

Sales Tips and Best Practices for Installers

Many homeowners think of energy-efficient products and services as premium options, and installers often rely on upselling to promote these features. Rather than upselling, try reframing the discussion to show that energy-efficiency upgrades can provide several solutions that address the homeowner’s pain points while providing superior comfort and savings.

This approach opens the door to packaging sales of complementary upgrades and increasing the volume of projects, which can lead to valuable referrals and happy customers. Implement these best practices in your sales process:

Cross-sell energy-efficient services.

Add value to the energy-efficient products and services you offer by recommending other services that allow the homeowner to get more from their investment. For example, tell the homeowner how duct sealing can maximize the effectiveness of the added insulation.

Recommending services your company does not provide, communicates to the homeowner that you have their best interests in mind when it comes to savings and energy efficiency. Consider a lead-sharing agreement with an installer in your area to perform services you recommend but do not provide.

Primary Product or Service	Complimentary Products or Services		
Air & Duct Sealing	Attic Insulation	Floor Insulation	
Single-Family Insulation	Air Sealing	Duct Sealing	Smart Thermostat
Multifamily Insulation	Duct Sealing	Window & Door Replacement	
Manufactured Home Insulation	Duct Sealing	Heat Pump Water Heater	
Heat Pump Water Heater	Ductless Heat Pump	Single-Family Insulation	
Ductless Heat Pump	Heat Pump Water Heater	Window & Door Replacement	Single-Family Insulation
Window & Door Replacement	Single-Family Insulation	Multifamily Insulation	
Air Source Heat Pump	Duct Sealing	Smart Thermostat	

Reach out to past customers.

Keep a list of completed installations, and note in each case additional energy-efficient upgrades the homeowner should consider to maximize energy and money savings. Use this list to send follow-up communications to ask about satisfaction, and introduce compatible products and services for their consideration. Focus on comfort and savings, and remember to mention current utility incentives and tax credits.

This strategy capitalizes on the trust and familiarity you've earned with the homeowner to increase the likelihood of converting another sale. Compared to a new customer, an existing customer is more likely to listen to you and act on your recommendation, based on the service and value you've already delivered.



Validate your recommendations with data and personal experience.

When making recommendations for energy-efficient products and services, back up your claims with data. This will help you gain the trust of even the most discerning homeowner and increase your chances of making the sale.

Use information from trusted and familiar third-party sources such as ENERGY STAR®, along with industry studies and anecdotes from your installation experiences. When possible, offer to send supporting materials by email or text message. In each case, share real numbers with the homeowner and make it personal by relating the discussion back to their home.

For in-person and impartial third-party support, [ask your Comfort Ready Home Field Specialist](#) about joining you for a ride-along.

Bring upfront costs down with incentives.

Although energy-efficient installations often end up saving homeowners money in the long run, their high upfront costs can be a big barrier. Equip yourself with the latest information on the incentives offered by utilities in your service area to pass on immediate savings to your customers. Explain to homeowners that utility incentives are short-term savings opportunities that help make long-term savings from energy-efficient upgrades more accessible.

This is especially important for lower-income and income-qualified customers who may be eligible for additional savings. Requirements for these programs can vary. For help understanding the requirements, incentive amounts and rules for participating, [contact your Comfort Ready Home Field Specialist](#).