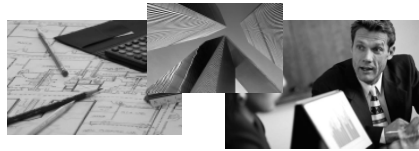


B2B Sales Excellence



**“Energy Savings for Existing Buildings:
The Engineering Analysis, Monitoring, &
Retro-Commissioning Approach”**



1

Agenda:



1. **Selling Energy Services: Energy Retrofit Work, Higher Efficiency Equipment Options, Replacement Planning, Lighting Changes, Utility Rate Negotiating, Demand Controls, Automation and More...**
2. **Best Markets & the Marketing Approach**
3. **Recognizing Opportunity, Introductory Meetings**
4. **The “Plan of Action” or Your “Letter of Intent”**
5. **The Use of and Engineering or Design Analysis**
6. **Benchmarking & Monitoring**
7. **HVACR System Retro-Commissioning**
8. **Presenting Energy Services Recommendations**

2

Section 1. Selling Energy Services

**“Why Energy Services is Important to
Building Owners and Managers.”**
**“How to present and sell Energy Services
using statistical data and supporting
documents.”**



Energy Services Description



- Energy Services Professionals can include those certified in LEED® programs, Green Buildings and Energy Star programs, CEM, CEPP, and CEP accredited experts, energy conservation and efficiency experts and a design-build approach to maximizing energy efficiency.
- Begin by understanding the opportunities to help save building owners money and how to promote those programs.

4

Selling Energy Services



- Research the DOE Website, ASHRAE, BOMA, more
- Understand the Opportunities, Interview & Survey
- Gain Knowledge and/or Certification (Energy Star)
- Categorize Vertical Markets – “Best Few” Markets
- Use a Proven Marketing Approach
- Use a Thorough Sales Process
- “Today, cutting costs and controlling energy helps businesses drop dollars directly to the “bottom line and could mean the difference between surviving an economic downturn and not”.

5

Use a thorough Sales Process



1. Marketing preparation and targeting facilities
2. Prospecting activity and setting the appointments
3. Facilitating a first meeting or “qualifier appointment”
4. Surveying, scope, financials and pricing the solutions
5. Confirming information with a financial analysis
6. Making unique recommendations - proposals
7. Closing the sale – signing of agreements
8. Performance reviews and customer retention

6

The ES Sales Process



- Preparing and setting the appointments to have the opportunity to structure a "Plan of Action"
- Facilitating a first meeting or first call to help qualify the opportunity and set the "Plan of Action" in motion
- Scope development, surveying and qualifying, pricing the solutions, financials, energy savings projections
- Confirming information, financial analysis
- Making recommendations – presenting proposals
- Closing the sale – signing agreements

7

Sales Process Step by Step



- A. Prepare and set appointments using strategies to begin gathering information related to initial scope
- B. Facilitate a first meeting to set up a plan of action and move forward allowing your self to present multiple solutions and options
- C. Use the survey and information gathering techniques to help qualify the scope of work, perform energy savings calculations and cost justification after collecting operating costs

8

Sales Process Overview (2)



- E. Produce a financial analysis or sample financial cost analysis and scope of work with options to facilitate a confirmation meeting to explore options and verify direction
- F. Produce a unique proposal and use a presentation format to make your recommendations
- G. Ask for the order after reviewing the documents then talk about a time frame to get started and have the agreement signed

9



Section 2. The Best Markets & Marketing Approach for HVAC Contractors

“Specific Market Segments are more likely to be interested in Energy Services.”

“We will identify the top markets and how to present financial justification.”



Target Market Segments

- ❑ **Universities, Schools, Institutions**
 - Help maintain a budget and plan for replacements
 - Ensure comfort and reduce complaints
- ❑ **Healthcare, Nursing Homes, Medical, Hospitals**
 - Control budgets and reduce costs – Energy Savings
 - Maintain critical temperatures or set-points
- ❑ **Industrial, Research/Pharmaceutical, Distribution**
 - Improve productivity for the business – Energy Control
 - Reduce or eliminate emergency breakdowns
- ❑ **Owner Occupied Office, Property Manager-Developer**
 - Improve or maintain tenant or occupant comfort
 - Reduce overall operating costs – Energy Savings

11



Market Segments - Building Type

- ❑ **Aging Buildings in the 15,000 to 200,000 Sq. Ft. Range**
- ❑ **Buildings Spending \$1 to \$2 Per Sq. Ft. and Greater on Energy or Low Energy Star Rating**
- ❑ **Office Buildings, Medical, School Systems, Banking, Dormitories, Municipal, Certain Big Box Retail**
- ❑ **Heating & Cooling Equipment of One Certain Type of Application; Air Source Heat Pump, Ground, Source Heat Pump, Electric Resistance, Packaged Gas Unit, Boilers and Chillers, DX/Packaged Units, Air Source Heat Pumps, Ground Source Heat Pumps, etc.**
- ❑ **Businesses Expressing “Green” Awareness**

12

Energy Service Marketing Approach



- ❑ The Target Direct Marketing Approach is identifying key prospects based on building age and business goals
- ❑ Aging Facilities, Aging Equipment, Lower Efficiency Ratings, Desire for Real Planned Maintenance and Control of Utilities
- ❑ Escalations and “Spikes” in Energy Bills
- ❑ Energy Assessment Needs
- ❑ Energy Recommendations “Not Acted On”
- ❑ Business Budget Discussions, CFO Access

Target Direct Marketing Approach



- ❑ Your Existing Files, Past Customers
- ❑ Gain Access to the CFO, VP Finance
- ❑ Introductory Letters and Phone Scripts
- ❑ Setting Up Appointments
- ❑ Flip Chart Presentation
- ❑ Energy Savings Articles
- ❑ Case Studies
- ❑ Assessment

- ❑ Energy Report Sources...



Aging Facilities, Aging Equipment



- ❑ Are there opportunities to gather energy data to help add value through design, engineering and options for installations to differentiate YOU?
- ❑ Add value and savings by offering control solutions
- ❑ Take advantage of zoning opportunities to limit runtime
- ❑ Use economizer functions for savings
- ❑ Present higher efficiency equipment
- ❑ Evaluate savings through voltage and phase differences
- ❑ Negotiate the rate structure or demand charges
- ❑ Add the extended warranty protection (full maintenance)



Section 3. Recognizing Opportunity & Introductory Meetings

“Begin with an overall plan on how you identify and then present Energy Services.”
“Research the articles and energy savings tools provided in this packet and use that information in introductory letters.”



Know the Customer, Facility

- Financial -----
- Walk Through-----
- Survey-----
- In-depth-Survey---
- Letter of Intent-----
- Use open-ended questions
- Actively listen for “pain” or concerns, issues
- Probe, qualify and confirm the concerns, ROI
- Prioritize criteria, pain and business objectives
- Summarize using benefits of energy services
- Are drawings available
- Take notes on all discussions



Introductory Letters – First Meetings

- | | |
|---|--|
| Introductory Letters: | First Meetings: |
| <input type="checkbox"/> Market Specific | <input type="checkbox"/> State Agenda |
| <input type="checkbox"/> Short – Concise | <input type="checkbox"/> Deliver Capabilities |
| <input type="checkbox"/> “Actionable” – I will call | <input type="checkbox"/> Benefit Statements |
| <input type="checkbox"/> 10 – 15 At a Time | <input type="checkbox"/> Energy Case Study |
| <input type="checkbox"/> Emails & Voice Mails | <input type="checkbox"/> Questions - Interview |
| 1. Capabilities – Services | 1. Needs, Pain, Goals |
| 2. Benefit Statements | 2. Energy Opportunities |
| 3. “I will call you to set a time to meet...” | 3. “Plan of Action” |

Know the Prospect Business Goals



1. Ask questions about the prospect's responsibilities and business budget or energy issues
 - "Tell me about your responsibilities and give me an idea of the energy or budget issues that you experience."
2. Ask questions about the facility and HVACR system or comfort concerns that exist
 - "What impact does the HVACR and energy have on your business?"
3. Ask questions about the budget and any financial issues related to HVAC expenses
 - "What financial impact does the HVACR and energy have?"
4. Ask questions about how the recommendation would be approved and who would be involved
 - "If I were able to help, how would the work get approved?"

18

Section 4. The "Plan of Action" and "Letter of Intent"



"There are qualifying tools you can use to protect your intellectual property and avoid price only and bid situations."

The "Plan of Action"



- Have and introduce the Agenda or Meeting Objective
- Review your capabilities (message or 'elevator pitch')
- General benefit statements
- Energy services case studies
- Question and listen
- "Plan of action"

•Today's Meeting
•Survey and Interview
•Review Options
•Recommendations

21

Your "Plan of Action"



- First Introductory Meeting
- Survey & Building Assessment
- Financial Analysis
- Reviewing Options (date and time)
- Proposal Presentation
- Agreement Start-Up
- Customer Service Review



22

Letter of Intent



- A "Letter of Intent" is a qualifying tool to protect your intellectual property and is presented as a "Plan of Action" in the early stages of the sale.
- The "Letter of Intent" describes the prospects intent to do business with you based on the specific needs, pain and business goals of the prospect and should they not move forward with the energy services recommendations, they will have to pay a fixed amount for engineering and design of the program.
- Sample "Letters of Intent" are included in the support tools handouts and CD that is free

23

Leading to Confirmation



- The Confirmation Meeting or Meeting to Explore Options is the Date and Time set up in the "Plan of Action"
- Confirmation is the negotiating stage of the process
- This is an informal meeting to discuss your findings
- This is the meeting to present financial justification
- The Confirmation Meeting may have to be held several times to discuss options with all decision making levels
- The costs of the program are verbalized...

24



Section 5. The Use of and Engineering or Design Analysis

“Continue to Qualify the Opportunity by performing a Technical Analysis after the Introductory Meeting and gaining a “Plan of Action” or Letter of Intent.

Surveying, Formulas & Calculations



- Investigate Design-Engineering Issues, Evaluate
- Temperature Control or Programmable Thermostats
- Lighting Retrofit Work, GE Supply or Sylvania
- Return Air Solutions, Return Air, Outside Air
- Humidification-Dehumidification
- Filtration and Heat Transfer Surfaces
- Duct Cleaning, Equipment Cleaning
- Efficiency Ratings and Insulation
- VFD or other Energy Solutions
- HVAC, Energy Articles

Design-Engineering Review(2)



5. Share concerns over risk allocation and collaborate with the owner
6. Determine which team member is best suited to accept risk, develop the design, oversee engineering and provide final project scope and construction documents
7. Involve the construction or delivery team in the early stages of design for feedback



HVACR Design-Engineering Review



1. Risk allocation and taking on responsibility
2. Out-sourcing some risk and design or engineering capabilities
3. Develop a design and engineering team to evaluate and help produce each job
4. Involve the owner as soon and as often as possible with the design team



28

Surveying & Calculations



- Know Conversion Tables – ASHRAE
- Use Filtration Savings Calculations
- Use Outside Air Limitations Energy Savings
- Use Economizer Function Calculations
- Use Lighting Savings Calculations
- Please refer to the Support CD...



29

Energy Assessment Needs



- Lighting Applications, Count Fixtures
- Determine any Insulation Needs
- Rate the Efficiency of the HVAC Equipment
- Note the use of Economizer Function
- Count Motors over Five HorsePower (HP) VFDs
- Examine Controls, Calibration, Settings, Automation
- Check All Heat Transfer Surfaces for Cleanliness
- Identify Filtration Needs and Savings Opportunities
- Reduction in Over-Abundant Outside Air
- Use a Professional Report

30
