

RETROFIT SALES PLAYBOOK

CERTIFIED ENERGY EXPERT® PROFESSIONALS

April 2024

WHY A PLAYBOOK?

Retrofit work can help to yield higher margins and bring in a continual cash flow for your business. But to succeed in this space, you must first have the right strategy in place. To set your business up for success, it's critical to have standardized processes — from getting leads to gathering customer reviews.[1]

Not everyone has the personnel and infrastructure in place to build a retrofit program from scratch. So, we're here to help. This playbook has been designed using guidance from experienced experts who have "been there and done that." Leverage the following assets, recommendations and strategies to generate more retrofit work and WIN in your market.

If you have any questions or need additional support with these strategies, please send a message to ceeinfo@owenscorning.com or speak with your Owens Corning sales rep.



[1]Not a guarantee of customer leads or profits.

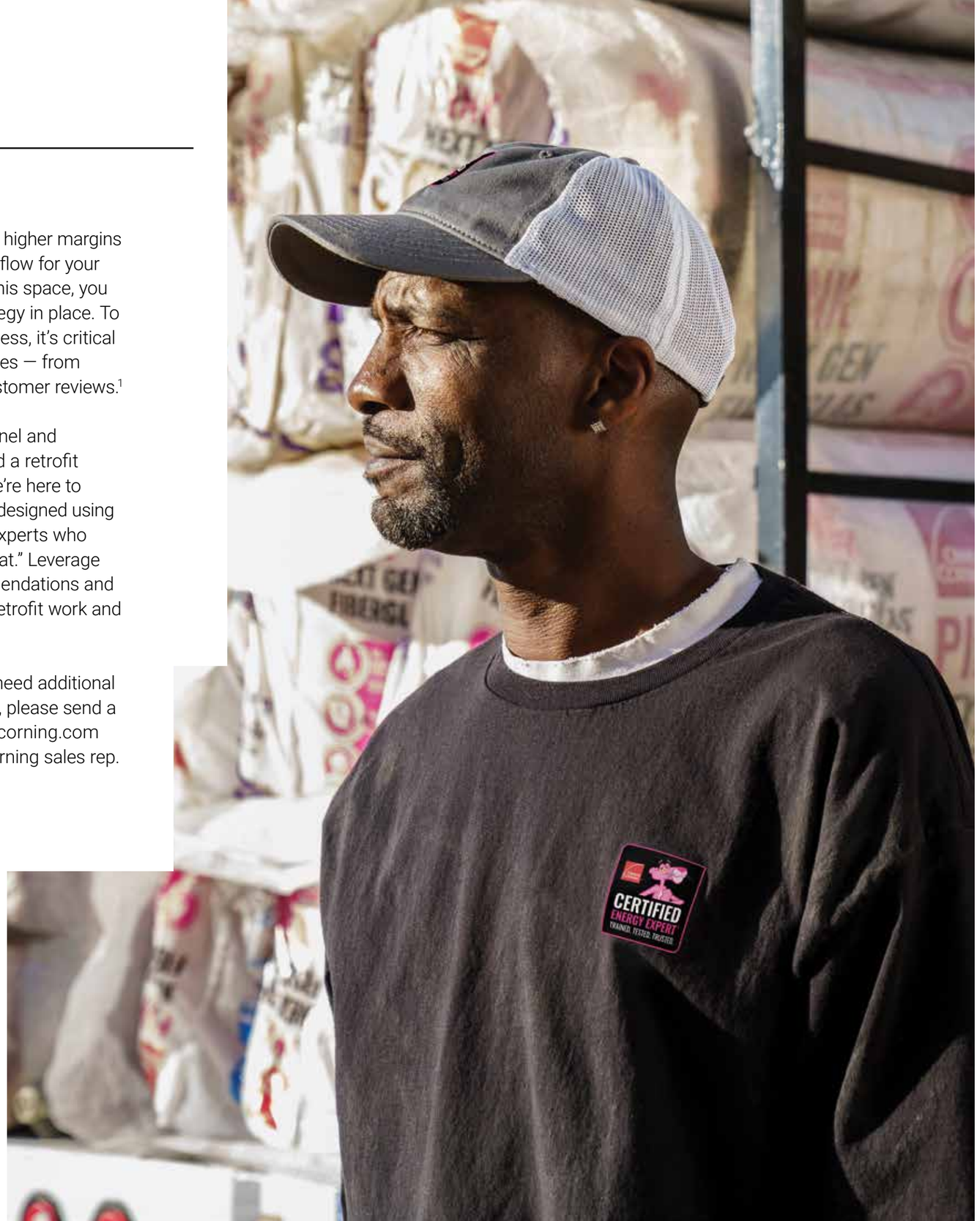


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Tips for Success

GENERATING RETROFIT LEADS

Lead generation is a pivotal part of establishing the retrofit portion of your business. You'll find that your approach to generating new business will continually evolve. You must constantly adjust your strategies, tools and spending as you go. Here are some tips that will help you stay on top of your game.

Update your business practices to specifically attract homeowners and establish trust.

- Outfit your sales team and installers in branded apparel. You can order a variety of high-quality co-branded items via OCConnect™.
- Market your business consistently to distinguish yourself and build upon your professional reputation. Ways to start include:
  - **Truck wraps** for a consistent brand presence
  - **Direct mailers** to reach homeowners
  - **Yard signs** to increase brand awareness
  - **Homeowner-facing sell sheets** on topics like the Inflation Reduction Act (IRA) tax rebates and the advantages of reinsulating
  - **Door Hangers** for neighborhood canvassing
- Work with the CEE team to refresh your company website. Use this checklist as a guide:
  - » Features educational content to inform homeowners
  - » Speaks to your Certified Energy Expert® status, including information about the exclusive CEE Limited Lifetime Warranty on products and workmanship
  - » Includes the latest federal tax credit information
  - » Mentions any local utility rebate programs
  - » Has an easy-to-use online form to request a consultation
- Establish a consistent social media presence for your company. Contact the CEE program if you'd like help with content or account management for the following:
  - » Facebook Page
  - » YouTube Page
  - » LinkedIn Page
  - » Instagram Page (if you regularly have photos and videos to feature)



POST CONTENT SUGGESTIONS

Wondering what to post? Here are some ideas:

- Before and after photos
- Community service/volunteer work
- Industry news or trend information
- Customer testimonials
- Meet the team photos or videos
- Seasonal tips for homeowners
- Promotions, sales and deals
- Awards or accreditations earned
- How-to videos
- Fun facts

GENERATING RETROFIT LEADS

- Reach consumers online who are seeking out your services through search engine marketing. You can enlist the CEE team to help with Pay-Per-Click (PPC) advertising through Google Ads (Search, Display & Remarketing), YouTube and Facebook Ads.

- Request online customer reviews to bolster your online reputation. Research suggests that the average consumer reads 10 reviews before feeling able to trust a business. Equip your crews with Google Review Cards, which include your logo, contact details and a customized short link and QR code to your company's Google page. Consider incentivizing employees with bonuses for collecting reviews.

- Make sure your company's presence on homeowner-facing third-party websites is up to date.
  - **Better Business Bureau** (bbb.org)
  - **HomeAdvisor** (homeadvisor.com)
  - **Angi** (angi.com)
  - **Yelp** (yelp.com)
  - **Nextdoor** (nextdoor.com)

- Consider your unique market. While the web is typically the most cost-effective way to gain leads, explore other ways to reach homeowners in your region:

Local home shows
- Advantage: face-to-face access to homeowners
- Disadvantage: high lead costs (labor)

Door knocking with appointment setters
- Advantage: can generate quality leads
- Disadvantage: high lead costs (labor)

Collaboration/cross-selling with other trade contractors (e.g., roofers, HVAC)
- Advantage: broader reach
- Disadvantage: lower margins

TIP Based on several years of past data, it's recommended that a CEE member sets a Google Ads Search campaign budget of $35 per day for their main location and $30 per day for any additional branch. You can work with a marketing professional through the CEE program who will create a campaign specifically for your business. You will also receive regular reporting so you can adjust your spend as needed.

- Know where your leads come from.
  - If needed, you can set up a dedicated phone number per lead source. Check out these web-based digital phone systems to get started:
    - **Grasshopper** (basic) www.grasshopper.com
      An affordable virtual phone system that works right on your smartphone or computer.
    - **Call Tracking Metrics** (advanced) www.calltrackingmetrics.com
      Reveal which ads generate great leads and automate pipeline engagement to close them faster.
  - Make sure your team members know to ask every potential customer how they found you and have a process in place for documenting this information.

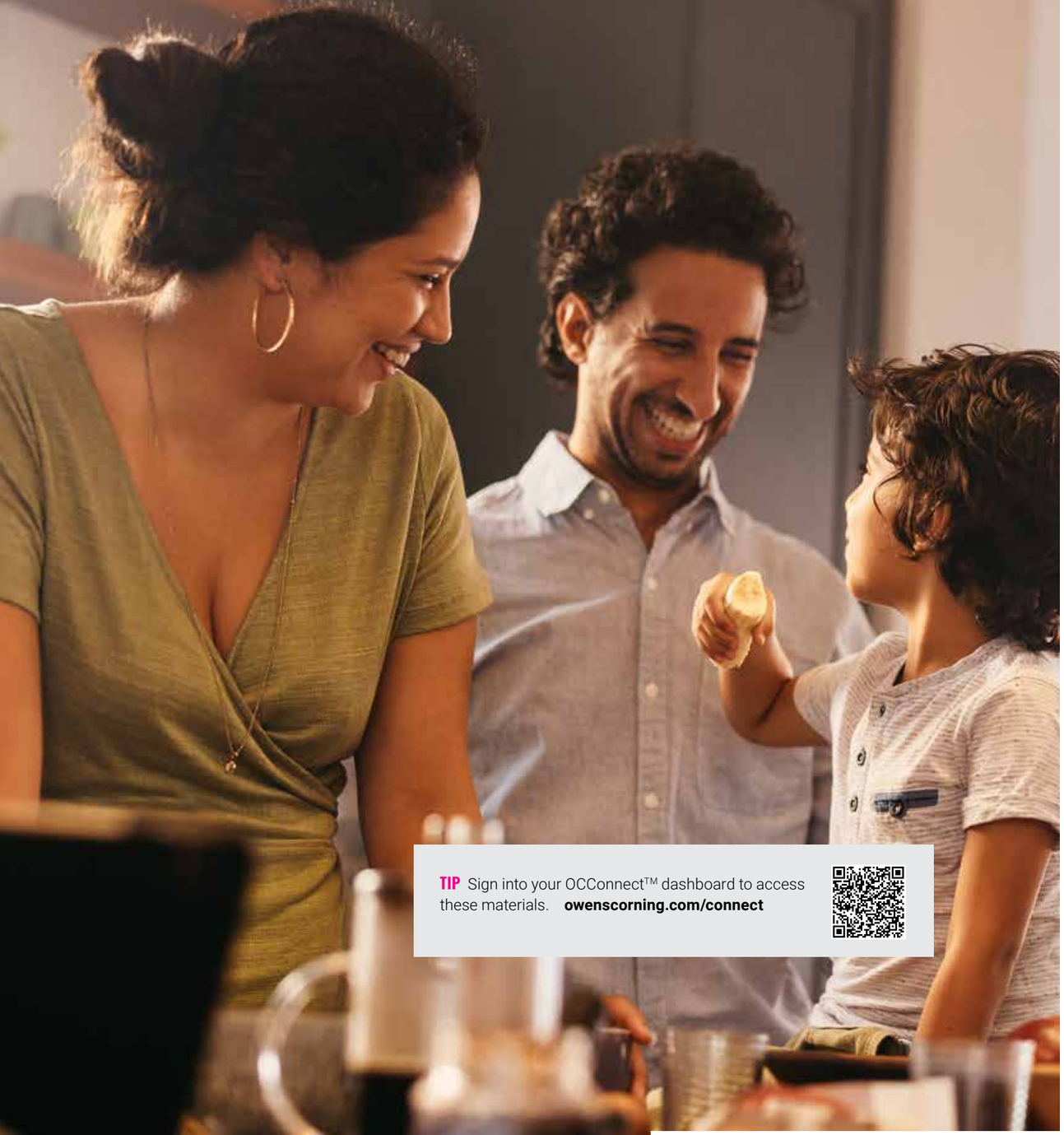
- Understand your costs.
  - The best lead generators conduct a thorough analysis of where their marketing budget was spent on at least a monthly basis. Then, they adjust their budget according to each tool's performance. Make sure you're tracking these metrics:
    - What are my **costs per lead** from each lead source?
    - What are my **costs per sale** from each lead source?
    - Does a lead source **drive high quantities** of leads that may not be high quality?
    - Does a lead source **drive high margin** leads?
    - Does a lead source have **high close rates**?
  - Here we have included ballpark spends based on our experts' input. We've included referrals with this group because a strong referral program is as valuable as any online marketing you can do.

TOOL	RECURRING COST LOW	RECURRING COST MEDIUM	RECURRING COST HIGH	TARGET COST/LEAD	TARGET ACQUISITION	NOTES
Google Ads	$500.00	$100.00	$5,000.00	$100.00	$300.00	Average ROI: 2X
Referrals	$25.00	$50.00	$100.00	$50.00	$200.00	Knock on 6 Close Doors
Home Advisor/Angie	$0	$0	$0	$75.00	$450.00	High Vol & Low Quality
Facebook/Instagram	$100.00	$250.00	$500.00	$100.00	$350.00	Drive Quaility Leads
Yelp	$500.00	$750.00	$2,500.00	$100.00	$300.00	High CNV, Cheap Clicks
Next Door	$0	$0	$0	$0	$0	Post Free, BIZ Gets Tagged

*Note: Information is based on a sampling of industry experts and contractors. It is for informational purposes only.



- Not every homeowner can afford the upfront cost of insulation. Explore adopting a consumer financing program that appeals to homeowners. Service Finance Company specializes in providing contractors with flexible finance options for their customers. With more than 80 different loan options available, Service Finance makes it easy to find the right loan program for homeowners.
  - CEE members can receive exclusive rates when utilizing this service by enrolling at https://enroll.svcfin.com/CEE.



TIP Sign into your OCConnect™ dashboard to access these materials. **owenscorning.com/connect**

Lead Scrubbing

MANAGING YOUR LEADS

Effectively managing leads allows you to better allocate your time and resources. This begins with lead scrubbing. This involves filtering out non-legitimate leads so your team can focus on valid opportunities that will yield revenue.

It is typically recommended that the individual taking inbound calls and emails for a business not be a salesperson. After all, there is a risk of a salesperson being too aggressive when scheduling the lead. The individual who responds to potential customer inquiries should be properly trained on scrubbing a lead. Specifically, have them confirm a few key details:

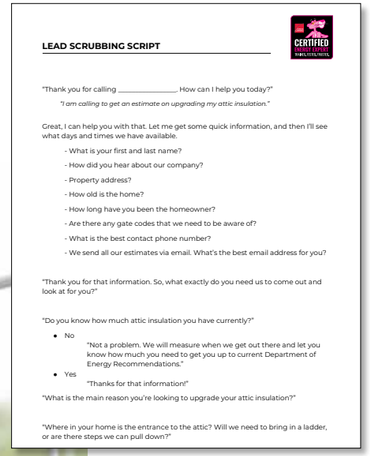
- **Is this customer looking for a product or service we offer?**
- **Do they live in our service area?**
- **Are they the homeowner?**
- **Will they be home for the appointment?**

Then, have a consistent process in place for documenting this information and following up as needed.

Sample Script

We have developed a script to help you scrub leads and maintain consistency across your business. A downloadable word document can be found on OCConnect.





LEAD SCRUBBING SCRIPT

"Thank you for calling _____. How can I help you today?"

"I am calling to get an estimate on upgrading my attic insulation."

Great, I can help you with that. Let me get some quick information, and then I'll see what days and times we have available.

- What is your first and last name?
- How did you hear about our company?
- Property address?
- How old is the home?
- How long have you been the homeowner?
- Are there any gate codes that we need to be aware of?
- What is the best contact phone number?
- We send all our estimates via email. What's the best email address for you?

"Thank you for that information. So, what exactly do you need us to come out and look at for you?"

"Do you know how much attic insulation you have currently?"

- No
  "Not a problem. We will measure when we get out there and let you know how much you need to get you up to current Department of Energy Recommendations."
- Yes
  "Thanks for that information!"

"What is the main reason you're looking to upgrade your attic insulation?"

"Where in your home is the entrance to the attic? Will we need to bring in a ladder, or are there steps we can pull down?"

MAKING THE SALE

Once you have secured a consult with a homeowner, you should have a consistent process in place for each appointment. You don't need to be the lowest-cost provider to be the best value and the right choice. We have a variety of resources available to help support you as you connect with homeowners and win their business.



"Choose A Certifed Energy Expert for Your Home"
Video *Length: 32sec*

In-home Consultation

The in-home sales process consists of four main parts:

Warm-up

Get to know the homeowner. Ask questions like:

- Why did you ask that we come out today?
- What are your goals for this project?
- How long have you been in the home?
- What other projects have you done around the house? How did they go?
- What drives your decision making?

Presentation (Part 1)

Check out our pre-made, customizable CEE sales presentation tool you can use with homeowners.

- Tell your company story, including what differentiates your business and why they should work with a Certified Energy Expert® professional.
- Educate the homeowner by explaining the benefits of reinsulating, along with some of the science behind it.

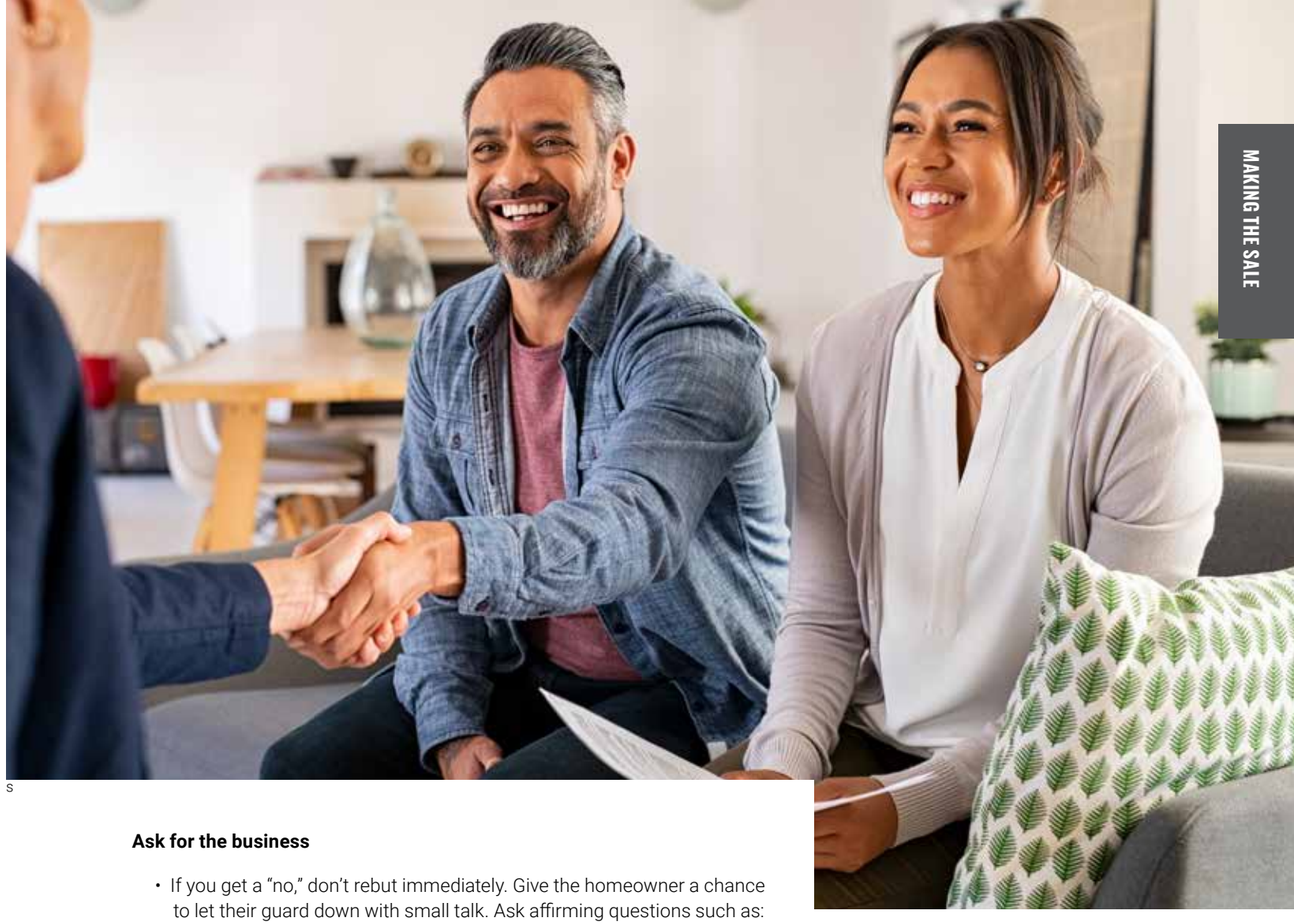
Measurement and Inspection

- Demonstrate your value and expertise as you assess the home.
- Make sure you look for other services you can help with and ways you can help make their home a better place to be.

Presentation (Part 2)

- Use visual sales tools to highlight products and their benefits.
- Provide an overview of the install process so they know what to expect from the start.
  - **Check out our customizable "What to Expect" video online!**
- Highlight the CEE Limited Lifetime Warranty in your pitch. We've included it on page 14 of this guide and within the PowerPoint presentation for your reference.
- Provide the Limited Lifetime Warranty sell sheet as a leave-behind.
- Present an estimate on the spot.
  - **This is essential. Providing an in-person estimate leads to a significantly higher close rate.**
- Share information about the IRA tax credit, as well as any utility rebate programs you know of in your area. Provide a leave-behind IRA sell sheet, so they have the information on hand (see page 19 in this guide).

TIP Sign into your OCConnect™ dashboard to access these materials. **owenscorning.com/connect**



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Ask for the business

- If you get a "no," don't rebut immediately. Give the homeowner a chance to let their guard down with small talk. Ask affirming questions such as:
  - Are you confident in the products we discussed?
  - Are you confident in our install abilities?
  - Is the warranty something that matters to you?
- Also revisit the benefits that insulation will add to their home, highlighting the added value, return on investment, enhanced comfort, and lower heating and cooling costs.

If cost is a concern, remind them of the IRA tax credit available to them. Also share financing options available if your company is enrolled in Service Finance Company.

Ask one more time!

- If needed, you can ask for a small concession from homeowner in exchange for a discount. Examples include:
  - Offering an incentive for leaving an online review
  - Asking to leave a yard sign for 30 days for a discounted price and then picking up the sign for reuse
  - Asking the homeowner to share energy bills from before/after the work
  - Offering an upcoming open spot on the schedule to help kickstart the project fast

TRAINED. TESTED. TRUSTED.

Owens Corning® Certified Energy Expert® professionals work with homeowners to help make buildings and homes quiet, comfortable and energy-smart.

TIP: Show customers why you're the right choice. Use this messaging on your website and marketing materials.

As energy performance consultants, we're trained to help optimize comfort, noise control and energy efficiency. As elite insulation contractors, we're tested to meet the highest standards, delivering advanced solutions based on decades of building science research. As an exclusive group certified by Owens Corning®, we're backed by a limited lifetime warranty* on the #1 most trusted brand of insulation† and the industry's only limited lifetime warranty‡ on installation.

Working with an Owens Corning® Certified Energy Expert® professional means knowing your team is trained, tested and trusted to help make any home or building a better place to be.

✓ Trained to Optimize Comfort
Energy consultants with extensive training and hands-on experience.

✓ Tested for Proven Performance
Elite insulation contractors tested to ensure Grade 1 installation quality.

✓ Backed by a Trusted Leader
Product and workmanship warranty‡ no other brand can match.

Meeting the Highest Standards

Only the very best insulation contractors have what it takes to be Owens Corning® Certified Energy Expert® professionals.

Knowledge
Completion of mandatory training through online, classroom and hands-on learning.

Integrity
Commitment to uphold the highest industry standards and practices.

Licensing
Current on all required state and local licenses.

Ethics
Good standing with the Better Business Bureau.

Quality
Verified R-value of Owens Corning® PINK® Fiberglas™ insulation, the #1 most trusted brand of insulation.†

Workmanship
Tested for Grade 1 installation quality.

Warranty
Backed by Owens Corning® limited lifetime warranty on product and workmanship.*‡

Recognized
We are proud to be a part of the Owens Corning® Certified Energy Expert® program, the EXCLUSIVE manufacturer's insulation contractor program recommended by ENERGY STAR based on rigorous training and the highest quality installs.

Using the CEE Logo

Only the most elite insulation professionals can feature this logo. Use it with pride along with your own branding elements to create an identifiable and elevated presence in your market. Consistent usage strengthens your brand and ours. Always follow brand guidelines.

FOR MORE INFORMATION
Download the CEE Logo Guidelines from OCConnect™
Questions? **CEEinfo@owenscorning.com**

* If you live in the United States and you are the homeowner of any free-standing residential home or any wood framed multi-family housing structure (5 stories or under) containing Owens Corning® Fiberglas™ insulation installed by a Certified Energy Expert®, you are entitled to the benefits of this warranty. The CEE Limited Lifetime Warranty can be transferred from homeowner to homeowner for the life of the home.

† Home Innovation Research Labs Builder Panel, April 2019.

‡ See actual warranty for complete details, limitations and requirements. For the lifetime of the Home beginning from date of installation by an Owens Corning® Certified Energy Expert®.

SELLING BEYOND PRICE

Your company's "differential value" is that competitive advantage that sets you apart from the competition in ways that matter to your customers. Here are six ways to enhance your Differential Value so you can sell beyond price.

1. Define Your Difference.

Whether it's shorter lead times, an exceptional inspection pass rate or the most crews, show your customers how you're different—and how that can help them.

2. Get Personal.

Take the time to follow up on bids and demonstrate a personal commitment to the work.

3. Emphasize Your Expertise.

The rigorous training you receive as a Certified Energy Expert® professional is a major differentiator. Demonstrate your ability to offer value-added solutions.

4. Promote Your Productivity.

Owens Corning® PINK® Fiberglas™ insulation is proven, cost-effective and quick to install, helping homeowners to enjoy the improved comfort of their home faster.



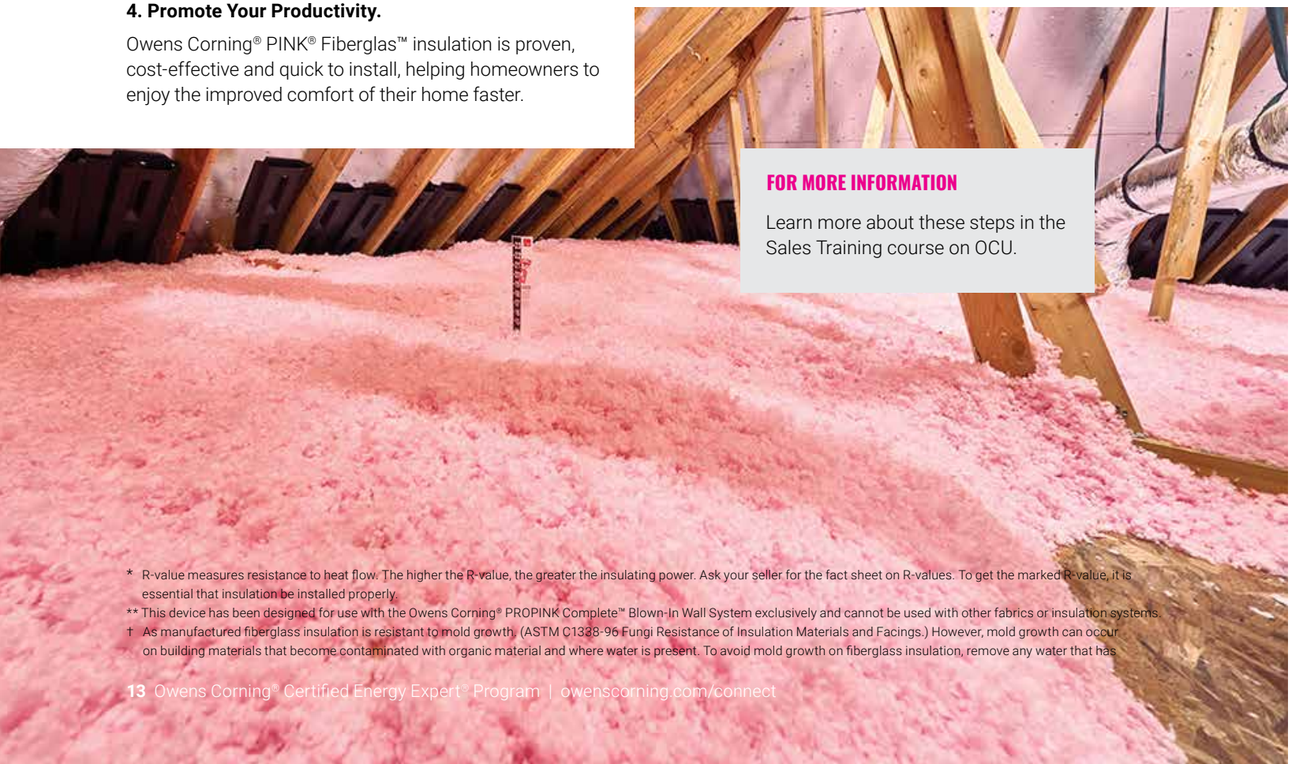
We've developed an in-home customizable sales tool to help you sell your value to a homeowner. You can find it on the OCConect™ portal.

5. Walk Through the Warranty.

As a Certified Energy Expert® professional, you're able to offer an exclusive lifetime limited warranty on workmanship PLUS a limited lifetime warranty on the product itself.

6. Spotlight Safety and Sustainability.

Owens Corning® PINK® Fiberglas™ insulation is GREENGUARD certified for indoor air quality, free of chemical fire retardants and made with renewable electricity.



FOR MORE INFORMATION

Learn more about these steps in the Sales Training course on OCU.

* R-value measures resistance to heat flow. The higher the R-value, the greater the insulating power. Ask your seller for the fact sheet on R-values. To get the marked R-value, it is essential that insulation be installed properly.

** This device has been designed for use with the Owens Corning® PROPINK Complete™ Blown-In Wall System exclusively and cannot be used with other fabrics or insulation systems.

† As manufactured fiberglass insulation is resistant to mold growth. (ASTM C1338-96 Fungi Resistance of Insulation Materials and Facings.) However, mold growth can occur on building materials that become contaminated with organic material and where water is present. To avoid mold growth on fiberglass insulation, remove any water that has

LIMITED LIFETIME WORKMANSHIP WARRANTY

Offer your customers what no one else can! Now, you're backed by the industry's only limited lifetime warranty on installation workmanship,† along with our limited lifetime warranty on products. It's a huge testament to the quality work you deliver as a Certified Energy Expert® professional.

Here are five quick ways to promote this value-added benefit:

1. Post about the warranty on social media -- we've already created them for you and they're ready to share.
2. Update your company website with the limited lifetime warranty language.
3. Give a leave-behind sell sheet detailing your CEE status/ warranty to homeowners when you provide an estimate.
4. Feature the Certified Energy Expert® video on your company's YouTube page and website.
5. Order a co-branded window cling or electrical box sticker with the limited lifetime warranty graphic.



This exclusive warranty covers:

the homeowner of any free-standing residential home or any wood framed multi-family housing structure (5 stories or under) containing Owens Corning® Fiberglas™ insulation installed by a Certified Energy Expert® within the United States.

The CEE Limited Lifetime Warranty can be transferred from homeowner to homeowner for the life of the home.

Brand Awareness Videos

Use your association with Owens Corning® to reinforce your message of quality and dependability.

"Trained. Tested. Trusted."
Length: 1:15

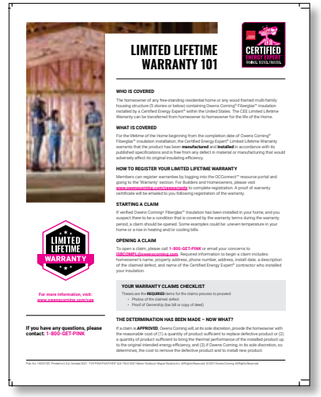


Show homeowners that you're one of the most qualified installers in the industry, supported by one of the most recognized brands.

"Making Home Better – Together"
Length: 2:02



Working with Owens Corning means being part of a larger effort. Together, we're making home a better place to be.



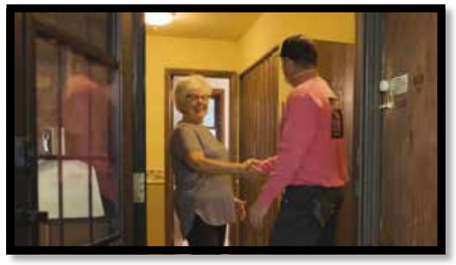
† See actual warranty for complete details, limitations and requirements. For the lifetime of the Home beginning from date of installation by an Owens Corning® Certified Energy Expert®.

THE INSTALLATION PROCESS

Many contractors have one crew who is fully dedicated or trained to install in retrofit applications. Here are a few best practices for before, during and after the installation process.

Before Installation

- Share the CEE "What to Expect" video with the homeowner, so they better understand the end-to-end process and feel more prepared for installation day.
- Make sure the trucks that you send to the jobsite are professional and branded to your business.
- Set the expectation that all employees must be extremely careful, clean and courteous in a home. Emphasize the need to leave a home exactly as it's found.
- Equip your trucks with cleaners, disinfectants and a shop vac for crews to use. Make sure teams apply floor coverings and always wear the appropriate gear.
- Train crews on OSHA guidelines and keep them accountable for upholding what they've learned.
- Instruct your crew on how to conduct pre- and post-work inspections. Before the job, they can point out any preexisting abnormalities to the customer (e.g., ceiling cracks).



"CEE What to Expect" Video
Length: 2:27

During Installation

- Of course, keep the home you're working in as clean as possible.
- Designate one team member to be the point of contact with the homeowner.
- Ask the homeowner if you can place a yard sign while you're on the jobsite.
- If a team member has time, ask them to knock on surrounding neighbors' doors, offering to set up free estimates.



RESOURCES TO CONNECT WITH HOMEOWNERS

Sign into your OCConnect™ dashboard to begin leveraging these materials and more to market your business and win with homeowners.
owenscorning.com/connect

After Installation

This is an often-overlooked opportunity for the salesperson to follow up with the homeowner. **Reviews and referrals are two of the best marketing tools you have!** If possible, the salesperson should meet with the homeowner to:

- Review the completed work and explain the results with the homeowner. Keep customers away from equipment and out of the attic by utilizing photos as needed.
- Collect payment and double-check that the homeowner is completely satisfied.
- **Ask for a review!** Collecting Google reviews is an impactful way to build a positive online presence. Equip employees with Google Review Cards, so they can remind customers to provide an online review. Incentivize your team with a small bonus for those who are mentioned by name in a review. Also have a designated team member selected who will respond to all reviews on Google, both positive and negative. **Note: you can ask the CEE team to make a Google Review Card for your business if you do not already have one.**
- Tell the homeowner about your company's customer referral program to encourage them to spread the word about your good work.



CEE MARKETING & SALES TOOLS

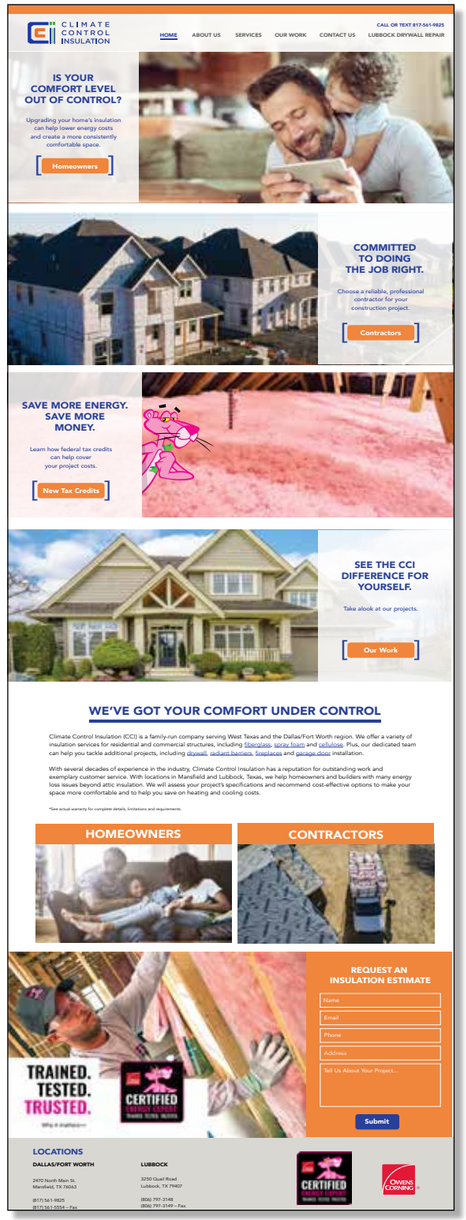
As a Certified Energy Expert® member, you have exclusive access to a variety of marketing resources to position your business as the leader in your market. From sell sheets to yard signs to neighborhood canvassing collateral, these tools are designed to help you gain more retrofit leads. If you have a specific marketing request, you can message ceeinfo@owenscorning.com to get started.

TIP Sign into your OCConnect™ dashboard to access these materials. **owenscorning.com/connect**

Co-branded Collateral



Customized Websites



Truck Graphics



Co-branded Window Cling



Electrical Box Stickers



Digital Ads







CEE MARKETING & SALES TOOLS

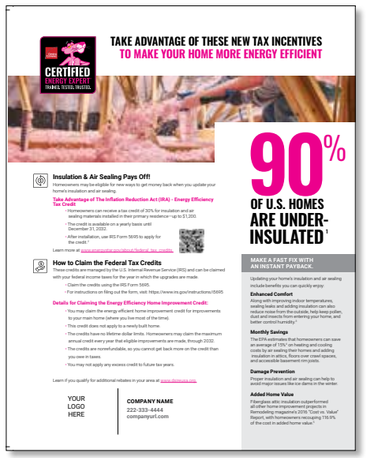
The Inflation Reduction Act (IRA) Tax Credit Resources

Sharing information about the Inflation Reduction Act educates homeowners about this unique opportunity to get money back when they reinsulate their home. Provide them with a leave-behind sell sheet so it keeps the tax credit top of mind.[1]



TIP Sign into your OCConnect™ dashboard to access these materials. **owenscorning.com/connect**

Homeowner Sell Sheet

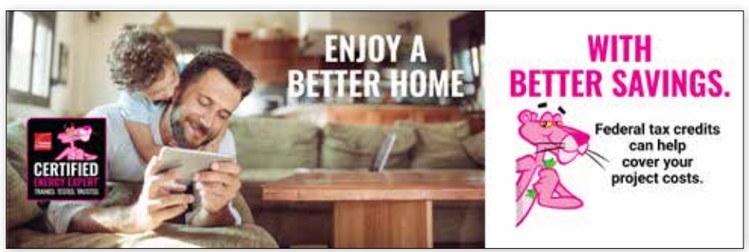


Online ads





Web Sliders and Web Content



[1]See 'www.irs.gov/credits-deductions/energy-efficient-home-improvement-credit' for further details. Consult your financial advisor or accountant for further information or to see if you qualify.

The CEE Limited Lifetime Warranty

Offer your customers what no one else can! Spread the news that you're backed by the industry's only limited lifetime warranty on installation workmanship,† along with a limited lifetime warranty on products. It's a huge testament to the quality work you deliver as a Certified Energy Expert® professional.



Homeowner-facing Sell Sheet

It's one thing for someone to hear that insulation is good for their home. It's another thing to see it! This sell sheet provides fast facts and stats about the many benefits of insulation. Provide the information during your in-home consult.



Videos to Support You:

This eye-catching animation quickly shares many of the key benefits of reinsulating a home. Feature this video on your website, on your company's YouTube page and via social media posts.



"It Pays to Insulate" Video
Length: 53 sec

A WHOLE-HOME APPROACH

Feature the Owens Corning® Material Difference Home™ on your website

We've made it easier to see the way our products help improve the way a home feels and performs every day. The Material Difference Home™ illustration helps demonstrate the benefits of a whole-home approach to insulation.

We've created a version of this graphic especially for CEE professionals to use on your website. It's designed to dynamically adjust when viewed on a laptop, tablet or mobile device.

Ask about our homeowner-facing Material Difference Home™ posters that you can offer your builder customers or use directly with homeowners as part of your sales process.

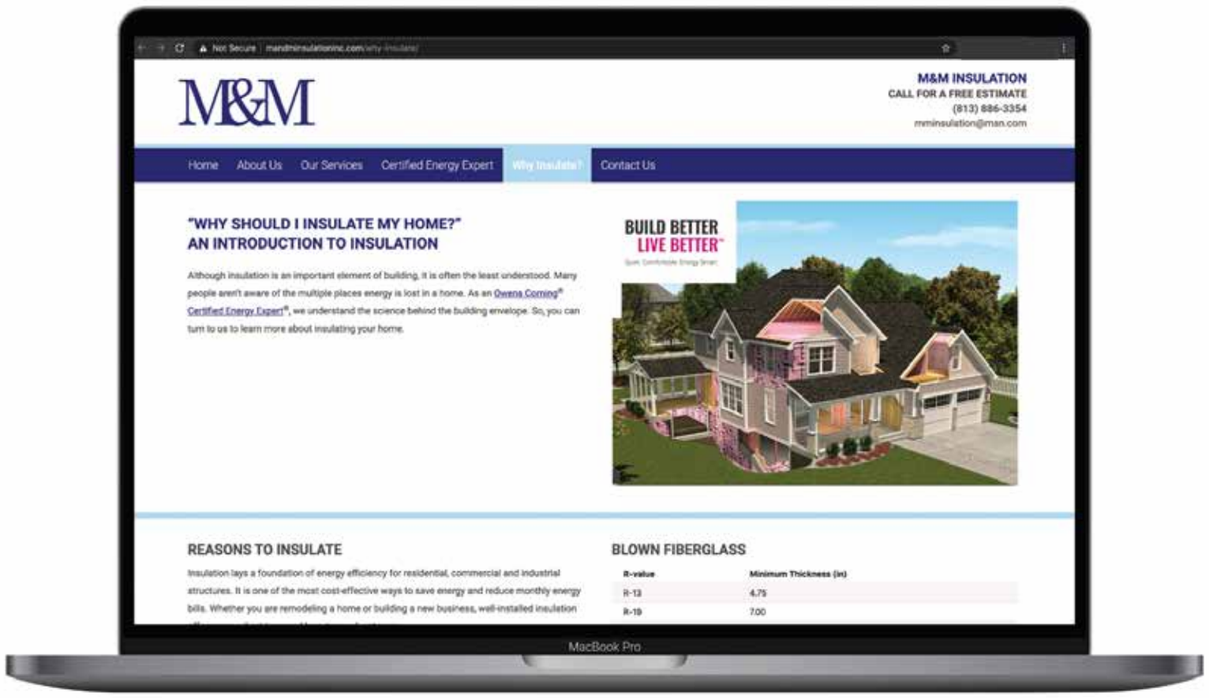
FILE REQUESTS, QUESTIONS & INQUIRIES

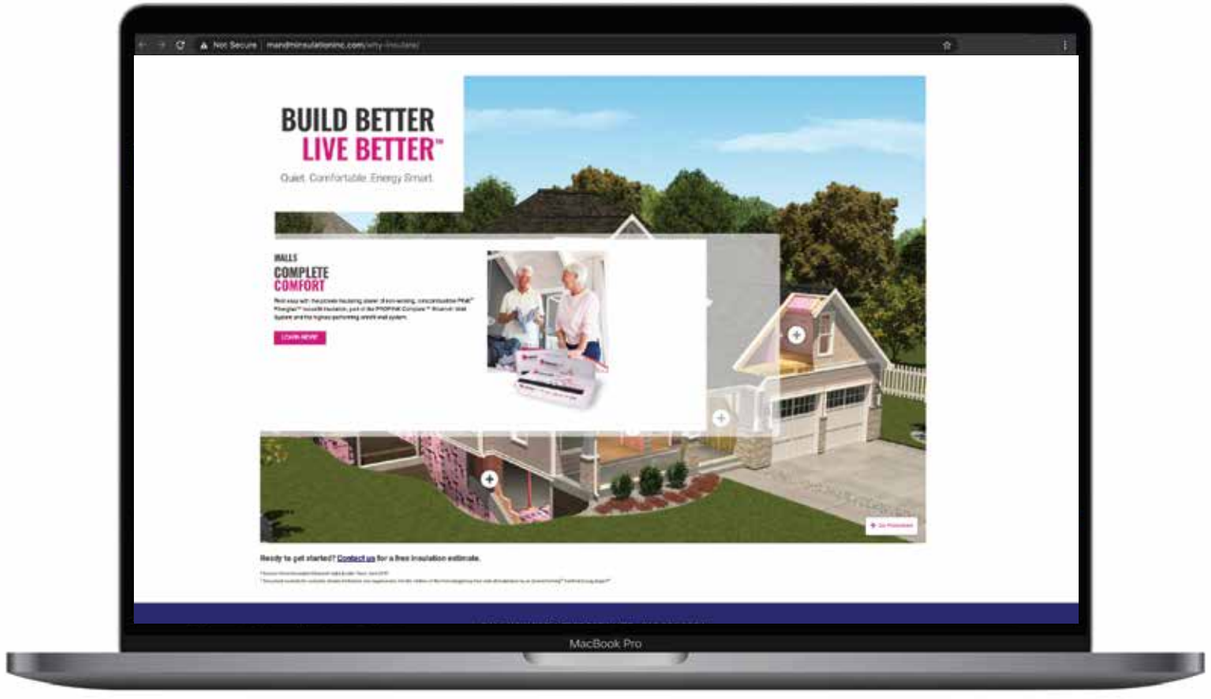
Contact: **CEEinfo@owenscorning.com**

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