

EMPOWER your customers to say:

YES!



Go Greener Academy

Sales Training & Resources
for NEIF-Approved Contractors

**Sales Planning for 2026 —
Starting With a Strong 2025
Q4 Finish!**

Go Greener Academy
11/20/2025

Presented By:
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NEIF - National Leader in Energy Efficiency Financing



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- **The nation's only Certified B Corp™ and US DOE Home Improvement Expert lender partner** meeting the highest verified standards of social and environmental performance, transparency, compliance and accountability.
- NEIF works with **qualified, leading contractors of all sizes** as well as distributors, manufacturers, utilities, and governments.
- NEIF-Approved Contractors have met our standards **for commitment to quality work and customer service**, financial stability, and personal integrity.
- NEIF partners with them to **integrate trusted and transparent financing into their sales process** and broaden their markets in HVAC, roofing, remodeling, lighting and most energy improvements.

**Based in Allentown, PA and Denver CO,
NEIF is a national lender providing
trusted financing for home and building
energy upgrades for work performed by
NEIF-Approved Contractors**



APPROVED CONTRACTOR

Every Sale Matters



Today's agenda:

- How to optimize the rest of 2025
- How to develop a clear plan for 2026 for predictable revenue

The Momentum Opportunity



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- Many companies slow down sales activities in Q4
- Take advantage and focus on short-term wins





Quick Wins

Finish 2025 strong!

- Revisit past leads – book appointments
- Run a simple promotion – (holiday tune up, discount period, service contract renewal)
- Hold a mini sales contest – (# of appointments)
- Boost follow-ups – nudge proactive planning
- Use social currency – share useful information
- Deliver thank-yous – an underused referral reminder
- Provide sales training – sharpen skills

The Return = Momentum



**Time is best spent on building customer relationships
and effective follow-up**

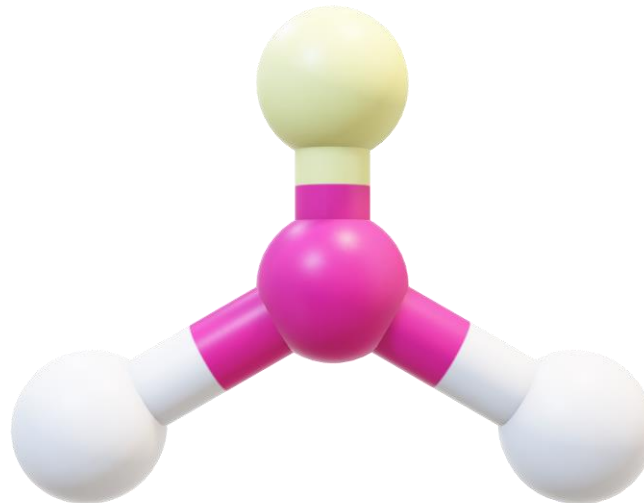
Finish strong in Q4 to start Q1 fast



Three Fundamental Elements

People

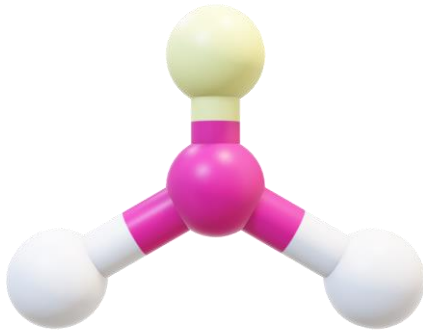
Process



Pipeline

Assess your sales team and set goals

People



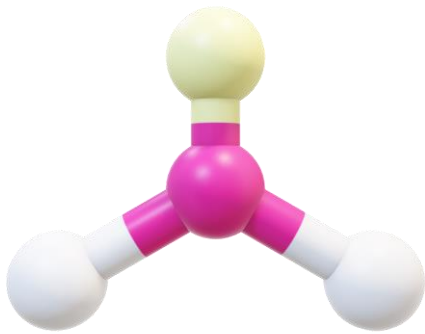
- Keep roles and responsibilities current
- Conduct training as needed
- Schedule accountability work sessions
 - Set annual team goals
 - Make sure individual goals tie to company plan
 - Review quarterly and adjustments
 - Weekly check-ins with recognitions



2026 Sales Plan

How do you close sales

Process



- Review your 2025 process
- Is the process measurable?
 - E.g., call volume, win rates, sales cycle
- Look for opportunities to improve
- Keep it simple – pick one thing to improve and build on
 - E.g., faster quotes, more touch points



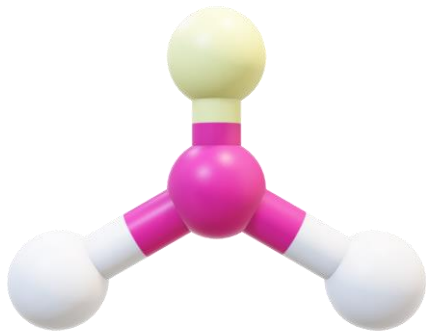
2026 Sales Plan



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Know where sales are coming from



Pipeline



- Know key indicators to calculate # of leads needed
 - Average job size, close rate, # pre-qualifications, # jobs
- Review 2025 mix & set 2026 targets by category
 - E.g., replacements, upgrades, service
- Set 3 -5 annual team goals
 - E.g., # jobs \$30K+

Three Fundamental Parts

People

- Set 2026 team goals

- Examine your process
- Pick one process area to improve

Process



Pipeline

- Review 2025 data
- Set 2026 leads targets

Summary



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Key Takeaways: Three Fundamental Parts

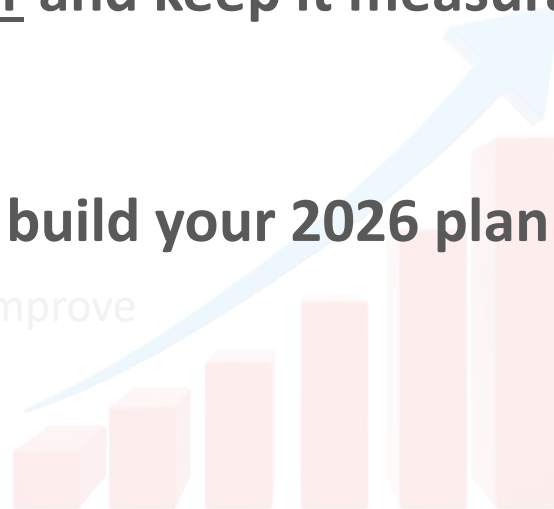
- Finish Q4 Strong and focus with momentum
- Build 2026 plans around People, Process, and Pipeline
- Make 2026 plan clear and keep it measurable

Next Step:

- Schedule 2 hours to build your 2026 plan

- Examine your process
- Pick one process area to improve

Process



Pipeline

- Review 2025 data
- Set 2026 leads targets

Thank You!

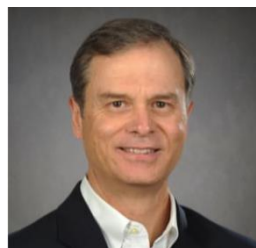
NEIF's Business Development, Contractor Relationships, and Marketing & Lending Teams can provide you with guidance on how to integrate our trusted financing programs into your sales process to broaden your energy improvement markets.



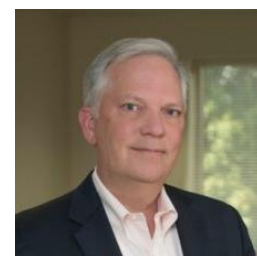
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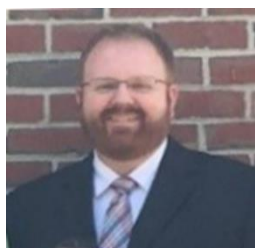
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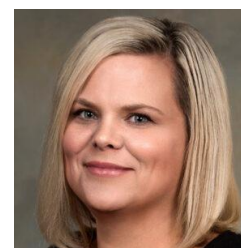
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