

# Energy Efficiency and Natural Gas Utilities

## Professional & Business Development: Building capacity for growth

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### HOME UPGRADE PROGRAM & CONCIERGE MENTORING PROGRAM

#### Overview of the Home Upgrade Program

Administered by **Pacific Gas and Electric Company** (PG&E) within its service territory, Energy Upgrade California® Home Upgrade is a statewide program that offers incentives of up to \$6,500 to homeowners who complete comprehensive energy-saving retrofits on single-family and two to four unit residences. The program leverages a network of participating contractors to take a house-as-system approach to maximize energy savings for customers. Customers must work with a participating contractor to install multiple measures that maximize energy savings. These include duct sealing or replacement, whole building air sealing, attic, wall, floor, or duct insulation, high efficiency furnaces, water heaters, air conditioners, and efficient windows.

#### Home Upgrade Concierge Mentoring Program

In northern California, PG&E relies on its network of participating home performance, insulation and heating ventilation and air conditioning (HVAC) contractors to promote home performance as well as sell and install energy savings measures. As both the face of the program and the boots on the ground, the participating contractors are vital to the success of the program. Approximately 20 percent of these contractors install 80 percent of the energy savings measures for the program.

Traditional “key account management” focuses on expanding support to this 20 percent; however this method does not focus on growing the contractor base to meet needed program scale. Typically, key accounts receive the majority of attention, while low performers receive the majority of the training, leaving much of the contractor network with limited support. To better support and engage potential high-volume contractors, PG&E in conjunction with **Build it Green**, a San Francisco Bay Area non-profit, developed an innovative approach to key account management called Concierge Mentoring. In this approach, the high-performing contractors and those with the greatest potential to scale or grow (not just in volume) receive 80 percent of the training and development resources.

Concierge Mentoring connects contractors with experts in home performance business strategy and marketing. Mentors travel to the contractor business to work one-on-one to create customized solutions that remove business barriers and improve the quantity and quality of their work in the Home Upgrade Program. Offerings include:

- Hands-on training in business development, sales, and marketing to grow their businesses and improve operational efficiencies.
- Support and training to implement quality management systems that increase profit margins and reduce non-conformance costs.

- Training by industry experts in the latest building science knowledge and skills set. Additional resources through partners and collaborative opportunities.

## **Program Results**

Since the inception of the program in January 2015, Concierge Accounts have completed on average 25 percent more jobs than Key Accounts, and over 50 percent more jobs than non-key accounts. The typical Concierge account job includes a larger number of program measures and is more profitable: one contractor experienced the highest profit in 30 years of business. Additionally, these contractors have closed more sales and have generated more qualified leads than Key Accounts.

In addition to increasing contractors' ability to scale their business, Concierge Mentoring has improved the quality of work through professional development and training. Through an on-demand online-learning system, contractors can fill skills gaps through tailored training. As a result, contractors are better able to convey and deliver value to homeowners in the Home Upgrade program.

PG&E continues to refine and develop the Concierge Mentoring program with Build it Green and is committed to the professional development of the home performance workforce.

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**Web Links:** Home Upgrade Energy Upgrade California <http://www.homeupgrade.org/grow-business/business-mentoring-support/>

Home Upgrade Customer Information page <http://www.pge.com/homeupgrade>

*Pacific Gas and Electric Company serves Berkeley, Davis, San Mateo, Fremont, and Sunnyvale, California — five of 50 communities across the United States competing in the Georgetown University Energy Prize to make the most significant impact on energy savings.*