained, though it flows naturally from a mind-set of helpfulness.

Many programs approach the question of "appropriate level of knowledge" as primarily a question of certification level. That's completely understandable and, in many ways, defensible. A certification at least sets a base expectation for a level of desired professional knowledge. However, simple certification isn't an assurance of competence. *When did the person in question become certified? Yesterday? Ten years ago? What is the "real" level of experience? What is the rigor of the certifying body?* In most ways, the appropriate mechanism to deal with this open question is to ensure that rigorous quality assurance is coupled with the program. This does seem to be the missing equation in a great number of programs. To use the old adage we employ in our training programs, *"You get what you inspect, not what you expect."*

Helpfulness is a much tougher code to crack. Hiring for attitude is probably the first step in developing and maintaining a staff that is committed to the customer. However, this can be particularly

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difficult to address in sub-contractor driven models. In that case, robust customer satisfaction follow-up is a likely antidote to apathy. Training can, and should, be a part of the equation. This doesn't necessarily mean formalized classroom training. In fact, training around attitude is more likely to be effective in modeled environment via "ride-a-longs" and other related activities. Role-playing and incentives for high customer satisfaction results can also be part of an environment that supports helpfulness.

EXPECTATIONS

Let's turn back now to expectations; setting them and meeting them. Anyone who's been in business for very long realizes that setting expectations is one of the biggest keys to success. After all, if you don't set expectations, how does a client know what to expect? What are the chances that their unguided expectations are going to align with what you want to or are required to deliver (or not deliver)? Pretty much a case of slim to no chance at all that will happen. Whether you are operating in an energy audit program or operating in the bare knuckle free market, you have to set expectations. Even if you are the captain of your own ship, you are setting your price based on what you perceive to be the "fair market value" of a basket of services.

Does your basket include items that the client is expecting?

Do they expect...a blower door test? An infrared inspection?

Do they expect you to recommend contractors? Or a sales pitch?

You can see that it's pretty easy to get expectations misaligned in a hurry. If expectations are misaligned, you've already gone a substantial way toward losing the battle of customer satisfaction. In essence, it doesn't matter what the basket of services contains once you've got the sale (it matters a lot prior to the sale!) as long as you deliver what's expected. How that message and expectation is set is thus important.



It could be that you are able to do all of the expectation setting automatically via email and other electronic outreach methods. Bravo if you can. Our experience has been that we need to be able to respond to our clients (of all types) via a breadth of means. Just as in marketing and outreach, we have to reach them where they are. We still have a considerable segment of clients that want to interact with us via the phone. Call center operations are likely to be an ongoing part of running a business or a program for some time to come. Technology plays a critical role in effective call center operations. However, technology isn't the only solution. One thing we've discovered is that a well-informed, well-educated call center person is an incredibly valuable asset. Not only have you provided the first and in some cases the primary point of contact for the customer with better and deeper knowledge, you have an empowered call center staff that is able to answer far more questions with more authority and deal with far more of the expected but unpredictable situations that arise in running any service company. *Go ahead; try outsourcing your energy audit call center to Bangladesh!*

We work to train all of our call center staff on the basics of energy auditing. Many of them have attended energy auditor or energy rater training and gone to the field to observe field operations. Another effect of this is that the call center staff understands what the auditor has to contend with. Having each member of the staff understand the position of the other builds strong teams. We haven't had field staff man the call center, but we probably should. If you as a manager or administrator haven't ever at least sat and observed your call center staff (better yet—pick up that headset yourself), you should, you'll learn a lot (especially appreciation for your call center staff).

I'd like to do a deep dive on one aspect of customer expectations: One question that virtually every customer asks on the initial contact is, "How long will this take?" People are busier than ever and it's very important to most of them that you don't overstay your welcome in their home. However, if you spend substantially less time than is expected, you open yourself up to the suspicion that the client was shorted or cheated somehow. In most cases, there is a business imperative to not spend too long in a home. Spend too long and you start losing money and disrupting schedules (and thus lowering customer satisfaction). Spend too short a time in a home and risk raising customer suspicion levels and again, risk lowering customer satisfaction.

For most of us, we know how long we'd like to spend in a home. We also know what the market will bear for our services. We want to hit that sweet spot. In effect, we need to be efficient in delivering the services that we've led our clients to expect.

EFFICIENT ENERGY AUDITS

We all know the term energy efficiency audit, but what about efficient energy audit? That is, delivering the expected services in an efficient fashion so that everyone is happy. So what are the keys to achieving efficient delivery? First, let's look at our overall structure again and expand on it:

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

- 1 Don't waste time.
- 2 Don't collect data that's useless.
- 3 Don't try to educate the uneducable.
- 4 Understand time and motion.
- 5 Know your client.
- 6 Don't procrastinate.
- 7 Make sure you got everything.
- 8 Set expectations.

Let's spend a little time with each of these areas, obvious as they may be. We hope that for each topic our experiences might help you with your work.

Don't waste time.

Nothing could be more obvious. But the real point of this staggering piece of wisdom is to continually ask yourself if you're wasting time. Are you wasting time with unnecessary data collection, inefficient movements, wasted trips, etc. This is sort of the über category, so a number of the subsequent points encompass this.

Don't collect data that's useless.

I think the saying goes that *"Beauty is in the eye of the beholder."* However, it could well be *"DATA is in the eye of the beholder."* Now don't get me wrong, we are decidedly data hounds. It was a decade ago that we decided that, yes, while energy geeks, what we really are is in the business of data. The amount of data that can be generated in a home is truly impressive. The question has to return to "What are you going to do with the data?" If you have no clear or obvious future position on the value of the data, you're very likely wasting your time gathering it.

This necessarily returns to program design. Even if you're running a pure, market-based operation, you still have to design the data set that you intend to gather. If you don't gather data, that's an entirely different problem! One approach that we tend to favor is the idea that we don't gather data upon which we never expect anyone to act. For example, if the walls of a home are blown full of insulation, what value is there in diligently measuring the area of those walls? Very little. Of course, you can always spin up a scenario in which you might need the data, but we're attempting to characterize the minimum data set for a given level of accuracy. We have to have some idea of what level of accuracy is required to meet our objectives. In some cases, performing a neighborhood level characterization of homes may be adequate. In others, we may need a far more comprehensive set of data. *Know what you need and forget the rest.*

Your data collection and reporting tools should HELP your process, not HINDER it.

Don't try to educate the uneducable.

This one is more than a bit tricky. It falls in the category of know when to cut your losses. In every business venture, yes, even the education variety, there are people who will actively thwart your every well-intentioned effort to help them understand their home, energy, sustainability, take your pick. Occasionally, and in our experience, it is pretty rare, you've got to just do your job and walk away. Note that this is not inconsistent with being helpful, it's simply being realistic.

Understand time and motion.

Some lessons are hard earned. An almost universal attribute of inexperienced energy professionals is that they waste tremendous time and energy by not moving through a home efficiently. We've conducted time and motion studies on our energy audits to identify inefficiencies and promote standardization where appropriate. Typically, an inefficient auditor will make multiple trips to the same areas of the home where the experienced auditor minimizes passes through the home. Part of this is experience of course, but it's also intimately tied to process and the data gathering tool that's being used. For example, when measuring or inspecting the outside of the home, efficient auditors collect all the necessary information from mechanical equipment that's located outside. Making another trip because you forgot the air conditioner information kills productivity. Again, your data collection tool should help you with your process and not stand in the way of productivity.

Know your client.

Should you spend your time extolling the carbon-reducing aspects of home retrofit if they have no interest in it? Possibly, but if their primary objective was to save money, not only are you not meeting expectations, but when you realize your error, you'll likely waste time backtracking to try to do the job right. How to know? Well, ask them. Hopefully, your crack call center staff has already started the ball rolling on this by asking for you. If you don't know and are too shy, use your Sherlock Holmes skills to try to discern their primary interest. But really, just ask!

Don't procrastinate.

Every overworked energy professional that has ever lived has dreaded this phone call, "Where is my report?" It's happened to us all, but one of our most sage pieces of advice is this—get the report done as soon as humanly possible after you've done the audit. Preferably, you can deliver the audit as you leave the home. This takes some technology. You'll have to perform the audit on a computer of some sort. You could use a paper approach, but your simply pushing time off until later (unless you don't do any analysis and don't care about data—see above). *However you do it, though, do it now.*

Make sure you got everything.

This is a statement of the "Master of the Obvious" category. However, every experienced energy professional has made this mistake and had to return to the home. To avoid this fate, you need process. A checklist, some sort of system that ensures you don't leave without critical information. And of course, you've already determined which data is worth gathering, so it's all critical.

Set expectations.

Yes, again. As you're leaving the home, set the expectations for the homeowner for what will follow. If you do a good job of this, you'll avoid time on the phone for either you or other staff taking care of what you could have taken care of. *When will I have my report? What is the next step? When will I hear from the contractor? When will my rebate be processed?* **Handle questions and set expectations now, and you take another step toward attaining excellent customer satisfaction.**

Please continue with us via the next white paper in this series: ***Which Customer? (all of them)***

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