



RECAPPING THE 2024 NATIONAL HOME PERFORMANCE CONFERENCE

Energy Circle Webinar Series

Peter Troast, Founder & CEO

April 24, 2024



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Peter T.

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PRESENTATION ICONS

Decarbonization & Electrification

Diversity, Equity, Inclusion, & Accessibility

Pre-registration



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Standout Topics/ Presentations in the Business Track

- 1 Pay for Performance Compensation Strategies
- 2 Evolving Sales Processes and the Role of the Energy Audit
- 3 Customer Acquisition—What's Working & Some Big Company Insights
- 4 Rising Importance of Differentiation
- 5 Value of Peer Groups

PAY FOR PERFORMANCE HALCO ENERGY

ROCHESTER, SYRACUSE, ITHACA, NY



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PROS OF P4P

- Higher wages for the employees and a better life for their families
- Increased productivity
- Fewer trucks and equipment your company has to invest in
- Higher retention rates for production staff
- Higher profitability

INSULATION & AIR SEALING CREWS

- The crews all get paid \$15/hour plus production bonuses.
- The foreman is typically making \$40-\$50 per hour on average and the second person on the crew is typically making \$30-\$40 per hour on average.
- This production bonus incentivizes them to look at the pictures and job work order ahead of time so that they can load their truck up accordingly.



INSULATION & AIR SEALING CREWS

- They do not dilly-dally much because their rate of pay is only \$15/hour until they get on the job and make production bonus.
- They never leave a job with 2 hours or less of work to do. They stay and finish so they are on a new job the next day with a new production bonus.
- They are motivated to do the job very thoroughly and correctly the first time.
 - If there is a call back based on the quality of their work, they need to return to fix it at \$15/hr.



CREW SCORECARD

- Each crew's production goal is set at \$30k/week.

<u>Employee</u>	<u>Position</u>	<u>Average Per Hr</u>
Nate	Foreman	\$36.26
Kevin	Foreman	\$42.32
Dave	Foreman	\$42.90
Tim	Foreman	\$48.03
Travis	Foreman	\$41.15
Xavier	Technician	\$26.93
Anthony	Technician	\$30.42
Jaydon	Technician	\$30.36
Kory	Technician	\$37.40
Mason	Technician	\$22.39
Noah	Floater	\$25.77

**STATE OF THE ENERGY AUDIT
IDEAL AIR CONDITIONING, PHOENIX
ECO PERFORMANCE BUILDERS, CONCORD, CA**



Home Performance Sales

Without Audits or Too Much Building Science

...





RIP

The Energy Audit
Once a sales tool

Lore

Sales Process

Audits vs Walkthroughs

Audits showed \$X/hr of revenue generation

Walkthroughs showed \$Y/hr of revenue generation

The scope of work was still what we wanted for the company

Easy decision.



A Change in the Order of Things (Peter's Interpretation)

1. Strong Pre-qualification via Phone
2. Site Visit/Walkthrough—*Experienced Sales Staff*
3. Proposal and Signed Contract
4. Paid Visit After Contract & Comprehensive Report—*Technical Person*. Manual J, Duct & System Design, Blower Door, System Selection
5. Post-Job Test Out and Measurement



What, How, Why and Pictures

Attic Insulation (With Removal)

WHAT

- Install Stabilized Cellulose Insulation to a level of R-50.
- Thoroughly remove existing insulation, debris etc. prior to air sealing and then installing the new insulation to adhere to.

HOW

- Install rulers in the attic to ensure the desired level of insulation is achieved.
- Frame up around the 2 attic hatches to act as a permanent dam for the deeper insulation.
- Protect heat sources for fire hazard prevention.
- Install baffles/dams in front of the large gable end attic vents to ensure ventilation is maintained while providing the desired amount of insulation.
- Insulate the 2 attic hatches with thick closed-cell rigid foam board insulation and install foam weather stripping.
- Blow in Cellulose Insulation to a level of R-50 to the correct and optimal density.
- Insulation will be installed in accordance with Quality Insulation Installation (QII) standards.

WHY

- Green Fiber is SCS certified, 85% recycled content, takes less energy to produce than other insulation materials, improves sound levels, and provides mold control.
- The loose fill Cellulose we use, Green Fiber, contains borate, a benign fire retardant non-hazardous to human health.
- Improves the home's efficiency and strengthens the thermal envelope.
- Improves comfort by making it so the house can retain heated or cooled air and reduces the temperature difference from ceiling to floor.
- Reduces noise transmittance between the inside and the outside.

YOUR HOUSE



AFTER EXAMPLES



Cellulose attic insulation



Insulated attic with a framed-up plywood mechanical platform

Hard to Argue with Success



- Average Job Size: \$38,000
- Envelope, Full Electrification (heat, air, water), Ducts
- Booked Out 9 Months



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)



NEW CUSTOMER ACQUISITION
HOMeworks, MA, CT, NY
ALLIED ENERGY EXPERTS, NJ
SNUG HOME, MI



Running Your Home Performance Business

Marketing & New Customer Acquisition for Home Performance Contractors in the IRA Era

 Wednesday, April 10, 2024  10:00 AM – 11:00 AM  Location: Room M100 F (Mezzanine Level)

CEU Type(s): BPI, InterNACHI, NARI



Peter Troast

CEO
Energy Circle
Portland, Maine



Denny Duchene (he/him/his)

Manager
Snug Home
Grand Ledge, Michigan



Bill Graham

Chief Marketing Officer
HomeWorks Energy
Medford, Massachusetts



William Doyle

President
Allied Energy Efficiency Experts
Cherry Hill, New Jersey



Summary of the Session (Peter's Takeaways)

- 2 of 3 are Large Companies—Significant Marketing Resources
- All 3: Diverse, Integrated Campaigns and Agility
- Structured Referral Programs Strong
- Some Traditional Tactics are Working
 - Direct Mail*
 - Door-to-Door
 - Neighborhood Aggregation
 - Community Events & Tabling—Brand Ambassadors
 - Municipal Partnerships
- Marketing % of Revenue: ~6-7%



GROWING IMPORTANCE OF DIFFERENTIATION



THE GROWING IMPORTANCE OF DIFFERENTIATION: HOW CONTRACTORS ARE POSITIONING TO STAND OUT FROM THE CROWD

MICHELLE GRIFFITH, DEVERE HOME PERFORMANCE, MARYLAND

KEVIN BRENNER, HEALTHY HOME ENERGY & CONSULTING, NEW YORK

MATT HARGROVE, TOTAL HOME PERFORMANCE, MARYLAND

Moderator: Peter Troast, Energy Circle

April 9, 2024



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



Marketing Changes—New Competition



**Entrepreneurial
Contractors**

**Quality
Contractors**

Angi

Lead Sellers

**SPAM
"Contractor"
Websites**



**Utilities & Efficiency
Programs**



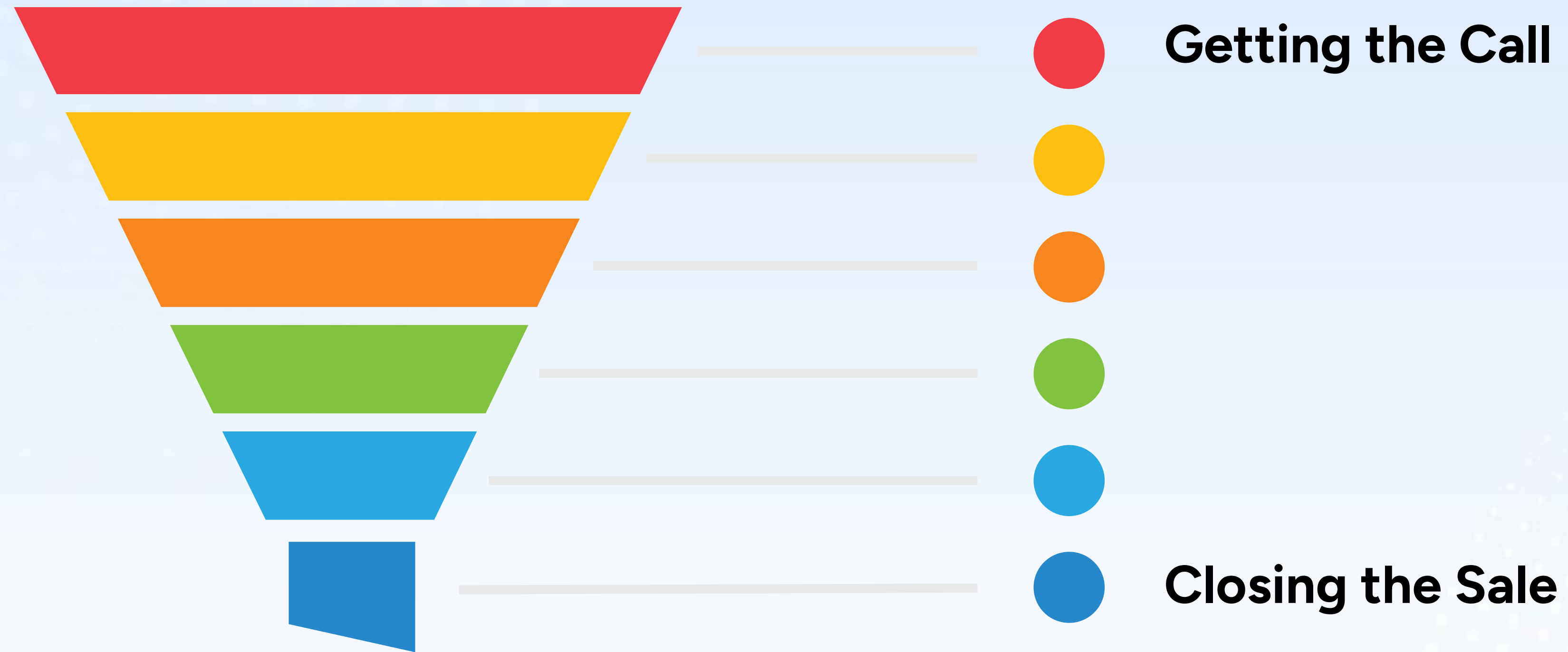
Concierge

**Special Financing
Models**

Directories
(Clean Energy Connection, Yelp)



Differentiation Across the Funnel



VALUE OF PEER GROUPS



PEER GROUPS

- Non-competitive service areas
- Similar, but not exact, business models
- Meet 2X/year on site at one company
- Deep dive—interview staff, witness rollout, sales calls, job sites, feedback session
- Also: FUN



Interested? Contact Me--peter@energycircle.com



QUESTIONS?

Peter Troast
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