

# Courtship to Commitment

An Interactive Brainstorming Session on the Role of  
Trade Allies in Delivering Energy Efficiency

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# Definition of Trade Ally (TA)

- Common industry term to describe:
  - Installation contractors
  - Consultants
  - Architects, engineers
  - Energy services companies
  - Other professionals who deliver energy efficiency measures to end-users
- Conduit to support energy efficiency



# Program Landscape: TA Benefits

- Program registration: 10 – 1,000 TAs
- Online listing or link to TA information
- Program focused newsletter
- Training: intros, indepth technical, sales
- Webinars
- Co-branded material: restricted or provided
- Bonuses, offers: means to motivate, reward



# Range of Engagement Models

## Information Conduit

- Unofficial network of trade allies share, receive program information

## Sales Agents

- Trained, recognized trade allies actively sell program

## Market Transformer

- Highly-trained trade allies change how customers view EE

## Business Leader

- Trade Ally builds its business around the program

# Program Support Increases as Trade Ally Further Engages



# How Do Models Differ?

## **Business to consumer**

- One decision maker
- TA sells quality to ensure service

## **Common element**

- Utility program established credibility

## **Business to business**

- Multiple influencers, decision makers
- May offer free service to generate sale
  - Walk-through audit
- May charge fee to lead to sale
  - Compressed air study

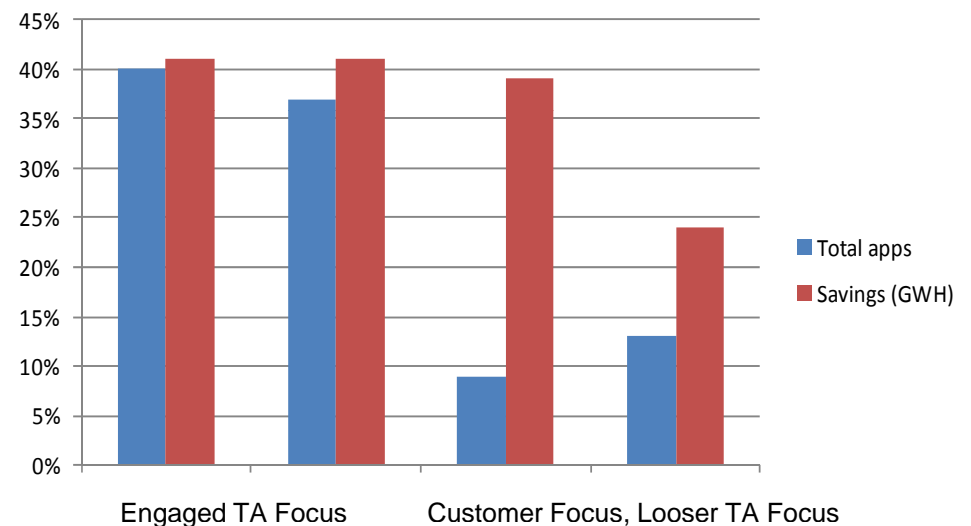


# Impact of Various TA Models:

## Engagement

- Leveraged and targeted as building block
- Mass appeal to build market momentum
- Combination necessary as goals increase
- Core lighting focus, build networks with niche players

## Example Top 20 TAs



# Effective TA Program Benefits

## Utility and Trade Ally

### Utility Benefits

- Cost-effective channel to customers
- Complete applications speed processing, implementation cycle
- Satisfied customers
- Quality representation of program

### Trade Ally Benefits

- Predictable incentives
- Marketing support
- Training: technical, program, sales
- Networking opportunities





# Don't Just Sell a Box

- Reinforce value of energy efficiency, recognize differing values
- Help contractors re-position themselves in the customer's mind
  - Professional, long-term relationship vs. interchangeable commodity
- Build awareness, educate customers
  - Help customers understand significant energy efficiency retrofits are not just an up-sell



# Case Study: A/C Quality Install Contractors in Phoenix

- QI program struggled after launch
  - 60 contractors
  - Inconsistent quality
  - Customers didn't value QI
- APS combined QI with equipment rebate
  - Only available through qualified contractors
- Focus on professional service
  - Promoted importance of correct installation
  - Emphasized contractor training



# New Approach Sparked Activity

- 200 participating contractors: competition got more contractors involved
- Increased involvement in other programs (Duct Repair, RCA)
- Contractors built better relationship with utility and customers
- Lessons Learned: Key Components
  - Direct communication with contractors
  - Create value for contractors, customers
  - Consistent program requirements



# Sample TA Program Highlights

- DTE Energy
  - Many contractors, wide participation
  - Long standing list, no requirements
- ComEd
  - Platinum Program Bonus for surpassing stretch goals
  - Energy Expo participation
- APS
  - Technical skill training (residential and commercial)
  - Registration, training requirements, annual renewal
- AEP
  - Sales training and “ride-along” coaching
  - Regional blitz events with utility staff





# INTERACTIVE SESSION

# Interactive Session Agenda

- Refer to your written instructions
- Task 1 Introduce yourself to others at your table
- Task 2 Assign a scribe
- Task 3 Assign a time keeper
- Task 4 Share current practices and pros and cons of each as outlined

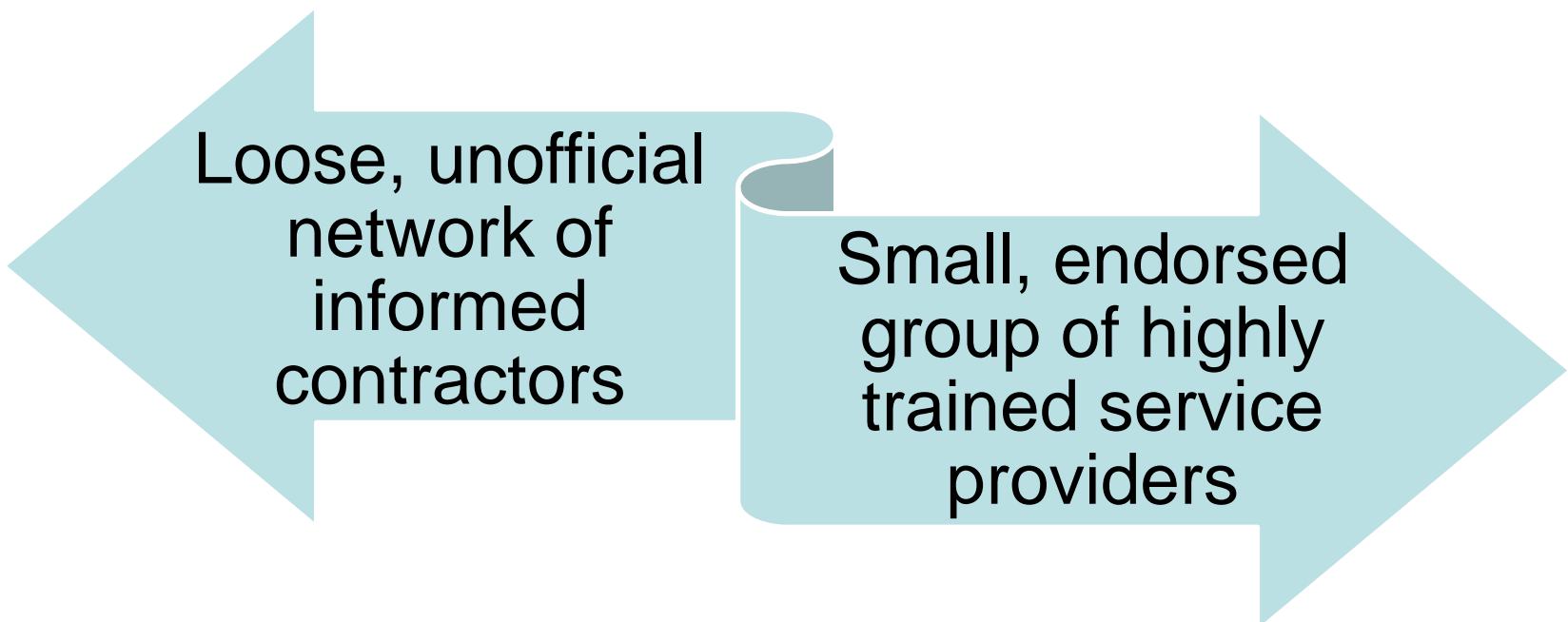


# TA Spectrum

Two dimensions

Program maturity/time

TA involvement



Loose, unofficial  
network of  
informed  
contractors

Small, endorsed  
group of highly  
trained service  
providers



# Topic Groupings

- What is the best structure for engaging TAs and the optimal #?
- How do you find and effectively engage contractors to support the program?
- How do you keep contractors motivated and interested?
- What types of support are most helpful to contractors?
- How can contractors best support the utility/program?







## Save the Date

**May 15-17, 2012**

**AESP's Spring Conference  
Baltimore, MD**

**Oct. 15-17, 2012**

**AESP's Fall Conference  
Long Beach, CA**

**Jan. 28-31, 2013**

**AESP's 23<sup>rd</sup> National Conference  
Orlando, FL**

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