

**Trade Ally Roundtable  
Grants Pass, OR  
September 7, 2007**

**In attendance:** Tom Beverly, Katherine Howard, Noëlle Saint-Cyr and approximately 20 trade allies

Comments overall were constructive and delivered in a positive tone. The location was determined to be good. Courtesy calls made to contractors in advance of the meeting really boosted attendance as compared to previous meetings in eastern OR.

**Communications Requests:**

Two weeks notice before promotions are launched in order to better understand them before communicating about them with customers.

Better meeting notification methods, some attendees learned only from other contractors about the meeting. Perhaps an email blast in conjunction with the mailers and web announcements. Mailers often get lost.

Everyone said they do read the Insider e-newsletter but it needs to include more info that applies to all T/As, not just those in the metro area.

Email is the best way to communicate with them. They were very clear about not wanting to see fax blasts anymore.

**Marketing Requests:**

HPwES certificate or preferably a plaque to come with incentive checks. Home owners would appreciate it and this would be a great marketing opportunity for the program. Increased ETO representation at home shows in southern Oregon where attendees can take away the trade ally lists that are distributed at HERs.

They really like the regional trade ally awards and would like to see a press release go out to the area paper (Mail Tribune) next year.

More opportunities to differentiate themselves on the website making who can do specialized work more clear. Most people were unaware that certifications can be listed on the website. Perhaps a certification update form goes out to them annually. They appreciated hearing that we are exploring the idea of requiring a minimum number of jobs, trainings and possibly meetings in order to be a trade ally.

They would like more give away swag.

**Training:**

Training need is being met. They would like to see a price reduction for trade allies.

What is being done well:

They are very excited to hear that electronic forms are on their way so that they can go into electronic files and be emailed to customers. They are not at all interested in using carbon copy forms. Mailings in the bright yellow envelopes are appreciated, quickly indicating something from ETO.

**Wish list:**

Give customers the opportunity to give the contractor the incentive via a checkbox on the incentive form. This is ideal for low-income customers. More Quality Control reviews in the southern part of the state. Distribute info on how public purpose funds are spent throughout the state. Offer an incentive for replacing a duct system, not just for upgrading an existing system. Increase the incentives for multifamily. Schedule quarterly roundtable meetings. When offering a phone in meeting option, be sure those people receive any materials in advance.