Trade Ally Contractor Referral
Selection Criteria

Conservation Advisory Council
September 14, 2011

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Presentation objectives

- Review context of TA contractor referral
- Present TA contractor referral criteria
- Capture and respond to feedback

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Context

Projects	
HER	No HER
~20%	~80%

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Enhance service with referral

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Context

Relevant customer engagement changes, as presented at May 18, 2011, CAC:

1. Guide customers through targeted information to customer specific need(s) and relationship building.
2. Expand role of TA as a favored technical resource for customers.
3. Customer service designed to drive customers to take action more quickly.

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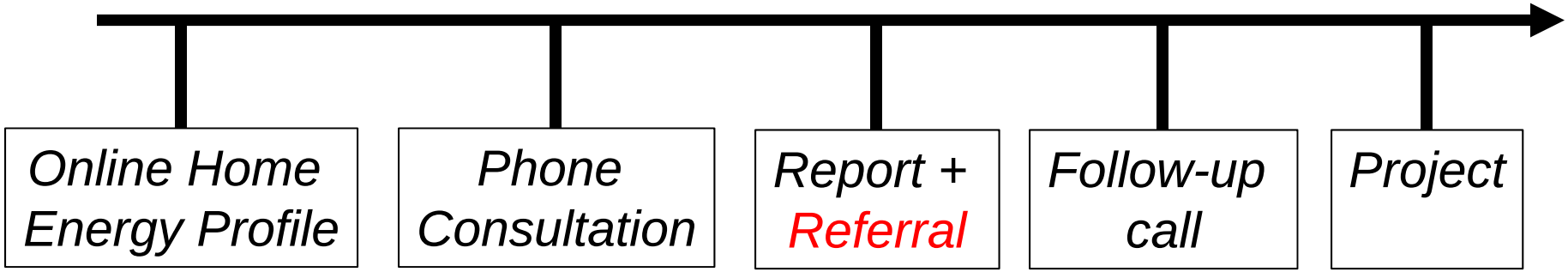
Context

Basic Existing Homes program customer flow

- Post-consultation: 3 TA contractors referred with Custom Home Energy Report via email



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TA Contractor Referral Eligibility

1. 3-star or 2-star Trade Ally rating*
   - QC rates
   - Contractor activity

•Approximately 97% of TA projects are by 3- and 2-star TAs.
Method applied in regions where sufficient numbers of TAs exist.

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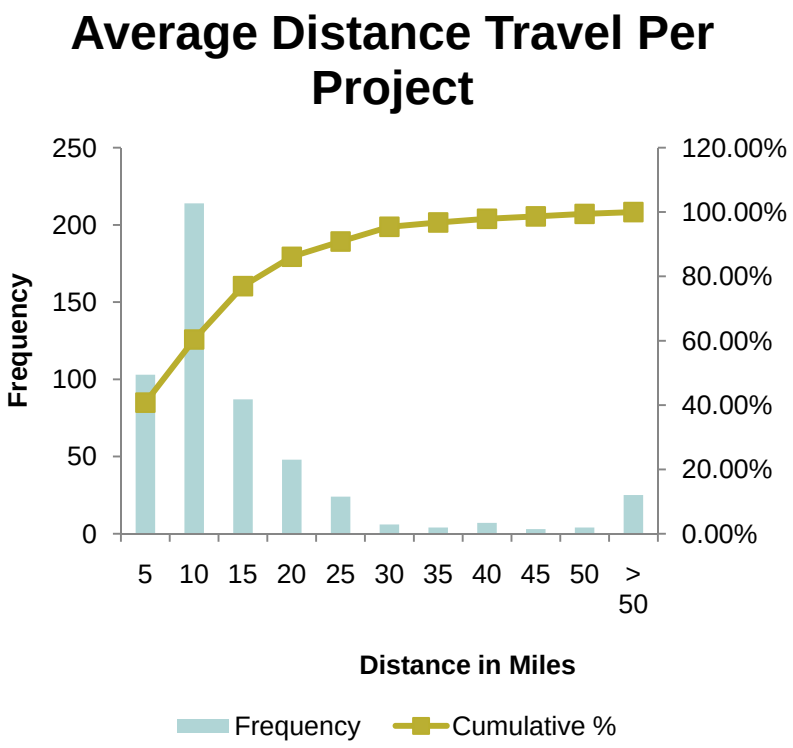
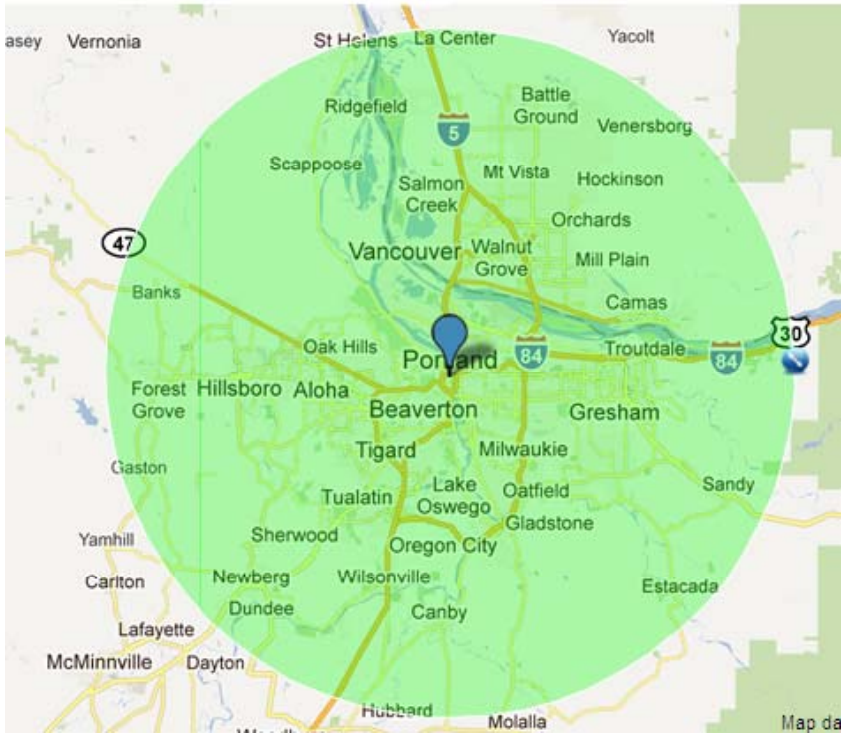
TA Contractor Referral Criteria

2. Geography
   - 25 mile radius, minimum 20 contractors
   - 100 mile max





TA Contractor Referral Criteria

3. Measure history
   - Installed recommend measure(s) within last four quarters.
   - Random

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TA Contractor Referral Criteria

Other features

- Randomization and referral queue
- Follow-up support
- Faster feedback evaluation

Timing: November 2011

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Thank you

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