SEM RECRUITMENT BEST PRACTICES

Use this guide to improve your SEM recruitment by offering enhanced professional development, program design, prospect discovery, pitching and retention.

PROFESSIONAL DEVELOPMENT

- Begin by providing or taking consultative sales training to improve skills (including interview skills) of staff members who will be recruiting participants

PROGRAM DESIGN

- Create demand and urgency by:
  - Limiting the number of applications and enrollments during the timeframe
  - Offering higher incentives for those that enroll early
  - Providing tiered, non-energy incentive levels for all participants (e.g., staff assistance, toolkits, etc.)

PROSPECT DISCOVERY

- Tap into internal or external resources for qualified leads and warm introductions

- Consider existing relationships and those with energy-project experience

- Leverage current or past participants for referrals

- Build or utilize relationships with trade groups and chambers of commerce

- Research organizations and businesses to understand their needs

- Provide print or video case studies (see examples below in the Further Reading section)

PITCHING

Tactics

- Discover the needs and goals of the business or organization and then effectively communicate how SEM addresses those specific needs

- Provide a financial analysis of avoided costs, with the following best practices in mind:
  - Deliver the analysis in terms of additional sales, KPI, and/or equivalent revenue
  - Convey the consulting value for free SEM services
  - Present money saved using estimated savings
  - Include labor costs in analysis

- Provide a list of peer organizations or competitors already participating in SEM

- Communicate non-energy benefits, including:
  - Safety
  - Productivity
  - Increased profitability
  - Reduced risk
  - Extended equipment life
  - Reduced maintenance
  - Increased resilience
  - Enhanced environmental reputation

Messaging

- Communicate the expected large return for a limited investment

- Motivate action with a limited-time offer

- Explain how SEM supports their triple bottom line: Profit, People and Planet

- Demonstrate how SEM helps them achieve climate action goals

- Convey how SEM can serve as a tool or solution to better analyze savings

- Illustrate how SEM represents an opportunity to:
  - Continually improve operations
  - Optimize processes and productivity
  - Formalize energy-saving efforts already happening
  - Provide quality management
  - Reduce energy waste
  - Enhance employee professional development

- Show them how SEM can provide alignment within their organization through:
  - Interdepartmental collaboration
  - Enhanced teamwork
  - Shared goals and committee objectives

- Specify what is offered through SEM participation (e.g., coaching, tools, training, walkthroughs, energy analysis, etc.)

RETENTION

Once you have customers enrolled, keep them engaged by:

- Offering continual customer connection
  - Determine ideal communication cadence with each customer
  - Set reminders
  - Offer regular energy team support

- Create a communication structure that supports ongoing cohort relationships
  - Share a peer contact list
  - Pair experienced participants with newer ones to serve as mentors

- Motivate and reward through award recognition
  - Program virtual badges
  - Industry awards
  - Use awards as an opportunity to showcase long-term benefits for organization and cost savings

- Provide opportunities for education and enrichment
  - Career-enhancing trainings
  - Technology and industry news

- If relevant, help them earn additional utility incentives (e.g., lighting) and support their utility communications (e.g., utility billing and meter change outs) to help build trust and add even more value to their SEM participation

FURTHER READING

- SEMHub.com: Resources and tools for your SEM needs

- BCHydro: SEM Cohort Program

- Energy Trust of Oregon: Commercial SEM

- Puget Sound Energy: Commercial SEM

- NYSERDA SEM Program

This guide was developed by the Northwest SEM Collaborative's Beyond the E working group.

To view all SEMHub tools and resources, visit: SEMHub.com.

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