



HeatSmart Alliance Coaching Principles

Revised 3/29/2021

These overarching principles guide our coaching behavior and actions for the benefit of clients, coaches, and the HeatSmart Alliance.

HeatSmart Alliance volunteer coaches...

- **Conduct themselves professionally**
Coaches respond in a timely manner; are clear and respectful; set clear expectations on actions they'll take (and when) and follow through; disengage if a client is disrespectful.
- **Avoid conflicts of interest**
Coaches do not accept favors, gifts or payments from clients, or from installers or organizations that have the potential for financial gain from the sale or installation of heating/cooling equipment.
- **Understand and respect the client's values and priorities**
Coaches elicit client priorities from discussions and homeowner questionnaires, and use that information to guide the engagements.
- **Enable clients to reach their own decisions without making decisions for them**
Coaches help clients become sufficiently informed that they feel confident making their own decisions such as selecting an installer and equipment options. Coaches provide information, suggest options, suggest questions for installers, and may help with evaluating quotes.
- **Are objective and factual about installers, brands, and equipment**
When discussing installers, brands, or equipment, coaches state the basis for their knowledge and avoid strong negative or positive language or guidance.
- **Set realistic expectations about comfort, cost and GHG emissions impact**
Coaches are clear about uncertainties underlying any projections of cost and/or GHG emissions.
- **Know their limits; Strive for continuous learning and improvement**
Coaches approach every engagement as a learning opportunity. They are forthright when they don't know something and seek help when needed.
- **Take satisfaction from their coaching**
Coaches enjoy helping others lower their carbon footprints.. They always appreciate verbal gratitude.