

# ESP Training Evaluation

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Final Report

for



**May 11, 2015**

**btan consulting**

207 N. Allen Street | Madison, WI 53726

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## Executive Summary

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In February 2014, Energy Trust of Oregon (Energy Trust) sponsored the Efficiency Sales Professional™ (ESP) Certificate Program (Boot Camp). This five-day training course was offered at reduced cost to individuals who provide energy efficiency equipment or services to commercial customers of Portland General Electric (PGE) or Pacific Power.

Energy Trust hired Btan Consulting to conduct an independent evaluation of the ESP training. The evaluation objective was to assess the impact of the training on participants' sales of energy efficient equipment and services. The evaluation was conducted in three parts: 1) a paper survey on the final day of Boot Camp, 2) a follow-up web survey three months after course completion, and 3) in-depth interviews (IDIs) with contractors and program implementation staff one-year post training. Response rates to all data collection activities were high.

### **Class Survey**

Participants expressed enthusiasm and excitement about the training. They gave the training high ratings on most aspects and were especially impressed with trainer Mark Jewell's presentation style and the wealth of information provided. The training exceeded expectations for the majority of participants. Some participants found the pace too fast and many would have liked more in-class exercises to enhance their learning. The great majority of participants left the training with the intent to make changes to their sales practices.

### **Three Month Follow-Up Web Survey**

Three months after the workshop, participants continued to be enthusiastic about the training and were engaged in on-going learning. All participants had accessed training resources post-training, and 93 percent were subscribed to on-going content delivered electronically from the training organization.

Participants identified multiple changes made to their sales approach since the ESP training. A majority reported adopting one-page proposals, asking customers more questions, revising or developing "elevator" speeches, and included non-energy benefits in discussions or written materials. About one-third intended to make additional changes.

Most respondents (~ 70%) reported positive effects on customers' willingness to adopt energy efficiency products or services. Many respondents found that their focus on customer wants, combined with new sales approaches, translated into longer discussions and seemingly greater acceptance of energy efficiency. Four contractors provided convincing evidence of impacts.

### **One Year Follow-Up IDIs**

One year post training most contractors (trade allies) interviewed remained enthusiastic about the training.

All respondents engaged in sales had made changes in work habits or sales approaches as a result of the training. The most commonly reported were the adoption of one-page proposals and the use of financial calculations other than simple payback. Many made several substantial changes and some could document the impact on sales.

The training has had impacts beyond the participants, with several participants sharing their knowledge, tools, and new approaches within their organizations. Respondents retained a lot of what they learned, in part, because they continue to get reinforcement of the training messages through the on-going content delivery.

The impacts of the training were not (and likely cannot be) quantified in terms of kWh savings. Many reported increases in sales since Boot Camp, although few were comfortable tying them directly to the training. The impact on some participants is dramatic, and the number of attendees adopting changes is high. The changes appear to be lasting; some attendees changed their work habits soon after the training, and have maintained them since. These are now new habits. Individuals, and some organizations, have integrated into their sales practices new forms and calculations developed directly from the training.

**Recommendation: Energy Trust should continue to support sales training similar to that offered by Efficiency Sales Professional Institute.** Energy Trust's focus on achieving energy savings with a larger number of smaller projects requires a greater reliance on vendors. This sales training motivated participants and provided them with tools to more effectively and efficiently sell energy efficiency to commercial customers. This supports Energy Trust's current strategies to broaden program reach through vendors.

The key components that make this training effective are:

- The "selling energy efficiency" content
- A motivational presenter
- Specific and concrete suggestions, often with tools to implement them
- Real and convincing examples
- On-going reinforcement of training content

**Recommendation: Energy Trust should consider the following recommendations to better achieve their goals.**

- Offering shorter trainings. Participants
- Offering more focused trainings. Participants serving the residential and industrial sectors found that much of the training did not apply to them. Some very experienced sales professionals found the general sales content unnecessary.
- Aligning Energy Trust program operations and templates with best practices identified in Boot Camp. Participants conducting technical studies for Energy Trust programs pointed out that the Energy Trust templates do not include the financial calculations recommended in the training. A few others noted that the programs are not set up to reach decision makers.
- Developing local resources to deliver effective sales training, rather than bringing trainers from outside the area.
- Working with trainers in advance of classes to assure that the curriculum will meet participant needs, and that the content is not overwhelming.

## MEMO

**Date:** September 22, 2015  
**To:** Energy Trust Board of Directors  
**From:** Sam Walker, Sr. Project Manager - Commercial  
Erika Kociolek, Evaluation Project Manager  
Phil Degens, Evaluation Manager  
**Subject:** Staff Response to Efficiency Sales Training Evaluation

The purpose of this evaluation was to assess the impact of an Energy Trust-sponsored efficiency sales training course on participants' sales of energy efficiency equipment and services. Held in February 2014, there were 64 participants from a wide variety of organizations (Energy Trust, PMCs, utilities, contractors). Through surveys and interviews conducted at various intervals – immediately after the course, three months after the course, and one year after the course – the evaluator found that course participants retained the insights from the course, and the training motivated participants to make significant changes.

The evaluator recommended that Energy Trust continue to support similar trainings (with some modifications) and align Energy Trust templates (for technical studies, etc.) with one-page proposals, which were recommended by the trainer.

Although there are no plans currently to hold a similar training, the commercial program may decide to hold the training again in the future, especially as the program anticipates it will rely on more contractors delivering savings from smaller projects.

The evaluation had specific feedback for how to improve the training, including length (shortening it) and content (spending more time on financial calculations and tailoring the content to the audience). These suggestions will be useful should this training be offered again.

The recommendation to align Energy Trust templates with one-page proposals was somewhat unclear as multiple templates were referenced. Energy Trust has a wide variety of customer-facing documents, including technical studies, incentive applications, incentive offers, etc. Each one of these documents serves multiple purposes.

The commercial program is currently working on developing a strategy to educate customers and contractors on project financials, which will, in part, help businesses evaluate energy efficiency investments as they do other investments. This strategy will be informed by the recommendations from this evaluation.

# 1 Introduction

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In February 2014, Energy Trust of Oregon (Energy Trust) sponsored the Efficiency Sales Professional™ (ESP) Certificate Program (Boot Camp). Energy Trust subsidized registration costs (\$1,000 per participant) so that qualifying individuals paid only \$495 for the class. To be eligible, individuals had to provide energy efficiency sales or services to commercial customers of Portland General Electric (PGE) or Pacific Power. In addition, Energy Trust covered a quarter of the time spent on the training for Energy Trust Program Management Contractor (PMC) staff.

Energy Trust hired Btan Consulting to conduct an independent evaluation of the ESP training, which was led by trainer Mark Jewell. The overall objective of the evaluation was to assess the impact of the training on participant sales of energy efficient equipment and services. The evaluation had three key parts:

**Course Survey.** A short survey to assess participant satisfaction with the training and intentions to make changes as a result of the training.

**Three Month Follow-Up Web Survey.** A web-based survey to identify participant on-going learning activities, changes implemented, likely future changes, as well as participant assessment of the effect of these changes on customer willingness to adopt energy efficiency equipment and services, three months after the workshop.

**One Year Follow-Up In-Depth Interviews.** To identify and potentially quantify the impacts of the training on the adoption of energy efficiency equipment and services, one year after the workshop.

This document is the final evaluation report. It includes the findings from the in-class paper survey, the three month follow-up web survey, and a final follow-up that consisted of in-depth interviews with contractors and program implementation staff one year after the workshop. It begins with an Executive Summary of key findings and final recommendations for Energy Trust consideration.

Section 2 present the findings from the course survey.

Section 3 present the findings from the three month follow-up web survey.

Section 4 present findings from the one year follow-up in-depth interviews and overall recommendations for Energy Trust sales training.

# Course Survey<sup>1</sup>

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## 2.1 Introduction

This section summarizes the findings from a survey distributed on the last day of Boot Camp for those in attendance, and later provided online to those not in attendance and non-respondents.

### 2.1.1 The Class

The ESP Boot Camp is a 48 hour course. When completed, participants can receive continuing education credits, as well as certification from EEFG (the organization that provides the training). The training was held in Portland, Oregon on February 3 – 7, 2014 at PGE facilities. The 40 hour in-class training was to be supplemented with 8 hours of online, on-demand material. Unfortunately, Portland had a snow storm starting on February 6, which truncated both the Thursday and Friday sessions. EEFG plans to increase the training materials available online so that learners can complete the course.

Registration for the Portland training reached 68. The great majority of registrants received Energy Trust subsidies (see Table 2-1). Four subsidized registrants did not show up for the training (without notifying EEFG or Energy Trust in advance). An additional three subsidized registrants missed 3 or 4 days of the training. At a minimum, more than 10 percent of the subsidized registrants did not complete the Boot Camp training.

**Table 2-1. Registration and Attendance**

<b>Registrants</b>	<b>Count</b>	<b>Percent</b>
<b>Attendees</b>		
<b>Not subsidized</b>		
Attended 4 plus days	3	4%
<b>Subsidized</b>		
Attended 4 plus days	58	85%
Missed 3 or 4 days	3	4%
<b>Total attendees</b>	<b>64</b>	
<b>Subsidized</b> Did not attend <sup>1</sup>	4	6%
<b>Total Registrants</b>	<b>68</b>	<b>100%</b>

<sup>1</sup>These registrants were not included in the course survey sample frame.

Participants worked for a variety of organizational types, as shown in Table 2-2. Over 50 percent were contractors, vendors, and engineers who work for companies that provide energy products or services in the market. Another group was comprised of firms that primarily provide energy program delivery (and other services) to organizations promoting energy efficiency. The remaining 30 percent of attendees were utility, Energy Trust, or Energy Trust PMC staff.

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<sup>1</sup> This section was initially provided to Phil Degens, Energy Trust Evaluation Manager, in a memo dated March 17, 2014.



**Table 2-2: Attendees by Organization Type**

Attendee Type	Count	Percent
Contractors/Engineers, other	36	56%
EE Professionals/Program contractors <sup>2</sup>	9	14%
Utility	8	13%
Energy Trust	5	8%
Energy Trust PMCs <sup>1</sup>	6	9%
<b>Total Registrants</b>	<b>64</b>	<b>100%</b>

<sup>1</sup> PECI and Lockheed Martin staff self-identified as Energy Trust sub-contractors.

<sup>2</sup> PECI, Lockheed Martin, ICF, and Nexant staff that did not identify themselves as Energy Trust contractors.

### 2.1.2 The Survey

The initial assessment was a survey designed to obtain participants’ assessments of various aspects of the training. It also included questions about their intent to make modifications to their sales approach as a result of the training.

We designed a one-page paper survey for participants to complete at Friday’s session. Because of low on-site attendance (due to the snowstorm), we sent non-respondents links to an online version of the survey, and followed up with two reminders. Ninety-two percent of the attendees responded to the survey (see Table 2-3). Three of the five non-respondents had missed three or four days of the training.

**Table 2-3: Survey Response Rate**

	Count	Percent
<b>Total attendees</b>	<b>64</b>	
In-class	28	44%
1st web	20	31%
Reminder	7	11%
Last chance	4	6%
<b>Total Survey Completes</b>	<b>59</b>	<b>92%</b>

## 2.2 Survey Findings

We discuss the survey findings under three subheadings: Training, Class Format, and Intended Changes (due to Boot Camp).<sup>2</sup>

**Training** addresses the training itself and how participants rate various aspects of the training and the training overall.

**Class format**, related to the training, addresses participant ratings of the amount of different teaching tools, such as presentations, exercises, and written materials.

**Intended changes** addresses participants’ intentions to make changes as a result of the training.

<sup>2</sup> A copy of the survey is in Appendix A.

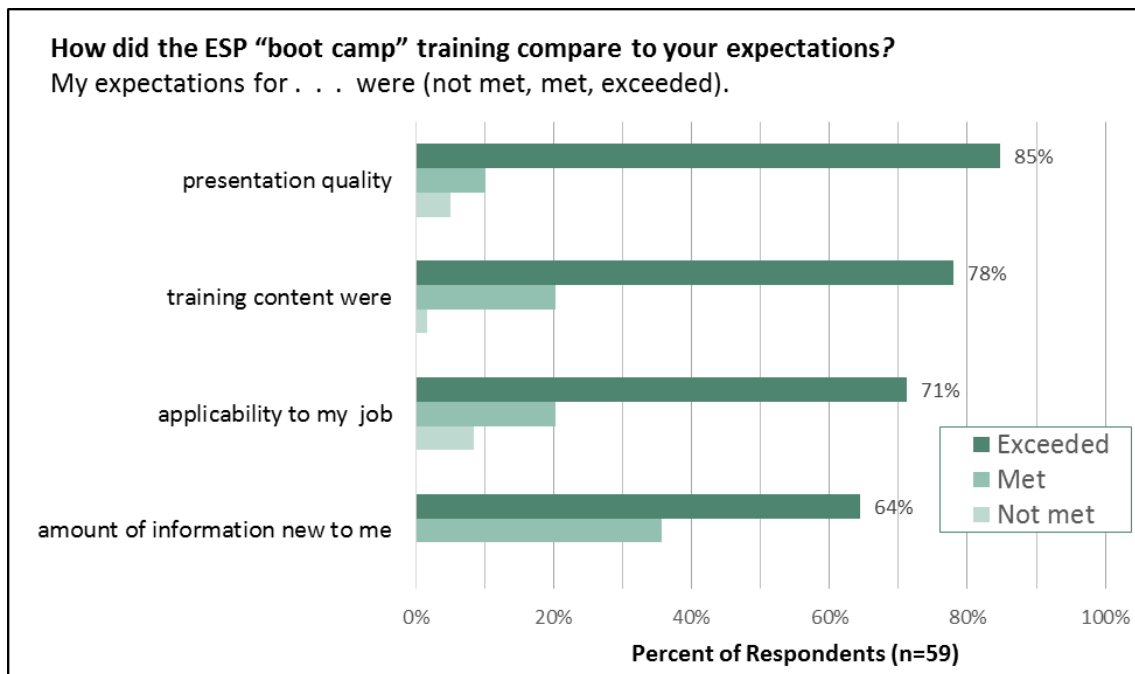
### 2.2.1 Training

To assess participant satisfaction with the ESP training we asked respondents multiple questions. First, we asked them to rate how four training features compared to their expectations. We also asked them how likely they would be to recommend the training to a colleague, and to provide an overall rating for the training.

The ESP training scored high on all of these metrics. All (100 percent) of the participants rated the workshop a 4 or a 5 on a five-point scale. Two-thirds of them gave the training a 5. All but one participant said that they would recommend the training to a colleague with similar responsibilities to theirs.

The training also did well relative to participants' expectations. These questions addressed presentation quality, training content, applicability to respondents' jobs, and the amount of new information. The training met or exceeded expectations on all features for 90 percent of the participants (see Figure 2-1). The training exceeded the expectations for 64 percent of participants on all four features.

**Figure 2-1: Training Relative to Participant Expectations**



Presentation quality was also identified as a key strength of the training in respondent comments. Example comments are:

“Great presenter, funny, captivating, informative.”

“I wasn't exactly sure what to expect and was blown away by the depth and quality of the training.”

“Mark is an expert trainer. All details tended to.”

Training content was also highly regarded, as is reflected in these comments.

“Training content had more than what was initially thought and more beneficial than I believe was even advertised.”

“A wealth of information and presented in a format that made it relevant to the individuals in the class.”

The diversity of material and what participants learned is also reflected in responses to the question “What was the most significant thing you learned from the training?” Responses were varied, and covered multiple areas including:

- Financials
- One page proposals
- Customer decision-making.
- Mining data on existing customers.
- Better understanding of customers, and selling to what each one values or needs.
- Selling benefits other than energy savings.

### 2.2.2 Class Format

Learners had more varied opinions about class format items. These results indicate clear strengths and areas for improvement. Participants were asked to rate the quantity of various class items on a five-point scale, with one meaning “not enough,” three meaning “just right” and five meaning “too much/too many.” The results are shown in Figure 2-2.

A large majority of participants found the time to “ask questions” and the time “devoted to presentations” to be just right. Those who didn’t were split between thinking there was too much or not enough time for these activities. This split indicates that it would be difficult to do better on these items.

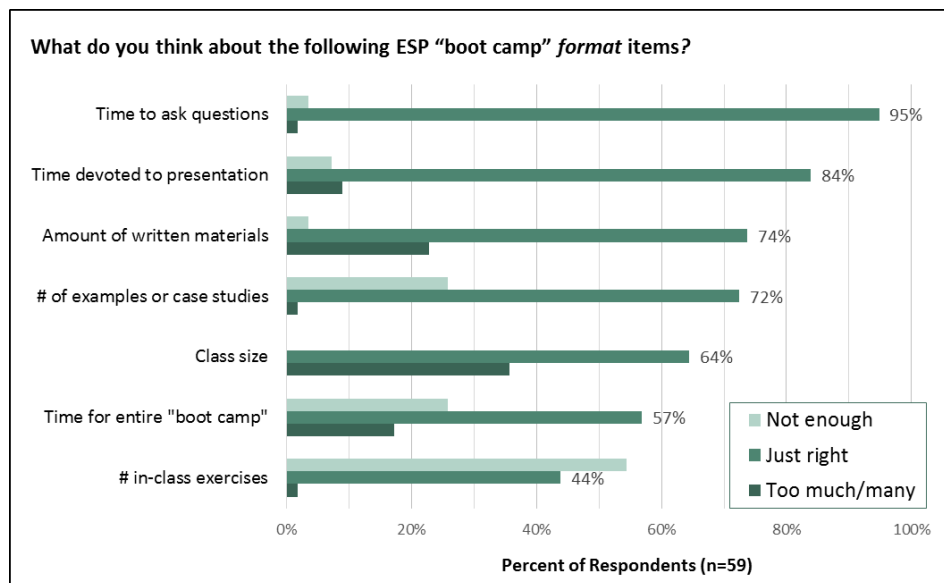
The results for the “amount of written materials” are interesting. The fact that 74 percent of the participants found the amount to be “just right” is very good. It is unusual that most of the remaining participants found that there was “too much” written material. In previous surveys using the same question<sup>3</sup> respondents were more likely to say there were “not enough” written materials.

A few respondent comments indicate that it may be a combination of the quantity and the nature of the handouts. One person commented that the handouts were “overwhelming,” while another said “[there were] too many slides in the deck.” A couple of other respondents identified the slide content as part of the issue, with both finding some of the written content (slides) expendable. One referred to pages of “unnecessary slides with questions and no answers” and another recommended “fewer slides that don’t have impact on the material.”

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<sup>3</sup> Evaluations of multiple training workshops provided at the IEPEC Evaluation Conferences bi-annually 2005 – 2011.

**Figure 2-2: Participant Assessment of Class Format**



About one-quarter of the participants felt there were too few examples or case studies, but comments did not provide any additional insights.

Participants had varied perspectives on the amount of time for the entire Boot Camp. A slight majority found the length just right, with 25 percent wanting more time and the rest wanting less. Those who found the class too short were likely to comment on the fast pace. One participant summed it up as “I felt that there was not quite enough time to absorb all the materials in one section before we moved onto the next one.” Those who found the course too long often provided comments suggesting greater content focus (less material). For example, one suggested “focus more specifically on energy sales,” while another mentioned focusing on “critical items.”

A substantial number of participants (36 percent) found the class size to be too large. This appears to be due to the actual size of the class (60 plus attendees per day) and the venue. Some respondents would have liked more interaction, which can be difficult with a large number of people, and may also have been hindered by the layout of the room.

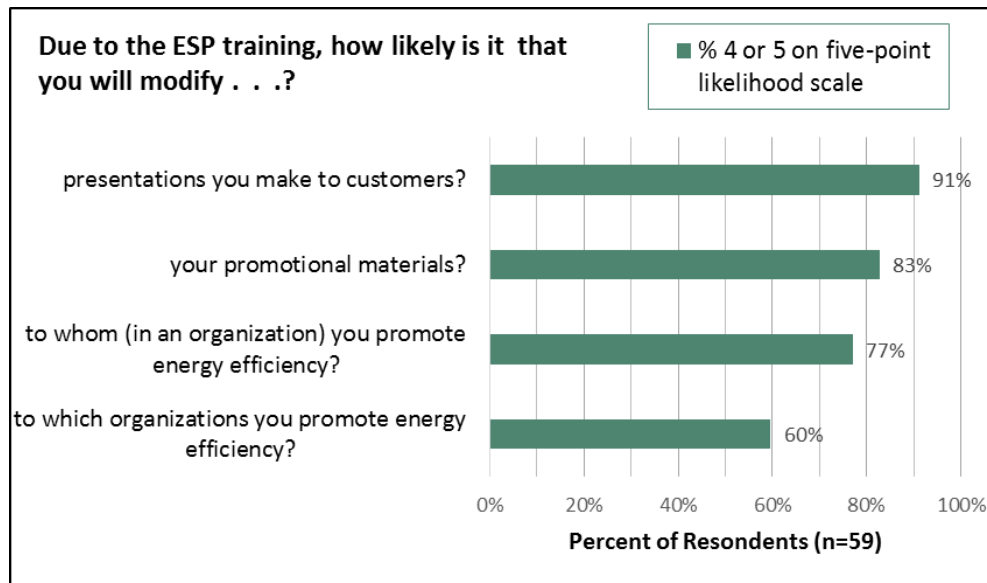
More than one-half the respondents found the “number of in-class exercises” insufficient. It is common for training participants to want more in-class exercises. It is not common for the percentage to be this high. Many respondents not only identified the need for more in-class exercises in general, but specifically targeted the financial calculations. As one respondent put it, “A few more exercises would help ground the information (in particular financing).”<sup>4</sup>

### 2.2.3 Intended Changes

The ultimate success of the training depends on participants improving their sales approaches in ways that result in increased adoption of energy efficiency equipment or services among their customers. We asked participants to indicate how likely it is that they will modify specific sales practices due to the ESP training (see Figure 2-3). Unfortunately the questions did not address the specific training content. The responses, however, indicate that most participants intend to make changes as a result of the training.

<sup>4</sup> This may be due in part to the truncated class schedule due to snow, as well as the complexity of the topic for some participants.

**Figure 2-3: Participant Intentions to Modify Sales Practices**



In addition to the items identified in the survey, many respondents identified other intended changes and provided enthusiastic comments. These comments include:

“Proposal layout, conversations, general interactions with customers, etc. My team and I (three of us attended) learned more than we could have dreamed. We have agreed to meet weekly to keep tabs on each other's progress in modifying our documents, processes, behaviors, etc.”

“I'm changing my entire pitch.”

“I will work more on modifying the tone and metrics of my presentations/reports so that they are more impactful to the ultimate decision maker(s).”

“The biggest change I will do is reframing the conversation to what's important to the customer.”

## 2.3 Summary and Next Steps

### 2.3.1 Summary

The ESP Boot Camp was well received by participants. Participants gave the training high ratings on most aspects and were especially impressed with Mark Jewell's presentation style and the wealth of information provided. The training exceeded expectations for the majority of the attendees. Some participants found the pace of the training to be too fast and many would have liked more in-class exercises to enhance their learning.

The training was affected by the snow storm in several ways. The final two days were shortened. Friday's session was attended by many via an online webinar, which is less desirable than in-class learning. The content on the last two days included more focused content (e.g. sector specific non-energy benefits) and the financial calculations. To obtain ESP certification participants will need to complete more than the eight hours of on-line content already required to complete the course. This may affect the course completion rate, learning effectiveness and ultimately sales impacts. Only the first (course completion rate) can be measured.

Most important to this evaluation, the great majority of participants left the training with the intent to make changes to their sales practices. The intent was not only reflected in the quantitative results, but supported by comments provided in the surveys.

# Three Month Follow-Up Web Survey

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## 3.1 Introduction

This section reports the findings from a web survey sent to ESP training participants in May 2014, three months after the workshop. The purpose of this survey was to:

- Identify participant on-going and likely future learning activities,
- Identify changes participants made or are likely to make to their sales or marketing approach, and,
- Assess the effect of these changes on customer willingness to adopt energy efficiency equipment and services.

To meet these objectives the survey addressed 3 topic areas:

**Resources accessed.** We asked participants what resources they had accessed since the training (such as the class binder or recommended readings) and what they are likely to access in the next six months. Use of the resources and ongoing learning activities are likely to result in lesson retention and further development of sales skills.

**ESP training-induced changes.** We asked participants about specific changes (based on the course materials) that they may have made to their marketing or sales approach as a result of the training. We also asked how likely they are to make these changes in the next six months.

**Effect of changes.** We asked participants to indicate what effect the changes had on their customers' "willingness to adopt energy efficiency equipment or services," and to tell us in their own words why they think this is the case.

### 3.1.1 The Survey

Btan Consulting fielded a web based survey from April 30, 2014 through May 20, 2014. The survey was sent to 61 ESP registrants who attended three or more days of training. Participants were sent an initial email containing a unique link to the survey, a brief description of the survey and its importance, and a promise of confidentiality. Two additional reminder emails with survey links and modified messages were sent to non-respondents. Participants were informed that one respondent would be randomly selected to receive a \$250 check. Thirty-nine participants responded, for a response rate of 64 percent.

The remainder of this section addresses the three topic areas discussed above, followed by a summary and next steps. The survey/codebook is included in Appendix B.

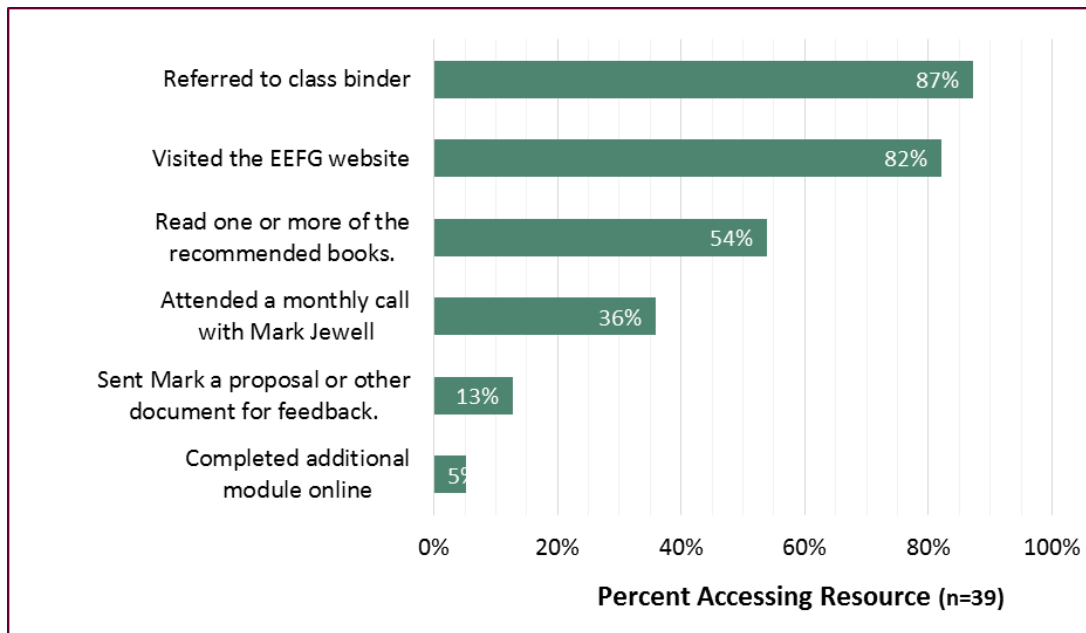
### 3.2 Resources Accessed

The workshop leader provided participants with multiple ways to access sales training information outside the workshop. In addition to the class binder, training participants have access to monthly calls with Mark Jewell, and can give Mark a proposal or other documents for feedback for one year post-training, The EEFG website a contains suggested readings (with easy access to Amazon for purchasing), Mark’s blog “Jewell Insights,” information on other classroom and on-line workshops, links to download the ESP Ninja app (Ninja app) and to sign-up for regular emails.

ESP Boot Camp attendees remained engaged in learning after the workshop. All respondents reported accessing at least one of the available non subscription resources (Figure 3-1) and 93 percent have subscribed to on-going content (Figure 3-2).

Almost 90 percent have referred to their binder and more than 80 percent visited the EEFG website. More than one-half have read one or more of the recommended books. Responding participants assessed an average of 2.8 resources each.

**Figure 3-1. Resources Accessed**



Two respondents reported completing modules on-line, one on financial worksheets and the other on the one-page proposal. Both were satisfied with the module. An additional 26 percent looked for on-line modules when visiting the website. (We did not ask these respondents if they completed one.) Several respondents indicated (in their comments) that they are waiting for the additional course content to complete the course.

More than 80 percent of the respondents revisited the ESP website, looking for various resources. (Table 3-1). Respondent’s average looking for 2.5 items on the website. Mark’s blog, links to Ted talks and looking at recommended readings (titles, but not content) are the most often cited items.



**Table 3-1 Website Resources Accessed**

<b>Item</b>	<b>Percent of Respondents<sup>1</sup> (39)</b>
Mark's blog (Jewell Insights)	44
Links to TED talks	41
Recommended readings	36
Webinars	28
ESP ninja app	26
On-line modules	26
Other	3
Nothing in particular	5
Did not visit website	18

<sup>1</sup> Totals more than 100% because multiple responses allowed

The workshop providers maintain several subscription services: an ESP Ninja app, “daily dribble” emails, and bi-weekly email blog updates for those who subscribe. The content within these items is very similar, with variations to address the medium.

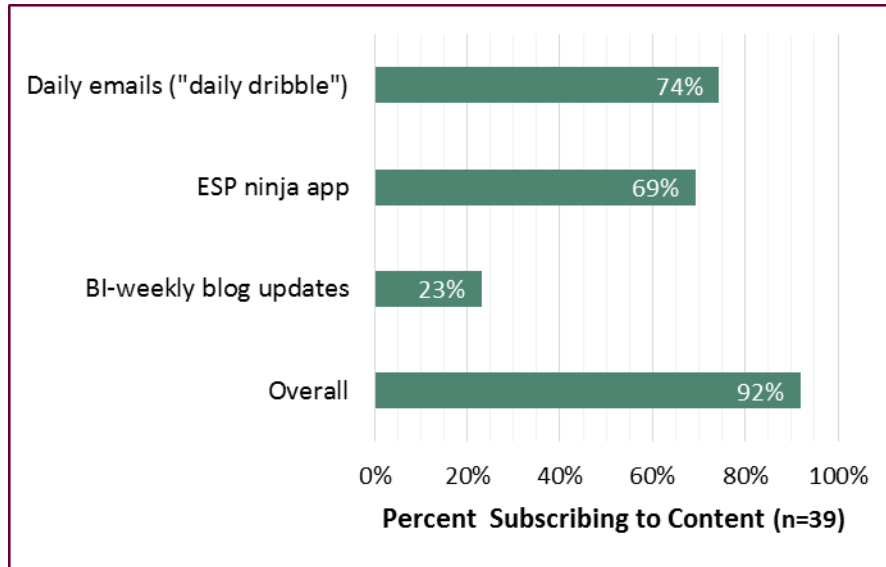
**ESP Ninja app.** The ESP Ninja app is the most comprehensive and has five discrete sections. Two sections provide content to reinforce or expand on what was addressed in the training. The Wisdom section contains articles related to sales. These range from extracts from Mark’s blog, to discussion of sales related books, often with links to purchase the book or to a related TED talk. The video section contains links to YouTube videos of Mark discussing various sales topics. Some are content heavy, others are more promotional. The News section promotes ESP trainings and the organization’s activities in general, and the Store provides easy access to information on ESP trainings and other offerings. The Quotes section is self-explanatory.

**“Daily dribble” emails or “Jewell Insights.”** These daily emails have the same content as the Wisdom section of the ESP Ninja app, as well as information regarding ESP offerings.

**Bi-weekly email blogs.** The bi-weekly (two times per week) are now “weekly summaries” that include links to the most Jewell Insights.

Most of the respondents (92%) subscribed to one or more of the ongoing information sources (Figure 3-2). Better yet, 85 percent read an email, opened the ESP Ninja app, or did both at least once per week in the prior month.

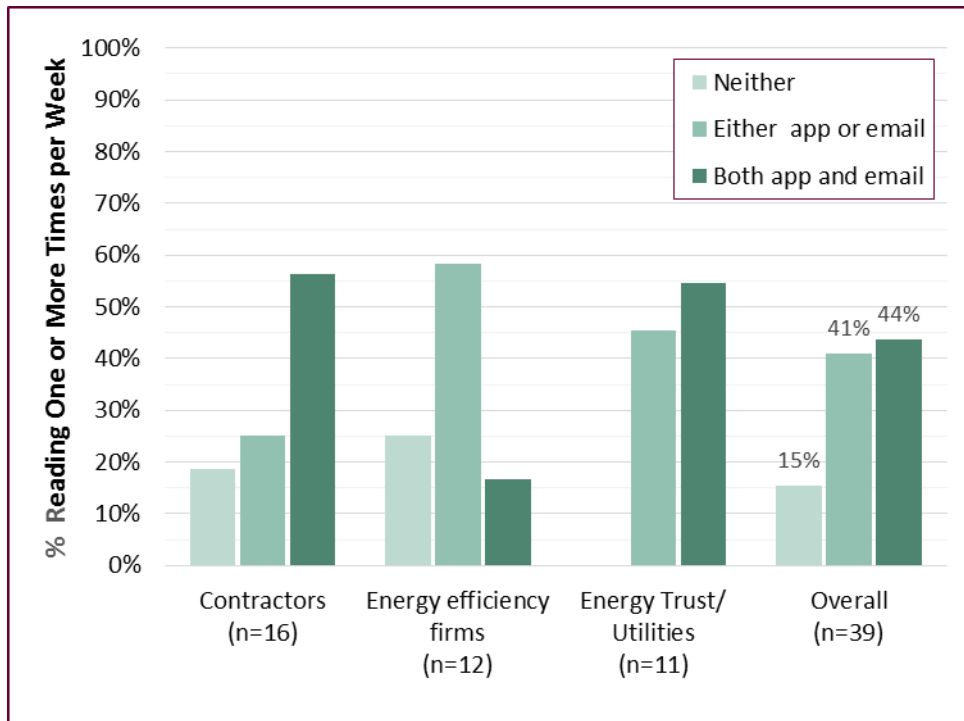
**Figure 3-2. Content Subscriptions**



<sup>1</sup> Totals more than 100% because multiple responses allowed

We asked respondents how often in the past month they read the daily email or opened the ESP Ninja app. Overall, the majority of respondents (85%) reported doing one or both of these at least once per week. Viewership appears to vary somewhat by respondent type. All Energy Trust/utility respondents open the ESP Ninja app or read the email at least once per week. More than half do both at least once per week. Contractors are also highly engaged, with 56% reading an email or opening the ESP Ninja app at least once per week.

**Figure 3-3. Weekly Viewing of Ninja App and Emails**



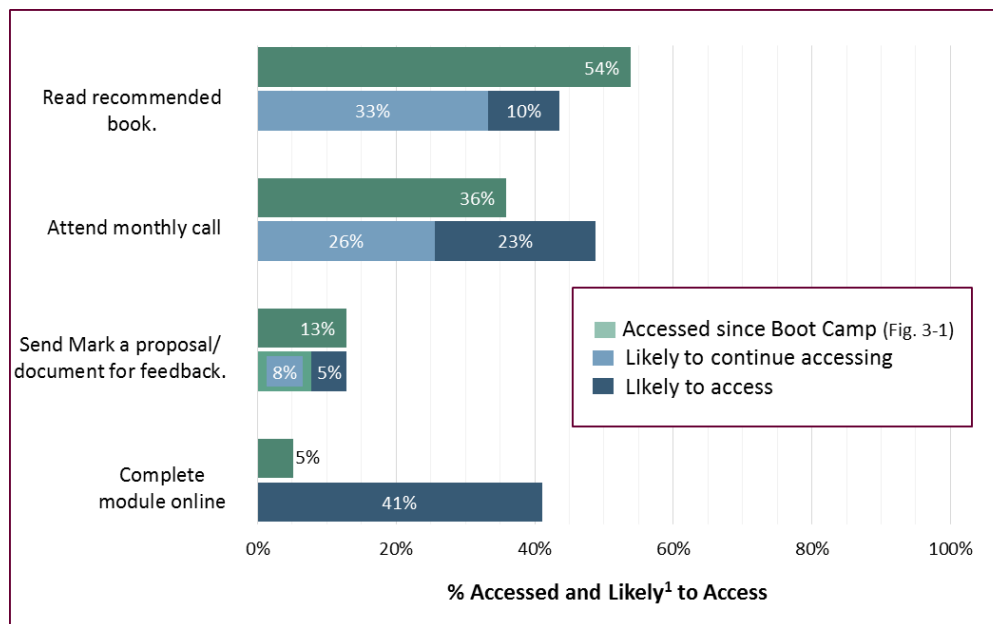
### 3.2.1 Likelihood of accessing resources in next six months

We asked respondents how likely they are to access ESP training resources in the next six months. Most (74%) indicated that they would access at least one of the resources listed in Figure 3-4.

This top bar for each resource (green) shows the percentage of respondents who have already accessed the resource. The lower bar shows the subset of the top bar who will continue to access the resource (light blue) and respondents who are likely to access it for the first time (dark blue). So, for example, 36 percent of respondents have already attended a monthly call. Overall, 49 percent plan to attend a monthly call in the next six months, with about half of them (26 percent) having already attended one, and the other half (23%) doing it for the first time.

Note that 41 percent of the respondents say they are likely to complete an online module. Several comments in the survey indicate that respondents are still awaiting the online content and test. As one respondent put it, “I look forward (to) the on-line modules and test being available.”

**Figure 3-4. Resources Likely to be Accessed in Next Six Months**



<sup>1</sup> Responded 4 or 5 on five-point scale with 1 “not at all likely” and 5 “very likely”

We also asked respondents how likely they are to “take the ESP test to get ‘Ninja’ status.” About 60 percent of respondents said they are likely to do so in the next months (4 or 5 on five-point scale of likelihood.)

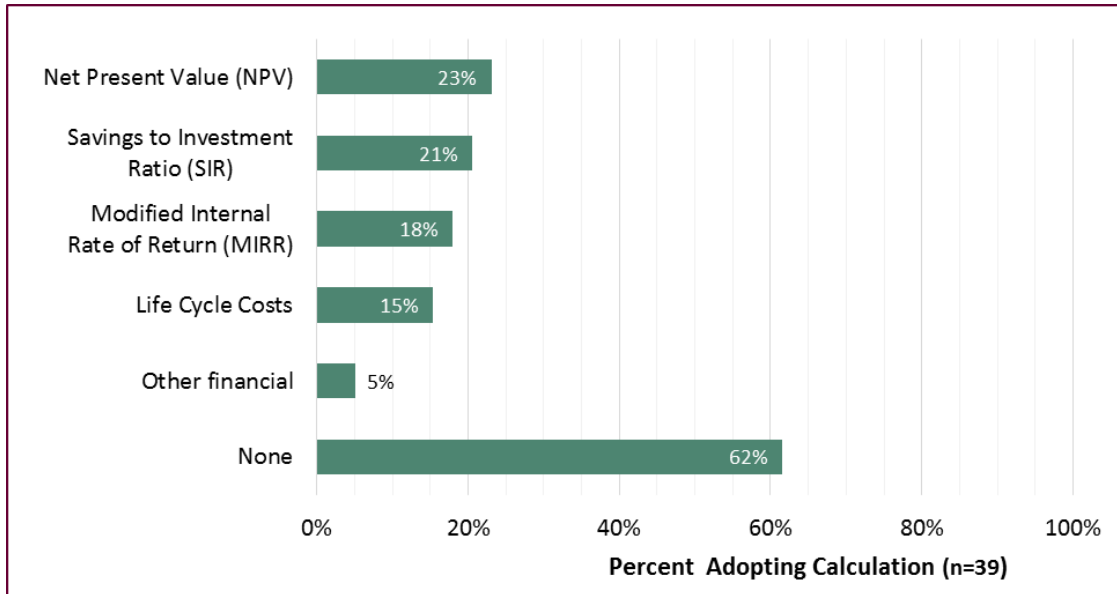
## 3.3 Changes Made and Effect on Customer Reception

### 3.3.1 Changes to sales or marketing approach

All but one respondent (97%) made one or more of the listed changes to their marketing or sales approach as a result of the ESP training. On average, respondents made 3.7 listed changes to their sales or marketing approach (Figure 3-5). The most prevalent response (69%) is that respondents

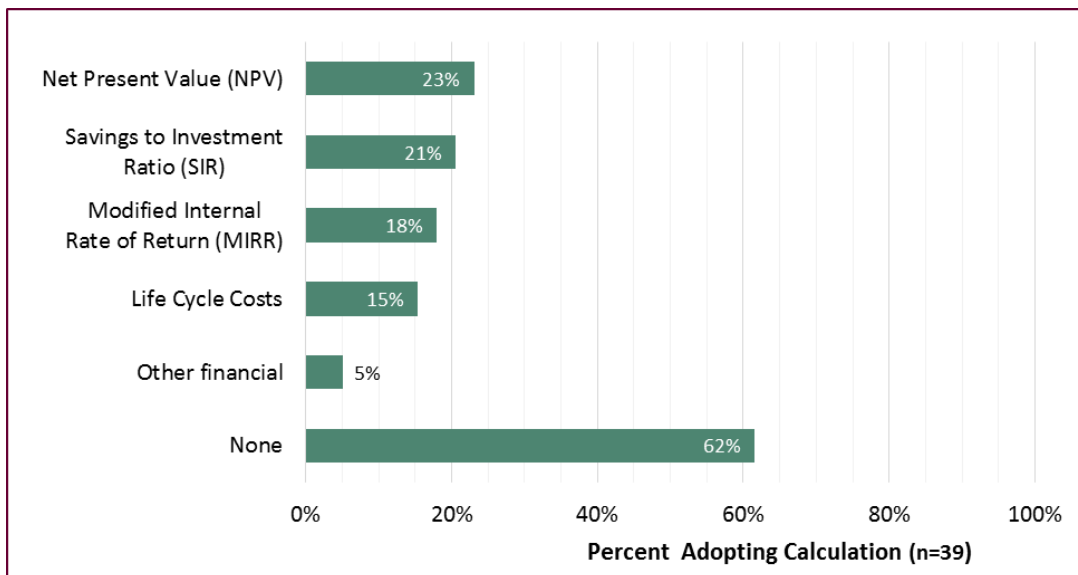
“ask customers more questions.” Based on comments this seemingly easy change leads to other changes and more effective sales approaches. Most participants (65%) have added non-energy benefits to discussions, proposals, or marketing materials.

**Figure 3-5. Changes Resulting from ESP Training**



Almost 40 percent of respondents adopted one or more (an average of 2) financial calculation as a result of the ESP training. (Figure 3-6)

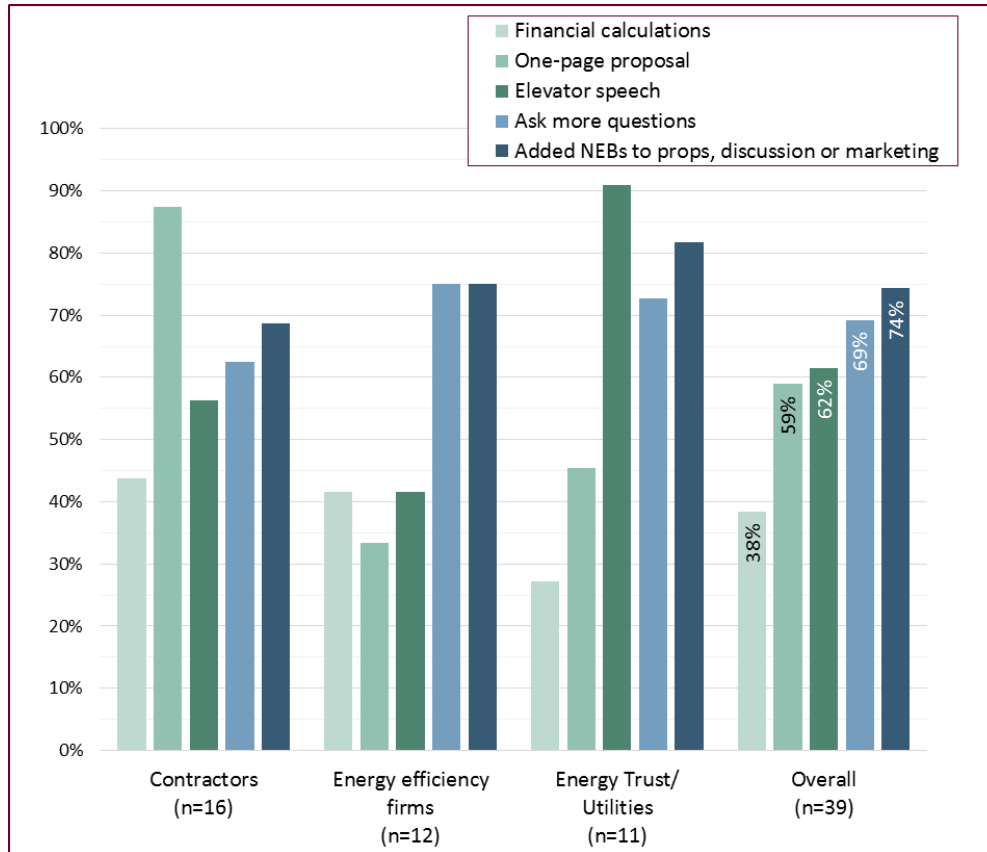
**Figure 3-6. Financial Calculations Adopted**



Since respondents made many changes relative to the number of items listed (an average of 3.7 across 7 options), and three addressed non-energy benefits, we did not identify much difference across the respondent types (Figure 3-7). The Energy Trust/utility group reported the most changes

and the contractors were most likely to have adopted new financial calculations and the one-page proposal.

**Figure 3-7. Selected Changes by Respondent Type**



We asked respondents if their organization made other (not listed) changes to their “sales or marketing approach,” and if they had “made any changes to how you approach your job as a result of the ESP training.” Because the responses had substantial overlap, we discuss them together below. Responses fell into three broad categories: specific additional changes to the organization’s approach, internal changes to facilitate sales, and changes in how the individual approaches their job.

**Specific additional changes.** Three contractors identified specific changes to their sales approach or process. These were integrating their “proposal spreadsheet to the incentive agency,” “implementing free benchmarking after controls job completion,” and providing multi-level cost analysis and proposal sections targeted to different groups within the customer organization (such as maintenance, purchasing and finance). An energy efficiency firm is developing sales sheets for contractors and retailers to assist them in upselling. An Energy Trust/utility group member discussed revising marketing materials to focus on dollar (instead of energy) savings, improvements and ROI.

**Internal changes.** Multiple respondents mentioned establishing regular sales meetings. In some cases discussing sales was added to an existing meeting; in other cases new meetings or working groups were established to share sales information, success stories, ideas or other sales and marketing related information. Others mentioned internal sales training or transferring the new information/approaches to others in their organization.

**Changes to individual approaches.** Most (92%) respondents said yes when asked if they had “made any changes to how you approach your job?” While their comments sometimes address their use of the specific categories in Figure 3-5 or the categories above, they also reflect that respondents feel different about their approach. The changes to individual approaches were a shift to a customer focus, a more aggressive sales approach, addressing non-energy benefits and adopting new habits.

Many comments addressed the importance of a *customer focus* when selling a project. This requires more listening to identify the benefits (energy and non-energy) that are important to that customer. As one respondent put it, “one of the greatest value items was the idea of re-framing the discussion and values based on items that increase value to the customer’s core business.” One mentioned identifying “sector specific examples of benefits beyond utility cost savings”; another mentioned “compelling financial metrics.” Several discussed mentioned non-energy benefits or other issues specific to that customer. Another said that she has “re-framed our team's responsibility as finding solutions to problems of our customers.” Many mentioned having completely different discussions, largely due to the customer focused approach.

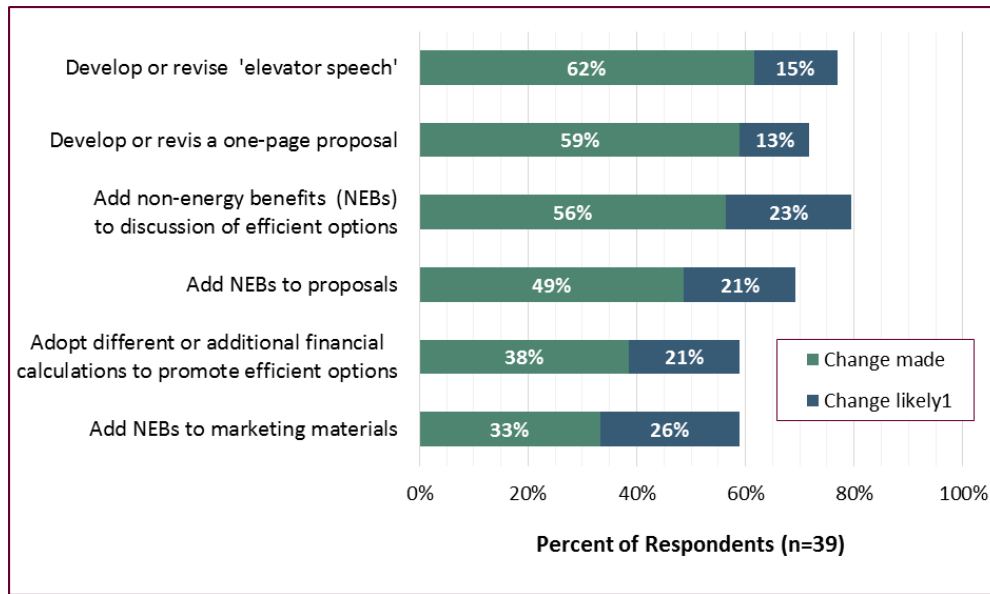
Other comments reflect respondents putting more *emphasis on sales* or adopting a *more aggressive sales approach*. For example, one respondent mentioned “focusing on “selling” instead of “promoting” program measures.” Several mentioned adopting a “challenger” sales approach. As one respondent put it, he is “less willing to accept first answer when a customer declines sales pitch. More likely to dig into objection to understand root issue and articulate problem and proposed solution back to customer.”

Many respondents adopted new work habits (recommended at the training) that make them better prepared for customer meetings, more focused, or more efficient. Several mentioned that they are more “professional” in their approach. The work habits included prioritizing, tracking calls, preparing for sales meetings (with questions) and changing how they set up customer appointments. Others mentioned networking (and being comfortable doing it) and keeping abreast of industry trends.

### 3.3.1 Changes likely in next six months

Many respondents (38%) are likely to make additional changes in the next six months. Figure 3-8 shows the percent of respondents who have adopted a change (in green) and those who are likely to make the change in the next six months. If those who are likely make changes do, then between 60 and 80 percent of respondents will have made all the changes listed in the figure.

**Figure 3-8. Changes Likely in the Next Six Months**

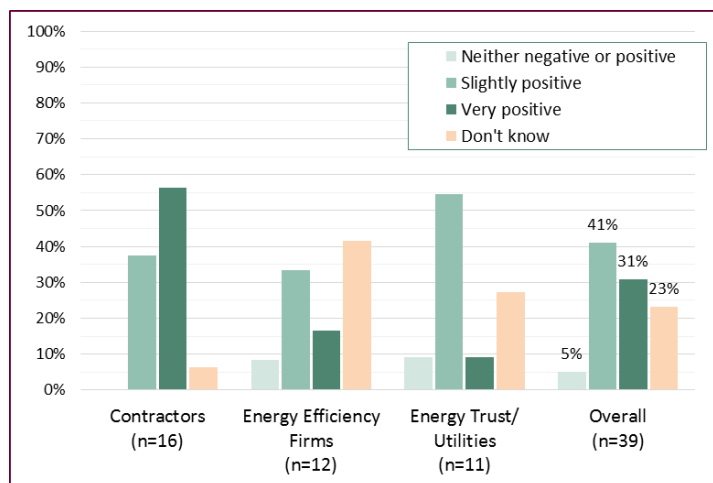


<sup>1</sup> Responded 4 or 5 on five-point scale with 1 “not at all likely” and 5 “very likely”

### 3.4 Effect of changes

The majority of respondents (72%) see positive effects on their “customers’ willingness to purchase energy efficient equipment or services.” Contractors are most likely to report positive effects, with more than 90 percent reporting a “slightly” or “very positive effect” (see Figure 3-9). Several contractors provide evidence of the effects in their comments. One contractor mentioned turning “one sales call for some basic controls upgrades in to a full blown system upgrade by presenting the proper financial metrics vs just trying to sell based on quality of product.” Another successfully converted a customer looking at a \$70,000 retrofit with future phasing to completing a \$240,000 project. . . utilizing the tools and concepts taught in this class.” Others point to higher success rates with customers accepting proposals. Others point to the one-page proposal being well received, longer conversations with customers, and general more positive responses.

**Figure 3-9. Effect of Changes on Willingness to Purchase EE**



Energy efficiency firms (those that deliver programs for Energy Trust or other program administrators) were more likely to report that they “don’t know” or that the effects were “slightly positive,” when compared to the contractors. These respondents indicate in their comments that customers seem more receptive and they feel more effective. One pointed to long sales cycles and another to the economy as reasons that they have not seen more effects.

About one-half of the Energy Trust/utility group respondents reported “slightly positive” effects. In their comments these respondents discussed ways that they have improved their approach, for example, with more customer focus, addressing non-energy benefits, and generally better presentations. The majority of the remainder either “don’t know” or reported it was “neither positive nor negative.” These respondents are more removed from the purchase decision and less likely to see the effects.

### 3.5 Summary and Next Steps

#### 3.5.1 Summary

Workshop participants continue to be enthusiastic about the training and are engaged in on-going learning. All participants have accessed resources since the training, and 93 percent have subscribed to on-going content delivered electronically from EEFG. Almost three-quarters of respondents plan to access resources in the next six months.

Respondents identified multiple changes that they have made to their sales or marketing as a result of the ESP training, with an average of 3.7 changes per respondent organization. In addition to changes we specifically listed, respondents identified additional changes that their organization has made or that they have made to their approach. Sixty percent or more of respondents say they ask customers more questions, have revised or developed “elevator” speeches and one-page proposals, and have included non-energy benefits in proposals, discussions or marketing materials. Many respondents (38%) are likely to make additional changes in the next six months.

Most respondents (~ 70%) report positive effects on customers’ willingness to adopt energy efficiency products or services. Many respondents found that their focus on customer wants, combined with new sales approaches, translated into longer discussions and seemingly greater acceptance of energy efficiency. Four contractors provided convincing evidence of impacts. They cited substantially increased success rates, success substantially increasing the size of projects, and a customer returning immediately to them after rejecting a one-page proposal because of changing priorities.



# 1 One Year Follow-Up In-Depth Interviews

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## 1.1 Introduction

This section reports the findings from in-depth interviews (IDIs) with ESP Boot Camp participants one year after the training. Interviews were completed with 14 trade allies and five program implementation staff. The overall objective was to assess the impact of the ESP training on increasing the adoption of energy efficient equipment in the Pacific Northwest

The interview guide addressed the following topic areas:

- Participant's company and their role in the company
- Participant's continued engagement in learning about sales
- Changes to participant sales related practices (attributed to training) after 1 year
- Changes adopted by participant's organization or others in the organization (attributed to training)
- Impact of training on end-user adoption of energy efficiency (generally)
- Key aspects of training that led to changes
- Suggested modifications to training, if any
- Determine ESP participant attrition levels (due to changing jobs, going back to old ways, other)
- Likelihood of sending others to or recommending ESP training

### 1.1.1 The Survey

Btan Consulting contacted ESP participants by telephone and email to provide feedback on the ESP training after one year. The total population of training participants was 60. The sample population was limited to the 48 participants identified as Contractors and Program Implementation Staff. Five workshop participants (working for Portland General Electric) originally identified as "Utility Staff" were re-categorized as "Program Implementation Staff," since they are delivering programs under contract to Energy Trust.

IDIs are a form of qualitative data collection that often uses purposive sampling approaches. Both the contractor and program implementer samples were selected for maximum variation. Contractors were selected for variation in business type and size. When a single firm sent more than one attendee we attempted to complete an interview with a least one person from each firm. Program implementation staff were selected to maximize variation in job title and company employing them.

Interviews were conducted over an eight week period starting in late February 2015 and continuing into April 2015. Interview recruitment used telephone calls, voice mail messages and emails. Potential respondents were told the nature of the interview, promised confidentiality, and informed of the \$250 incentive for one randomly selected respondent. Many contractors were difficult to reach, required multiple attempts over several weeks, and limited interviews to 30 minutes. When reached, they were willing to participate – some were enthusiastic; others felt they should, given the Energy Trust's investment in their training. Several scheduled interviews for two to three weeks after they were contacted and kept their appointments.

**Table 4-1 Workshop Attendees**

<b>Organization Type</b>	<b>Participant Population</b>	<b>IDI Sample</b>	<b>Completed IDIs</b>
Contractors	32	27	14
Program Implementation Staff <sup>1</sup>	16	6	5
Energy Trust Staff	6	0	0
Utility Staff <sup>2</sup>	5	0	0
Other	1	0	0
	<b>60</b>	<b>33</b>	<b>19</b>

1 Includes Program Management Contractors and Program Development Contractors.

2 Portland General Electric staff were identified as either utility or PDC staff. When unable to determine they remained in the “Utility” category.

As shown in Table 4-2, response rates were high. Twenty four contractors were contacted to complete 14 interviews. Only one respondent refused. Five never responded to multiple attempts over a period of eight weeks. Six program implementation staff were contacted to complete five interviews. The non-respondent was later identified as a utility employee.

**Table 4-2 IDI Final Response**

<b>Final Disposition</b>	
<b>Complete</b>	19
<b>Refused</b>	1
<b>No response</b>	5
<b>Job change</b>	3
<b>No attempt</b>	32
	<b>60</b>

## 1.2 Respondents

The interview respondents were selected from two attendee groups: Contractors and Program Implementers. The contractors interviewed were diverse in business size and type. Business size ranged from a sole proprietor to staff from companies with more than 1,000 employees.

Businesses in the contractor group sold either equipment, services or both. Contractors were selling equipment ranging from LED lighting to digital controls, and boilers, pumps and HVAC. Many contractors were selling services, such as engineering or architectural design, technical studies, benchmarking or monitoring. The service contractors generally provided technical studies funded through Energy Trust or other utility programs. Most attendees worked primarily in Oregon or Washington.

Two contractor respondents served residential customers, one served industrial customers and the fourth was not a salesperson “nor inclined to one.” His boss recommended that he attend the training.

Five respondents worked on program implementation. They represented 4 program implementation companies, and a wide range of Energy Trust programs. Job titles ranged from Field Engineer to Project Manager.

### 1.3 Continued Engagement in Sales Training

Through the ESP training the attendees were introduced to multiple opportunities to engage in continued sales training and education. Opportunities include attending monthly meetings with Mark Jewell to discuss sales topics, reading recommended books and completing a training module online. More than 40 percent of respondents to the three-month follow-up survey (May 2014) intended to engage in each of these activities in the next six months (see Figure 3-4). Another opportunity was to subscribe to Mark's daily emails, now called Jewell Insights.

**Most respondents receive Jewell Insights emails and read them two or more times per week.**

These emails contain short articles, inspirational quotes, book reviews and promotions for Efficiency Sales Professional Institute offerings. The same content is also available through the ESP Ninja app. Only one respondent reported reading it daily, most read at least one article two or more times per week, and a few less often because they are busy. The participants find the articles to be good reminders of things that they learned in class. Some find them motivating as well.

**Intentions were optimistic.** Few respondents reported attending one of Mark's monthly meetings, although some held onto the intent month-after-month. One respondent completed a training module online, but said that it "didn't work well" for him.

**Most initial activities were not maintained.** Many respondents read one or more (up to six) books recommended by Mark Jewell within the six months following the training. A few continue to read job related books, but not based on Mark's recommendations. As one participant put it, "I was diligent at first, but then it faded."

Participants within three separate organizations with multiple attendees agreed to regular internal meetings to discuss the training, sales or recommended readings. The meetings at all three organizations "sizzled out" within six months after the training.

### 1.4 Changes to Sales Approach

As described by respondents, the five-day training had two distinct parts. The first was general sales training, which touched upon "general sales approaches and work habits." One respondent characterized it as "about efficiency in how you do your job." The second part was focused on "the nitty gritty": specific tools or approaches, such as the elevator pitch, the one-page proposal and financial calculations. This provided a lot of opportunities for people to make personal, technical or organization changes to improve sales approach.

#### 1.4.1 Individual changes to sales approach

**Most respondents reported making changes as a result of the training.** The number of changes and the variety of changes that respondents identified was substantial. Most participants identified at least two changes; many articulated more than that. At least two revamped how they approach their sales, with noticeable impacts.

**Two respondents identified changes to their work habits.** These included length and subject lines for emails, and always carrying a pad on which to make notes. Others alluded to making changes to their work habits but did not articulate the specifics.

**Respondents identified multiple changes to their sales approach. These changes included:**

**Adopting the one-page proposal.** Many participants adopted the one-page proposal soon after the workshop. Others saw the benefit of doing so but ran into organizational barriers (discussed below).

**Different financial metrics were also adopted by many.** Some contractor respondents report adopting different financial metrics based on the training. Additional respondents believe that the financial approaches Mark addressed are better than using simple payback, but did not adopt them because they found them too complex. The training was not sufficient for several to use the Excel tool with confidence. You “have to practice with them.” One respondent said that the binder was “missing the most important thing – there is no workbook of exercises for financial calculations.”

**Listening more and better.** As one respondent put it, “I used to listen but I did not hear.” Another said that she has learned to keep her mouth shut. By listening, the respondents learn more about their customers.

**Framing the discussion in terms that matter to the customer.** Many identified a shift to a customer focus, and framing the discussion in terms that are important to the customer.

**Greater preparation for meetings with customers.** Several respondents said they prepared more than they had before the training and were able to present themselves better. One respondent articulated the research he does in advance of a meeting so that he arrives with substantial knowledge about the company, how they perceive themselves and what challenges they have. Another arrives with a “value proposition.”

**Modifying sales presentations.** One respondent has focused on his PowerPoint presentation skills. This vendor does a substantial amount of selling through presentations on-site at customer locations (“lunch and learns”), as well as presentations to trade organizations. After the training he read a book recommended by Mark and has substantially modified both his slides and how he makes the presentations.

**Targeting people higher up in the organization.** Several people identified this as an important strategy, as in the past they have not been selling to the decision-maker. Only a few have been successful at making the C-level connections. One respondent said that “the utilities are targeting the wrong people. It is not the facility managers who make the decisions.” Another person uses the one-page proposal as a tool to move up through an organization to reach the decision maker.

**Tracking sales efforts.** Two respondents say they do more sales tracking, in order to set goals and identify problems.

**Choosing or targeting different potential customers.** At least two respondents reported refocusing who they target their business to. One respondent said “we choose them instead of letting them choose us.” Another is being more strategic about where she is focusing program efforts.

**In general, program implementation staff made fewer changes than contractors.** Three of the program implementation respondents seemed confused or conflicted about their responsibilities regarding sales. Two identified their jobs as sales related. One immediately added, “But I don’t

really sell anything, I give away rebates.” The other said his job was to engage with customers to sell, but went on to say that he “determines opportunities and eligibility” and “slots them into the correct program.” He identified the need for training to address “selling the benefits of energy efficiency without selling a product.” A third program implementer identified his role as “find work and deliver the incentives.” But then he went on to say that he was reframing the issues, and adding net present value to the calculations he uses.

Two program implementers were more affected by the training. One referred to it as “eye opening” and identified multiple changes to his approach, including using different financial calculations, and shortening his proposals from six or seven pages down to one or two pages.

The fifth program implementer (who is in a management position) discussed the need for a change in mindset and structuring. She sees that some field staff shy away from sales. They see themselves as representatives and educators. She has made substantial modifications within her organization, from adding sales pitches to weekly emails, to being more strategic in targeting customers.

#### 1.4.2 Organization changes to sales approach

The ESP training has resulted in changes to sales approaches throughout some organizations. While not as ubiquitous and varied as the personal changes, the impacts could be far greater.

**The most common organizational change is adoption of the one-page proposal.** Multiple respondents report adopting the one-page proposal for their company. All report that it is effective. One said “simpler is better” and noted that the layout is great. He cut his energy benchmarking report down to a single page. Another respondent said he had been “using long proposals, but people don’t have the attention span, don’t care about the details.” Others echoed that observation. Another respondent noted “I didn’t adopt the one page proposal, but the spirit of being succinct.”

**Vendor A made multiple changes as a result of the training.** Several contractor firms sent multiple staff to the ESP training. All of vendor A’s attendees were influenced by the training. Soon after the training they “downloaded” to the other sales associates. They adopted the one-page proposal and different financial metrics to make sales. After the training they met twice monthly to check-in and hold each other accountable (until scheduling conflicts and other things got in the way). Other salespeople within the organization are now using the one-page proposal. The individuals interviewed from vendor A had changed their work habits, approach to customer targeting, and were documenting success stories and turning some into case studies. They continue to share their knowledge and practices with others in the organization.

**A medium sized vendor B implemented changes as a result of the training.** This vendor sent their only salesperson to the training. He was new to the industry and found the training very educational. “After one week at training I had to do something.” As a result of the training he adopted the one-page proposal (“I get it”). He also sent the elevator pitch companywide. When others in the company are visiting potential customers he sends them the elevator pitch, information on the client, and identifies who to talk to. The company has shifted their perspective: “we are now an energy service provider.”

**Different financial metrics have been adopted throughout some smaller companies.** Other small vendors have made substantial changes to their sales approach. While most changes were adopted within a few months of the training, a few respondents are continuing to make changes.

### 1.4.3 Organizational barriers to change.

Respondents identified organizational barriers to making changes.

**Energy Trust and other programs' templates.** Many respondents provide technical studies for Energy Trust and other program providers in the Northwest. The programs dictate the nature of the reports and financial calculations used. Some of these respondents adopted one-page audit proposals or different financial calculations, but only for work outside of the program.

Some of these participants pointed out that when they are doing technical studies they are “not allowed to sell.” Their role is as a neutral party.

**Participant lacks the authority to make changes.** Multiple contractor respondents attempted to introduce changes within their organization, usually the one-page proposal, and were unsuccessful. One respondent said they should “send management to the training,” referring to management within his company. Another respondent could not adopt the one-page proposal because his large firm has a standard template that is electronically generated.

**Organization lacks the authority to make changes.** Energy Trust program implementation contractors say (or imply) that they do not have the authority to make changes. One noted that the programs are not nimble and that it is difficult to make changes. Another respondent said that there is a “mismatch between the curriculum and their [*Energy Trust*] ability to absorb it.”

**Lack of time.** One program implementer said that the reality is that they have a high volume of work, are addressing customer complaints, and have other demands on their time. It makes it hard to be nimble.

## 1.5 Impact on Sales

Contractors were asked to discuss the impact the changes had, if any, on their company's sales. Most participants reported higher sales volumes in the past year, but some were hesitant to tie these changes directly to the ESP training. They believe that other factors might have contributed to the increase. These other factors included:

- Improved economy
- Other changes to their company (e.g. one respondent found synergy teaming with another firm, which substantially increased sales). These sales were not limited to the Northwest.

Most could not quantify the increase in sales. They are not well tracked or tied to an individual. Another participant has a sales cycle that is longer than one year, so it is too soon to assess. He did say that he has more projects “teed up” than he did a year ago.

Other respondents felt more comfortable attributing changes directly to the ESP training. These respondents reported the following:

- I “got a promotion, in part due to what he did from training.” He increased his sales by 12 percent and believes it is due to what he learned at boot camp. He has “closed projects that would not have” without what he learned, and successfully increased the scope of other projects.
- Sales of energy audits have increased by 5 percent “because I’m a better communicator.”
- Another reported increased sales due to the training, but could not quantify the amount.

- One respondent decreased his work hours. He can meet his goals in 40, instead of 60 hours, due to more efficient work habits.

## 1.6 Reflections on Training

All respondents thought very highly of the training and found Mark Jewell to be an excellent instructor. Almost everyone said that they would send or recommend sending other people in their organization to the training. Several have said that they have recommended it to people outside their organization. The other respondents did not have the authority to make that decision, but one said he would “certainly promote it.”

When asked if they would send staff if it were full cost, most said no or that it was much less likely. One respondent said it would depend on the location, since travel and lodging could get expensive.

We asked participants to reflect on the training to address some additional questions. These included identifying what motivated them to make the changes they did, suggestions for improvement to the training and to identify sales training topics that would be beneficial for them or their organization.

### 1.6.1 Motivation to Change

Workshop attendees were asked, “what about the training motivated you to make the changes.” Many respondents could not identify anything specific, but those who did identified one or more of the following three items.

**Mark Jewell is a motivator.** His presentation style and the example he sets as a sales person are motivating. “Inspiring messenger.”

**Practical and grounded recommendations.** Mark’s recommendations “made sense,” and he provided tools to make it easier to make the changes. One respondent said he saw “a clear path to communicating and motivating customers.” Another said it was the “common sense nature” of the recommendations – “keep it simple, not too much information and motivate them [the customer].”

**“Convincing examples.”** Mark’s examples resonated with some participants, who found them to be real.

### 1.6.2 Suggestions for Improved Training

Respondents were asked what could have been better in the training, or suggestions for improvement. Many respondents had not thought about this and chose not to answer. Those that did answer identified similar related issues.

**Reduce the amount of content.** One respondent said about the training: “it was amazing on the one hand, on the other it was overly ambitious. It’s impossible to absorb all of it that fast.” This was echoed by another, who thought Mark should “slow down” and that with “less content and we can absorb more.”

**Shorten the length of the training.** Several noted that five days is a long time to spend away from the office. One pointed out the irony of suggesting shorter training, given Mark’s emphasis on keeping things short.

**Introduce the financial aspects earlier in the training, and spend more time on them.** The most challenging material covered in the training appears to be the financial calculations. This topic comes

late in the curriculum and was abbreviated for this workshop due to a snowstorm. Respondents recognized that the storm shortened the time spent on the calculations. Some thought that, given how important they are, the financial calculations should be introduced earlier in the workshop to give students more time to work with them and ask Mark questions.

**Respondents differed on how they felt about Mark’s comprehensive approach to the training.**

One respondent suggested focusing more on the “meat and potatoes,” while another appreciated the holistic approach. Two respondents felt that attendees new to sales gained more than the experienced from the more general parts of the training, noting that older people are more set in their ways. (Both of these respondents were experienced salespeople.) More experienced sales people were more likely to say that the earlier material was just a “refresher.”

### 1.6.3 Modifications to Better Fit Organization

The ESP training was targeted to vendors selling to the commercial sector. Several respondents worked in the residential or industrial sectors. The heterogeneity of the attendees generated some complaints from all sectors.

**The content addressing basic sales approach and work habits were applicable across all sectors.** The material provided could be useful to all salespeople. Respondent opinions of its value were unrelated to the sector served.

**Participants selling to industrial and residential participants did not find the “selling energy efficiency” portion of the training useful.** Participants selling to industrial customers pointed out that industrial customers tend to own their facilities and are focused on things such as production efficiency and product quality. Mark’s real estate background and attention to vacancy rates did not apply. Their projects are more technical and industry/situation specific, so case studies would not be an effective sales tool. One industrial focused participant said that he did pick up some “nuggets” from the training and that some of the financial calculations could be applied to the industrial sector.

One participant selling to residential customers said that the first half of the training made him a “better salesperson.” The second half was “more detailed and commercial” and not all of it applied. Another selling to residential customers said that “it didn’t transfer to residential.”

**One participant selling to commercial customers felt the time spent addressing questions about multi-family housing was a distraction for most of the attendees.** He understood that Mark was being responsive to the situation and providing value to these attendees. Yet, it took time away from material that applied to the majority of the class.

### 1.6.4 Future Sales Topics

When asked “If you were to get additional sales training, what topics do you think would be most beneficial?” respondents provided a wide variety of answers. Some did not provide one. (In hindsight, it is unrealistic to think that respondents can provide a thoughtful answer on the spot.) The respondents identified the following topics:

- More in-depth information on multi-family properties
- More residential focus
- Topics specific to industry – productivity, quality



- Train the trainer – replicate the insights – don’t always hire out but build internal competencies.
- Selling benefits of energy efficiency without selling products (program implementation staff)
- Refresher course
- Prospecting, generating leads, proposals and close
- Different closing techniques
- Elevator pitch
- How to blog – post, and hold webinars
- Art of persuasion
- Customize the class for the attendees

## 1.7 Summary and Recommendations

The ESP training is well delivered and comprehensive. All but one respondent (not engaged in sales) made changes as a result of the training. Many made several substantial changes and can document the impacts on their sales. The training had effects beyond the attendees, with several participants sharing their knowledge, tools and new approaches with others in their organizations. Respondents have retained a lot of what they learned from the training, in part because they continue to get reminders through subscriptions to Jewell Insights.

The impacts of the training were not (and likely cannot be) quantified in terms of kWh savings. Many reported increases in sales since the Boot Camp, although few were comfortable tying them directly to the training. The impact on some attendees is dramatic, and the number of attendees adopting changes is high. The changes appear to be lasting. Some attendees changed their work habits soon after the training, and have maintained them since. These are now new habits. Individuals, and some organizations, have integrated into their sales practices new forms and calculations developed directly from the training.

**Recommendation: Energy Trust should continue to support sales training similar to that offered by Efficiency Sales Professional Institute.** Energy Trust’s focus on achieving energy savings with a larger number of smaller projects requires a greater reliance on vendors. This sales training motivated participants and provided them with tools to more effectively and efficiently sell energy efficiency to commercial customers. This supports Energy Trusts current strategies to broaden program reach through vendors.

The key components that make this training effective are:

- The “selling energy efficiency” specific course content
- A motivational presenter, who is also a role model for some participants
- Specific and concrete suggestions, often with tools to implement them
- Real and convincing examples

**Recommendation: Energy Trust should consider modifications to sales training offerings.** Modified offerings may better help Energy Trust achieve their goals. Sales training modifications to consider are:

***Shorter trainings.*** Shorter trainings are less expensive, and require less time away from the office.

**More focused trainings.** More focused trainings would likely include more content applicable to all participants. Examples of potential focused training topics are:

- General sales approaches and work habits. Targeted to those who are new to sales.
- Sector specific. The Boot Camp focused on the commercial sector. Other sector specific training (residential, multi-family or industrial) would expand the training efforts.
- Role specific. The training needs, sales focus, and motivations of program implementation staff are different than those of trade allies. Training designed for program implementation staff might shift their mindset (towards a sales approach), and provide them with tools to be effective selling efficiency.

**Recommendation: Aligning Energy Trust program operations and templates with best practices identified in Boot Camp.** Multiple respondents pointed to Energy Trust and other program templates as a barrier to the adoption of short, concise reports and advanced financial calculations. Others noted that Energy Trust programs were not designed to target decision makers within business organizations.

**Recommendation: Developing local resources to deliver effective sales training.** Relying on a single and remote trainer is expensive and may not be sustainable. His approach and message are different, but other people could learn to be effective. And other presenters may be better suited to address non-commercial sectors.

**Recommendation: Work with trainers in advance of classes to assure that the curriculum will meet participant needs, and that the content is not overwhelming.** For the ESP training, this is especially important for the financial calculations, which some did not adopt because they found them too complex.

# ESP Training Evaluation

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Course Evaluation: Appendices

for



**May 11, 2015**

**btan consulting**

207 N. Allen Street | Madison, WI 53726

## Appendix A: Class Survey

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Starts on next page

**Due to the ESP training, how likely is it that you will modify . . . ?**

(Circle one response for each item.)	Not at all Likely	2	Somewhat	3	4	Very Likely	5	NA
your promotional materials?	1	2	3	4	5	na		
presentations you make to customers?	1	2	3	4	5	na		
the type of information you provide with bids?	1	2	3	4	5	na		
to whom (in an organization) you promote energy efficiency?	1	2	3	4	5	na		
to which organizations you promote energy efficiency?	1	2	3	4	5	na		
other aspects of your work? describe ( _____ )	1	2	3	4	5	na		

**Why these changes, or why are changes unlikely?** \_\_\_\_\_  
 \_\_\_\_\_  
 \_\_\_\_\_

**Would you recommend ESP training to a colleague with responsibilities that are . . . .**

- similar to yours?            1. Yes            2. No  
 different than yours?      1. Yes            2. No

**Overall, how would you rate this training?**

	Poor	2	3	4	Excellent
	1	2	3	4	5

**What was the most significant thing you learned from the training?** \_\_\_\_\_  
 \_\_\_\_\_  
 \_\_\_\_\_

**What, if any, changes would you recommend?** \_\_\_\_\_  
 \_\_\_\_\_  
 \_\_\_\_\_

**Your first and last name** \_\_\_\_\_

**Job title** \_\_\_\_\_

**Company name** \_\_\_\_\_

## Appendix B: Three Month Follow-up Web Survey

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### Efficiency Sales Professional (ESP) Training Evaluation

All answers are confidential and will not be associated with your name or your company. All respondents are entered into a drawing for a \$250 gift card. (You have better than a 1 in 65 chance of winning.)

#### How many years have you been . . .

(put 0 if less than 1 year)

at your current company?

in the energy industry?

involved with energy efficiency

#### What do you think about the following ESP "boot camp" format items?

Use a five-point scale, where 1 = Not Enough 3 = Just Right 5 = Too Much/Too Many

	1	2	3	4	5
The size of the class	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
The number of in-class exercises	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Time to ask questions	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Amount of written materials	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Number of examples or case studies	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Time devoted to presentations	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Time for the entire "boot camp"	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

#### Comments about the learning format?

### How did the ESP "boot camp" training compare to your expectations?

Use a five-point scale, where 1 = Not Met 3 = Met 5 = Exceeded

	1	2	3	4	5
training content were	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
presentation quality were	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
applicability were	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
the amount of information new to me	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

### Comments about these items?

### Due to the ESP training, how likely is it that you will modify . . . ?

Use a five-point scale, where 1 = Not at all Likely 3 = Somewhat Likely 5 = Very Likely

	1	2	3	4	5	NA
your promotional materials?	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
presentations you make to customers?	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
to whom (in an organization) you promote energy efficiency?	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
to which organizations you promote energy efficiency?	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
other aspects of your work (describe below)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

### Why these changes, or why are changes unlikely?

### Would you recommend ESP training to a colleague with responsibilities that are . . .

	Yes	No
similar to yours?	<input type="radio"/>	<input type="radio"/>
different to yours?	<input type="radio"/>	<input type="radio"/>

Overall, how would you rate this training?

Use a five-point scale, where 1 ="Poor" and 5 ="Excellent."

- 1 Poor
- 2
- 3
- 4
- 5 Excellent

What was the most significant thing you learned from the training?

What, if any, changes would you recommend?

Your job title

Thank you for taking the time to complete this survey. Your name will be entered into a drawing for a \$250 gift card.

Your responses and name will be kept confidential by btanconsulting. Reports will not include the respondents or their company names.



## Appendix C: Open-ended Responses (Follow-up Survey)

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### C.1 Organization changes to sales or marketing

**Did your organization make any other changes to your sales or marketing approach that were not listed?**

<b>Organization changes to sales or marketing</b>
We are revising some marketing materials to de-emphasize "energy savings" and stress dollar savings. Specifically we have removed some references to kWh and therm savings and shifted emphasis to improvements to NOI and dollars saved.
Training of staff to make sure we understand customer needs more holistically
we integrated our proposal spreadsheet to the incentive agency
started a EE sales working group to discuss ideas and keep motivated
I've steered my sales to having clients make a comparison vice a decision.
We're in process of developing sales sheets for program partners (contractors and retail associates) so they can upsell EE
conversation takes a slightly different flavor
Implemented free benchmarking after controls job completion
I've taken more of a challenger approach!
Presenting in their terms
We gather bi-monthly to share success stories, what hasn't worked, share books, etc.

### C.2 Changes to job approach

**Have you made any changes to how you approach your job as a result of the ESP boot camp? Briefly describe these changes?**

<b>Changes to job</b>
The training was good practice in how to approach a customer with a higher level perspective to try and understand the non energy benefits of energy efficiency investments for individual customers.
I've worked on my ability to ask questions and then listen. From this I've been able to close more projects because I now know my customers key selling points.
I am clearly rethinking/rephrasing my sentences and questions before asking and speaking
Meeting with all training attendees monthly to "keep it fresh". Worked with Corporate Communications to make sure they're in the loop with new ways to message to customers.
One of the greatest value items was the idea of re-framing the discussion and values based on items that increase value to the customers core business. This in addition to the one page proposal has helped our company sell some larger energy retrofit projects since completion of the class.
reframe the proposition away from costs
I focus more on framing the project savings and costs in terms that resonate with the customer, as well as taking a more "challenging" sales approach.
Not only focusing on the energy saving merits, really looking at benefits for customer holistically.

<b>Changes to job</b>
Standing up for all phone calls, taking notes via excel for phone calls, networking and immediate follow up through business cards, not talking about savings in kWh or therms but always in their \$ equivalents.
I leverage some of Mark's productivity tips. I spend more time keeping myself informed of industry/market trends. I feel more comfortable and productive when networking. I share insights I learned during ESP training with my team. I have met with fellow Ninja's I met during the ESP training.
Better organization/prioritization; thought of self as more of a sale professional; engaged in org ESP group meetings every othe rweek
Focusing on what the customer wants rather than what they need. Trying to understand the mindset and priorities of the customer: EE, Safety, Appearance, Functionality, etc.
I have better discussions and closing ratios.
I think more about the non energy saving benefits when talking to customers. I have also dug deeper into networking.
Having a better plan when I go on sales calls, with specific questions in mind. Listening & less talking. More professional approach
Discussed non-energy benefits more often. Thought more about the "why" of what I do. Developed a different approach to setting up appointments with customers.
One page proposal summaries. Bringing up costs in a different light to landlords and property managers.
The biggest change has been to reframe the conversation around the customer instead of energy savings. Whats important to them.
my attitude regarding sales have improved, I shut my mouth and open my ears more.
Selecting the most appropriate and compelling financial metrics. Sector specific examples of benefits beyond utility cost savings.
The biggest change is how I approach customers. I try now to never leave the conversation with the thought in my mind that "they did not get it". If I have presented what I feel is a wining proposal to the customer and they decide not to move forward, I request from them a list of the reasons why they feel they cannot move forward and then work hard to to over turn all these obstacles in a positive way.
Less willing to accept first answer when a customer declines sales pitch. More likely to dig into objection to understand root issue and articulate problem and proposed solution back to customer.
Emphasize non energy benefits and de-emphasize Energy Trust financial incentives Link energy savings to other non energy benefits such as CO2 emissions Provide "energy use comparisons" based on similar customer types using utility data Challenge status quo thinking through awareness
Acting more like a sales Professional. Connecting the dots, asking better questions, framing benefits to the success of clients, etc.
One page proposal simplifies the proposal process and gets you into a conversation about the benefits of the products.....and detours you from throwing up verbally on the customer
Have my elevator speech ready at all times.
My role in energy service sales has me in front of customers regularly talking about potential projects or services we can offer. I can a much more focused role in learning their business and framing our value proposition around their business needs rather than just focusing on energy savings or basic benefits of our product/service.
I'm putting more daily thought into my daily schedule, and have shifted the way I track to-do's and accomplishments.
Re-framed our team's responsibility as finding solutions to problems of our customers. Become much more efficient with getting work done.

<b>Changes to job</b>
we redesigned our cost analysis to be multi level. Each section was designed to answer the questions of the different management groups. The maintenance department had a description of what was to be replaced and with what part. the purchasing dept. had a po with part numbers and pricing. The CFO had a financial work up with incentive information. All in a stand alone document package
I've steered my organization from accounting to engineering to all become sales people. To speak and discuss our company.
Focusing on "selling" instead of "promoting" program measures
more inclined to pursue more commercial clients as opposed to our historic focus which was public sector
Minor change in that I've taken a bit more of a challenger approach.
Guide staff to present in "their" terms
1. We incorporated a "sales minute" into each weekly team meeting. 2. We purchased two copies of the five ESP recommended books to share between the seven of us. 3. We are in the middle of a one month trial of getabstract.com to see if we want to purchase the service.

### C.3 Effect of changes

**Did your organization make any other changes to your sales or marketing approach that were not listed?**

**Why do you say that the changes had {{ effect }} effects on your customers' willingness to purchase energy efficient equipment or services?**

<b>Effect</b>	<b>Why do you say that?</b>
slightly positive	Well I am seeing a higher positive response to my sales pitches, but due to tight money by the client the projects are taking longer to get completed so I say the positives are in place but the economy is still a stumbling block taking projects longer to complete
slightly positive	Since the training, we've run a sweepstakes to promote EE technology using more of an emotional focus and showcasing the non-energy benefits. We've seen an uptick in responses compared to last year.
slightly positive	It has only been 2 months since the ESP training, so with time I expect that willingness to increase as I become more polished and effective with my approach.
slightly positive	Understand that we are focused on the company's betterment in more ways than just EE savings.
slightly positive	We typically have long sales cycles, so it is difficult to directly correlate the impact the changes I made based on the ESP training have had on customers' willingness to purchase energy equipment or services, but I feel like it is helping.
slightly positive	I think I'm presenting information in a more compelling way.
slightly positive	Most of the equipment we sell is energy-efficient.
slightly positive	When talking about pay back period and the significance of what they choose to do and it's potential impact on their tenants it seems they are much more responsive.
slightly positive	I have not been able to truly implement all of the tools that we learned about. In addition the business I am dealing with in is slightly different than the content of the class was directed towards.

<b>Effect</b>	<b>Why do you say that?</b>
slightly positive	At this point in time, I say this because I am still working on my presentation of both the products and the project. As I improve my knowledge of my own industry and well as grow more comfortable using Mark's techniques, I am sure the affect I have will be more that just "slightly".
slightly positive	it forces the customer to give additional thought to their objections and the context for which they object. Allows me to continue the conversation and unpack solutions...
slightly positive	We turned one sales call for some basic controls upgrades into a full blown system upgrade by presenting the proper financial metrics vs just trying to sell based on quality of product and our people. It took us from ~30% chance of getting a job to securing a project worth 8x what the project was originally going to be worth.
slightly positive	One-page proposal has been well-received by influencers and decision makers in customer organizations.
slightly positive	I've been received well when I've spoken directly to clients about the potential pitfalls of selecting commissioning based too much on cost.
slightly positive	Better presentation meant more positive response
slightly positive	Please refer to the changes I listed that we have implemented. Keeping all of this in mind helps make us more customer focused, more results focused, and more rounded in our sales approach.
very positive	It's simplified and streamlined my approach to selling a project and has helped me hone in on the needs of my customers and directly address these needs.
very positive	We successfully converted a customer looking to do a \$70,000 retrofit project with future phasing to completing a \$240,000 project while beating out two competitors for this work utilizing the tools and concepts taught in this class.
very positive	It made my pitch a soft sell. It halped me come from a position of understanding the customer's wants and needs.
very positive	I can explain the non-energy benefits better.
very positive	even though the rate of sales has not been 100%, I have had much longer converstaions with my customers, and feel they have walked away with a different feel of what I was explaining to them. Now when they look at the equipment that i was working with they are more likely to remember me because I was able to make the project look more like what they are interested in.
very positive	My pitch has been more effective and my listing skills have produced better offering to my clients.
very positive	Paints a better picture of all the ways energy efficiency works to benefit the client while conveying confidence and success.
very positive	ESP teaches you to get to the point with financials that make sense to a qualified decision maker.
very positive	finding that a shift in mentality has improved customer management making influencing customers decision easier.
very positive	our success rate has gone from one in ten to 5 out of ten. We are now focusing on choosing better customers
very positive	The sales process is stacked that we provide almost little or no room for our customer to say no or go out to another contractor for the project or service that we provide.
very positive	though they didn't accept our one-page-proposal for a specific service due to changing priorities, they immediately came to us first for a related service when the need arose.

## C.4 Other Feedback

### Any other feedback about the ESP training?

Other feedback ?
Very good training class at a very good price. Thanks
Please send Mark back to Portland!
I've referred your training to my contact in New Jersey at X&Y Service. This training has been helpful to me and I've challenged our team to grow our sales presence. I'm also increased my ability to meet with and discuss projects with "C" level contacts moving the sales process further.
It was great. I look forward the on-line modules and test being available.
It was great. I am still wondering about other modules. This was mentioned in the survey. I thought we got all of them? The monthly calls are the best. I learn a lot through them.
It was fantastic!
It was a great course with great value for those willing to apply the principles learned. I thought helping fund this course was a good use of ETO money and helped our office send multiple sales people to a training that we had already had interest in but had passed on due to cost.
Great course. Thank you... Used the presenting skills a lot
good training
amazing course!! Our office is committed to many of the great elements presented by Mark. We are in our 3rd session now of deep downloads to other sales staff with highlights of the ESP bootcamp. From renewed financial metrics to 1 page proposals to customer business value sales focus, we are changing drastically our sales approach. thanks!
Additional reading and study is required maximize the benefits from the training content.

## Appendix D: One Year Follow-up IDI Guide

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Starts on next page

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ESP Training Evaluation  
In-Depth Interview (IDI) Guide

February 17, 2015

**About the company (TA only) and the respondent**

*To put respondent at ease, put responses in context, and identify respondent roles for filtering later questions.*

**Company**

- Size, locations and products/services
- Size and composition of sales staff (how structured, different roles, shared materials, etc)
- Percent of product/service sales that is program related? Ee related?

**Respondent**

- Role and responsibilities
- Tenure
- Background

**Continued engagement in sales training**

I'd like to start by asking you some questions about ESP opportunities that you may or may not be engaging in.

Which, if any, of the following have you done this year in the past 3 months?

(check all that apply) red are items not in earlier survey

- Attended a monthly call with Mark Jewell
- Sent Mark a proposal or other document for feedback
- Read one or more books recommended by Mark Jewell
- Read other sales related books
- Referred to the class binder
- Attended other sales related training**
- Participated in an ESP networking event
- Met with others to discuss sales/marketing approaches

What training did you attend?

- Who offered it
- Focus/content
- What were you looking to learn
- Comparison to ESP boot camp
  - Why do you say that?

---

Are you currently subscribed to . . . ?

- ESP ninja app
- Daily emails ("daily dribble")
- Bi-weekly blog updates
- None of the above

Thinking about the past month, how often did you read the daily email?

- Never
- Less than once per week
- 1 - 2 times per week
- 3-6 times per week
- Every day
- Don't know

Thinking about the last month, how often did you open the ESP app ?

- Never
- Less than once per week
- 1 - 2 times per week
- 3-6 times per week
- Every day
- Don't know

In the past month, when you opened the ESP app how often did you do each of the following?

Frequency of Each in the Past

Month    Never Always

0    1    2    3    4    DK

Read an article   

Viewed a video   

Clicked on a link   

Thinking about the last month, how often did you read the bi-weekly blog update emails?

- Never
- One time
- Both times
- Don't know



---

### Why do you read these materials (app, blog, emails)?

(probes: what do you get out them, how do you use them, share with others)

What impact, if any, do these articles have on you?

### Changes to sales approach (TA only)

Next I'd like to discuss changes that you've made to how you approach your job as a result of the ESP boot camp. In an earlier survey you said that [summary of the earlier responses]

What, if anything, has changed since then? (probe: anything else)

- For each change, get why it was made, how well it is working, and why they think that.

(Adapt response below based on responses to earlier survey.)

Which, if any, of the following changes has your organization made to its sales or marketing approach as a result of the ESP training?

(check all that apply)

- Developed or revised an "elevator speech."
- Developed a one-page proposal summary.
- Adopted different or additional financial calculations to promote efficient options.**
- Added non-energy benefits to proposals.
- Added non-energy benefits to discussion of efficient options.
- Added non-energy benefits to marketing materials.
- Ask customers more questions.
- None of the listed changes.

changing calculations.

In an earlier survey you said you had [summarize changes to calculations]

**Have you made other changes to the project financial calculations since then?**

If yes, what and why?

For all – how do you use the approach?

How is it working?

---

**NO changes** to financial calcs or a non-respondent.

What **financial calculations**, if any, have you adopted since the ESP training?

(check all that apply)

- Net Present Value
- Modified Internal Rate of Return (MIRR)
- Savings to Investment Ratio (SIR)
- Life Cycle Costs
- Other financial calculation 1, describe \_\_\_\_\_
- Other financial calculation 2, describe \_\_\_\_\_

How do you use this approach? (probes: with whom, when, all the time or specific situations)

How is it working?

### Changes to organization

What **other changes** has your organization made as a result you attending the ESP Boot Camp training? (

(probes if needed: internal meetings, marketing materials, marketing approach, target market, proposals, level targeted, other)

For each;

Discuss change

Identify who or how many responsible or participating in it

Internal or external barriers to change

Perception of impacts – type and level

### Impact on sales

Next I'd like to discuss the impact, if any, that the changes you've made have had on your company's sales of energy efficient equipment.

**What types of impacts on sales?** (e.g. higher sales volume, more efficient equipment, more measures, accelerating projects, larger projects, etc)

Evidence of impacts?

Estimate of change in sales volume?

Increased savings?

Changes for ee equipment that has incentives through programs? (What? How much?)

Changes for ee equipment that doesn't get incentives through programs? (What? How much?)

**Other impacts on your business?**

**Other impacts on your customers?**

---

## Program changes (PIF, PID)

**What changes, if any, has your organization made to how it promotes or delivers energy efficiency programs as a result you attending the ESP Boot Camp training?** (probe: to marketing materials, marketing approaches, messaging, processes).

For each;

Discuss change

Identify who or how many responsible or participating in it

Internal or external barriers to change

Perception of impacts – type and level

## Reflection on training

**What aspects of the ESP training motivated you to make these changes?** Anything else?

What could have been better?

**If you were to get additional sales training, what topics do you think would be most beneficial?**

**What, if any changes, would you suggest for the ESP boot camp training to make it a better fit for you or your organization?** (anything else?)

**If it were available, would you send others in your organization to the ESP boot camp?**

Why?

Why not?

## Closing

**Is there anything else you want to share with me about the ESP training or its impacts on you or your sales?**

Thank you for sharing your thoughts and your time.