

EMPOWER your customers to say:

YES!



Go Greener Academy

Sales Training & Resources
for NEIF-Approved Contractors

Contractor Sales Management 101

Go Greener Academy
10/11/2022

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 of 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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- How to effectively train and educate your sales team
- Best practices for attaining and maintaining a high close ratio
- Different structures to incentivize and motivate your salespeople



First and Foremost:

Sales training is as important and needs the same amount of time and attention, *from the beginning*, as technician, auditing or construction training.

Onboarding Process



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Comprehensive and diverse onboarding training process: Take Your Time.

- 1-2 months to start being good, 6 months to hit stride
- Treat everyone the same regardless of experience
- Make sure they sell your services how you want them to

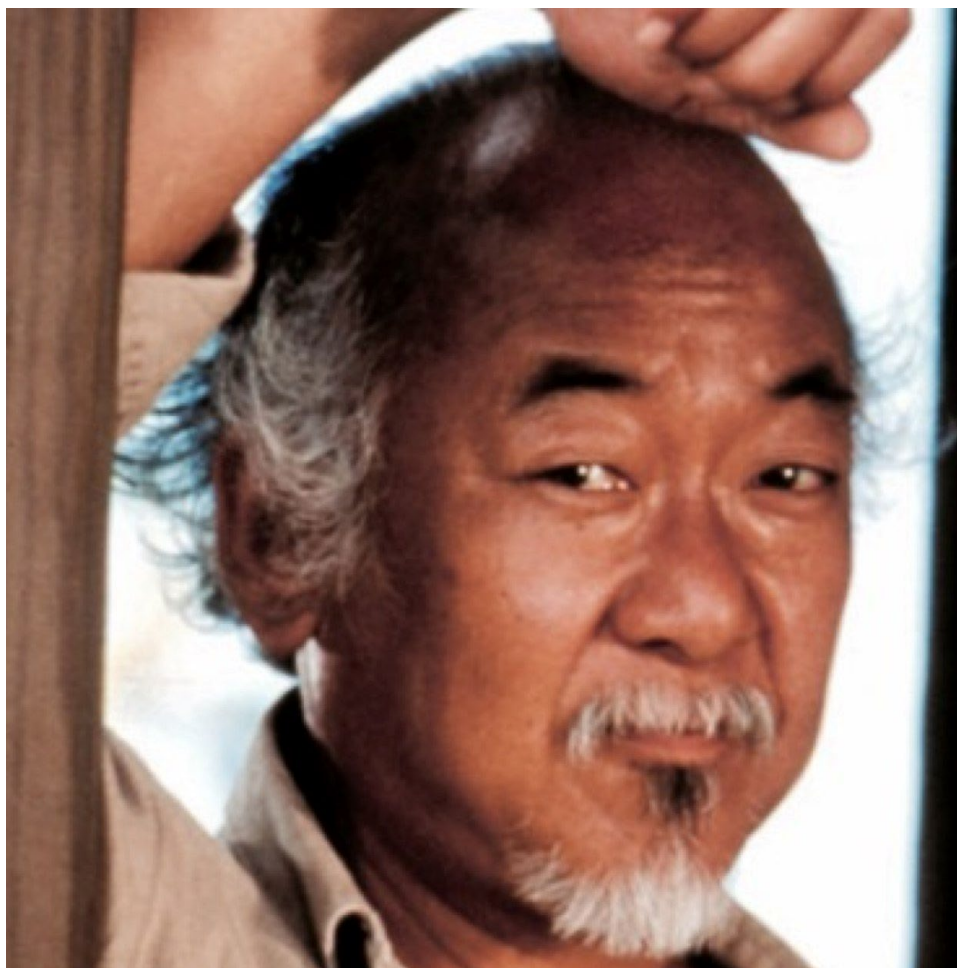
Learn from the Best



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NEIF
NATIONAL ENERGY IMPROVEMENT FUND
A Certified B Corp™



Training Mantra



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C.O.R.E.

Creativity

Oversight

Repetition

Education

C for Creativity



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C.O.R.E. Creativity



O for Oversight



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C.O.R.E. Oversight



R for Repitition



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C.O.R.E. Repetition



E for Education



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C.O.R.E. Education





4 MUST HAVES

1. Readings

2. Scripts

3. Shadowing

4. Coaching



Utilize scripts as support to your SALES PROCESS.

- Sit down and write out what you say
- Introductions, product descriptions, closing lines & rebuttals
- Roleplay & Encourage them to **PRACTICE** on their own

Shadowing



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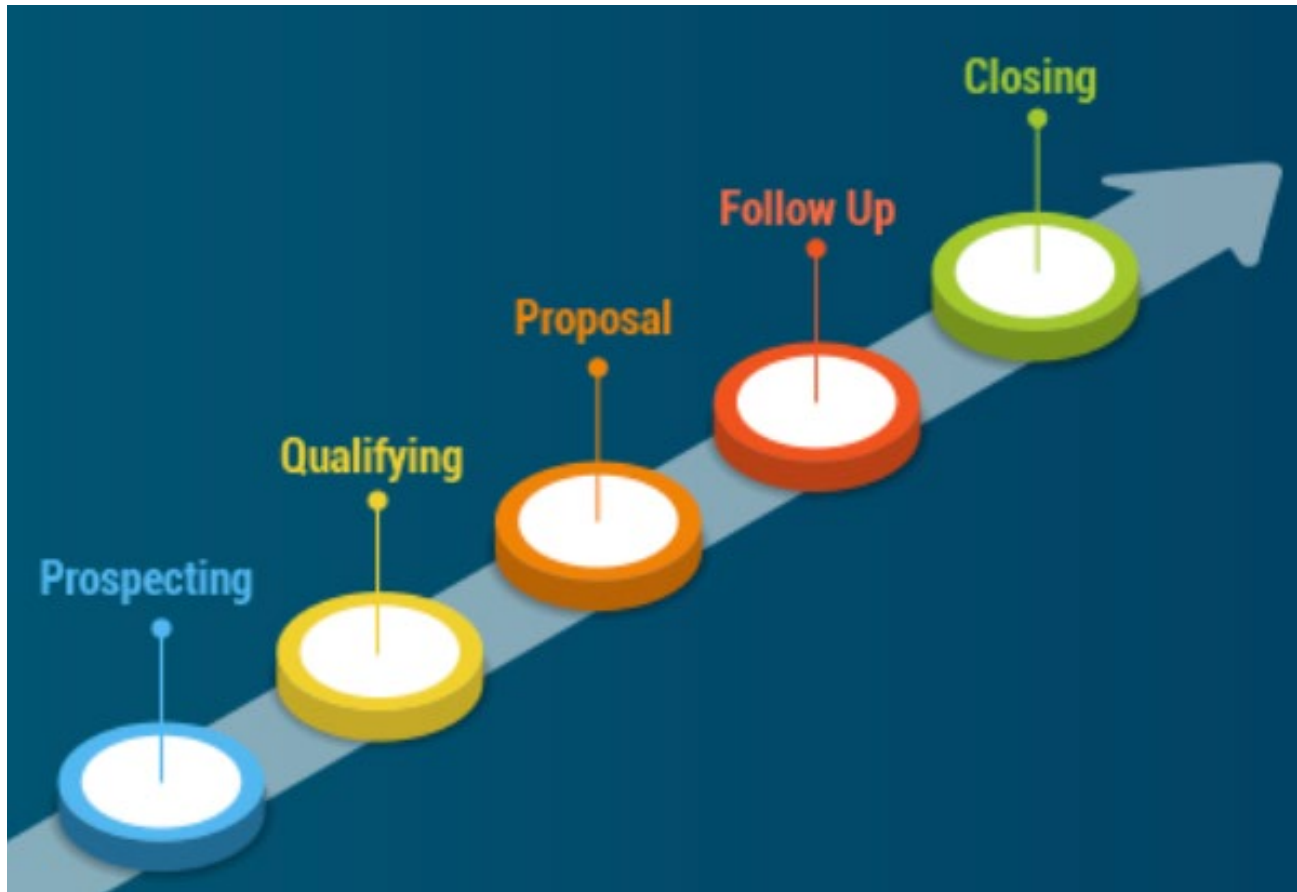
Don't just let them go, stay close by...



Pipeline Meetings a MUST



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Track close ratio not just volume!

- **1st Visit jobs won**
- **2nd Visit jobs won**
- **Close Held ratio**



Create innovative and motivating sales commission structures.

- **Goals, Incentives and Bonuses**
- **Prizes and Awards**
- **Make it FUN!**

You Are Responsible



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**"NO SUCH THING
AS BAD
STUDENT, ONLY
BAD TEACHER.
TEACHER SAY,
STUDENT DO."**

Mr. Miyagi

www.motivateamazebegreat.com



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



Ed Matos, VP Business Development

ematos@neifund.org 201-618-0878

Randy Bak, Senior Director – Business Development

rbak@neifund.org 978-766-7348

Chris Schielke, Senior Director – Business Development

cschielke@neifund.org 646 315-0469

Jensen Handwork, Senior Director – Commercial Programs & Training

jhandwork@neifund.org 720 689-2288

Contractor Support Team

contractors@neifund.org 484-838-5460 Option 3

Tessa Shin, VP Lending and Programs

tshin@neifund.org

Peter Krajsa, Co-Chair and Founder

pkrajsa@neifund.org

Matthew Brown, Co-Chair and Founder

mbrown@neifund.org

Laura Nelson, COO

lnelson@neifund.org