

EMPOWER your customers to say:

**YES!**



# Go Greener Academy

Sales Training & Resources  
for NEIF-Approved Contractors

## Drive Sales of Commercial Energy Efficiency with Financing

Go Greener Academy  
11/15/2022

Presented by:  
**Chris Schielke**  
Senior Director,  
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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- Why use financing to sell more?
- What is the optimal way to close a project?
- What systems are in place for NEIF-Approved Contractors to utilize?

# Why Use Financing to Sell More?



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## Why do we care about financing?

- You will sell more if you include financing in every proposal
- If you're not selling with financing, your competitor is



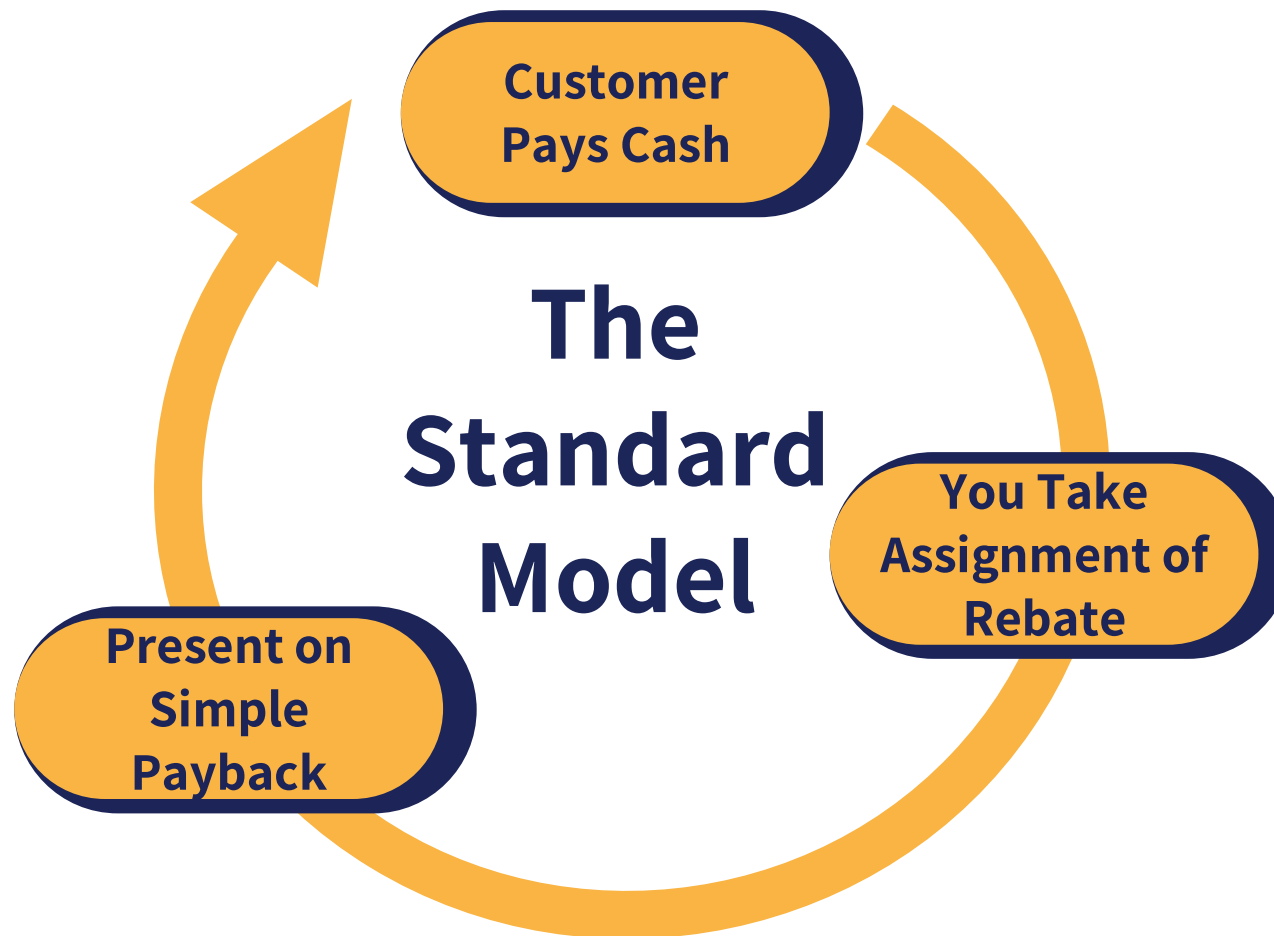
# How to Propose More Energy Efficiency Projects Now?



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**But sometimes The Standard Model is not enough**  
**And that's what NEIF financing is all about.**

# No Capital for the Project?



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In The Standard Model, with **no capital**:

**DELAYED**

**DELAYED**

**DELAYED**

**FOLLOW UP**



**THE OUTCOME: YOU PERFORM A SALES AUTOPSY**

# What Options Do You Have?



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In The Standard Model:

**Revise  
scope**

**Offer  
phased  
approach**

**Reduce  
your margin**

**NONE OF THESE ARE GREAT OPTIONS**

**BETTER YET ... OFFER FINANCING**

**NEIF is the approved  
finance company for  
several utilities**

**NEIF uses multiple  
capital partners to  
offer the best rate**

# The Benefits of Offering Financing



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**Provides customer with  
options and continues the  
engagement**



**NEIF financing  
covers 100% of  
project costs**



**Prefunding typically  
available**



**Avoid pitfalls of  
capital expenditure  
and project delays**



**Work with someone you  
can trust! NEIF is a Certified  
B Corp.**



**Close more deals and  
sell higher efficiency  
equipment**

# First Steps to Offer Financing



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STEP 1

Become an  
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Approved  
Contractor

STEP 2

Create  
Monthly  
Payment  
Proposals

STEP 3

Discuss  
Financing  
with ALL  
your  
customers

## Monthly Payment Estimates ⓘ



Show/Hide Monthly Cash Flow results



Offer 3-Month Deferred Payment Plan (5yr only)

Term	Monthly Energy Savings	Monthly Payment	Net Monthly Cash Flow
2 years - 24 months	\$2,083.33	\$3,229.82	-\$1,146.49
3 years - 36 months	\$2,083.33	\$2,181.94	-\$98.61
4 years - 48 months	\$2,083.33	\$1,676.56	\$406.77
5 years - 60 months	\$2,083.33	\$1,377.84	\$705.49
6 years - 72 months	\$2,083.33	\$1,184.71	\$898.62

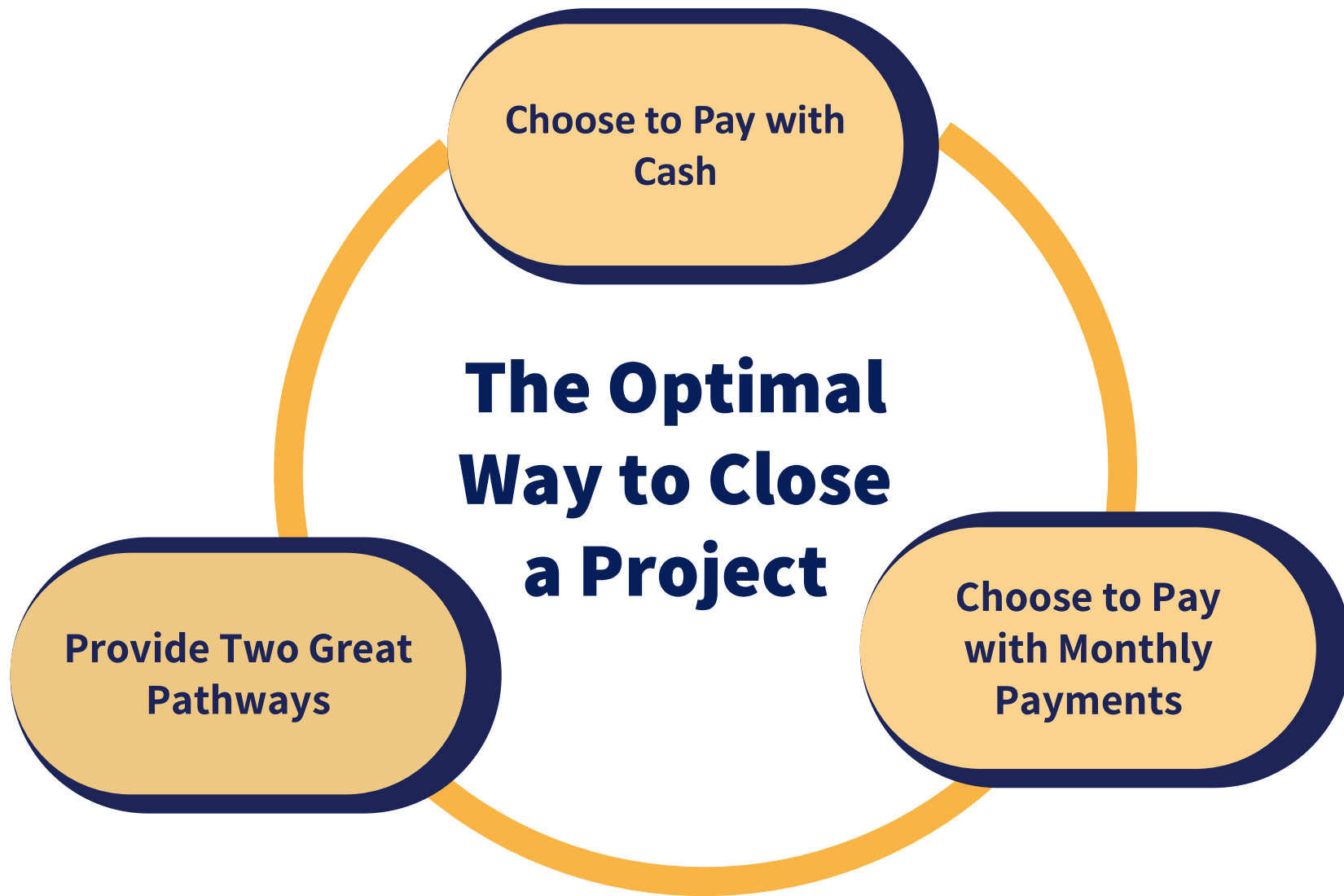
# Offering a Cash Bonus and Financed Monthly Payment



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# How to Offer Financing



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Build a Financing Proposal in the **NEIF Commercial Portal** (Be sure to add project cost, rebate, and energy savings)

Take monthly payment calculations and **snip into your proposal** below Executive Summary

Offer both pathways to increase your close rate



### Monthly Payment Proposal for Lakeside LLC

#### Project Summary

Sam Jones of ABC Lighting, has engaged the National Energy Improvement Fund, LLC to offer a monthly payment plan for your project. The figures on this sheet explain the payments and savings calculated specifically for your project. If you are interested in moving forward with this offer, let us know and we will submit your project for approval.

*Please note: Monthly payment estimates are subject to credit review.*

#### Project Cost Overview

Project cost:	\$125,000.00
Incentives:	\$0.00
<b>Net:</b>	<b>\$125,000.00</b>

#### Project Saving Estimates

**Annual Savings:** \$30,000.00 Projected energy cost savings over one year

**10 Year Savings:** \$300,000.00 Projected energy cost savings for ten years

**6 Months Cost of Delay:** \$15,000.00 Forgone energy cost savings if you wait 6 months to install the project

#### Monthly Payment Estimates\*

Term	Monthly Energy Savings	Monthly Payment	Net Monthly Cash Flow
2 Years	\$2,600.00	\$5,702.57	-\$3,202.57
3 Years	\$2,500.00	\$3,896.32	-\$1,396.32
4 Years	\$2,600.00	\$2,993.86	-\$493.86
5 Years	\$2,500.00	\$2,456.91	\$43.09
6 Years	\$2,500.00	\$2,109.58	\$390.42
7 Years	\$2,500.00	\$1,865.88	\$634.12

\*This proposal uses projected energy and maintenance savings data provided by your contractor. Many factors can affect the energy savings estimates as well as the realization of these estimated savings once the project is installed. National Energy Improvement Fund, LLC does not guarantee savings and encourages the customer to review these numbers with their contractor.

#### Next steps

- 1 Review this offer and either click the **I am Ready to Apply** button in your email, or notify your contractor that you want to move forward with this offer.
- 2 You will receive an email with a link to a secure online application within one business day.
- 3 Receive notification of approval, sign closing docs, and begin equipment installation.

#### Questions about this quote or next steps?

Contact the National Energy Improvement Fund, LLC (NEIF)

**Phone:**  
(726) 724-7673

**Email:**  
[commercialfinance@neifund.org](mailto:commercialfinance@neifund.org)

# Thank You!



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## LET US HELP YOU CLOSE MORE BUSINESS!

Any questions? We'd love to hear from you.



**Chris Schielke,**

Senior Director of Business Development

**P:** (646) 315-0469 | **E:** [cschielke@neifund.org](mailto:cschielke@neifund.org)

# 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

