Existing Homes Customer Engagement Initiative

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Background

2009 Re-examine Customer Service

- Educate homeowners on opportunities
- Be a resource beyond initial connection
- Foster participant interaction with trade ally contractors

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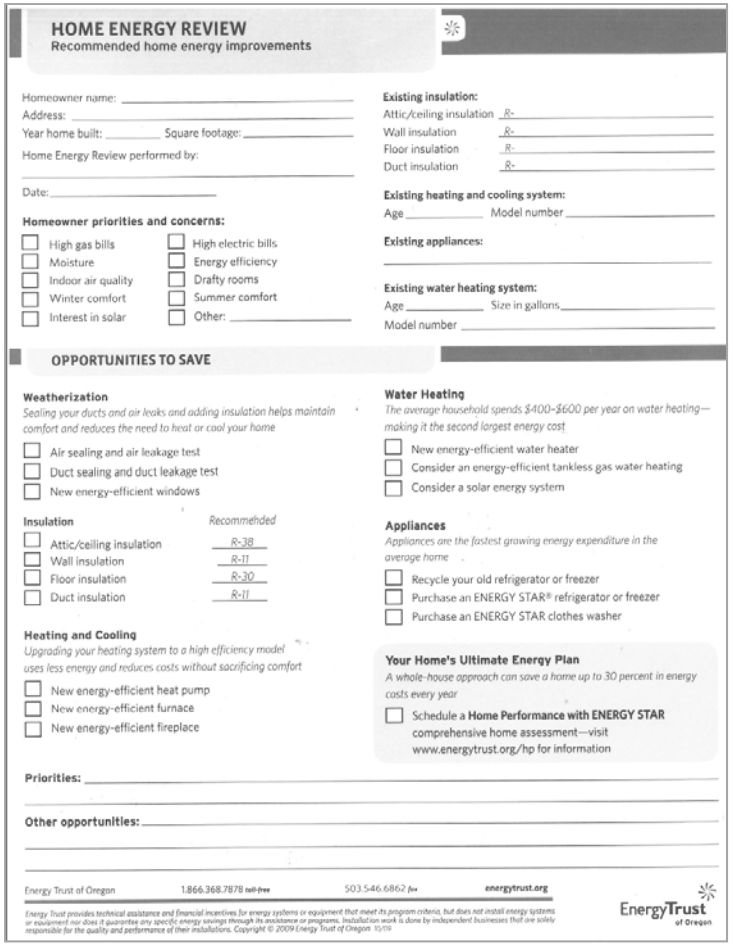
Background



HOME ENERGY REVIEW
Recommended home energy improvements

Homeowner name: _____
Address: _____
Year home built: _____ Square footage: _____
Home Energy Review performed by:
_____
Date: _____

Homeowner priorities and concerns:

- ☐ High gas bills
- ☐ Moisture
- ☐ Indoor air quality
- ☐ Winter comfort
- ☐ Interest in solar
- ☐ High electric bills
- ☐ Energy efficiency
- ☐ Drafty rooms
- ☐ Summer comfort
- ☐ Other: _____

Existing insulation:
Attic/ceiling insulation R-_____
Wall insulation R-_____
Floor insulation R-_____
Duct insulation R-_____

Existing heating and cooling system:
Age _____ Model number _____

Existing appliances:
_____

Existing water heating system:
Age _____ Size in gallons _____
Model number _____

OPPORTUNITIES TO SAVE

Weatherization
Sealing your ducts and air leaks and adding insulation helps maintain comfort and reduces the need to heat or cool your home

- ☐ Air sealing and air leakage test
- ☐ Duct sealing and duct leakage test
- ☐ New energy-efficient windows

Insulation *Recommended*

- ☐ Attic/ceiling insulation R-38
- ☐ Wall insulation R-11
- ☐ Floor insulation R-30
- ☐ Duct insulation R-11

Heating and Cooling
Upgrading your heating system to a high efficiency model uses less energy and reduces costs without sacrificing comfort

- ☐ New energy-efficient heat pump
- ☐ New energy-efficient furnace
- ☐ New energy-efficient fireplace

Water Heating
The average household spends $400-$600 per year on water heating—making it the second largest energy cost

- ☐ New energy-efficient water heater
- ☐ Consider an energy-efficient tankless gas water heating
- ☐ Consider a solar energy system

Appliances
Appliances are the fastest growing energy expenditure in the average home

- ☐ Recycle your old refrigerator or freezer
- ☐ Purchase an ENERGY STAR® refrigerator or freezer
- ☐ Purchase an ENERGY STAR clothes washer

Your Home's Ultimate Energy Plan
A whole-house approach can save a home up to 30 percent in energy costs every year

- ☐ Schedule a **Home Performance with ENERGY STAR** comprehensive home assessment—visit www.energytrust.org/hp for information

Priorities: _____

Other opportunities: _____

Energy Trust of Oregon 1.866.368.7878 toll-free 503.546.6862 fax energytrust.org

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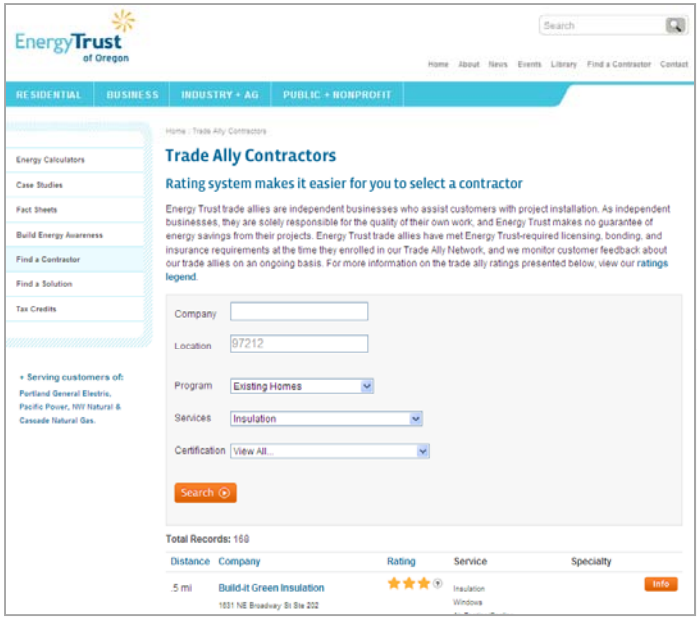

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+ Serving customers of: Portland General Electric, Pacific Power, NW Natural & Cascade Natural Gas.

Home : Trade Ally Contractors

Trade Ally Contractors

Rating system makes it easier for you to select a contractor

Energy Trust trade allies are independent businesses who assist customers with project installation. As independent businesses, they are solely responsible for the quality of their own work; and Energy Trust makes no guarantee of energy savings from their projects. Energy Trust trade allies have met Energy Trust-required licensing, bonding, and insurance requirements at the time they enrolled in our Trade Ally Network, and we monitor customer feedback about our trade allies on an ongoing basis. For more information on the trade ally ratings presented below, view our ratings legend.

Company
Location 97212
Program Existing Homes
Services Insulation
Certification View All...
Search

Total Records: 160

Distance	Company	Rating	Service	Specialty	
.5 mi	Build-It Green Insulation 1831 NE Broadway St Ste 202	★★★	Insulation Windows		Info

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Background

- Enhance customer service
- Continue to support in-home Home Energy Reviews
- Customer Engagement is a great educating resource for homeowners
- Trade Ally Network has the expertise to deliver energy-efficiency upgrades

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Background

1. Understand the points of entry
2. Introduce Energy Trust as technical resource
3. Expand concept of Home Energy Review to customers
4. Focus on trade ally and homeowner connection

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Goals

1. Increase quality and quantity of homeowner participation
2. Increase trade ally and homeowner connection

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Key Elements

Entry points
Establish relationships
Home Energy Review
Trade ally contractors

Entry points

- Events
- Calls
- Past participation
- Web inquiries
- Referrals

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Establish relationships

- Information based on homeowner interests
- Guidance based on their home
- Support selecting energy-saving offers

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Home Energy Review

Home Energy Review expanded service

- In-home (historical offer)
- Online (enhancement)
- Speak with an advisor (enhancement)

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Trade ally contractors

Establish homeowner expectations

- Promote trade ally's expertise early in conversation with homeowner

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Customer Engagement

Approach
Marketing and outreach
Training
Analysis

Approach

Paths of entry

- General contact center inquiry
- Home Energy Review request by phone or website
- Online Home Energy Profile

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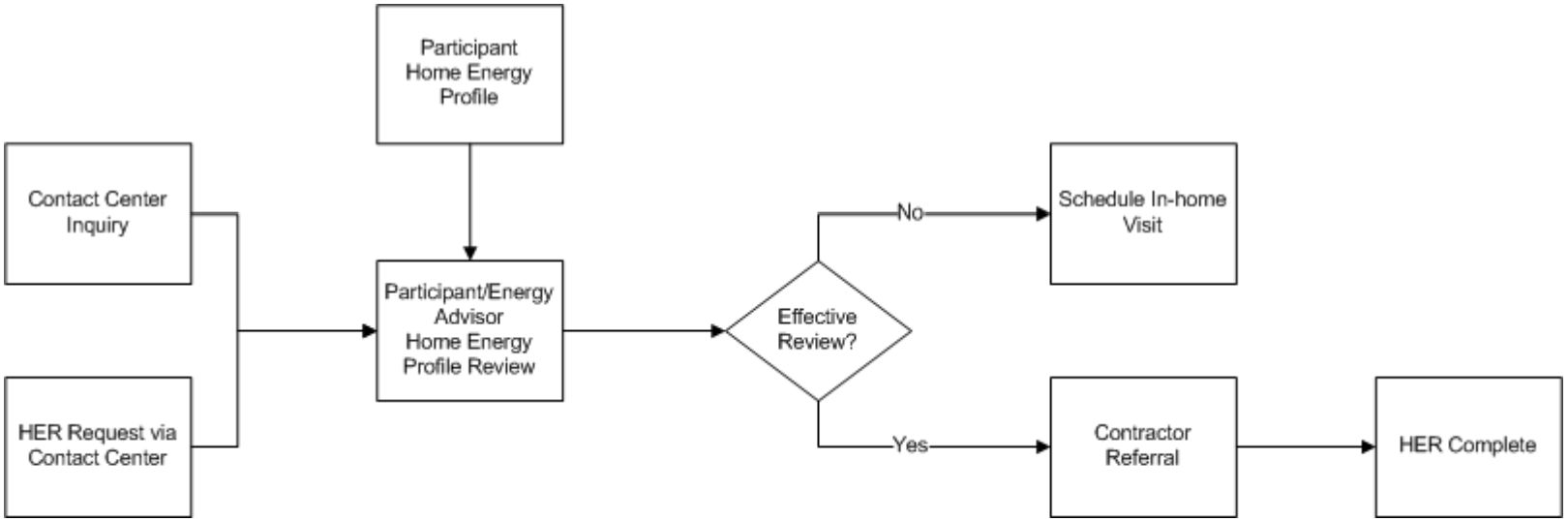
Approach



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Marketing

Marketing message

- Enhanced service
  - More than one way to engage (phone, website, in-home visit)
  - Then, create a plan with the homeowner

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Outreach

- Focus on a conversation with the homeowner: "*Would you like to learn more?*"
- Move away from in-home Home Energy Review sign-up as the focus

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Training

- Energy advisors–sales skills
- Contact center–up-sell in a good way

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Analysis

- Participant satisfaction
- Savings
- Meet the goals for enhancing the consumer experience and follow-through

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Thank you

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