

EMPOWER your customers to say:

**YES!**



# Go Greener Academy

Sales Training & Resources  
for NEIF-Approved Contractors

## Selling Whole Home Solutions!

Go Greener Academy  
7/18/2023

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



Go Greener  
Academy  
Sales Training & Resources  
for NEIF-Approved Contractors



- Using the right language to set the stage and drive more value to your clients
- Increasing your average job size
- Maximizing your on-the-job profitability

**It all starts with process...**



**Go Greener  
Academy**  
Sales Training & Resources  
for NEIF-Approved Contractors



**“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”)**



1. At-The-Door Intro
2. Audit Integration
3. Supporting Sales Tools
4. Whole Home Solution Proposal

## At the Door Intro



Go Greener  
Academy  
Sales Training & Resources  
for NEIF-Approved Contractors



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 Program
- Set Expectations



# Set Expectations



Go Greener  
Academy  
Sales Training & Resources  
for NEIF-Approved Contractors



**“At the end of the process I am going to sit down with you and our goal is to provide you with a ‘Whole Home Solution’ to make your home more comfortable and energy efficient.**

**Sound good?!”**





**“Selling is teaching. Teaching is selling. An educated customer buys your value proposition, whereas an uneducated customer buys on price.”**

-Chris Lytle (“The Accidental Salesperson”)



## Consultative education based selling process.

- Balance between simple & technical
- IR Walkthrough a MUST!



ResearchGate

# Selling with the IR Camera



Go Greener Academy  
Sales Training & Resources  
for NEIF-Approved Contractors



## Script Example



Go Greener  
Academy  
Sales Training & Resources  
for NEIF-Approved Contractors



Example:

**“So, the way this works is the yellows are the higher end of the temperature and the blues are the colder. So here, if you look at this, we are pointing it at your attic and you can see where it’s bright yellow, there is no insulation there and the heat is just coming right in the house. That’s the reverse in the winter and those are cold spots where the heat is just going right out the house. That’s exactly why we want to get in the attic, properly seal and insulate, so we can keep all that heat in your home in the winter and out in the summer. In doing this you’ll actually be more comfortable while using less energy. Does that make sense?”**

## Highlight the work and stress the benefits.

- Slide presentations: Laptop, iPad, tablet
- Experiential, analytical and visual learning



# Using the Right Language



Go Greener  
Academy  
Sales Training & Resources  
for NEIF-Approved Contractors



**Get program and money questions out of the way so the closing can be focused on their solution.**

- **Talk in terms of average job size to avoid sticker shock**
- **Always position in terms of monthly payments**
- **Leverage savings, rebates & incentives**

# Whole Home Solution Proposal



## Pitch the whole job and have a plan.

- Be prepared for objections
- Sell on Financing & Monthly Payment
- Less is more when it comes to financials

<p>Monthly Payment Calculator</p> <p>Amount</p> <p><input type="text" value="25,000"/></p> <p>Term</p> <p><input type="radio"/> 3 Years</p> <p><input type="radio"/> 5 Years</p> <p><input checked="" type="radio"/> 10 Years</p>	<p>720 plus to 35k, 7.99</p> <p><b>\$303</b></p> <p><b>per month</b></p>	<p><b><u>Monthly Savings:</u></b></p> <p>\$100 per month</p>	<p><b><u>Monthly Cost:</u></b></p> <p><b>\$203.00</b></p>
---	--	--	---



# Define Your Process & Be Confident



Go Greener  
Academy  
Sales Training & Resources  
for NEIF-Approved Contractors



# Training & Program Contacts at NEIF



**Go Greener  
Academy**  
Sales Training & Resources  
for NEIF-Approved Contractors



- 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](mailto:ematos@neifund.org) 201-618-0878

**Randy Bak, Senior Director – Business Development**

[rbak@neifund.org](mailto:rbak@neifund.org) 978-766-7348

**Chris Schielke, Senior Director – Business Development**

[cschielke@neifund.org](mailto:cschielke@neifund.org) 646 315-0469

**Jensen Handwork, Senior Director – Commercial Programs & Training**

[jhandwork@neifund.org](mailto:jhandwork@neifund.org) 720 689-2288

**Contractor Support Team**

[contractors@neifund.org](mailto:contractors@neifund.org) 484-838-5460 Option 3

**Tessa Shin, VP Lending and Programs**

[tshin@neifund.org](mailto:tshin@neifund.org)

**Peter Krajsa, Co-Chair and Founder**

[pkrajsa@neifund.org](mailto:pkrajsa@neifund.org)

**Matthew Brown, Co-Chair and Founder**

[mbrown@neifund.org](mailto:mbrown@neifund.org)

**Laura Nelson, COO**

[lnelson@neifund.org](mailto:lnelson@neifund.org)