

EMPOWER your customers to say:

YES!



Go Greener Academy

Sales Training & Resources
for NEIF-Approved Contractors

Integrating Financing to Close More Deals!

Go Greener Academy
7/23/2024

Presented by:
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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



- Strategies to successfully integrate financing EARLY & OFTEN in your sales process.
- How to empower your salespeople to sell monthly payments with CONFIDENCE!
- Methods to change the conversation with homeowners and eliminate price objections.



COMPONENTS OF A SALES PITCH



Introduction



Value Proposition



Call to Action



Must Have an Integrated Marketing and Sales Process

- Financing on Website
- Phone Intake Process
- Utilize NEIF Pre-Screen
- In-Home Sales Process
- Sales Proposal Must Stress:
 - **Affordable Monthly Payment Options!**

Financing on Website



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Digital Logo & Button Library

Download and share!

[CLICK HERE](#)



Trusted financing for
upgrades that make
your home or building
efficient, safe, healthy
and comfortable



APPROVED CONTRACTOR
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Phone Intake Process



“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** so you can set things in motion to have your system installed and be saving money this spring.

Does that sound like a plan?”

Utilize NEIF Pre-Screen Tool



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A Certified B Corp™



Residential Prescreen



NEIF's Credit Pre-Qualification Tool - EnergyPlus Loan

- Use this tool to determine if a potential customer will pass NEIF's initial credit qualification and which program they qualify for.
- The EnergyPlus Loan is for homeowners in approved states who are making qualifying improvements to their primary residence or vacation home (1 to 4 unit on permanent foundation). Good credit and the ability to repay are required. All income levels are eligible.
- If customer is successfully pre-qualified you must present them with the [Pre-Qualification brochure](#).
- When the customer decides to proceed have them apply for final approval through the application link on your NEIF Financing Gateway.

Applicant Information

*First Name	Middle Name	*Last Name	Suffix
<input type="text" value="First Name"/>	<input type="text" value="Middle Name"/>	<input type="text" value="Last Name"/>	<input type="text" value=""/>
<small>First name is required</small>			
SSN			
<input type="text" value="###-##-####"/>			
*Address	*City	*State	*Zip
<input type="text" value="Address"/>	<input type="text" value="City"/>	<input type="text" value=""/>	<input type="text" value="City"/>
<input type="button" value="SUBMIT"/>			



A sales process that sells on value not price!

- Build Rapport
- 3rd Party Validation
- Explain the Process or Program
 - **Use NEIF Explainer Video!**
- Leverage Tax Credits, Rebates & Savings
- Always talk in Terms of Monthly Payments

In the Home, Don't Ask...Assume!



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- *“We have a good financing option, is that something you would be interested in?”* **NO**
- As we mentioned on the phone when you called, we have a set of **monthly payment options** we can show you to pay for these upgrades, which is certainly **the best way to go about these projects**. I will go over everything with you once we develop **your solution!** **YES**

Sales Proposal



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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

\$104 per month

Price for Option 2

\$10,000

Term

- 3 Years
- 5 Years
- 10 Years

\$149 per month

Price for Option 3

\$15,000

Term

- 3 Years
- 5 Years
- 10 Years

\$223 per month

Stress the Benefits



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- **Simple Interest Unsecured Loan** – No lien on property
- **Low Guaranteed Fixed Monthly Payments** – Not a credit card or teaser rate
- **Complete Flexibility on How Much Interest You Pay** – pay off or pay ahead with no penalty!
- **Simple, Transparent, Expert, Trusted Financing** from the nation's most experienced B-Corp energy improvement lender