EMPOWER your customers to say:





Integrating Financing to Close More Deals!

Go Greener Academy 7/23/2024

for NEIF-Approved Contractors

Presented by:

Ed Matos

VP-Business Development



From NEIF- The National Leader in Energy Efficiency Financing

- The NEIF Seal of Approval for Contractors means:
- Access to <u>all</u> NEIF's financing programs
 - Special utility and government programs for targeted improvements
 - No Contractor-Fee EnergyPlus financing for all types of home improvements
 - Small Business and Commercial Financing and Rebate Advance Funding
- **Reputational enhancement** for your company by association with the nation's only Certified B-Corp, US DOE Home Improvement Expert and FORTIFIED partner lender
- **Benefit from NEIF's Alliances** with green banks, utilities, manufacturers & associations for special insights and programs
- Expert sales training, sales tools and support for your team to increase closing rates
- Marketing and branding programs to help you differentiate your company, broaden your market and promote fair, trusted affordable financing options to your customer





Today's Session





- Strategies to successfully integrate financing EARLY & OFTEN in your sales process.
- How to empower your salespeople to sell monthly payments with CONFIDENCE!
- Methods to change the conversation with homeowners and eliminate price objections.

Sales Process 101





COMPONENTS OF A SALES PITCH



Introduction



Value Proposition



Call to Action

Connect Marketing to Sales





Must Have an Integrated Marketing and Sales Process

- Financing on Website
- Phone Intake Process
- Utilize NEIF Pre-Screen
- In-Home Sales Process
- Sales Proposal Must Stress:
 - Affordable Monthly Payment Options!

Financing on Website









Phone Intake Process





"At the conclusion of your assessment your home energy specialist will provide you with the right solution to make your home more comfortable and energy efficient. He/she will also provide you a set of affordable monthly payment options so you can set things in motion to have your system installed and be saving money this spring.

Does that sound like a plan?"

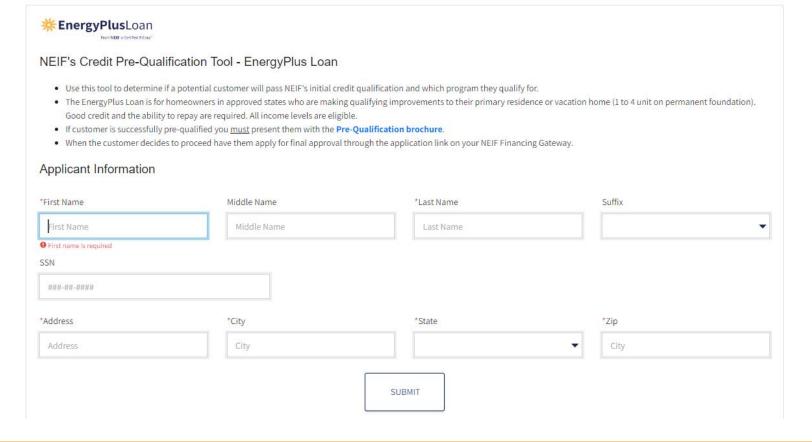
Utilize NEIF Pre-Screen Tool







Residential Prescreen



In-Home Sales Process





A sales process that sells on value not price!

- Build Rapport
- 3rd Party Validation
- Explain the Process or Program
 - Use NEIF Explainer Video!
- Leverage Tax Credits, Rebates & Savings
- Always talk in Terms of Monthly Payments

In the Home, Don't Ask...Assume!





- "We have a good financing option, is that something you would be interested in?" NO
- As we mentioned on the phone when you called, we have a set of monthly payment options we can show you to pay for these upgrades, which is certainly the best way to go about these projects. I will go over everything with you once we develop your solution! YES

Sales Proposal









Use this Monthly Payment Estimator to compare different options for qualifying EnergyPlus financing from the National Energy Improvement Fund.

| Price for Option 1 | P |
|--------------------|---|
| \$7,000 | |
| Term 3 Years | T |
| 5 Years | |
| \$104 per month | 9 |





Stress the Benefits





- Simple Interest Unsecured Loan No lien on property
- Low Guaranteed Fixed Monthly Payments Not a credit card or teaser rate
- Complete Flexibility on How Much Interest You Pay –
 pay off or pay ahead with no penalty!
- Simple, Transparent, Expert, Trusted Financing from the nation's most experienced B-Corp energy improvement lender