

## Talking Points for Follow-up Calls to Participants

**What customer information is Efficiency Vermont providing?** Efficiency Vermont will provide Button Up Community Partners with a spreadsheet of residents in your town who have signed up for a free walk-through. The spreadsheet will include contact information and a status update of where the customer is in the process.

**When will Efficiency Vermont be sending the customer information?** Our plan is to send each participating Button Up Hero community with an updated spreadsheet on the 15<sup>th</sup> of each month.

**What is purpose of the follow-up calls to participants?** The primary purpose of these calls is to encourage residents to move forward with completing their home energy project and to answer whatever questions you feel comfortable answering, such as information about Efficiency Vermont incentives or the Heat Saver Loan program. Thus, we are asking you to make calls to participants in your town after they have received the proposal from the contractor. Efficiency Vermont's Customer Support team is available to provide support to you and the participants. Their number is 888-921-5990. Remember that if the homeowner commits to moving forward with their contractor by Earth Day (4/22/2018), they will be entered into a prize drawing for \$500 toward their project – to be received upon completion.

**When should we call participants?** We suggest calling approximately 2-4 weeks after the contractor has submitted the proposal. When we have the information from the contractors, we will provide the date when the participants received their proposal.

**What if customers have questions about their contractor proposal?** If individuals have questions about their contractor proposal, encourage them to talk directly with the contractor. If they have already talked with the contractor but still have questions, please refer them to Efficiency Vermont's Customer Support staff at (888) 921-5990. Please do not attempt to make recommendations about what actions participants should take!

**Below are a few bullet points when making the call:**

- Introduce yourself: give your name and the name of the organization you are representing, e.g. local energy committee. Be clear that you are a volunteer and that the purpose of the call is to check-in to see if they got the contractor proposal and what their plans are for moving forward.
- Ask if they have any questions about the process or what to do next
- Encourage them to talk directly with the contractor if they have questions about their proposal
- Refer them to Efficiency Vermont at (888) 921-5990 for technical questions or specific questions about their proposal (if they have already talked with their contractor)
- **Loan info**

**Does Efficiency Vermont need any information after the call?** If you speak to a homeowner and learn that they have selected one contractor over another; have decided NOT to move forward; have decided to complete the work; or have had an issue with their contractor, please pass this information along to Efficiency Vermont. Feel free to add notes to the spreadsheet or simply reply to the email. We can follow up with the homeowner as necessary.