



WHITEPAPER

Tips from
Industry
Experts:



Leveraging Utility Data to Drive Client Engagement

Find. Track. Prove.
ENERGYPRINT®



INTRODUCTION

We asked several leading business development professionals in the mechanical and building automation arena to share how they've become trusted advisors delivering energy-related projects and services. And they all agreed—it starts with a *simple conversation*.

Approximately 30 percent of energy consumed by commercial buildings is wasted (EPA)—that's the bad news. The good news is...you can do something about it.

Talking about energy performance doesn't need to be awkward or intimidating,

and you don't have to be an energy expert to leverage energy expertise. Most building owners and managers simply don't track or understand energy performance in consistent and meaningful ways.

Becoming the trusted advisor delivering energy-related projects and services starts by opening the conversation with simple facts about building performance.

Better energy performance and energy solutions go hand in hand. You can't have one without the other. In fact, even the most basic energy audit can help identify persistent problems and suggest an action plan. Don't leave money on the table because you're uncomfortable or unsure about how to approach your clients.

We'll guide you through a simple step-by-step process from qualifying clients, to identifying common obstacles and overcoming objections. With a little planning combined with rich data insight, you'll approach energy conversations with

ease, positioning you and your company as a trusted energy partner and even tapping into new revenue streams that you may have previously overlooked or ignored.



"Every single building has operating issues and inefficiencies. So even when the client thinks they don't have the budget to make improvements, we help them understand that they actually do—they're just giving that money to their utility company every month instead."

— Jack Lann
Business Development Manager
Building Technology Systems

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Qualifying Clients

As with any complex sale, qualifying your clients early and often is a major key to success. Benchmarking is a simple and easy way to get both an accurate snapshot of a building's energy performance—relative to its peers, against industry standards, or even against itself over time—and assess your client's interest in digging deeper.



"The first thing I do is qualify the opportunity. I look at my customer's pain points, goals and motivating factors, and together we determine if there is a mutual interest and if both parties are ready to move on to the next step"

— Michael Trapani
Project Developer
McKenney's

Frankly, benchmarking is not very expensive and may even be included as a "value added benefit" or as a "free trial" to initiate a relationship. Either way, it's easy to understand how modest investments up front can yield substantial returns over time.

If your client doesn't see the value or can't justify committing resources to acquiring and analyzing basic benchmarking data, chances are they won't want to spend money on efficiency improvements. Don't waste your time pursuing clients who have no real interest in energy savings or simply don't have the budget, cash flow or the organizational drive to make meaningful changes.

"Benchmarking a customer's utility data helps us assess how a building is doing right off the bat. We want to know as soon as possible that if we bring something to the table, the client will proceed with it. That really helps us focus our efforts on the opportunities with the best chance for success."

— Scott Kattwinkel
Optimization Engineer
Damuth Trane

"I engage clients by showing them work we've already done where the customer saved money. Having simple visuals with some clear talking points really gets their attention."

— Andy Lufkin
Project Manager
ACCO Engineered Systems



Qualifying Clients

Similarly, you need to assess how energy use and efficiency directly impact your client's bottom line—or not. Different vertical segments have different priorities, different concerns, different pain points. Those that simply “pass through” energy expenses to their tenants or another third-party may not be as interested in energy performance. Conversely, those whose energy use

and consumption directly impact their budgets almost certainly have a keen interest in better understanding how they're doing. Knowing this difference is key.

Contractors and other building professionals who can effectively align their energy solutions with a customer's business and strategic goals have a major advantage over competitors who don't. And whether your client's

goals include reducing inefficiency and waste, proving potential savings on capital improvement projects, or increasing building ROI, there's a way to leverage energy performance metrics to identify opportunities and implement solutions.



“Asking strategic business questions that focus on solving your client's pain points differentiates you from your competitors. Understanding your client's business and putting yourself on their side of the table positions you as a trusted strategic partner.”

—Michael Trapani
Project Developer
McKenney's



Anticipating Obstacles and Overcoming Objections

According to a 2016 survey of EnergyPrint clients, the number one business challenge facing many contractors and other building professionals is communicating real value and justifying energy improvements to building owners.

Don't let obstacles get in the way. Rather, use them to guide your discussion and connect with your client's concerns, turning potential weaknesses into strengths that give you a competitive edge. In fact, identifying obstacles up front can not only help you avoid costly mistakes, it can also streamline your sales process and increase your sales efficiency. Most obstacles that hold your client back are easy to predict and quick to diagnose. Anticipate potential stumbling

blocks and start to navigate around them before they begin to derail your proposals.

Start the conversation by asking simple, business-oriented questions that establish a strategic framework for potential building improvements and other energy-related products and services. Listen carefully to your client as you guide them through your questions, using your strategic framework to cost-justify capital expenses and demonstrate ROI, greatly improving your chances of closing the sale.

Next, we'll take a look at some basic questions that help uncover the logic behind common objections and discuss simple ways to overcome them and solidify your case.

"Selling service solutions is complicated. Utility bills are complicated. A lot of professionals don't understand what all the numbers mean. I was one of them. Partnering with EnergyPrint has helped me navigate the complexity and focus on the metrics that actually matter."

—Eddie Dunn
Building Services Consultant
CCAC Building Solutions

"If you start by telling your client what they need to fix their building, you'll step on their toes and won't get very far. Rather than proposing energy solutions right away, we ask a lot of leading questions and 'listen them' into buying what they need."

— Jack Lann
Business Development Manager
Building Technology Systems

Anticipating Obstacles and Overcoming Objections



LACK OF KNOWLEDGE AND INSIGHT

A huge number of building professionals have no real understanding of their building's true energy use, much less its efficiency and real-world costs over time. The headline for these clients is simple: **they don't know what they don't know.**

Generally, it's not that customers are disinterested; energy use and efficiency just isn't top of mind. They have other priorities and concerns. They don't have the time, capacity, or expertise to gather and review energy data to make an informed assessment. Or maybe the problem is organizational: the department that pays the bills doesn't communicate with the department that tracks energy use, or the group who manages the building.



"Customers often operate in reactionary mode. Something is broken, they need it fixed quickly. They don't feel like they can stop to think about how the whole system is performing."

—Michael Trapani
Project Developer
McKenney's



Ironically, starting a conversation with these clients can be incredibly easy. Simply dive right in with some very basic questions.



How do you currently manage your utility bills?



How do you track your costs?



Who tracks your costs?



Do you know how your building is performing?

- » Over time?
- » Seasonally?
- » Relative to its peers or other buildings in your portfolio?

Anticipating Obstacles and Overcoming Objections



If your client doesn't know the answer to one or more of these questions, chances are they don't know what they don't know. Most importantly, if they don't care what they don't know and have zero intention of doing anything differently, move on. Don't waste more time. You've done your due diligence and qualified the client. Clearly, there isn't a fit. No worries. Better to invest minimal time and effort now

than waste valuable time and resources later.

Often, however, your client will show at least some interest in better understanding their energy performance. Perfect. Talk about next steps and gauge the client's interest in finding solutions.

For example, you could offer to send a detailed case study that showcases a similar building. If you're an

EnergyPrint client, you have access to our case study library that includes real-life benchmarking success stories from our proprietary database. Showing your client concrete "apples to apples" examples is an excellent way to forecast their willingness to move ahead, and position yourself as a trusted energy advisor.



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Anticipating Obstacles and Overcoming Objections



IT'S EASIER TO JUST PAY THE BILL

Sometimes, clients are fully aware that they're wasting energy, but it's easier to just pay the bill. Their biggest obstacle isn't lack of awareness, it's a lack of access to funds. They simply don't have the cash flow or capital to green light an expensive project.

In many ways, this problem helps illustrate the difference between data and insight. Objectively, the data tells them that they're wasting money. But without rich data insights, diagnosing the exact problem—or even fully understanding how much it impacts their bottom line—is merely an educated guess. They don't know how to turn their data into meaningful insights and actionable intelligence.



“When you start talking about saving significantly on utility bills, clients become far more interested in a real discussion about building solutions.”

– Tommy Mayhew
Business Development Manager
Daikin Applied



Start by asking a slightly deeper level of questions in this case and see where the answers lead you with your client.

- ? If you could save 10% or 20% in utility costs, what would that mean for your business?
- ? What are your biggest pain points in managing your building?
- ? What would it mean if I could solve those problems for you?
- ? How can I help you build a business case for savings?

Anticipating Obstacles and Overcoming Objections



Data visualization services, such as EnergyPrint's Utility Dashboard, can provide building trend reports, ENERGY STAR® performance, weather normalization and cost avoidance reporting with objective Measurement and Verification. Unsurprisingly, user-friendly graphs and visuals can help clients get a clearer picture of their total energy use, as well accurately diagnose inefficiencies and trends. And with rich data insight at their fingertips each and every month, clients can easily track ROI and prove project savings—past, present and future.

Often, with a concrete time horizon that objectively demonstrates exactly when a capital improvement project will pay for itself, key decision-makers will green light energy efficiency projects that they previously felt were too costly or unrealistic. Bottom-line dollars will speak for themselves.



"No one wants to come in last. If you can help a client see their building is performing 30-50% below peers, that's where you drive the discussion. Use utility data with comparative visuals to illustrate and build the case for improvements."

—Tommy Mayhew
Business Development Manager
Daikin Applied

Anticipating Obstacles and Overcoming Objections

CLIENTS DON'T WANT TO LOOK BAD

No one likes to look bad, not in front of their peers and certainly not in front of their boss. Predictably, some clients are fearful of establishing an energy use baseline because they're afraid it will expose inefficiencies and waste that reflect badly on them. Navigating this obstacle can be tricky. In truth, you can't guarantee your prospects or clients that they won't be confronted with news they don't want to hear about their building.






"You need to feel confident in the energy solutions you're proposing to get the client to understand and trust you. Whether you use EnergyPrint or something else, you have to back up what you say."

—Eddie Dunn
Building Services Consultant
CCAC Building Solutions



Lean on your people skills and remember: it's all about bill reduction and ROI. Focus on the institution, not the individual, and ask them some "big picture" questions.

-  What are your biggest pain points in managing your building?
-  What would it mean if I could solve those problems for you?
-  What is your owner or management team's overall investment strategy?

Anticipating Obstacles and Overcoming Objections



Build trust with your client and keep them engaged by using objective utility data to prove your value as a trusted energy advisor. Remind them that you're on their side. By solving their energy use problems and reducing inefficiency, they can positively impact their organization's bottom line and demonstrate the objective value for themselves and their department.

Naturally, building owners don't want to make costly capital improvements based on mere anecdotal evidence or a hunch. They want clear, objective data that supports their financial decisions and demonstrates meaningful ROI. Building trust with clients is the key to keeping them engaged. Use utility data to position yourself as a trusted energy advisor. Combine good data with the right people and skills to implement the best projects for the client.



Building trust with clients is the key to keeping them engaged. Use objective utility data insight to position yourself as a trusted energy advisor.



ENERGY CONVERSATION TIP SHEET

Starting an energy conversation with your clients doesn't have to be awkward or intimidating. Be thoughtful and prepared in what you want to say and take things one step at a time.

Be a building solution expert and let utility data be your guide

You don't have to be an energy expert to leverage energy data. Almost every building has inefficiency or waste, so use what every building already has available to point you in the right direction—utility data. And put it in simple terms and visuals that are easy to talk about (of course, we do that for you).

Find clients who care about reducing utility expense

Some clients don't know what they don't know—that's why they need you to be their trusted advisor. But even the best relationship-builder can't make someone care. Ask a few qualifying questions and make sure you don't waste your time with clients who won't make a change.

Know the business priorities of various vertical markets

It's easy to think you should go to every client with a message of bottom line savings, but different building verticals care about saving energy for different reasons. Know who pays the bill, and who will benefit if that monthly bill gets smaller—it will save you a lot of time chasing down financial decision-makers.

Listen to their objections and use them to your advantage

Many clients are afraid to admit they don't know how their building is performing. It's your job to initiate a discussion about what could be gained with better performance. Ask business-related questions to guide the conversation to what can be gained, and demonstrate how you will prove it.

Everyone wants to look good, especially to their boss

If your clients don't know how their building is performing, they might be worried about looking bad. Build their confidence by asking them to start with simple things, like benchmarking, and low cost/no cost improvements. Think ahead about how you can help them tell the story of improved performance and better efficiency.

In the end, it's all about being the trusted advisor

The best partners stay connected with valuable touchpoints—and energy insight will keep you engaged in an on-going conversation. Combine good people, expert building solutions and energy data insight to position yourself as the go-to trusted advisor. You'll be there consistently, and the conversation about building performance will never end.



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CONCLUSION

You cannot help clients manage what they are not willing to measure. To demonstrate value, differentiate services, and be the trusted advisor, you need data and insight and to offer solutions that make a real difference to both building performance and the bottom line.

"We use EnergyPrint to show our value, demonstrate success and deepen the relationship. You have to build confidence that you can make a building perform better, and convince the client that they will be a hero."

—Matt Long
Account Manager
Casto Technical Services

CONTRIBUTING PARTNERS:



Find, Track & Prove energy savings for the buildings you serve.

Are you ready to leverage the true power of utility data for your business? With EnergyPrint's utility tracking and data services, you will eliminate unnecessary administrative burden, increase operational efficiency and keep your customers engaged for the life of the building—and beyond.

Better insights, better engagement, better opportunities.

Learn More



Connect with us:



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