



turn to the experts 

SPREADING THE WORD WITHIN YOUR ORGANIZATION

Welcome to the third issue of the Home Performance Explorer e-newsletter.

Let me pose a question to you. You've now received three Home Performance Explorer newsletters. How many of them have you forwarded on to staff and co-workers so they could become acquainted with Home Performance and the Carrier® Energy Experts program?

We all know the challenges of keeping staff and co-workers informed and on the same page within a business. It's tough, especially when each of us is bombarded daily with meetings, emails, phone calls, and endless to-do lists. But please consider using this e-newsletter as a way to spread information across your organization at all levels.



Distributor sales managers and principles, email the newsletter to your Territory Managers so they can better answer questions

from the dealerships they call upon. Hand out hardcopies during your meetings. Post a copy on your community information board. Territory Managers, discuss this information with your Factory Authorized Dealer accounts when you call upon them. Carrier Factory Authorized Dealers, post or email the newsletters out to your staff – whether that's five employees or 35 employees. Carrier Residential Sales Managers, talk to your customers about the topics covered in the newsletter.

Do whatever you can to keep your internal customers as informed as possible about this emerging field. And we vow to do the same by continuing to hone the speed and relevancy of the Home Performance information we share with you.

I hope to see you at the Factory Authorized Dealer Meeting in Las Vegas on March 22.

Karie Johnson
Manager, Dealer Development

BEST PRACTICES: ENHANCING THE CONSUMER EXPERIENCE

Best Practice Submitted by Minnicks, Inc.

Thanks to Minnicks, Inc. for sharing one of its many Home Performance best practices with us.

"At Minnicks our service technicians perform a Home Evaluation and a HVAC Audit Report on the customer's system on each visit. They take the time to show and explain to the customer what they are doing and why it is important.

Based on the results of the visual check of the home, attic insulation, bypasses, HVAC system performance, airflow delivery and wattage used, they will then make recommendations to the homeowner to have a Total Energy Solution Audit, which is a Home Energy Audit and a HVAC Total System Audit. When the homeowner is interested in getting more information or moving forward, the tech will contact the office and provide a sales lead to our CSR staff so our Comfort Advisor can contact the homeowner right away."

SIGN UP TODAY FOR THE 2013 ACI CONFERENCE


By Carrier Marketing

Carrier's sponsorship of ACI's April 30-May 3 conference in Denver includes a limited number of discounted registrations for dealers and distributors to attend. Use the link and code below to register and receive registration at \$750 for the Core Conference and \$1,570 for both the Core Conference and the Home Energy Leadership Summit with no deadline to register under those prices.

<https://www.expotracsshows.com/affordable-comfort/2013/national/>

Discount Code: **AXC1D2** (select the category of **ATTENDEE**, then enter code)



turn to the experts 

CHECK OUT THE ENERGY EXPERTS MICROSITE

By Carrier Marketing

If you haven't checked out the Energy Experts microsite, take a few moments to do so. While you're there watch the video clip, which offers consumers a great overview of Home Performance and how your dealership fits into the picture.

<http://MyHomeEnergyExperts.com/>

Once your dealership achieves recognition as an Energy Expert, you're invited to link your website to this video or embed the video file into your website.

Be sure to include the website address on correspondence you send your current customers and on your phone messaging.

BRAND YOURSELF!

By Carrier Marketing

Once you're an Energy Expert, you have access to merchandise to promote your dealership. Visit www.hvacpartners.com and the Energy Experts section to review the merchandise options in the file entitled "Energy Experts-Identification."



MORE WAYS TO SHARE INFORMATION: HOME ENERGY MAGAZINE

By Carrier Marketing

Keep the Home Performance communication channels open by subscribing to Home Energy magazine at discounted rates as low as \$45 a year.

Visit <https://www.homeenergy.org/landing/carrier> and order your subscription by entering the **code of CARRIER** where prompted. Select to receive your issues online, in print, or both.

New from BPI: The Building Science Principles (BSP) Certificate of Knowledge

Article Submitted by BPI

Verify your knowledge of home performance with the BSP certificate.

- 100-question online exam
- Companion Reference Guide
- No hands on field testing
- Online exam and Reference Guide affordable at \$99 each
- Not a BPI Professional Certification

Discounts for bulk purchases are available. View the Reference Guide and learn more at www.bpi.org/certificate. Questions? Call 1-877-274-1274, and press 7.





turn to the experts 

Turning Dust Into Gold

Article Submitted by Brendan Reid, Comfort Institute

Considering stepping up to Home Performance, yet concerned about where the Carrier 360 leads will come from? Successful Energy Experts have learned how to convert many duct cleaning callers into profitable Home Performance projects.

HVAC contractors routinely get calls from homeowners wanting a duct cleaning quote. Some perform it in house, creating a \$400-\$600 sale. Others sub it out or refer it to a local specialist. Many contractors simply don't want to get involved, even going so far as saying duct cleaning is a waste of money. No matter how it's handled, many consider these to be low opportunity "nuisance leads".

However, many have learned how to better meet these customers' IAQ needs and also greatly increase revenue – **typically to between \$3000 and \$10,000+ high margin sales.** How? By using their CSR's and website to educate about the benefits of first performing a Home Performance assessment.

"That's one of our favorite phone calls we get: 'I want a price for cleaning my ductwork'. We regularly turn those into tests," says John Waldorf, GM of Estes Services in Atlanta GA.

"I always direct the customer to go to our web site, see the videos," continues Estes Comfort Advisor Sam Rhone. "I say you should check this out, just to be sure before you spend the money on duct cleaning, go take a look at the video and get an idea of what else we can do, because otherwise a year from now you'll probably call us back and say your ducts are still dirty. Once they look they call us back and say, 'How much does the testing cost?'"

"When a customer calls and asks for a duct cleaning quote, we always ask 'why do you want to get your ductwork cleaned?'" says Steve Schmidt of Frederick Air in Frederick, MD. "It forces them to come up with what the real

problem is, which 9 times out of 10 is 'Well I have a lot of dust in my house'. We then ask, 'Did you want to spend money to get your ducts cleaned, or did you want to solve your dust problem?'. That opens up the conversation about testing first."

"We give just a quick overview of what could happen, but then driving them to our web site is key," says Schmidt. "In fact we barely even want to talk to them before they've watched the online videos. We have this wealth of information to teach the homeowner what they need to know. So we actually say to them 'tell you what, take a couple of minutes, go to our website, watch these two videos and then we'll have another talk.'"

"We usually charge \$195 to do a basic blower door and duct leakage test," says Rhone. "That seems to be very successful because at \$195 people aren't apprehensive, they don't feel it's that expensive, and they're allowing us to get in there and we turn it into a larger job. The sale is anywhere from \$3000 to \$12,000...we might do duct sealing, a dehumidification system, a house doctor sealing day, air cleaners, an encapsulation of a crawlspace. Sometimes it turns into equipment, a lot of times it turns into zoning, ... you get a bit of everything."



After performing the blower door, duct leakage and negative pressure testing, and showing the customer how dust is getting into their home, Frederick Air has had good success reducing it by performing duct sealing and attic retrofitting (suck out contaminated old insulation, seal the top plates, can lights and pull down stairs and then reinsulate).

Schmidt compares duct cleaning callers to people who take their car in to the mechanic because it's making a funny noise. "When a customer call us and says they want to have their ducts cleaned, they are saying 'I'm a person who when I see a



turn to the experts 

problem I do something about it'. This is our perfect customer. Because they have demonstrated to us that if we recommend something to them, they're likely going to pay attention to us. So we love those calls. They are calling thinking, 'I'm willing to spend some money to solve the problem'."

"The real problem is they don't have a clue what they're talking about or what's causing their dust. But at least we've got them talking and they are open to the possibility...so what we are able to do is then gently educate them and become the expert for them."

Waldorf uses a doctor analogy: "Do you want us to come out and clean them and just treat the symptoms, or tackle the real cause of your dust problem. Let us come out and do a test, find out how the ducts are getting dirty, clean it, cure it, and you won't be calling us back out there in five years. And you'll save money on your utility bill."

While there are many ways to generate Home Performance test leads, the best are often the IAQ leads that are trickling in every day. Attend the Carrier Energy Experts 2 Home Performance Marketing/Lead Generation workshop and learn step by step how to implement this IAQ lead conversion strategy. Then, next time someone calls your office or asks a service tech for a duct cleaning quote or an air cleaner estimate...you can offer to first **test, not guess**. Both you and the customer will come out far ahead.

Brendan Reid is the CEO of Comfort Institute in Bellingham, Washington, and teaches the Carrier Energy Experts 2 class. A version of this article previously appeared in ACCA's IE3 Magazine, July 2012.

A RECENT QUESTION FROM THE FIELD:

Q: Who should attend the Energy Experts overview/introductory class?

A: The owner or principle of a dealership should attend this first required training session to determine how Home Performance fits into the current structure of and strategy for the dealership.

HVAC PROFESSIONALS TAKE A WHOLE-HOUSE APPROACH

Article Submitted By Glenn Mauney and Barney McClung, Everblue Training Institute

Not long ago a single trade was necessary for comfort conditioning. Old steam and hot water heating systems required plumbers for installation, repair, and modifications. It could be argued that plumbers were installing heating systems long before sanitary plumbing became their main business. As forced-air, gas-fired furnaces became more common, plumbers started installing those systems too. Coordination was easy, as there was only one trade doing all of the work.

With mechanical air conditioning and heat pumps making their way into buildings, plumbers weren't the only contractors installing systems. As contractors became more specialized, the coordination between trades was left to the architect, builder, or project manager. In practice, this meant no active coordination among the trades to consider the house as a system.

Understanding Energy Transfer in a Home

Beginning with the energy crisis in the 1970s, energy prices became too high to ignore, giving a new sense of urgency to energy conservation. Environmental scientists looked at ways to save energy in homes and realized what homeowners had known intuitively for years...houses are leaky. It doesn't take a genius to realize that sealing leaks in a home keeps the conditioned air inside longer, reducing the need for energy. A tighter house means smaller furnaces and air conditioners. These use less energy, yet still meet the occupant's comfort needs.

Fewer leaks, reduced energy loss, and smaller furnaces and air conditioners are steps that reduce energy demand. However, a tightly sealed building can cause other problems. The fireplace



turn to the experts 

is where installers probably first noticed a problem with a newly sealed house. Fireplaces consume prodigious amounts of fresh air to sustain combustion. Tightly sealed houses may have stopped drafts and energy losses, but now the fireplaces were not working properly; operating the clothes dryer, bathroom exhaust fan, or kitchen vent hood would actually pull smoke into the room. Obviously, there was a problem. Technicians found dangerous levels of carbon monoxide (CO) in the living spaces.

An overly tight home leads to another problem: fresh air being sucked into the house through floorboards, light fixtures, and the attic access. With tightly sealed doors and windows, “make-up air” was being pulled in from “dirty” sources. Attics and crawlspaces supplied air rich with molds, insect wastes, and pest droppings. Not surprisingly, reports of respiratory and other health problems increased.

The well intentioned and effective efforts to seal up a leaky house created new health problems, primarily increased levels of CO and molds inside the home. Minimizing energy use and making the space as airtight as possible are both important, but so is ensuring we provide enough fresh air to maintain a healthy environment.

Implications for Tradesmen

It is now apparent how critical it is to coordinate the work professionals do inside a building. The project coordinator must understand not only building construction but mechanical systems as well. Without planning and close coordination among the various trades, the health and safety of the building’s occupants can be put into jeopardy.

Professionals seeking whole-house knowledge should start with education and training in different, but related, technical fields. Many training tools are at the disposal of today’s leading-edge HVAC contractor who recognizes the need for energy-efficient building envelopes, mechanical, lighting, and power systems. Among them are:

- Manual J training (Manual M for commercial buildings). A heat load calculation is necessary to specify the most efficient HVAC system. Sizing HVAC equipment on square footage alone is not adequate. Today’s professional must consider many factors before specifying an HVAC system, including:
 - Proper sizing through load calculations
 - Construction issues that may impact the performance of the HVAC system
 - Proper installation techniques
 - Commissioning and retro-commissioning of the system
 - Proper operation with use of programming
 - Ongoing maintenance
 - Continuous efficient operation

- Energy Auditor Training – A properly trained Energy Auditor considers the house as a system, identifying problems that impact the HVAC system and energy demand. The first step is making the building’s envelope airtight. The next step is to insulate to recommended levels, ensuring the air and thermal boundaries align. An efficient lighting system, and proper insulation around can lights protruding into unconditioned space, will have a significant impact not only on energy demand but also on the occupant’s comfort. Ensuring there is sufficient fresh air addresses many of the health issues.

Another tool can be found in the recent update to the 2012 International Energy Conservation Code (2012 IECC). This is the model energy code, recognized internationally to lead to optimal efficiency and reduced fuel use. Versions of the IECC are in effect in over 40 states and referenced by U.S. Code, the Leadership in Energy and Environmental Design (LEED) standards, and many state and federal programs.

2012 IECC is a comprehensive energy conservation code that establishes minimum regulations for energy-efficient buildings. It uses



turn to the experts 

both prescriptive and performance-related metrics, containing separate provisions for commercial and residential buildings. 2012 IECC is the most up-to-date standard, often adopted as a single, all-inclusive energy-efficient building code.

Among the system requirements the 2012 IECC addresses are:

- Controls
- Ducts
- HVAC Piping Insulation
- Circulating Hot Water Systems
- Ventilation
- Equipment Sizing
- Multiple-dwelling Units

Below are excerpts from a few of the standards:

- Section R403.1.1 sets standards for programmable thermostats; R403.1.2 addresses Heat Pump Supplementary Heat. If primary heating is a forced-air furnace, at least one programmable thermostat is required. Heat Pump Supplemental Heat must be prevented from operating when the heat pump can meet the heating load, except during defrosts.
- Duct insulation standards, found in Section R403.2.1, are prescriptive. These prescribe R-8 for supply ducts in attics and R-6 for all other ducts. Section R403.2.2 covers Duct Sealing, making it mandatory that all joints or seams comply with International Mechanical Code (IMC) or International Residential Code (IRC). Also, all ducts, air handlers, and filter boxes must be sealed. Duct tightness must be verified.

- Piping insulation standards, in R403.3, require R-3 on HVAC piping systems. If that piping is exposed to weather, it must be protected from damage caused by the sun, moisture, equipment maintenance, or wind.
- Section R403.6 addresses equipment sizing and requires a load calculation to determine the proper size of the equipment, with the goal being adequate comfort, but no bigger. Oversized equipment costs more up front, more over time (in operating costs), and often ends up providing less comfort. Short-cycling reduces equipment efficiency and life expectancy - both are reasons not to oversize.

These represent only a portion of the codes that speak to equipment efficiency. The 2012 IECC, as a comprehensive code, sets the standard for energy-efficient buildings.

Summary


The short time ago that individual trades didn't need to worry about coordinating their work might as well be thought of as pre-historic. Multiple, newer technologies used in today's buildings and homes necessitate well-trained professionals who understand the cumulative effect on the performance of the building and its equipment. Consideration of the house or building as a holistic system, knowledge and application of energy codes, and utilization of the other tools available to today's professionals is good business and results in a balanced triple bottom line of People – Planet – Profit.

Framing cavities may not be used as ducts or plenums.

IECC 2012
Section R403.2.3





turn to the experts 

MORE UTILITY COMPANIES SPOTLIGHTING DUCT SEALING AS A CRITICAL PART OF THEIR HOME ENERGY EFFICIENCY REBATE PROGRAMS

Article Submitted by AeroSeal

Utility companies across the country are increasingly rewarding homeowners for sealing their duct systems, with incentives and rebate programs that pay up to 50% or more for the sealing process. According to [DSIRE](#), a database of state, federal, local and utility incentive programs that support energy efficiency, 38 of the 50 states in the U.S. now offer some sort of rebate or incentive for duct sealing.

Home air duct sealing is also receiving increased attention in “how to” articles, “energy savings tips” and other consumer information offered by a growing number of energy-conscience utility companies. In a recent customer [blog post](#), Louisville Gas and Electric Company (LG&E) listed duct sealing as the first tip in saving on home energy costs. The utility company is backing up this tip with a new energy conservation program that offers homeowner up to a \$1,000 rebate on duct sealing projects. According to LG&E, most of its customers lose up to 20% of air-conditioned or heated air before it reaches the targeted rooms. EPA calculations indicate that effective air duct sealing can save customers, on average, \$300 or more on their annual energy bill.

“Until recently, duct sealing didn’t appear as a prominent energy conservation option within most rebate programs,” said Neal Walsh, of AeroSeal. “That’s because there really wasn’t an effective

solution to the problem. The use of tape and mastic can only seal the easily accessible leaks – usually not enough to have much of an impact on energy usage. With the introduction of a new duct sealing technology that seals from the inside of the ductwork, this has all changed – and that’s being reflected in the new rebate programs.”

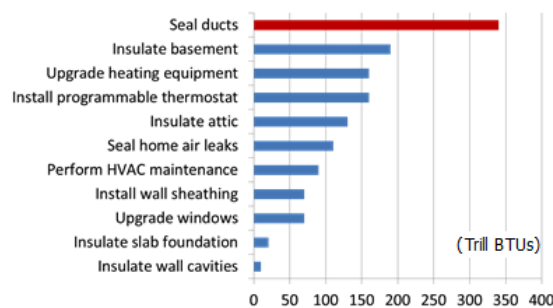
The new approach to duct sealing uses an aerosol-based technology developed at Lawrence Berkeley National Laboratory with funding from the U.S. Department of Energy and others. Commercially known as AeroSeal, it is the first air duct sealing solution that seals leaks from inside the

ductwork, eliminating the need to tear into existing walls or insulation to access the leaks. Applied as a non-toxic aerosol mist, the technology is 95% effective at sealing leaks throughout a home’s entire duct system.

“As part of the [Arizona Home Performance Program](#), we regularly perform energy audits for homeowners and have found that more than 80%

of the homes we inspect are losing a significant amount of energy through leaks in the ductwork,” said Dale Merritt, co-owner of [Eco-Rehab](#), a home energy auditing and contracting company in Tempe, Arizona. “Before AeroSeal, we used to perform our duct seals manually using mastic or zip ties. The problem with this was that we couldn’t always see or get to all the leaks. AeroSeal solves this problem by seeking out the leaks and sealing them from the inside of the ducts. It is so effective that we regularly help homeowners lower their energy bills in a


McKinsey: Energy Efficiency Potential



HOME PERFORMANCE EXPLORER

March 2013 – Issue 3



turn to the experts 

significant way, as well as other benefits such as reducing dust, and improving the overall efficiency of the home's HVAC system."

Due to the role that effective duct sealing can now play in home energy savings, Potomac Edison of Maryland recently launched a home performance [incentive program](#) that offers homeowners a rebate of up to 50% off on the cost of duct sealing their homes. The new program is focused specifically on air sealing, insulation and duct sealing projects. The program begins with a full energy audit conducted by a certified home performance professional.

"To ensure there is real energy savings, the program requires a pre- and post-testing of the



home to measure results," said William May, senior program coordinator, Honeywell Utility Solutions. "The beauty of Aeroseal is that the process already includes pre- and post-testing of the duct system. Homeowners actually receive a report that specifies exactly how much leakage there is before and after the aeroseal process is applied."

In Oklahoma, a new [rebate program](#) provides PSO utility customers with a choice of receiving either a "standard" rebate or "performance-based" rebate for their energy-savings projects. The

standard rebate path offers homeowners a rebate of 20% (up to \$1,800) on the cost of duct sealing. If the customer chooses the performance path, he or she may receive up to 50% of the cost of duct sealing (\$4,000 maximum), based upon the amount of energy saved.

Energy Upgrade California, a new energy conservation [program](#) sponsored by the California Public Utilities Commission and the California Energy Commission offers California homeowners \$4,000 or more in rebates for implementing home energy improvements. Focused on a few of the most effective measures for saving energy, the program shines a particular spotlight on duct sealing.

"Studies show that in most cases, aerosealing your ductwork can be a much more effective means of reducing your home energy bill than replacing windows, insulating your attic, upgrading your appliances or even installing solar panels," said Walsh. "The increased spotlight on duct sealing, along with the growing number of duct sealing incentive programs offered by utilities, is having a real impact on the HVAC industry. Aeroseal is quickly rising as a top-of-mind solution for those looking to conserve energy and reduce their home utility bill."

A RECENT QUESTION FROM THE FIELD:

Q: Who in a dealership should be taking the Sales class that is required to become an Energy Expert?

A: The same person who has undergone the BPI or RESNET technical training is the person who should also register for the Sales training. This allows the person to conduct the testing in front of the homeowners AND then speak to them post-testing about findings and what products or services are recommended.



turn to the experts 

TAKE YOUR BUSINESS TO THE NEXT LEVEL WITH HOME PERFORMANCE CONTRACTING

Part 2 of 2 - Article submitted by The Energy Conservatory

Part 2 of this article reviews the details of performing Home Performance assessments and expanding your Home Performance contracting business.

What should be included in a basic Home Performance Assessment

As a minimum, an assessment should include the following:

- A Blower Door test to determine how tight or leaky the house is; and using a smoke puffer or infrared camera to help find the air leaks.
- A Duct Blaster test to measure and located duct leaks, if ductwork is located in the attic, garage or crawlspace.
- A combustion safety test of all gas appliances, including measurement of carbon monoxide and a worst-case spillage test.
- An inventory of insulation levels.
- An interview with the homeowner to determine their comfort, energy, or air quality concerns. You will be surprised how much information they can provide if you are asking the right questions. This will be your guide to what additional testing will be needed.

How to help your customers prepare for an assessment

Once you have landed business, helping your customers prepare for an assessment is critical. Communication is key. This is your opportunity to clarify your expectations.

Give the homeowner several days' notice that you will need access to all rooms of the house and to the attic. If attic access is in a master bedroom closet, for example, they may need to clean out that room.

The homeowner will need to have all their windows and doors accessible. You will need to be able to open and close all interior doors

during testing. They will need to be aware of this so they can make arrangements for napping children or older adults living in the home. Service people can also upset dogs, cats or other pets, so be sure your customer knows what access you will need.


Be sure to ask them not to have a fire going in the fireplace and to clean out all the ashes so they don't scatter during your testing. You will need to be able to close the fireplace damper.

You will need permission to be in the garage if attic access or mechanical equipment is there. Ask if attic access is higher than an eight-foot ceiling so you bring ladders that are tall enough.

Tell the homeowner that you would like to have a 10-15 minute interview or information gathering meeting with them prior to you doing any testing. It is a good idea to have a questionnaire prepared in advance so you don't forget to ask important questions. You will want to know the homeowners comfort issues—have there been uneven heating and cooling, drafts, moisture or condensation issues in the past? Has there been water damage? Has there been ice dams, roof damage, damp insulation or leakage? Ask if there is a high water table. Ask details about their concerns and ask them to prioritize them. It's your job to identify pre-existing conditions.

Ask how much money they have budgeted for this project. It's part of setting and meeting expectations. Address ventilation, insulation, combustion safety, air sealing, duct sealing and mechanical equipment. Remember, all houses are different so don't use a cookie cutter approach. Mention that after the remedial work is complete, you will be retesting to assure building enclosure and the mechanical systems are working as a safe and efficient system and that all work is meeting expectations.



turn to the experts 

Walk around the house (with permission) and make a sketch of the home, noting location of roof vents, plumbing vents, exhaust fans, mechanical systems and chimneys. Having this information provides a good baseline for developing your work scope.

Develop a plan

Once you have your test data, use it to guide your work plan to create a customer rehab plan for the homeowner. Write out clear work scopes, with specifications and expectations. Focus on safety with the budget in mind. To use another medical phrase, “First, do no harm.” If there is not enough money for combustion safety or mechanical ventilation, then airsealing or insulation work cannot be done. For instance, if the homeowner has a natural draft hot water heater, this heater may exhaust fumes into the house if the dryer or kitchen fan runs at the same time. This may be a problem before work begins or may happen after air sealing work is done. Tighter homes may need mechanical ventilation systems to make up for the air that used to leak through the house naturally before the retrofit. Your test data and information you gathered in the client interview will aid you in developing a plan.

Recommend field inspections during construction

As the HPC in charge, it's your responsibility to verify compliance in the field. Have a checklist so you can keep track of:

- Are the right materials and equipment on the job site?
- Is the plan being followed?
- Are all the proper codes and standards being met?
- Is the job following the correct sequencing?
- Is the hand-off between contractors going smoothly?

Having a third party person do inspections is wise. This is worth the extra couple hundred dollars it will cost. Document the progress and the end product for your files.

Do post tests

After the work is completed, it's critical to compare your test results to the initial baseline to see the before and after numbers. Compare results to established guidelines. Were performance outcomes met? If not, why?

Get your customers' feedback

As part of your proposal, request feedback after the job and post tests are done. Conducting post tests should also be part of your proposal. For good Home Performance contractors, feedback is a required component for continuous improvement. Ask if comfort expectations were met. Getting feedback is especially critical when trying to get maximum results with minimum dollars. It's the only way to increase effectiveness and efficiency over time. Chances are, some of the best learning nuggets will come from this feedback loop.

How to get business as a Home Performance Contractor

The best place to look for new business is with your existing customers. If you are an HVAC, weatherization or insulation specialist, offer your new services to your current customer base. Ask these people for referrals to friends, family and neighbors. Offer them a discount, gift card or other appropriate incentive.

Join appropriate organizations and trade groups. Many of these sites have places to post your contact points. Ask colleagues for tips and tricks. Use online bulletin boards. Use business card bulletin boards at the grocery and hardware store.

If you want business in a certain neighborhood, print up flyers and hire a student to deliver them door-to-door. Neighborhood newspapers offer affordable business card listings in the classifieds.

State fairs, home fairs and local home shows are good places to display. Booth space can be very affordable. Spot and cable TV are more



turn to the experts 

affordable in some parts of the country, but the exposure can be exceptional.

Many trade publications have the ability to send out e-newsletters and emails to very well defined geographical and demographical specifications.

And remember, *'First, do not harm'* and *'Prescription without diagnosis is malpractice'*.

THE JOURNEY TO HOME PERFORMANCE

Article submitted by Jay Murdoch, Efficiency First

In today's marketplace, there are many roads that lead to home performance—some starting from an existing HVAC or insulation business and even some starting from scratch. At Efficiency First, we have been exploring what these different roads to home performance look like—with a recent focus on when and how to integrate insulation and air sealing into your business. On one of our webinars, HVAC to home performance experts Rob Minnick, Jamie Clark, and Mike Rogers discussed their thoughts on bringing air sealing and insulation in-house and working with insulation and air sealing subcontractors, and highlighted best practices for both approaches.

The decision to sub or not to sub will be different for every company—some will use subcontractors, some will bring insulation and air sealing in-house, and some will fall somewhere in-between.

Some points to consider if you are looking to partner with a qualified sub-contractor:

- Number of years in business is good, but look at training and certifications too. Certifications show you are doing the work correctly...not just doing the work. Make certain the contractor is dedicated to the retrofit business and not just in that space until new construction comes makes a comeback.



- Make sure the contractor has adequate insurance...when working in the home, accidents can and do occur.
- Ask who their customers are...utilities, retail and municipalities have already vetted contractors...ask for a list of the contractor's customers.
- Solid financials are essential to ensure that partner will be there and will have the resources necessary to complete the job professionally.
- Ensure the homeowner's experience of your subcontractor's retrofit crew matches the experience from your own crews (business model, attire, equipment, punctuality, customer rapport, etc).

Here are a few great places to look for quality insulation contractors:

www.insulateamerica.com
<http://www.insulate.org/>

Some points to consider if you are thinking about adding insulation and air sealing to your suite of services:

- Proper installation is essential for insulation to perform properly. Knowledge of vapor retarders, air infiltration, ventilation, recessed lighting, attic baffles to prevent insulation from blocking the airflow from soffit vents, and water pipes are just a few of the areas critical to installation technique. If this level of quality work means more training, be prepared to invest.
- Professional insulation contractors have access to a wide variety of training, are familiar with local codes and regulations, and can offer guidance about the type and amount of insulation to be used. Make sure your knowledge



turn to the experts 

matches the knowledge of quality insulation contractors.

- Upfront investment. Consider the cost for new equipment, training, employees, insurance, and quality.
- Increasing your suite of services has the potential to bring bigger ticket prices, higher profit margin, and more ways to make the phone ring.
- Insulation, air sealing, and home performance are not magic. Make sure your HVAC fundamentals are right before you begin to grow your suite of services.

Either way you look at it, growing your suite of services requires a solid foundation. You need to build a service/maintenance agreement base first—an active customer base is crucial. Next, home performance adds complexity—consider implementing a solid CRM platform before you begin your transition. And, as we all know, the journey to home performance truly is a journey—a regular, active, and ongoing in-house training program is essential. Lastly, and most importantly, know your numbers! Build your yearly budget. Does increasing your suite of services, whether bringing in-house or using subcontractors, fit with your financials? If you can't get it to work on paper, reconsider your plans until they do.

Whether you decide to bring insulation and air sealing in-house or partner with a reliable subcontractor, with a solid foundation, adding more home performance offerings to your suite of services can be a strong and natural progression.

At Efficiency First, we are here to help in your journey to home performance. We are focused on exploring the different strategies, challenges, and lessons learned that come with each contractor's unique journey to home performance. Our peer-to-peer Knowledge is Power Member Education Program provides members with access to an ongoing webinar series providing tangible, practical content that

can be readily implemented. Our office hours program is a forum for Efficiency First members to share and learn from other members' industry experience and knowledge. And, our state and local chapters give members the chance to network with and learn from others in the industry doing similar work in their own backyards. While every company may take their own path to home performance, we are all headed toward the same destination—a sustainable, scalable, and profitable industry working to retrofit more of America's homes!

Efficiency First has over 650 member companies in all 50 states with 20 local chapters and counting. Looking to get involved? Visit www.efficiencyfirst.org/join to learn more today.


Jay Murdoch is the Executive Director of Efficiency First. As the national association for the building performance industry, Efficiency First supports building performance companies by providing an impactful voice in Washington, access to new educational and networking opportunities, and discounts on products and services. With state and local chapters across the country, we work with companies to retrofit America's homes and bring them—and our economy—into the future. Together, we advocate for policies that accelerate the growth of the industry, creating huge opportunities for companies and delivering meaningful energy savings to homeowners.

GROW YOUR SKILLS, GROW YOUR BUSINESS AT ACI

Article Submitted by ACI

As the HVAC and home performance industries become intertwined, ACI (Affordable Comfort, Inc.) emerges as the go-to resource for all of the educational tools, training, research, and networking required to make this joint-industry successful. The partnership with Carrier is a huge step forward in accomplishing this. One vision, one voice, one industry!



turn to the experts 

From our years of experience as the leader in home performance education, we know that the better trained you are, the more potential for success you will have—and the more profitable you will become.

For most HVAC contractors who are entering the world of home performance, it can be a rough ride with a lot of bumps along the way. But it doesn't have to be. Learning from other professionals who have already entered the home performance and weatherization industry is a great first step in making the transition smoother.

To help the HVAC community with the learning process, ACI is offering a complete track especially for HVAC contractors at its [2013 National Home Performance Conference](#) in Denver on April 30–May 3. In the **Heating & Cooling Track**, you will find sessions covering topics such as brushless fan motor upgrades, ductless mini-splits, zoning systems, plus best practices and lessons learned from industry experts. And, for all of those new to the home performance industry, ACI has a Fundamentals track with sessions on the basic terminology and techniques as well as tying building science to HVAC.

In addition to the conference sessions being offered in this track, ACI is also offering two 4-hour HVAC workshops on Tuesday, April 30. One gives an in-depth look into becoming more profitable by incorporating home performance with HVAC, and the other provides hands-on learning for HVAC airflow measurement. Both are included with your regular conference registration.



Review all available sessions offered at the ACI 2013 National Home Performance Conference by visiting the link below. Register for this event at www.affordablecomfort.org/national2013.

BECOMING A CARRIER[®] ENERGY EXPERT

By Carrier Marketing

Once you complete the Energy Experts training requirements (outlined in your binder and on HVACpartners), you're very close to receiving the distinction of being an Energy Expert. Just follow these last steps to become activated in the system so you can start promoting your business as a provider of Home Performance services.

- 1) Complete the required technical and business training classes.
- 2) Send the following items to the FAD administrator per the contact information below:
 - a. Ten (10) of your recent energy audits that include the data collection form you used to gather test results and home observations, **AND** the customer presentation you used to review your findings and recommendations to the customer. **NOTE:** *You can submit audits using your dealership's current audit form, or contact your Territory Manager for a copy of the Carrier 360 Data Collection Form, which he or she can download from HVACpartners.*
 - b. A signed Energy Experts agreement which was part of your 2013 CFAD application.
 - c. A copy of your BPI or RESNET technical training certificate (if RESNET please include name of your Rating Provider) showing proof of coursework completion and satisfactory exam results.

Send the above information to:

FAD Administrator: Fax 877-523-7194 OR

Scan/Email to carriermarketing@mmcweb.com

Or, mail the paperwork to:

Carrier FAD Administration, Attn: David Maxam
29 Industrial Park Drive
Binghamton, NY 13904



turn to the experts 

BPI CELEBRATES 20 YEARS OF RAISING THE BAR!

Article Submitted by BPI

More than 20 years ago a group of building tradesmen and weatherization program professionals had a vision for independent, third party verification of worker skills in the weatherization industry. From this vision the Building Performance Institute took its first steps in 1993.

Since then BPI has played a pivotal role in shaping the nascent home performance industry by developing technical standards, credentials and quality assurance relied upon by thousands of contractors. Today BPI certified professionals hold over 43,000 active certifications across all 50 states and seven foreign countries. More than 150 energy efficiency programs specify BPI credentials to ensure quality. Over the next 20 years BPI will continue to raise the bar, helping contractors provide safe, high quality and cost-effective home performance solutions to homeowners around the world. [Take a walk through BPI's history.](#)

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