



END OF YEAR REBATE AND TAX CREDITS:

CRUCIAL MESSAGING FOR
CONTRACTORS

Peter Troast, Founder & CEO

Cory Allyn, Senior Content Strategist

August 23, 2023

Ongoing Focus on the Implications of AI



THINKING ABOUT AI IN HVAC & HOME PERFORMANCE:

VIRTUAL ASSISTANTS
FOR COMPLETION

Peter Troast, Founder & CEO

March 29, 2023



WEB SEARCH IN A WORLD OF AI:

WHAT WILL CHANGE FOR CONTRACTORS AND THE CUSTOMER JOURNEY?

Peter Troast, Founder & CEO

May 18, 2023



VIDEO MARKETING IN A WORLD OF AI:

WHY THE HUMAN COMPONENT IS CRITICAL FOR SUCCESS

Peter Troast, Founder & CEO
Jake Van Paepeghem, Senior Media Producer

July 26, 2023



CONTENT IN THE AI AGE:

STRATEGIES FOR NAVIGATING A SEA OF ROBOT-DRIVEN WRITING

Peter Troast, Founder & CEO
Cory Allyn, Senior Content Strategist

July 11, 2023



What We'll Discuss

- 1 QUICK SUMMARY OF DOE GUIDELINES—MOST IMPORTANT ISSUES FOR CONTRACTORS
- 2 OUR RECOMMENDATIONS ON GETTING READY TO TAKE ADVANTAGE



DOE'S GUIDELINES: WHAT'S MOST IMPORTANT FOR CONTRACTORS





INFLATION REDUCTION ACT HOME ENERGY REBATES

Home Efficiency Rebates Program (Sec. 50121)
Home Electrification and Appliance Rebates Program (Sec. 50122)

PROGRAM REQUIREMENTS & APPLICATION INSTRUCTIONS
Applications Due by January 31, 2025

U.S. Department of Energy
Office of State and Community Energy Programs
1000 Independence Avenue, SW Washington, DC 20585

July 27, 2023

Sign up for updates and learn more:
energy.gov/scep





WHAT'S IN THE NEW STATE GUIDELINES FOR IRA REBATES:

THE CONTRACTOR PERSPECTIVE

Peter Troast, Founder & CEO

Cory Allyn, Senior Content Strategist

August 9, 2023



DOE Guidelines to States: Key Provisions for Contractors

- States Must Establish Qualified Contractor Networks
- States Have Option for Quick Start Program (to market 2023)
- Low Income Carve Outs (40% to low income)
- Home Assessment Requirement (HOMES & HEERA)
- 3rd Party Verification: Post Install Certificate
- Modeled and/or Measured Savings
- Rebate Stacking Clarified
- Direct to Contractor Incentives



RECOMMENDATIONS TO SEIZE THE OPPORTUNITY



Staging the Year



Tax Credit Focus with Year-End Urgency

Foundation Work, Audience Building & Planning Support

Rebate Campaign Ramp Up; Concrete Information by State

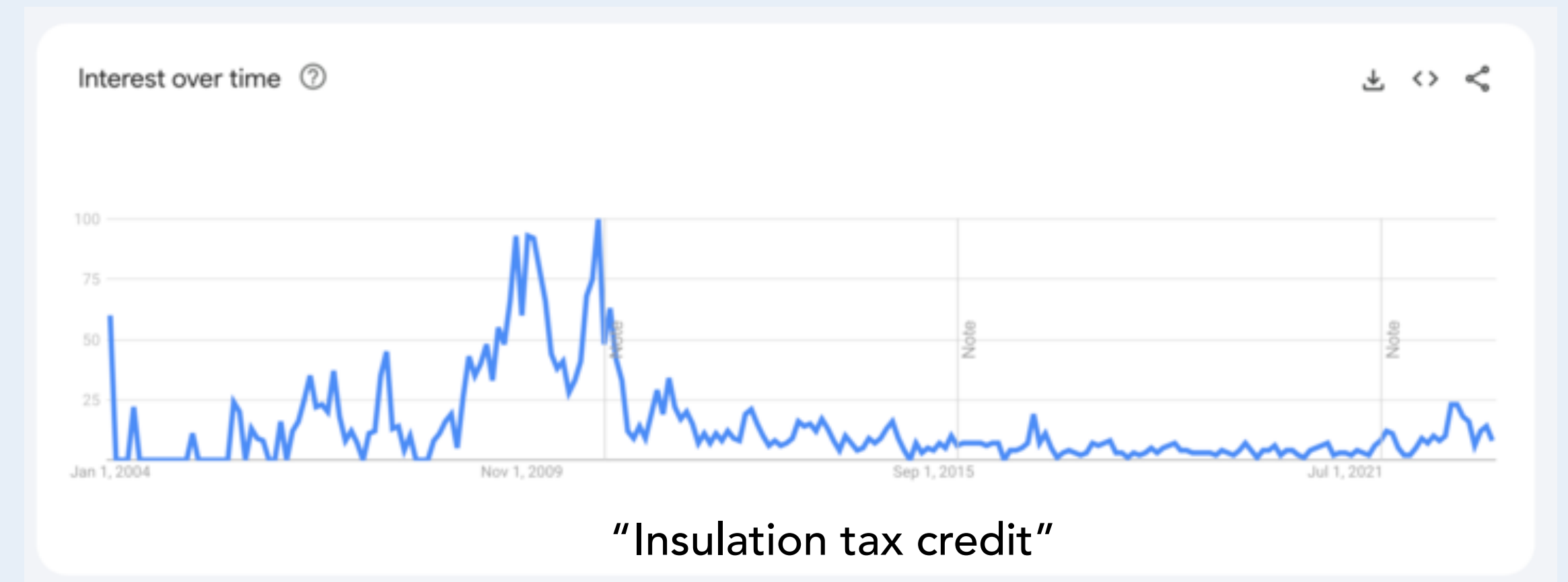
Campaigns in Full Swing



WE ARE NOT FOCUSING ENOUGH ON THE 25C TAX CREDIT

Table B-I. Residential Energy Credits Claimed and Average Amount, 2006-2015

	Number of Tax Returns Which Include Claims for Residential Credits	Total Amount of Residential Credits Claimed (Millions)	Average Credit Amount
2006	4,344,189	\$1,000.15	\$230
2007	4,326,398	\$1,007.58	\$233
2008	225,733	\$216.69	\$960
2009	6,711,682	\$5,822.88	\$868
2010	7,155,889	\$6,173.49	\$863
2011	3,642,988	\$1,676.00	\$460
2012	2,225,307	\$1,266.56	\$569
2013	3,036,039	\$1,613.80	\$532
2014	2,663,702	\$1,638.35	\$615
2015	2,592,967	\$2,087.75	\$805









25C—Energy Efficient Home Improvement Tax Credit


- Credit revived and made retroactive for 2022 (at original 10%)
- Starting in 2023, credit increases to 30% of total installation costs through 2032
- Lifetime cap of \$500 will be replaced by cap of \$600 per measure, with \$1,200 annual total limit (exceptions listed below)
- Eligible services and home improvements include:
 - Heat pumps and heat pump water heaters (\$2,000 credit)
 - Insulation and air sealing
 - Energy audits (\$150 credit)
 - Energy-efficient HVAC systems (including furnaces, boilers, and central AC)
 - Electrical panel upgrades
 - Energy-efficient windows and doors (\$500 credit for doors)
- Roofs are no longer eligible




Social & Paid Search Advertising for Tax Credits




 **The Fifth Fuel**
Sponsored ·   

 Attention homeowners!  Did you know you could qualify for thousands of dollars in tax credits and energy rebates? Our team is here to help you take advantage of these incentives and make your home more energy-efficient.




Attention Homeowners 
Start saving on energy bills today

thefifthfuel.com
Upgrade your home's performance and start... [Learn more](#)

 Like  Comment  Share


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Local Heat Pump Installer - Credits Up To \$2K On Heat Pumps

Ask About The New Federal Tax Credits That Are Up To \$2,000 On A New Heat Pump Install! In Addition To Incentive Programs, You May Qualify For Federal Tax Credits. Call Today! Service catalog: Heater Installs & Service, Solar Installs & Service, Home Performance,...

[Heater Installation Pros](#) [Free Add-On with Solar](#) [R](#)

 Call



Rebates, Tax Credits & Financing Landing Page



Two Big Concerns:

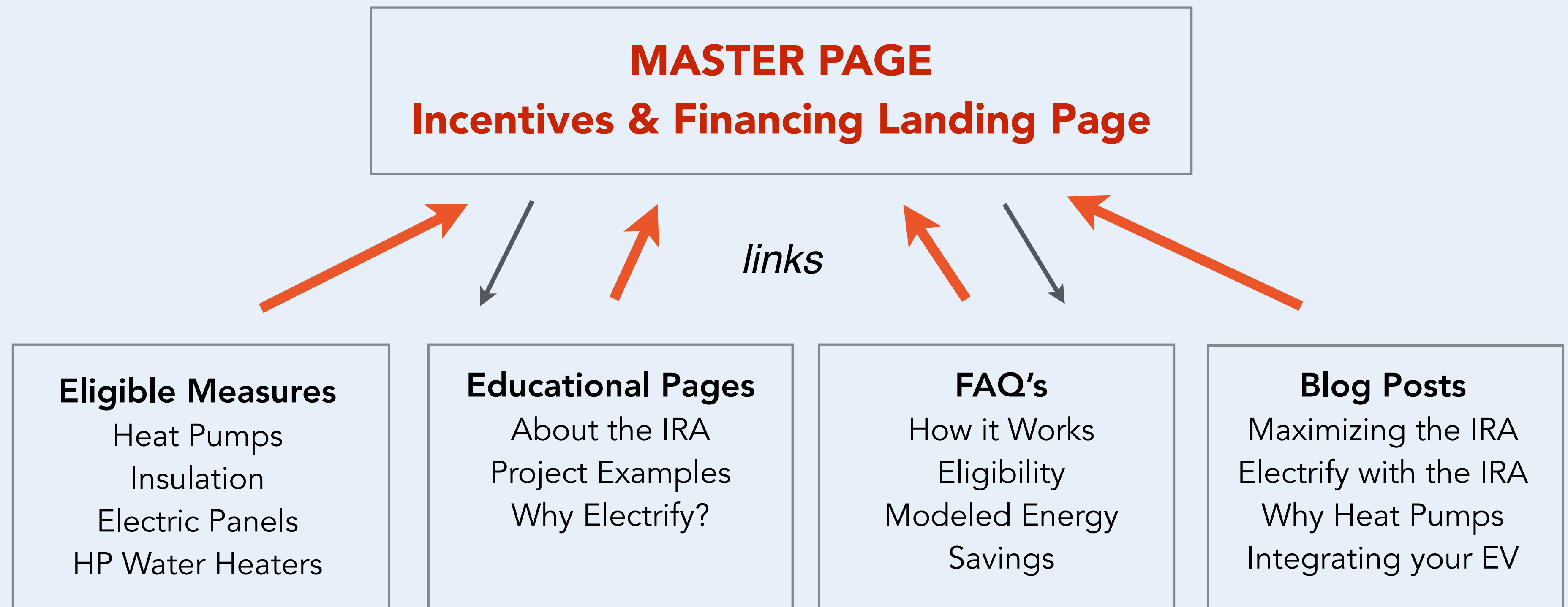
We Don't Know the Actual Numbers or Dates

We Don't Want Project Delays

- Traffic to a New Rebates Page Will Build Over Time
- Awareness Marketing Builds Slowly
- First Mover Advantage is For the Taking in Most Markets
- Some States Have Rebate Programs Now
- Potential Rebate Numbers Can Be Approximate
- Leads That Can't Be Converted Immediately Are Still...LEADS



Ideal Content Approach



Self Qualification Page

Do I Qualify and For How Much?

Area Median Income Levels for Your Service Area

Example Projects and Potential Rebate Amounts

Unique Call to Action Tailored to LMI Audience (We'll
Help You Create a Plan for Your Home)



Target Audiences

LMI

*First Home
Young Families
Retirees*



Electrification

*Super Greens
EV Owners*



Heat Pumps

*Everyone
Problem Houses*



Low & Moderate Income Audience Assumptions



- Low Awareness of Opportunity
- Minimal Out of Pocket Capital
- DIY Oriented
- Less Likely to Have Established Contractor Relationships
- Needier Housing Stock



**Area Median
Income (AMI)
Family of 4**

Location	80% AMI	150% AMI
Columbus, OH	\$59,960	\$112,425
Provo, UT	\$79,300	\$148,687
Sacramento, CA	\$64,840	\$121,575
Mobile, AL	\$41,800	\$78,375
Erie, PA	\$48,000	\$90,000
Rochester, NY	\$57,400	\$107,625
Baker City, OR	\$41,200	\$77,250



Low & Moderate Income Homeowner Messaging



- Reducing Energy Costs
- Fixing Comfort Problems
- Adding Home Value
- Getting Rebates
- *Climate/Environment*

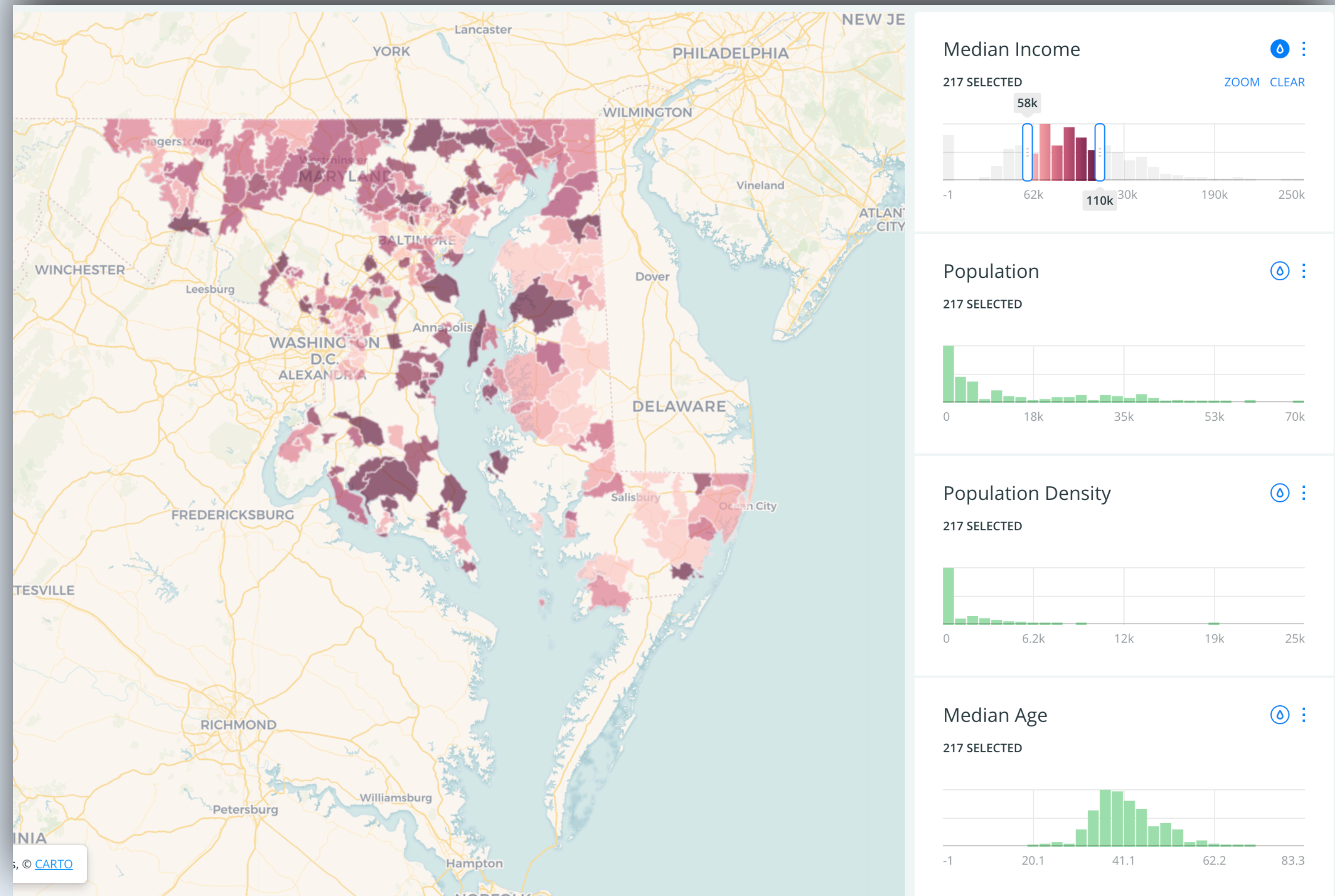


Customer Journey: Moderate Income

Awareness	Interest	Evaluation	Decision	Action
<p>Introduce IRA Possibilities</p> <p>Emphasize Size of Rebates & Urgency</p> <p>Remind that Energy Costs are Rising</p> <p>Connect IRA with Solutions to Energy Costs, Comfort and Home Value</p>	<p>Engage Homeowners</p> <p>Do We Qualify?</p> <p>Contractor/Agency as the Trusted Source</p>	<p>Options for Timing</p> <p>How to Maximize Incentives</p> <p>Case Studies</p>	<p>Scope of Work</p> <p>Net Cost</p> <p>Financing</p> <p>Phased Retrofit</p>	<p>Purchase</p> <p>Execute</p>
<p>Facebook/Instagram Community Events</p>	<p>Website Content</p> <p>Organic Traffic</p>	<p>Offer a Planning Process</p> <p>Example Math</p>	<p>Quote/Proposal</p>	<p>Manage Phased Retrofit</p>



Start with Income Targeting by Zip



www.incomebyzipcode.com



Keyword Focus:

Content

Education

Search Engine

Optimization

Products/Services First:

HEAT PUMPS

HEAT PUMP REBATES

INSULATION REBATES

ELECTRIFICATION REBATES

Program Names:

IRA REBATES

HOME ENERGY REBATES

EFFICIENCY VERMONT REBATES



Offer an IRA Planning Process

ELECTRIFY MY HOME We Design and Install Heat Pumps The Right Way [Financing](#) [FAQs](#) [Contact Us](#) [No-Visit Energy Assessment](#) [844.637.3733](#)

[HOME ELECTRIFICATION SERVICES](#) [BENEFITS OF ELECTRIFICATION](#) [INSULATION SERVICES](#) [OUR UNIQUE PROCESS](#) [THE STORY OF OUR COMPANY](#)

Tell Us About You

Name Email

Phone

Address

Address 1

Address 2

City - State * - ZIP code

Tell Us About Your Home

How large is your home? - Select a value -

General square footage of your home

How many stories? - Select a value -

My house was built... - None -

Number and Size of bedrooms



QUESTIONS?

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