



TAKING YOUR AUDIT BEYOND THE ENVELOPE PART 2:

MARKETING & MESSAGING TACTICS TO SELL AN EXPANDED BUILDING SCIENCE APPROACH

Peter Troast, Founder & CEO, Energy Circle

Energy Circle Webinar Series

September 11, 2024

Differentiation Series



DIFFERENTIATION SERIES:
**DOES YOUR COMPANY
STAND ABOVE?**

THE GROWING IMPORTANCE
DIFFERENTIATION

Peter Troast, Founder & CEO

February 7, 2024



DIFFERENTIATION SERIES:
**HOW TO STAND OUT
FROM THE CROWD USING
BUILDING SCIENCE AND
NEW TECHNOLOGIES**

Peter Troast, Founder & CEO

Energy Circle Webinar Series
July 24, 2024



DIFFERENTIATION SERIES:
**WHY CONTRACTORS
NEED BRANDING**

THE ROLE OF BRAND IN DRIVING BUSINESS
AND DIFFERENTIATING YOUR COMPANY

Peter Troast, Founder & CEO
David Puelle, Creative Director & Founder, Puelle Design

April 3, 2024



**TAKING YOUR AUDIT
BEYOND THE ENVELOPE:
NEW TOOLS TO UPGRADE
YOUR DIAGNOSTIC
PROCESS**

Peter Troast, Founder & CEO, Energy Circle
Eric Fitz, Co-Founder, Co-CEO, CTO, Amply
Joe Medosch, Client Success Manager, measureQuick

Energy Circle Webinar Series
August 28, 2024



What We'll Discuss Today

- 1 QUICK REVIEW—WEBINARS LEADING UP TO TODAY**
- 2 THE POTENTIAL FOR AN ADVANCED DIAGNOSTIC APPROACH OR...PLAN**
- 3 THE PRICING AND POSITIONING QUESTION**
- 4 WAYS TO MARKET**



Categories of Differentiation

1. Trust & Credibility
2. Branding & Reputation
3. Quality
4. Building Science & Innovative Technologies
5. Process
6. Community Involvement
7. Price Transparency
8. Risk Reduction (Licensing, Insurance, Guarantees)



HOW DO WE WIN THIS JOB?

Your Quote

21.5 SEER 1 ton Fujitsu ducted heat pump, 4 supply registers, 1 return grill, new R8 flex duct system.	\$14,856
Attic Insulation Removal, Air Sealing, Reinsulation	\$7,707
Airseal uninsulated portions of subfloor	\$4,735
Upgrade electrical service to support home electrification	\$5,805
TOTAL	\$33,103

Competitors Quote

17 SEER 1.5 ton Daikin ductless mini split system (2 indoor heads)	\$7,447
Upgraded electrical service	\$6,241
TOTAL	\$13,688



WHAT IS A "HIGH PERFORMANCE" CONTRACTOR?

Building Science Oriented

Building Science Standard

- A clear diagnostic process
- Working to a standard
- Calculating loads
- Addressing ducts
- More comprehensive jobs
- etc

Customer Oriented

Communications

- Web
- Sales process
- Documentation
- Scheduling
- Compelling case
- etc

On Site

- Timeliness
- Cleanliness
- Politeness
- Attire
- Craftsmanship
- etc

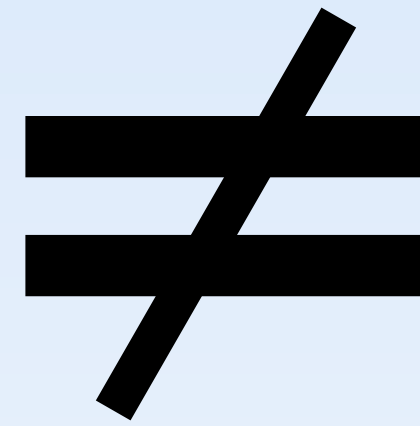
A Better Home

Outcomes

- Better outcomes and results
- Comfort?
- Efficiency?
- Cost?



USING BUILDING SCIENCE



“ENERGY AUDIT”

USE DIAGNOSTICS YOUR OWN WAY



USING BUILDING SCIENCE



**ANY DIAGNOSTIC-BASED APPROACH TO ASSESSING
THE HOME & RECOMMENDING A PLAN**



EVOLVING DIAGNOSTIC APPROACHES



CORE Tools: Primarily Envelope

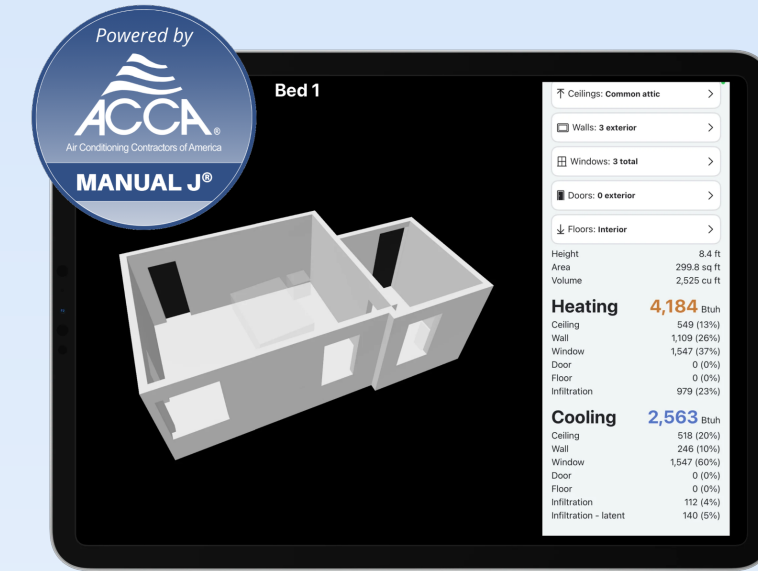


CORE Tools: Primarily Envelope

NEW Tools: HVAC, Ducts, Energy



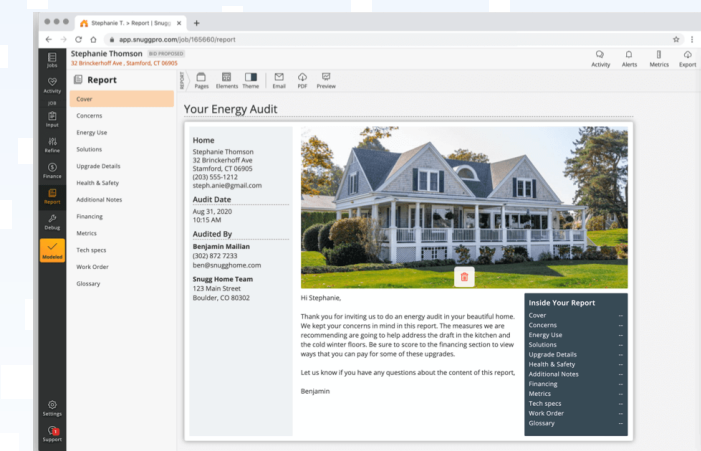
Load Calculation
(Amplify)



System Evaluation
(measureQuick, TEC
TruFlow Grid)



Energy Model
(Snugg PRO)



Elephant Energy Electrification Roadmap

The screenshot shows the Elephant Energy website's 'Healthy Home Kickstart Package' page. The page is divided into two main columns: 'Step One' and 'Step Two'. 'Step One' is titled 'Consultation' and includes 'ENERGY ASSESSMENT' and 'ELECTRIFICATION ROADMAP'. 'Step Two' is titled 'Installation' and includes 'WEATHERIZATION', 'HEAT PUMPS', and 'SYSTEM MONITORING'. The website header includes the Elephant Energy logo, navigation links for 'OUR SOLUTIONS', 'HOW IT WORKS', 'BLOG', 'FAQ', 'LOGIN', and a 'GET STARTED' button.

Elephant Energy

OUR SOLUTIONS HOW IT WORKS BLOG FAQ LOGIN [GET STARTED](#)

Healthy Home Kickstart Package

Step One

Consultation

First, we spend time getting to know you and your home to ensure we're equipped to make the right recommendations for your goals.

ENERGY ASSESSMENT

We coordinate an energy audit to understand the whole picture of your home's energy use and identify any efficiency issues.

ELECTRIFICATION ROADMAP

We build you a personalized Electrification Roadmap that is tailored to your preferences so that you can confidently plan your transition to a fully electric home.

Step Two

Installation

Once you're ready to go, our top notch team will be on point to install everything you need to start your transition to a healthy, electric home.

WEATHERIZATION

Using the recommendations from your energy assessment, we'll insulate and air seal your home to optimize for efficiency.

HEAT PUMPS

We install ducted, cold climate, air source heat pumps, ductless mini split heat pumps, and heat pump water heaters.

SYSTEM MONITORING

Every Elephant heat pump comes with an Ecobee thermostat and SmartAC, so you can keep an eye on your system from anywhere.



QuitCarbon Home Assessment

The screenshot shows the QuitCarbon website with a navigation bar containing 'Why Electrify?', 'How We Help', 'Resources', and a 'Get Started' button. The main heading is 'How QuitCarbon Works'. The process is divided into three columns:

- Assess:** A mobile app interface titled 'Tell us about your home!' with a list of gas appliances: Furnace, Cooktop, Oven, and Water Heater. The 'Furnace' option is highlighted.
- Review:** A mobile app interface titled 'Home Electrification Plan' with a checklist of five items. The first item is checked.
- Upgrade:** A photograph of a hand giving a thumbs up next to a wall-mounted air conditioning unit with a green checkmark icon above it.



Rewiring America

Personal Electrification Planner

The screenshot shows the website's main interface. At the top is a yellow navigation bar with the 'REWIRING AMERICA' logo on the left and links for 'Homeowners', 'Renters', 'Incentive calculator', 'Find contractors', 'Make a plan' (a purple button), and 'Log in'. The main content area has a light yellow background with a central illustration of a house. Surrounding the house are icons for a solar panel, a house with a thermometer, a smartphone, a washing machine, and an electric car. A checklist overlay is visible on the right side of the house illustration. The text on the page reads: 'Your situation is unique. Your plan to go electric should be, too.' followed by a paragraph: 'Interested in upgrading your home to all-electric appliances and vehicles? Generate a personalized electrification plan based on your particular home, lifestyle, and priorities — all in just a few minutes.' Below this text are two buttons: a purple 'Get started' button and a white 'Rent your home? Click here' button.



Advanced Diagnostics

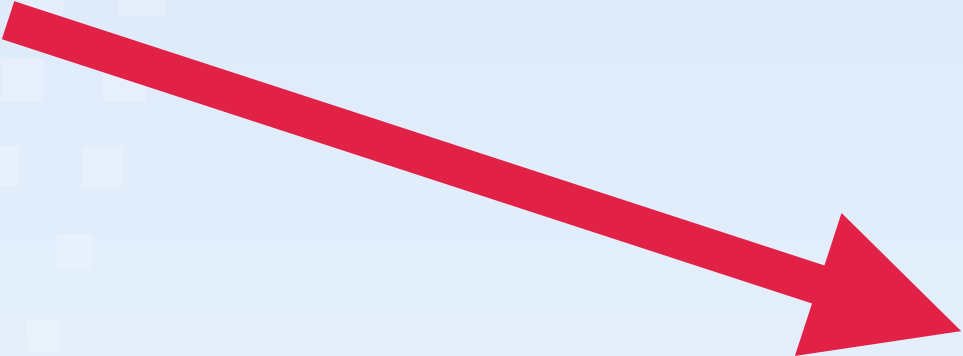


Load Calculation (Amply)

System Evaluation (measureQuick, TEC TruFlow Grid)

Energy Model (Snugg PRO)

This block contains three categories of diagnostic tools. The first category, 'Load Calculation (Amply)', features a red door with a circular opening and a handheld thermal imager. The second category, 'System Evaluation (measureQuick, TEC TruFlow Grid)', includes a tablet displaying data and a grid of circular sensors. The third category, 'Energy Model (Snugg PRO)', shows a computer monitor with a 3D architectural rendering of a house.



Comprehensive Job Scope



Home Energy, Comfort and Indoor Air Quality Plan

PREPARED FOR: FORE

PREPARED BY: COMPANY NAME

This block shows a document cover for a 'Home Energy, Comfort and Indoor Air Quality Plan'. The cover features a photograph of a modern living room with a white sofa, a coffee table, and a window. At the bottom, there are two text fields: 'PREPARED FOR: FORE' and 'PREPARED BY: COMPANY NAME'.



BUILDING SCIENCE IN PLAIN LANGUAGE



Building America Building Science Translator

February 2015



BS Translator

Table 2. High-Performance HVAC System (cont.)

Building Science Measure	New Building Science Terminology	Alternate Terms					
		Lives Better		Works Better		Lasts Better	
		Engineered Comfort	Healthful Environment	Ultra-Efficient	Advanced Technology	Quality Built	Enhanced Durability
High-Performance HVAC System (cont.)							
HVAC Quality Installation	Professionally-Installed Comfort System	Performance Assured Comfort System	Humidity-Managed Comfort System	Energy Saving Comfort System Installation	Advanced Comfort System Installation	Professionally Installed Comfort System	Moisture-Managed Comfort System
Proper Sizing HVAC System	Right-Sized Comfort System	Optimum-Sized Comfort System		Energy Saving Comfort System Sizing		Right-Sized Comfort System	Extended-Life Comfort System
Heating/ Cooling Equipment Sizing	Right-Sized Comfort Equipment	Optimum-Sized Comfort Equipment		Energy Saving Comfort Equipment Sizing		Right-Sized Comfort Equipment	Extended-Life Comfort Equipment
Duct Distribution Sizing	Right-Sized Comfort Delivery System	Optimum-Sized Comfort Delivery System		Energy Saving Comfort Delivery System Sizing		Right-Sized Comfort Delivery System	
Duct Terminal Sizing	Right-Sized Comfort Outlets	Optimum-Sized Comfort Outlets		Energy Saving Comfort Outlets		Right-Sized Comfort Outlets	
Quality Duct Installation	Professionally-Installed Comfort Delivery System	Optimum-Flow Comfort Delivery System		Energy Saving Comfort Delivery System Installation		Professionally Installed Comfort Delivery System	
Proper Duct Installation	Professionally-Installed Comfort Delivery Ducts	Optimum-Flow Comfort Delivery Duct Installation		Energy Saving Comfort Delivery Duct Installation		Professionally-Installed Comfort Delivery Ducts	
Tight Duct Sealing	Professionally-Sealed Comfort Delivery System	Optimum-Flow Comfort Delivery Duct Sealing	Contaminant Sealed Comfort Delivery System	Energy Saving Comfort Delivery Duct Sealing		Professionally-Sealed Comfort Delivery Ducts	Moisture Control Duct Sealing
High-R Duct Insulation	Energy Saving Comfort Delivery System Insulation			Energy Saving Comfort Delivery System Insulation			
Pressure Balancing Bedrooms	Comfort Balanced Rooms	Comfort Balanced Rooms					Moisture Control Comfort Balancing
Ducted Returns	Comfort System Return Ducts	Comfort System Return Ducts					Moisture Control Comfort Balancing
Transfer Grills	Comfort Vent	Comfort Vent					Moisture Control Comfort Balancing
Jump Ducts							
HVAC Controls/ Programmable Thermostat	Advanced Comfort Control Technology			Energy Saving Comfort Control System	Advanced Comfort Control Technology		



BS Translator

Table 11. Home Commissioning (HC)

Building Science Measure	New Building Science Terminology	Alternate Terms					
		Lives Better		Works Better		Lasts Better	
		Engineered Comfort	Healthful Environment	Ultra-Efficient	Advanced Technology	Quality Built	Enhanced Durability
Home Commissioning (HC)	Home Performance Assessment					Home Performance Assessment	
Home Energy Rating System (HERS)	Home Energy Rating System (HERS)				Advanced Home Energy Assessment	Home Energy Rating System (HERS)	
Energy Audit (e.g., Home Energy Score)	Home Performance Check-up				Advanced Home Performance Diagnostics	Home Performance Check-up	
Home Diagnostics	Home Performance Testing				Advanced Home Performance Diagnostics	Home Performance Testing	
Blower Door Test	Draft Control Test				Advanced Draft Detection Diagnostics	Draft Control Test	
Duct Leakage Test	Comfort Delivery Test				Advanced Comfort Delivery Diagnostics	Comfort Delivery System Test	
Combustion Appliance Zone (CAZ) Test	Combustion Safe Equipment Test				Advanced Combustion Safety Diagnostics	Combustion Safe Equipment Test	
Infrared Camera Inspections	Home Thermal Imaging Scan				Advanced Thermal Imaging Diagnostics	Home Thermal Imaging Scan	



Options—What Suits Your Company?

Home Performance and Comfort Enhancement **Plan**

Energy Efficiency and Indoor Comfort **Strategy**

Whole-Home Energy and Comfort Optimization Plan

Home Electrification and Comfort **Blueprint**

Smart Home Energy and Air Quality Improvement Guide

Residential Energy and Comfort Upgrade Plan

Sustainable Home Energy and Comfort Strategy

Home Comfort and Energy Performance **Roadmap**

Energy-Efficient Living and Comfort Plan

Indoor Comfort and Energy Efficiency Transformation

Whole-Home Comfort and Performance Electrification **Guide**

Home Energy and Air Quality Optimization Plan



THE PRICING QUESTION



My Perspective
on Pricing

**Decide what is right for
your business, but don't
undercut value**



Consult

**No
Cost**

Walk Through
Interview
Visual Inspection

Standard Plan

~~\$750~~
\$350

Walk Through
Interview
Visual Inspection
Home Leakage Test
Infrared Inspection
Insulation Test
Combustion Safety
Whole House Plan

Advanced Plan

~~\$2500~~
\$1000

Walk Through
Interview
Visual Inspection
Home Leakage Test
Infrared Inspection
Insulation Test
Combustion Safety
Indoor Air Quality
Heating and Cooling
Loads
HVAC System Evaluation
Energy Bill Eval
Whole House Plan



MARKETING CONSIDERATIONS & APPROACHES



**A Local/Regional
Approach is Critical**

Is “Energy Audit” a Known Term in Your Area?

**How much search volume for “Energy Audit” or
“Energy Assessment”?**

What are the pricing norms in your area?

Expect Demand (Search Volume) to be Low

Awareness Advertising is Essential

**Homeowners Want Plans/Roadmaps, but Don’t
Know It**



Solid Web Content

Will Get Some Traffic
Clear Differentiator
Process Explainer
Lean in to Value



What's Included in a Healthy Home Evaluation?

As a Building Performance Institute GoldStar® Certified contractor and NYSERDA energy audit contractor, our biggest asset, when it comes to identifying the home performance issues threatening the health of your home, is our eyes. However, we do use a number of tests to help guide and verify each of our energy saving healthy home upgrades, including:

- Evaluation of air filtration systems
- Evaluation of fresh air systems
- Air leakage testing (professional blower door testing)
- Infrared camera imaging
- Indoor air quality testing
- Combustion safety testing

What to Do with the Results

Once your Healthy Home Evaluation is complete, we will provide you with the results along with your customized solution to make your home a healthier place to live, work, and play. This will include the results from testing your indoor air quality with an AirAdvice test, which will show you what could be causing your frequent colds or headaches!

When you are ready to move forward with your Healthy Home solution, all home upgrades and system installations will be completed by our in-house team of building science experts.



Insulate Tight, Ventilate Right!

We often get the question, "Can a home be made too tight?", and our answer is: A house is never too tight, just underventilated! When a home is too leaky, with air leaks hidden throughout the attic, crawl space, windows, exterior doors, and ceiling, outdoor air is allowed to infiltrate the living space.

This outside air brings with it moisture and outdoor pollutants, but it can also help spread contaminants that already live in other areas of your home, like dust and volatile organic compounds (VOCs). This is why our Healthy Home Evaluations include envelope air sealing testing, otherwise called a blower door test.

Common home performance upgrades that can increase your home health and make your house more energy efficient in the process include:

- Insulation upgrades
- Air sealing
- Sealing and cleaning air ducts
- Heating and cooling upgrades



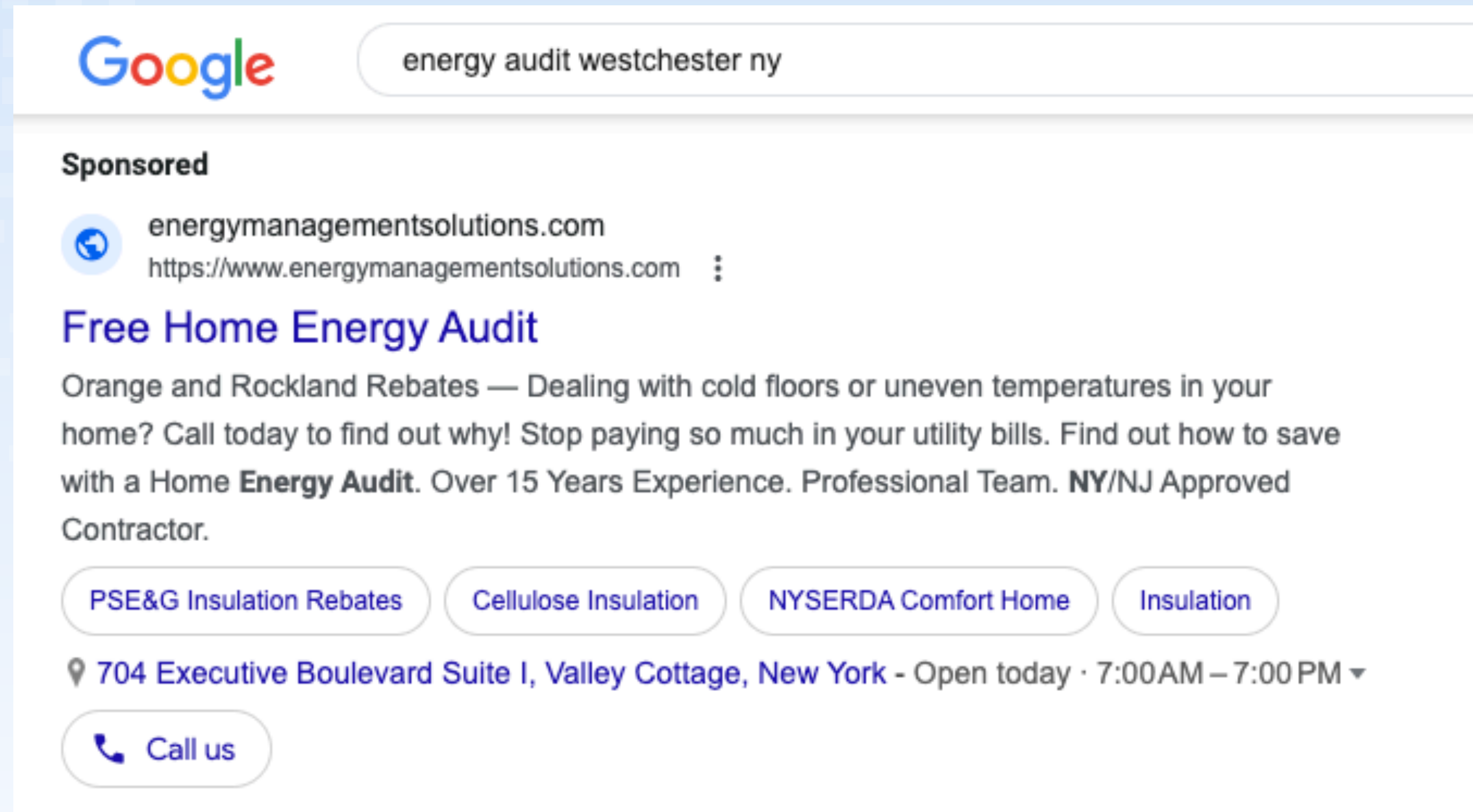
Paid Search

Lower Volume

Lower Cost

Generally Less Competitive

Limited but No Harm




The screenshot shows a Google search interface with the query "energy audit westchester ny". The search results are categorized as "Sponsored". The top result is from "energymanagementsolutions.com" with the URL "https://www.energymanagementsolutions.com". The main heading for the ad is "Free Home Energy Audit". The ad text describes services for Orange and Rockland Rebates, mentioning experience and professional team. Below the text are four buttons: "PSE&G Insulation Rebates", "Cellulose Insulation", "NYSERDA Comfort Home", and "Insulation". The address "704 Executive Boulevard Suite I, Valley Cottage, New York" and hours "Open today · 7:00AM – 7:00 PM" are listed. A "Call us" button is at the bottom.



Social Advertising

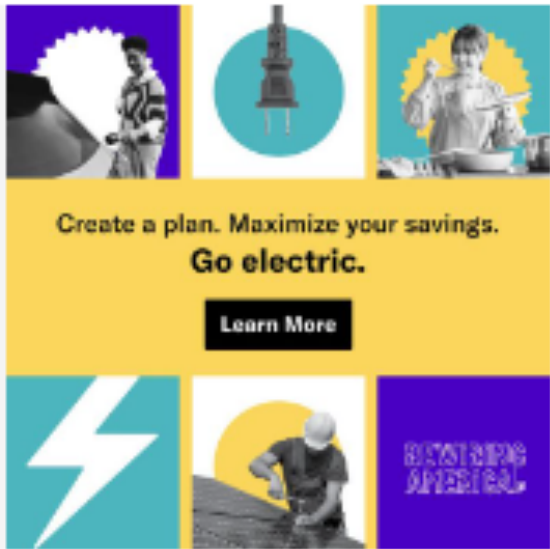
Very Targeted
Low Cost
Not Widely Used
Educational/Awareness
Building

 **Rewiring America**
Sponsored


To get all the savings and rebates and tax credits out there, you need a plan. That's why we built the new Personal Electrification Planner.

All the savings and discounts in one place, so you can figure out what pencils out for you.

...




Create a plan. Maximize your savings.
Go electric.
[Learn More](#)

 **Rewiring America**
Sponsored

Wondering where to start? Start here! Our Personal Electrification Planner delivers:


- ⚡ Personalized project recommendations designed for your unique home, lifestyle, and priorities.
- ⚡ All your savings in one place, so you can see what you can afford....



You're unique.

Your go-electric plan should be, too.

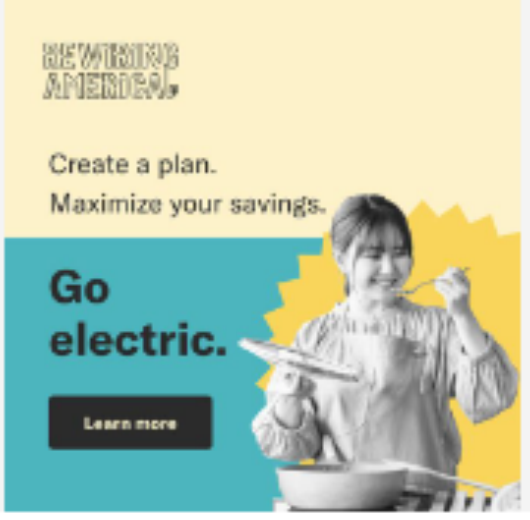
[Learn more](#)

 **Rewiring America**
Sponsored

To get all the savings and rebates and tax credits out there, you need a plan. That's why we built the new Personal Electrification Planner.

All the savings and discounts in one place, so you can figure out what pencils out for you.

...



REWIRING AMERICA

Create a plan.
Maximize your savings.

Go electric.
[Learn more](#)



END

