

EMPOWER your customers to say:

**YES!**



# Go Greener Academy

Sales Training & Resources  
for NEIF-Approved Contractors

Leverage NEIF's Energy  
Efficiency Financing to  
Drive Your Fall/Winter Sales

Go Greener Academy  
09/13/2002

Presented by:  
**Ed Matos**  
VP-Business Development

# From NEIF- The National Leader in Energy Efficiency Financing

- The NEIF Seal of Approval for Contractors means:
- **Access to all NEIF's financing programs**
  - Special **utility and government programs** for targeted improvements
  - **No Contractor-Fee** EnergyPlus financing for all types of home improvements
  - Small Business and **Commercial Financing** and **Rebate Advance** Funding
- **Reputational enhancement** for your company by association with the nation's only Certified B-Corp, US DOE Home Improvement Expert and FORTIFIED partner lender
- **Benefit from NEIF's Alliances** with green banks, utilities, manufacturers & associations for special insights and programs
- **Expert sales training, sales tools and support** for your team to increase closing rates
- **Marketing and branding programs** to help you differentiate your company, broaden your market and promote fair, trusted affordable financing options to your customer



Go Greener.  
Affordably.



# Today's Session



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- Best practices on setting the stage for booking initial appointments
- Utilizing the right tools and presentation to reinforce your message as an energy efficiency expert
- Language to use to increase your chances of a one-call close

# Setting the Stage



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**“Approaching the prospect properly is the key. Opening the sale takes more finesse than closing. Closing becomes the natural outcome of opening the sale properly and going through the steps in your process.”**

**-Chris Lytle (“The Accidental Salesperson”)**

It All Starts with the Phone...



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NEIF  
NATIONAL ENERGY IMPROVEMENT FUND  
A Certified B Corp™

**YOU NEVER GET  
A SECOND  
CHANCE TO  
MAKE A GOOD  
FIRST  
IMPRESSION.**



# Connect Marketing to Sales



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Take your time to engage the client in the process, let them know what to expect, and get them excited.

- **Build Rapport**
- **3<sup>rd</sup> Party Validation**
- **Explain the Process or Program**
- **Set Expectations**
  - **Introduce Monthly Payment Options!**

# Language, Language, Language...



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# Fall HVAC Phone Script Example



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“At the conclusion of your assessment your home energy specialist will provide you with the right **solution** to make your home more comfortable and energy efficient. He/she will also provide you **a set of affordable monthly payment options to** so you can set things in motion to have your system installed and be saving money this winter.

Does that sound like a plan?”



# Agreement Theory!



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Create a **SALES PROCESS** that builds value and stresses benefits.

- Slide presentations: Laptop, iPad, tablet
- Talk in terms of average job size to avoid sticker shock
- Always position in terms of monthly payments
- Leverage savings, rebates & incentives

# Simple Agreement Questions



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- Does that make sense?
- Does that sound good?
- Makes sense right?
- Sound like a plan?
- You can see how...?

# Monthly Payment Calculator



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## Go Greener. Affordably.

Simple interest low monthly payment options for heating, cooling, HVAC, roofing, windows, generators, plumbing, electrical, insulation and other home energy improvements. No lien. No fees. No pre-payment penalties.



Use this Monthly Payment Estimator to compare different options for qualifying EnergyPlus financing from the National Energy Improvement Fund.

### Price for Option 1

**\$7,000**

#### Term

- 3 Years
- 5 Years
- 10 Years

**\$92 per month**

### Price for Option 2

**\$10,000**

#### Term

- 3 Years
- 5 Years
- 10 Years

**\$132 per month**

### Price for Option 3

**\$15,000**

#### Term

- 3 Years
- 5 Years
- 10 Years

**\$198 per month**



# One Call Close

It's all about how you...?



“Ok so I certainly want to make sure you get on our calendar before winter. That’s everything with regards to your project and numbers. So what do you guys think, does this sound like something you want to do?”

# Training & Program Contacts at NEIF



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- NEIF specializes in working with contractors to integrate fair, transparent financing into their sales process to help increase the affordability of energy efficient upgrades
- We offer on-site and on-line training for contractors and their sales teams



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