

EMPOWER your customers to say:

YES!



Go Greener Academy

Sales Training & Resources
for NEIF-Approved Contractors

Strategies For Leveraging Customer Relationship Management (CRM) Software to Increase Sales!

Go Greener Academy
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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



- Why using a CRM is so important for contractor sales management
- How to ensure you are maximizing your ability to manage the sales pipeline
- Tips & tactics to best help managers and salespeople succeed

Customer Relationship Management



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What is a CRM system?



The TWO Must Dos!



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Contact Management:

Store and provide easy access to relevant contact information for all leads and customers.

Build and Manage Sales Pipelines:

Create processes that make it easier for your sales team to close deals at scale.

CRM Solution Options



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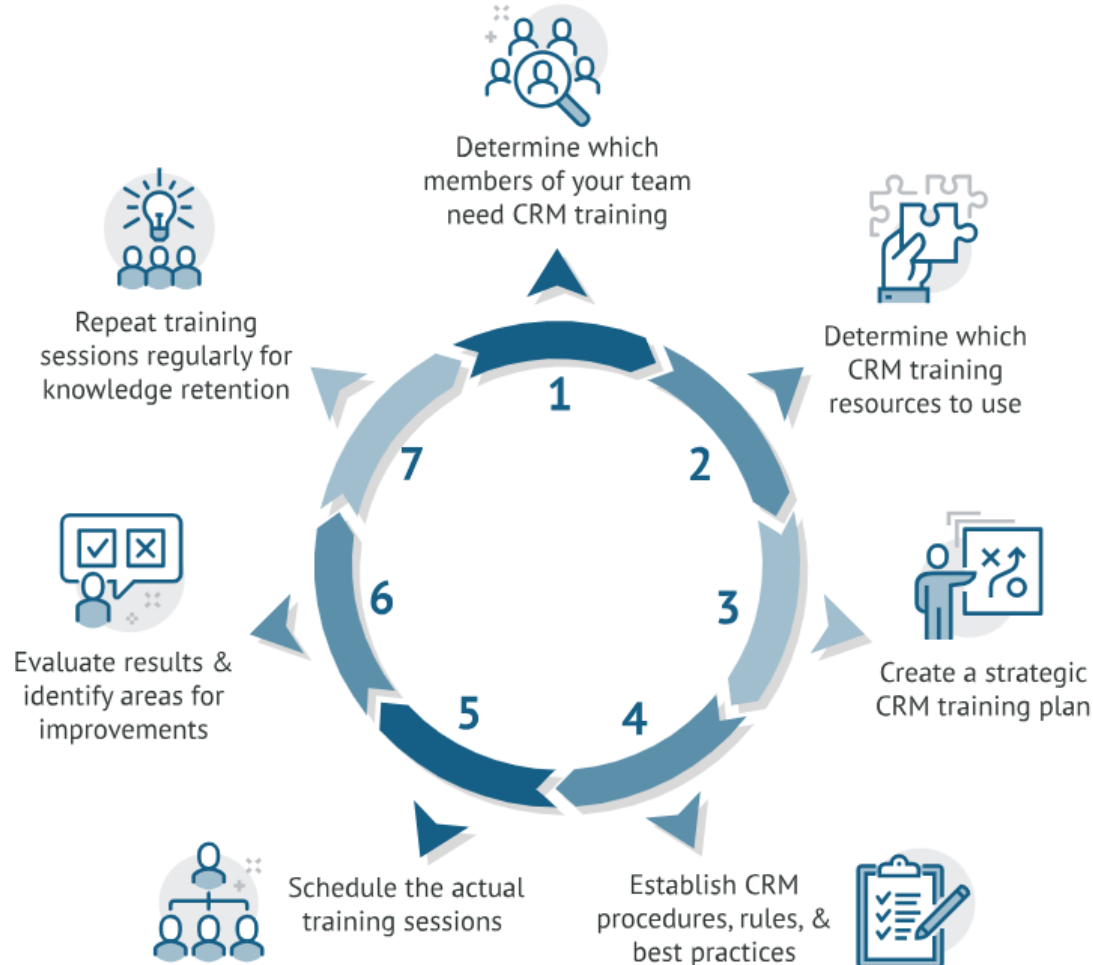
CRM Planning



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7 Steps for CRM Training to Build an Effective Sales Team



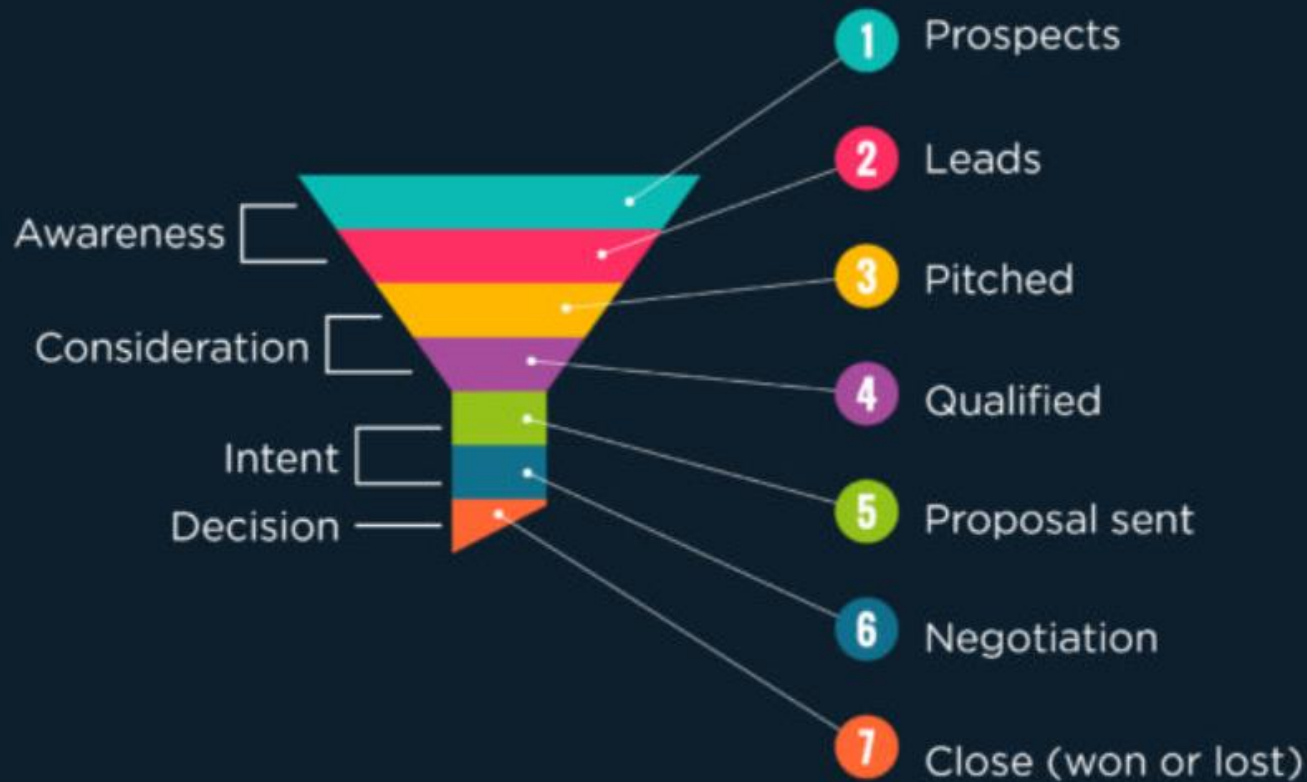
Sales Pipeline Management



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MARKETING CRM





93% of converted leads are contacted by the 6th call attempt .

- Velocify

- Track Call Notes
- Verify in Pipeline Meetings

5 Benefits of Pipeline Management



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- 1) Forecast Sales Accurately
- 2) Recognize Aggregate Sales Velocity
- 3) Monitor a Team's Progress
- 4) Stimulate Resource Allocation
- 5) Nurture Leads

Keep the Ball Moving!



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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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