Home Energy Review Improvement

Conservation Advisory Council
April 15, 2009

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Why Improve HERs?

Improve customer experience

Provide an experience that creates repeat customers; more measure installs; more savings.

Increase customer follow-through

Energy Trust evaluation shows 69% of HERs don't result in further action.

Reduce delay in measure installs

Those who take action wait an average of four months to install measures. Many wait more than a year. Need to get customers into contractor pipeline faster.

Improve customer service

Energy Trust is held to high performance standards that include customer satisfaction.

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HER Homeowner Report

Supports better communication

•Between reviewer and participant

•Between those present and other decision-makers not present at the review

•Provides ongoing reference as homeowners take multiple steps

Space to note existing conditions/appliances in the home

Highlights opportunities for savings

Features simple messaging around potential savings to motivate participant

Provides spaces for reviewer to prioritize energy-saving opportunities in the home

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Streamlined Packet Materials

Welcome Overview

- Online resources
- Top five common improvements by quickest payback
- Benefits of energy efficiency improvements to home

HER Report

- Advisor recommendations based on the home with notes area

Next Steps

- Easy to follow action oriented steps
- Identify financing option

Incentive Grid & Energy-Saving Tips

- Defines measure incentives (rebates, OR Tax Credits, Federal Tax Credits and loans) and installation criteria
- Backside features some no-cost, low-cost energy-saving tips

Trade Ally list

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Additional Components

Reviewer training

- Reviewers trained to provide better customer service
- More technical training in building science
- Train staff in “technical sales” to influence customers to move forward with energy efficiency projects

Continued customer contact with reviewer

- E-mail and phone number for customer questions
- Energy Advisor business cards
- Act as a resource to participant throughout measure installation process

Enhanced education on Energy Trust website

- Provide ‘next steps’ information and additional resources in HER section

Encourage measure installation follow-through

- Provide follow-up communications reminding participating to take action; next steps information and link to trade ally list

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Feedback Received

✓Focus on what is not working about HER and needs fixing

✓Provide customer FAQ--answer frequent customer questions

• Change name to Home Information Review (HIR)

✓Don't provide price estimates

✓Give information about programs and rebates

✓Priorities for homeowners (based on HPwES training):

- Weatherization/insulation
- Upgrade heating, appliances, lighting & hot water system to more efficient type
- Then add solar options – lower load less solar needed.

✓Reinforce that contractors provide more accurate assessments of energy-saving opportunities as well as cost information

✓Reinforce that Home Performance testing is the best way to accurately identify what is working and not working in the home.

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More Feedback?
Questions?

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