



Coaching Engagement Process (Residential Version)

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Introduction

This document describes a prototypical coaching engagement process for purposes of educating new coaches and establishing best practices for all coaches. Many variations of this process are possible and appropriate for differing circumstances. The particulars of each engagement will depend on the client's request and the coach's judgement, knowledge and skills.

The steps in the prototypical engagement are:

1. Respond to client request for coaching (required)
2. Schedule initial meeting (required)
3. Prepare for initial meeting (required)
4. Initial meeting, virtual (required) or in-person (optional)
5. Follow up to initial meeting (required)
6. Review installer quotes (optional)
7. Support during installation (optional)
8. Post-engagement followup (required)
9. One-year follow up (optional).

These steps are described below.

Coaching Steps

1. Respond to client request for coaching (required)

Most clients request coaching via email or a form on the HeatSmart Alliance website. Some requests are general while others are quite specific. Specific requests may refer to a particular system type or equipment model, seek names of installers for a specific locality, or ask opinions on a specific installer or quote. Some requests contain information about the client's situation, but rarely enough to understand the full context.

Coach Response to general requests: The coach sends a reply email covering the following topics:

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- Affirm willingness to assist or a commitment to help identify another volunteer coach who can take the case. If unable to assist, omit the remaining topics.
- Provide a link to the [coaching services description](#) on the HeatSmart Alliance web site.
- Provide personalized coaching statement (attach in PDF format)
- Explain that more information is needed to understand the client's needs and priorities, and request that the client completes the [homeowner questionnaire](#).
- Request that client and co-owners sign and returns the [liability waiver](#)
- A link to [Alliance-recommended general information on heat pumps](#) such as the NEEP buyer's guide and the Clean Energy Lives Here site.

Coach Response to specific requests: Some clients make specific requests without understanding the full context or options. For instance, a client may request assistance specifically for ductless mini-split heat pumps because someone they know has one while their home has existing ducting when in fact they might be a good candidate for a central heat pump. How to respond to these requests is a judgement call. To the extent possible, the coach should assume the client has incomplete information and respond in the same way as a general request.

2. Schedule initial meeting (required)

Upon receipt of the signed liability waiver and completed homeowner questionnaire, the coach schedules an initial meeting with the homeowner, typically of 60-90 minutes duration. An initial meeting is preferable to a further email or text exchange because it allows more immediate interaction and responsiveness. The initial meeting may be virtual or in-person.

During the Covid-19 pandemic, virtual visits are recommended. A home visit should be scheduled only if it is needed to understand existing conditions, and the coach and client are willing. During home visits, the coach and client must follow all Covid-19 guidelines then applicable, as posted on mass.gov/info-details/covid-19-updates-and-information and www.cdc.gov/coronavirus/2019-ncov/index.html. All parties must be asymptomatic at the time of the visit. Common precautions such as social distancing, mask wearing and sanitizing hands before and after must be taken. The coach should minimize the time spent inside the client's home.

3. Prepare for initial meeting (required)

The coach reviews the client's responses to the homeowner questionnaire and notes follow-up questions that will further characterize the existing conditions and client priorities. If the coach is unfamiliar with the existing conditions, the coach is encouraged to use the opportunity to become better informed.

Optionally, the coach may request energy usage records from the client and perform an analysis of the home's heat load. This analysis allows comparison with similar homes and later provides a basis for judging installer equipment selections.

If the initial meeting will be a home visit, the coach collects items such as a home visit checklist, handouts, and a flashlight that may be helpful during the visit.

4. Initial meeting (required)

The target duration for the initial meeting is 60-90 minutes. Topics to be covered include:

- Brief self introduction with review of coach's experience, and motives
- Seek clarification, if needed, of client's answers in homeowner questionnaire, particularly reviewing comfort concerns which can be highly subjective
- Subject to performing pre-visit energy analysis, comment on home's energy use relative to similar homes
- For an in-person or virtual home visit and subject to coach's experience, inspect the home's heating and cooling systems, water heater, and electrical panel (details below)
- Subject to coaching experience, comment on additional weatherization opportunities
- Subject to coaching experience, provide general information on heat pumps and heat pump water heaters, and/or discuss system configurations that may be best suited to the home. This discussion should include back-up heating options and integration of controls. **ASPIRATIONAL** The coach should use standard HeatSmart Alliance visual aides during this discussion. The visual aides may be provided by screen sharing in virtual meetings, or by paper handouts during home visits.
- Provide resources for identifying suitable installers with a recommendation to obtain quotes from at least three (3) installers
 - Discuss questions to ask installers during their visits, including comfort concerns and outdoor unit placement options
 - Review available incentive programs and, when possible, approximate incentive amounts.

At the meeting conclusion, and subject to the coach's experience and availability, the coach informs the client that they can provide further assistance by reviewing installer quotes. The coach explains that s/he can help with understanding and evaluating quotes, and suggest follow-up questions to installers about their quotes.

5. Follow up to initial meeting (required)

The coach prepares a home visit report using the HeatSmart Alliance template. At a minimum, the coach sends a follow-up email summarizing the meeting and enumerating recommendations and next steps. The follow-up email may include contact information for

installers that the coach judges may be appropriate for the existing conditions and location.
ASPIRATIONAL: The coach updates the engagement status in the Alliance CRM system.

6. Review installer quotes (optional)

This step occurs if the client requests assistance and may involve multiple calls or meetings until the client selects an installer and system configuration. Subject to the coach's experience and willingness, the coach may provide feedback on the following topics:

- Review quotes for completeness (example: location and mounting of outdoor units)
- Clarify type of equipment proposed (example: installers provide options for AC units instead of heat pumps)
- Verify HSPF (and SEER) in [AHRI Directory of Certified Product Performance](#) or [NEEP's Cold Climate ASHP List](#)
- Explain quote items, often presented just with model numbers
- Review equipment specifications, including controls
- Review proposed integration with back-up heat sources
- Assess proposed equipment sizing versus home's design heat load
- Support cost comparisons, factoring in possible incentives
- Estimate operating costs and GHG emissions for comparison purposes
- Suggest follow-up questions that clients can ask installers.

7. Support during installation (optional)

It may be helpful to a client to discuss issues or concerns that may arise during installation. Subject to the coach's experience and willingness, the client may contact the coach during the installation and request support.

8. Post-engagement follow up (required)

Some clients follow through with an installation while others decide not to proceed. Within 1 month after an installation or 3 months after the initial meeting, whichever comes first, the coach checks in with the client to determine if the engagement is ongoing or concluded.

ASPIRATIONAL: If the engagement has concluded, the coach asks the client to complete a post-engagement questionnaire. The questionnaire covers the client's satisfaction or issues with the following areas, as applicable:

- Satisfaction with the coaching service
- Installer interactions and the installation
- Post-installation energy costs
- Post-installation comfort (were pre-installation comfort issues, if any, resolved?)
- Rebates and incentives.

ASPIRATIONAL: The coach closes the engagement in the Alliance CRM system.

9. One-year follow-up (optional)

The coach contacts the client to learn their satisfaction or issues with the installed system's comfort, operating costs and efficiency. If the client is willing, the coach obtains post-installation energy use data that allows the Alliance to estimate the system's operating efficiency.