

Summary

This study identifies gaps between the sales-related training needs of the HVAC workforce and the industry's current education and training practices. It also identifies actionable recommendations to address those gaps.

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Use of this document

This document provides industry input on HVAC Sales Training Gaps and Recommendations.

It is based on an official [WHPA Work Product](#) of December 11th, 2013 titled "Sales Force & Service Working Group Gaps Report." This Work Product was developed by the WHPA Sales Force & Service Working Group.

This document, and also the WHPA Work Product, may be used in part or whole at no charge. Attribution to the Western HVAC Performance Alliance is requested.

We would also ask that you inform the WHPA through info@performancealliance.org if you have made use of either document, so that we can inform and encourage the hundreds of volunteers who donate their time to providing expert HVAC advice in order to support energy efficiency objectives.

HVAC Sales Training Gaps and Recommendations

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Background

The Sales Force & Service Working Group was launched in April 2012 to identify gaps between the sales-related training needs of the HVAC workforce and the industry's current education and training practices and to identify actionable recommendations to address those gaps. The driving question was, “What or where are the gaps between where we are today and where we need to be by 2020 and how can we fill those gaps?” This report is organized into five sections, each addressing an identified gap in sales-related training.

Gap 1: Lack of Awareness for Potential Energy Savings

- Gap exists in both residential and small commercial end-user arenas.
- There is insufficient usable and vetted research data or studies, which document and support that significant energy and HVAC system operation savings result from quality installation and quality maintenance (QI/QM) practices.
- End users are generally unaware of the magnitude of the savings available from the selection of both energy efficient HVAC systems and quality maintenance of their systems.

Recommendations

- Promote the use of energy savings literature, software, and appropriate case studies in energy efficiency programs; make those materials available for use by HVAC contractors and end users.
- Increase advertising and outreach to end users drawing attention to the full complement of benefits that accrue as the result of systems installed and serviced pursuant to accredited standards. For non-residential customers, focus on communications through their associations.
- Locate and disseminate currently available vetted energy and operational savings research.
- Support the funding of research to determine the range of energy and operational savings through the implementation of QI/QM practices.
- Encourage participation of WHPA member firms in the design and implementation of QI/QM research.

Gap 2: Contractor Sales Training

- Contractor Sales Training does not currently focus on the contractor’s role as an energy efficiency consultant or on the development of the value proposition for energy efficiency improvements.

Recommendations

- Establish customer role and responsibility for their building(s) energy efficiency.
- Recognize energy conservation opportunities. Training time should be spent in the understanding, developing, and delivering of the cost and benefits of energy efficiency improvements in order to capture a larger public mind share around energy conservation opportunities.

- Develop a compelling value proposition. Introduce new and extensive sales training around defining, developing, and presenting HVAC value propositions for energy efficiency and operational improvements.
- Emphasize life-cycle benefits over-and-above training on utility program parameters, incentive levels, and first costs. Increase training about financial selling terminology such as “life-cycle costs,” “net present value,” and “return on shareholder investment,” and how energy efficiency, comfort, reliability, good indoor air quality, and prolonged equipment life can be explained in these terms. Through these means, the value proposition surrounding high-performance HVAC will be better understood.

Gap 3: Energy Savings Estimation Tools

- There is a lack of awareness of existing energy efficiency tools in the marketplace and how to use them effectively in the customer dialogue.

Recommendations

- Establish and widely publicize a statewide clearinghouse for new and existing cost-effective and reliable software tools, which enable contractors and end users to calculate and project HVAC energy and operational potential savings. This will include but not be limited to:
 - Software for whole building energy use modeling.
 - Building HVAC system modeling.
 - Specific subsystem/component energy impact modeling which industry has developed for:
 - Packaged equipment selection,
 - Energy Recovery Ventilator (ERV) impact and climatic-appropriate use,
 - Ventilation and economizer strategy energy impact,
 - Variable frequency drive pump and fan energy reduction projection,
 - HVAC damper options and impact, and
 - De-humidification technologies.
 - Make participating contractors and end users aware of all known and available energy efficiency programs and all reliable energy efficiency tools. Some are available at no cost.
 - Suggest that HVAC energy efficiency programs include identification of, access to, and training on the use of savings tools.

Gap 4: Utility Program Manager Training

- Few utility program managers have had sales training or sales experience and most do not include or value inclusion of a sales component in their program.

Recommendations

- Establish appropriate sales training for utility energy efficiency program managers.
- Include a sales training component in all energy efficiency programs.
- Involve key HVAC stakeholders in utility program design. The committee highly recommends involving all utility program development and implementation staff, including construction and service contractors as well as facility managers.

- Ensure that program implementers have established goals to continuously improve their program processes and methods. Begin the improvement process in early program “pilot” phases.

Gap 5: Compliance Enforcement and the Sales Process

- Both residential and commercial consumers are not aware of the value of code compliance or the cost of non-compliance.
- Having little existing effective compliance enforcement structure or operational regulations for HVAC new construction or major retrofits greatly affects the competitive sales process and makes the sales side of the energy efficiency dialogue more difficult.
- To our knowledge, there are no California regulations (codes) that require energy efficient operation for existing home or building.
- Many compliance enforcement personnel lack the capability and training to properly evaluate advanced HVAC devices, components, or system operation.

Recommendations

- Include emphasis on applicable building codes in sales training. Assemble industry sales and marketing professionals to develop talking points for sales people about the importance of code compliance. Explore creative means to educate consumers regarding the benefits of code compliance.
- Create and implement energy efficiency codes for new and existing homes and buildings made enforceable through a sampling of inspections.
- Increase funding to support an adequate number of trained and qualified inspectors for all energy efficiency related programs.
- Improve enforcement inspector training to include energy efficient building performance. Provide means for inspectors to accurately measure HVAC system performance.