



## Behavioral Insights to Encourage Customers to Act: A Tip Sheet for Energy Assessors

Remote home energy assessments are here to stay! Here's how to make sure yours are as effective as they can be, using insights from tested principles of behavioral psychology. (Most of these techniques can also be applied to in-person assessments.)



**Encourage the homeowner's active participation.** In a remote assessment, the homeowner has no choice but to engage—by walking around their home, listening to the assessor's instructions and requests, and providing photos, videos, and other information about the home. This level of involvement is a big advantage over in-person assessments, where the homeowner may disengage while the assessor works. Encourage the homeowner's participation as much as possible. Have them touch places where dust builds up on leaking air ducts. Provide advice in real time, while they are looking at the equipment that should be upgraded. The more tangible the experience is for the homeowner, the greater the impact it will have on them.



**Show empathy and build rapport with the homeowner.** Listen to their concerns. Be patient, polite, and respectful, and make sure they feel comfortable. Acknowledge any upgrades they have already made, as well as their personal actions (e.g., "good job preparing for this session" or "good question"). If possible, tell them how much energy and money they have already saved with completed upgrades. This positive reinforcement will make them more likely to repeat those actions or try new ones.



**Personalize the energy assessment, follow-up report, and energy kit to the homeowner's specific needs.** Prior to the assessment, gather available information (such as utility bills and weather information) to tailor the assessment and subsequent recommendations. At the start of the session, ask the homeowner what they are most interested in accomplishing. Listen closely and take their concerns into account when providing upgrade recommendations. For example, avoid suggesting expensive upgrades if the homeowner has expressed financial concerns. On the other hand, if the homeowner seems ambitious and has already taken small steps, suggest larger actions, such as appliance or HVAC upgrades, that can generate further savings. If possible, tailor the energy kit or free items sent to the home so that the homeowner does not receive items they have already installed or that may not work for their home.



**Explain why the homeowner should do something, not just what you want them to do.** Providing reasons to make an upgrade may help convince the homeowner to get it done. During the assessment, explain what you are looking for—and why—to help the homeowner better understand both their home and the need for fixes. When offering energy-saving tips or tricks, describe how they will save the customer energy and money while also making the home more comfortable.



**Use descriptive, everyday language to explain your recommendations.** For example, to explain the importance of keeping fridge coils clear of debris, you could say that the refrigerator working with debris on the coils is like trying to breathe through a paper bag—it takes a lot more work and wastes energy. This type of language—more than technical terms—can help the homeowner understand the magnitude of their energy losses and the urgency of fixing problems.



**Employ the “foot in the door” and “door in the face” techniques.** In one study of energy conservation, participants were three times more likely to comply with a request to perform a large behavior if they were first asked to perform a small one. Ask the customer to commit to a small behavior, such as upgrading lights or pipe insulation, before making the actual target request, such as upgrading HVAC. Or do the reverse: ask for a major upgrade that is unlikely to be installed (e.g., replacing the furnace and AC), followed by a target upgrade that seems affordable in comparison (e.g., switching to a heat pump).



**Ask for a public commitment.** Customers are more likely to follow through with recommendations they have committed to. In one study, customers who publicly committed to reduce their gas use curtailed their use by 30% over the next 3 months compared to customers who made no commitment. Verifying that the customer understands the importance of each action can create a tacit agreement. Ask if they will actually install the free items sent to them (e.g., light bulbs, faucet aerators). Offering something extra, such as free items or additional advice about the home, can encourage the customer to look into more-expensive upgrades to reciprocate the “favor” from the assessor.



**Make the process as convenient for the homeowner as possible.** Offer assessments during times that are most convenient for the customer. Allow customers to use the technology platform they are most comfortable with, and don't go into areas of the home they do not want to share. If a homeowner is having trouble with video, talk on the phone. Show the customer that the time spent is worth their while by tailoring the evaluation to their specific needs. Adapt to the customer's approach toward the assessment (e.g., by answering questions as thoroughly as the customer prefers, not engaging in small talk if the customer is all business).



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