



# 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



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Scripps Ranch  
Community  
Center  
The Community Center is operated by the Scripps Ranch Civic Association.  
We hold our activities for our Scripps Ranch Community Center at  
various locations on the Scripps Ranch Campus. Please visit the SAC's  
website at [www.scrippsranch.org](http://www.scrippsranch.org) and look for "Community Center".

# Home Performance Lead Generation

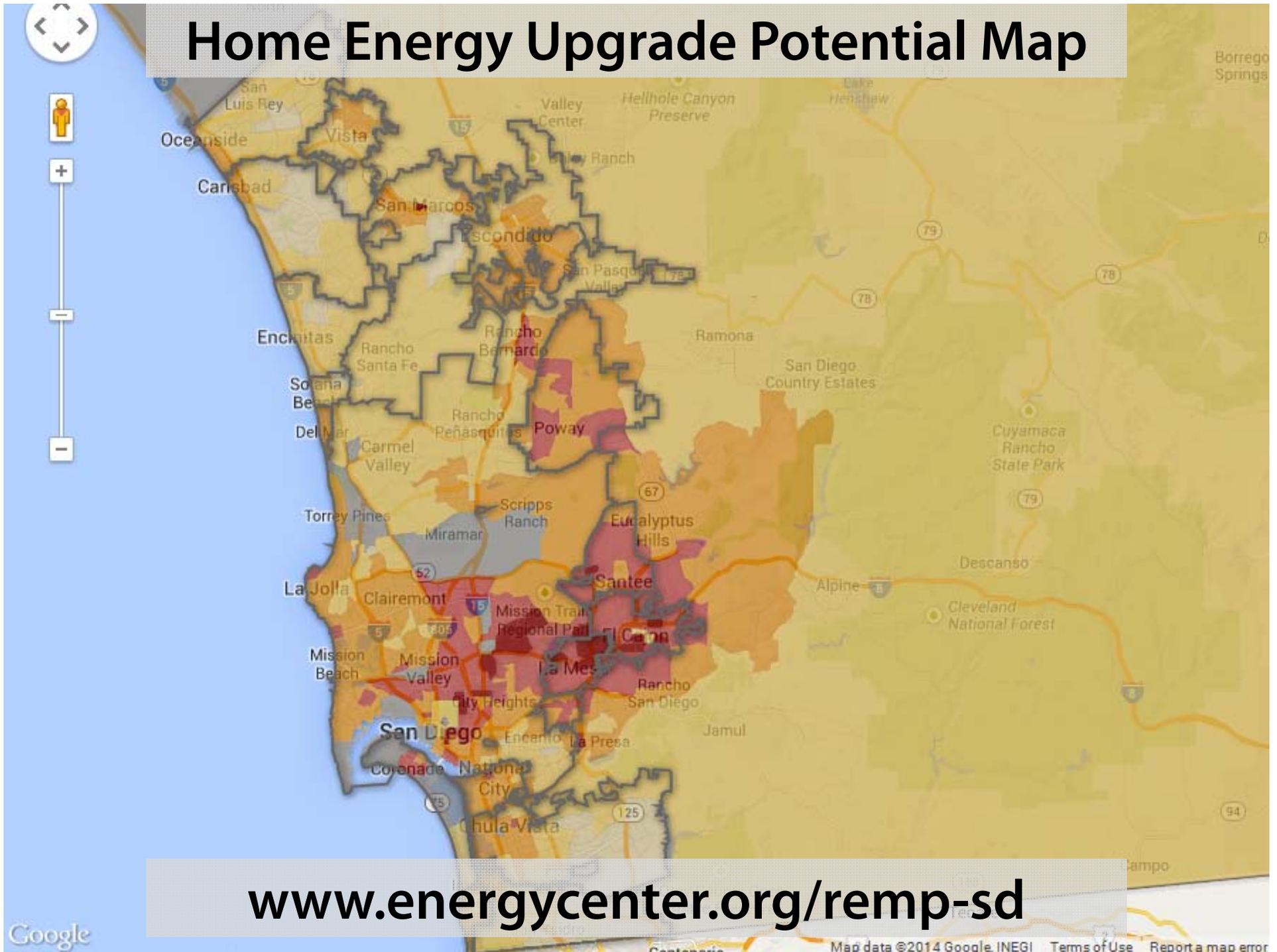
- Community Workshops
- Energy Efficiency Home Tours
- Home Energy Coach: Employee Program





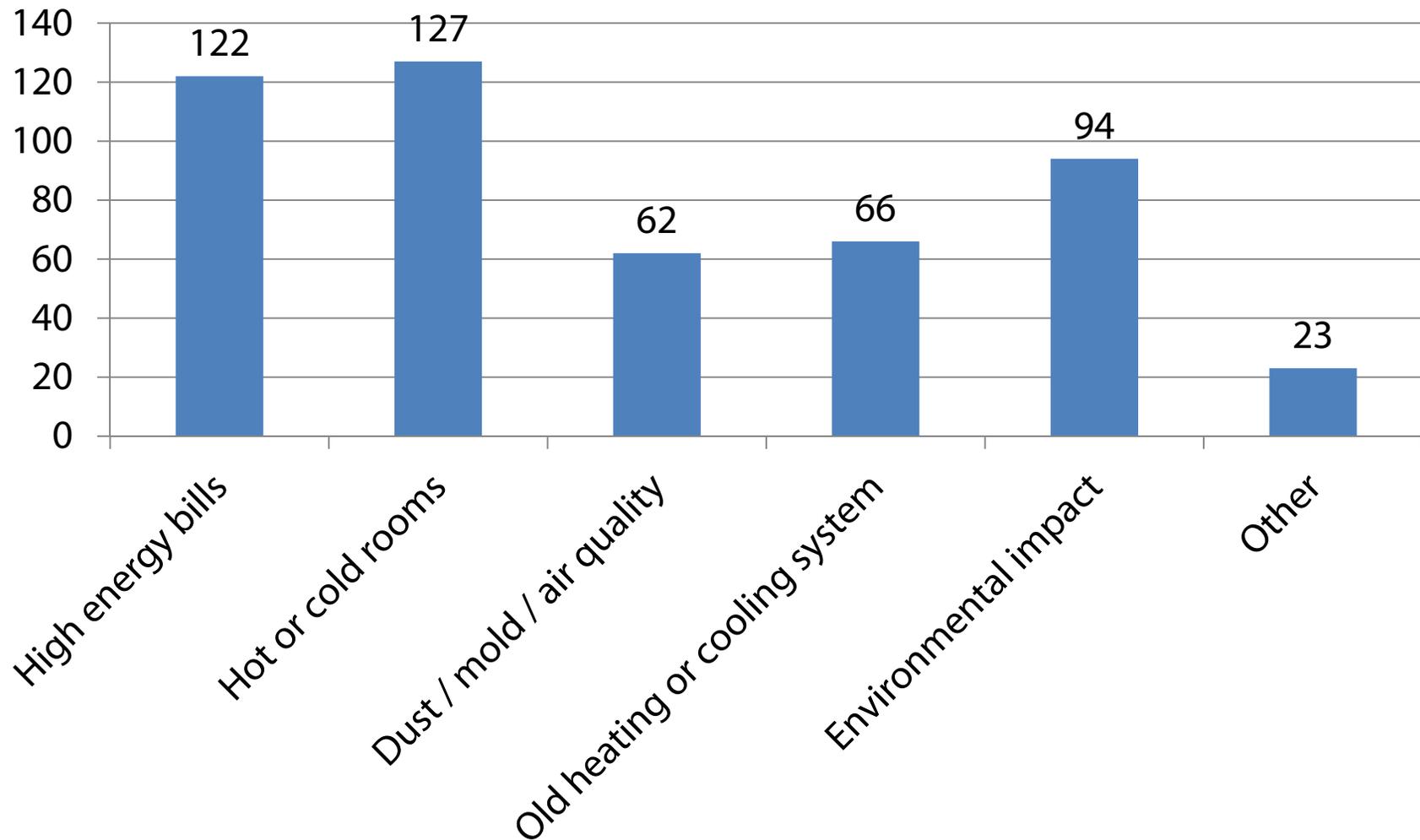
**Goal: Sign up for an assessment**

# Home Energy Upgrade Potential Map

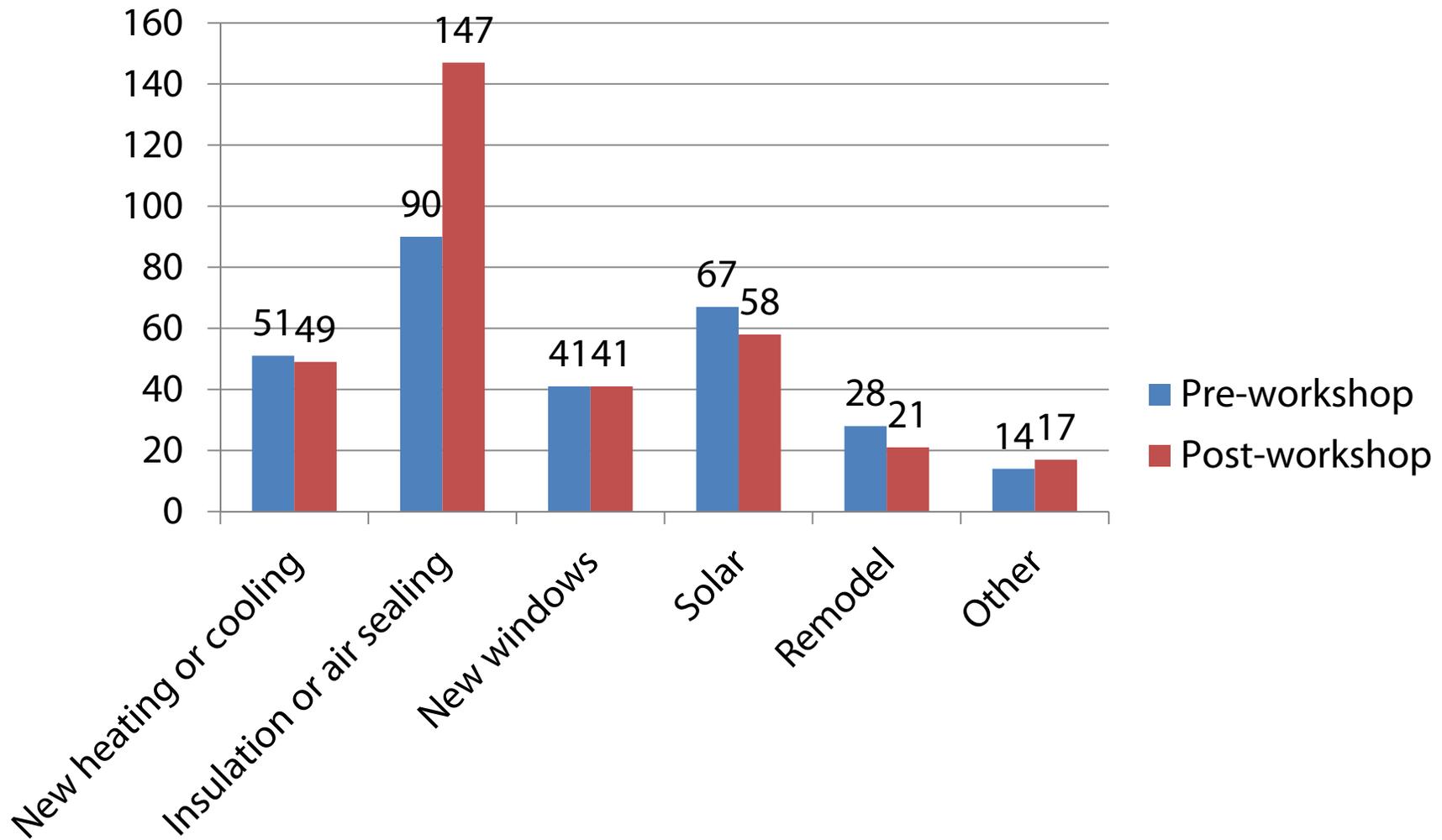


[www.energycenter.org/remp-sd](http://www.energycenter.org/remp-sd)

# 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**



## High-Efficiency Furnace

www.energycenter.org



Installation of new furnace

### ✗ Problem:

Old inefficient furnaces waste energy, are noisy and can pollute your home with carbon monoxide, a tasteless, odorless poisonous gas. Old furnaces can also be a fire hazard.

### ✓ Solution:

Install a high-efficiency furnace with an annual fuel utilization efficiency of 90% or greater, and improve the safety of your home.



A standard gas furnace wastes about 30 cents of every dollar spent on fuel.



Outside air intakes for combustion air (the air that is mixed with the gas as it burns) ensure safe, efficient operation. A sealed high-efficiency furnace reduces the risk of carbon monoxide spilling into the home.

**? Did you know?**  
You can get better heating performance at home by making sure your attic, crawl space and ducts are sealed and your home is properly insulated.



Energy Center

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

Center for Sustainable Energy<sup>®</sup> SDGE <sup>member</sup> Climate Collaborative SAN DIEGO REGION Home Upgrade Energy Upgrade California<sup>®</sup>

An 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.sanclimaticollaborative.org](http://www.sanclimaticollaborative.org). The Center for Sustainable Energy is an independent nonprofit that assists with the adoption of clean and efficient energy solutions. Energy Upgrade California's Home Upgrade program is managed locally by utilities and regional energy retailers 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. Incentives are offered as a state loan. Encouraged but not required. Trademarks are property of their respective owners. All rights reserved. © 2014 Energy Upgrade California.

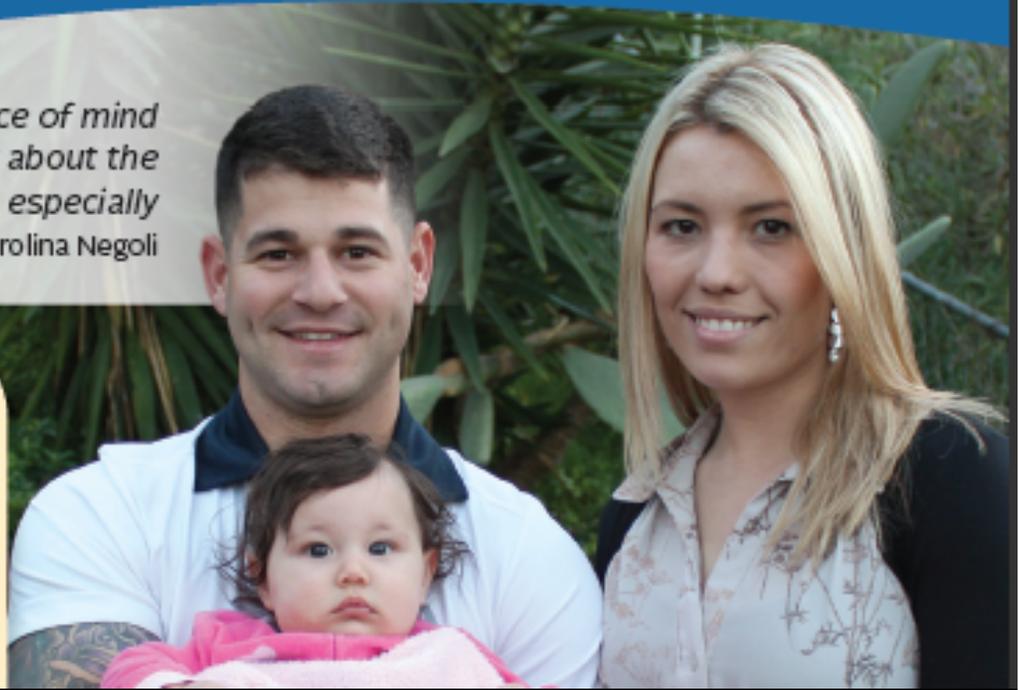
Start your upgrade today! Visit [www.energycenter.org/homeupgrade](http://www.energycenter.org/homeupgrade)

...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."  
 — 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



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 Energy Upgrade California is a program of the California Public Utilities Commission in collaboration with the California Energy Commission and the California Department of Industrial Relations. The program is designed to help homeowners improve the energy efficiency of their homes and reduce their energy bills. For more information, visit [www.energycenter.org/home](http://www.energycenter.org/home). © 2013 Energy Upgrade California. All rights reserved.

Start your upgrade today! Visit [www.energycenter.org/home](http://www.energycenter.org/home)

...fugas de gas o por la posibilidad de  
...un explosión, 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](http://www.cse.org)



Home Upgrade

# Home Performance Lead Generation

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



# Workshop



# Assessment

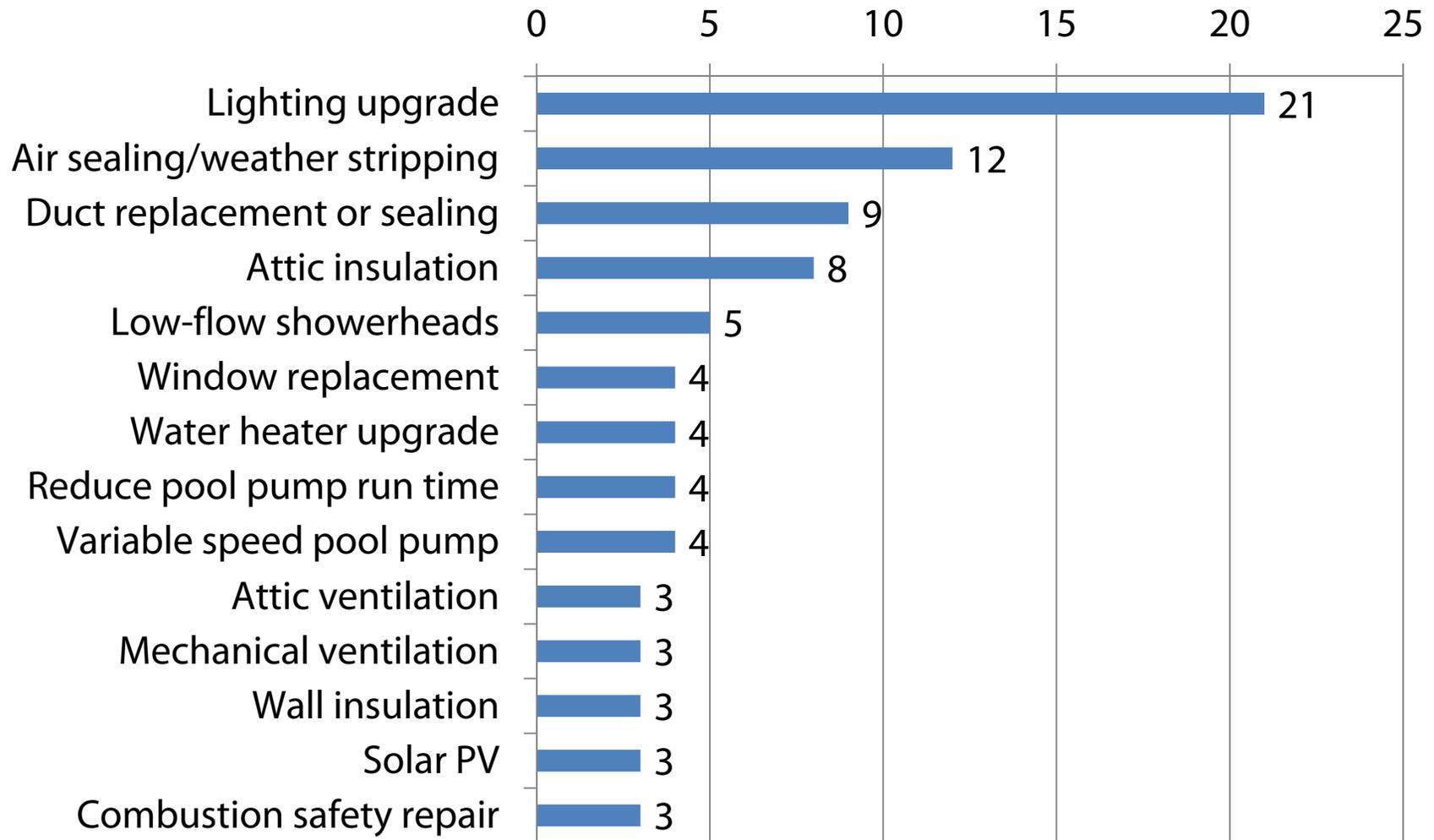


# Consultation

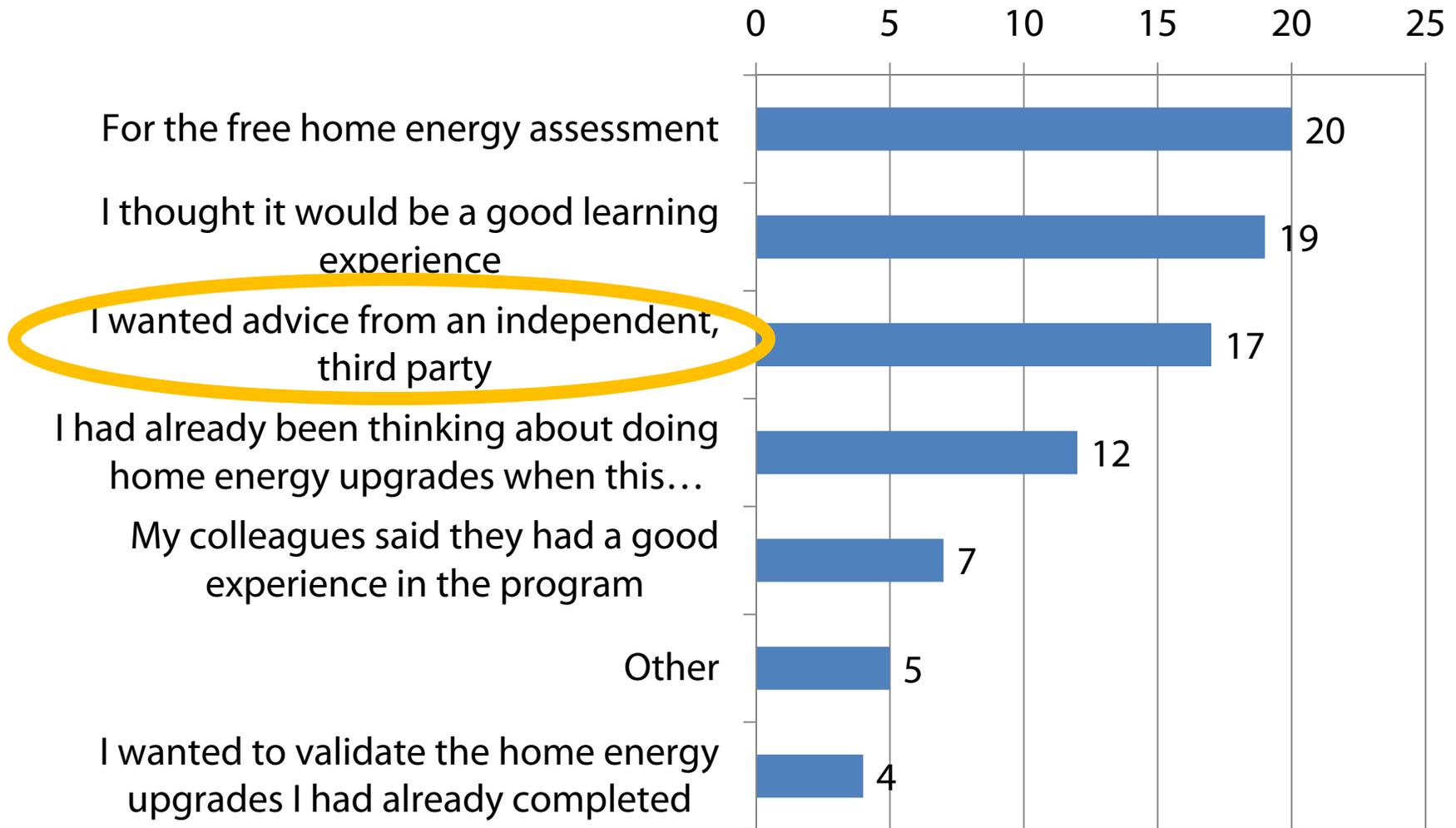


# Upgrade

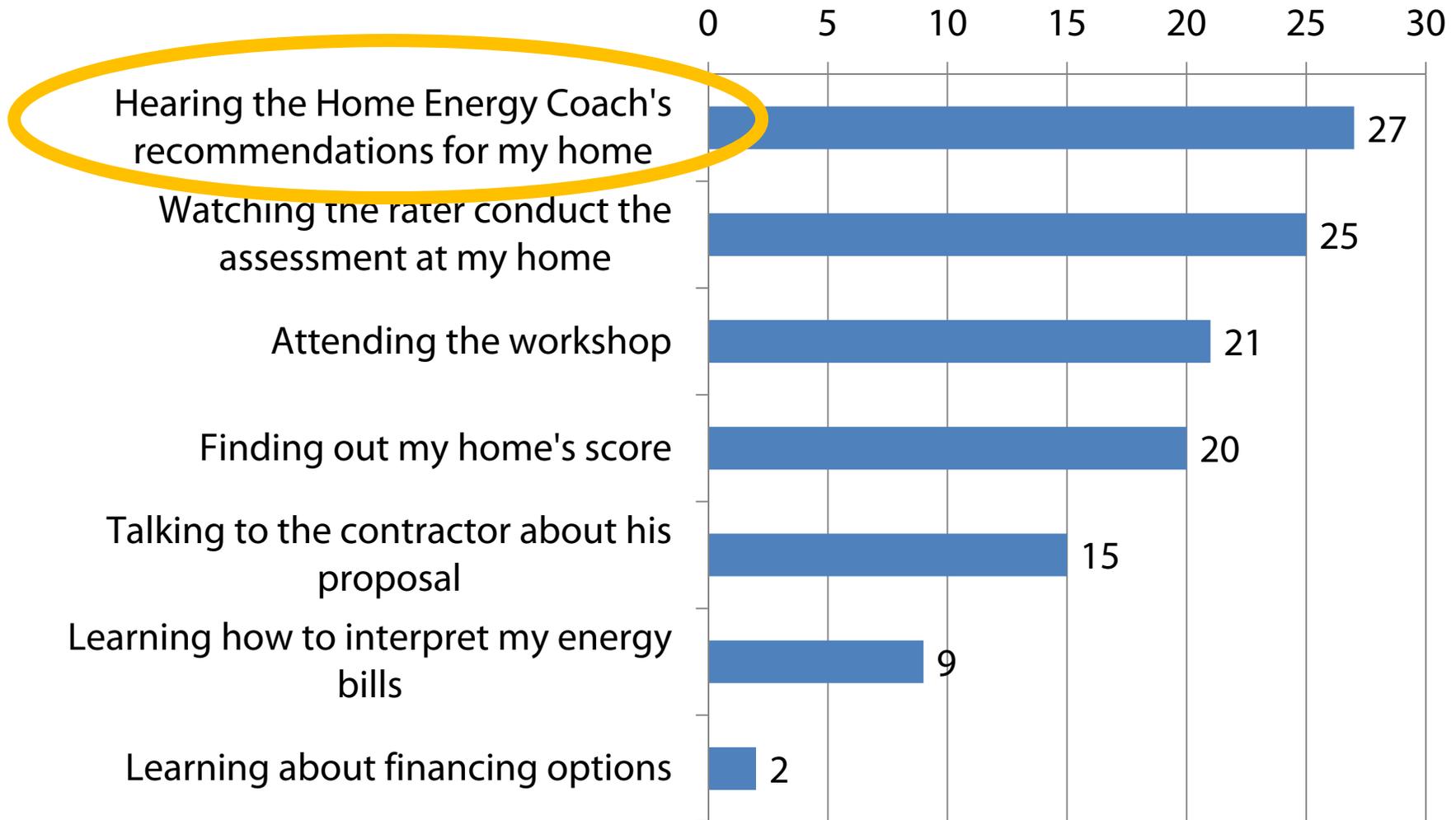
# Most popular measures completed



# 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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