



TRI-COUNTY
REGIONAL ENERGY NETWORK

SAN LUIS OBISPO • SANTA BARBARA • VENTURA

Psychology of the Electrification Sale: Part 2

Larry Waters – Electrify My Home

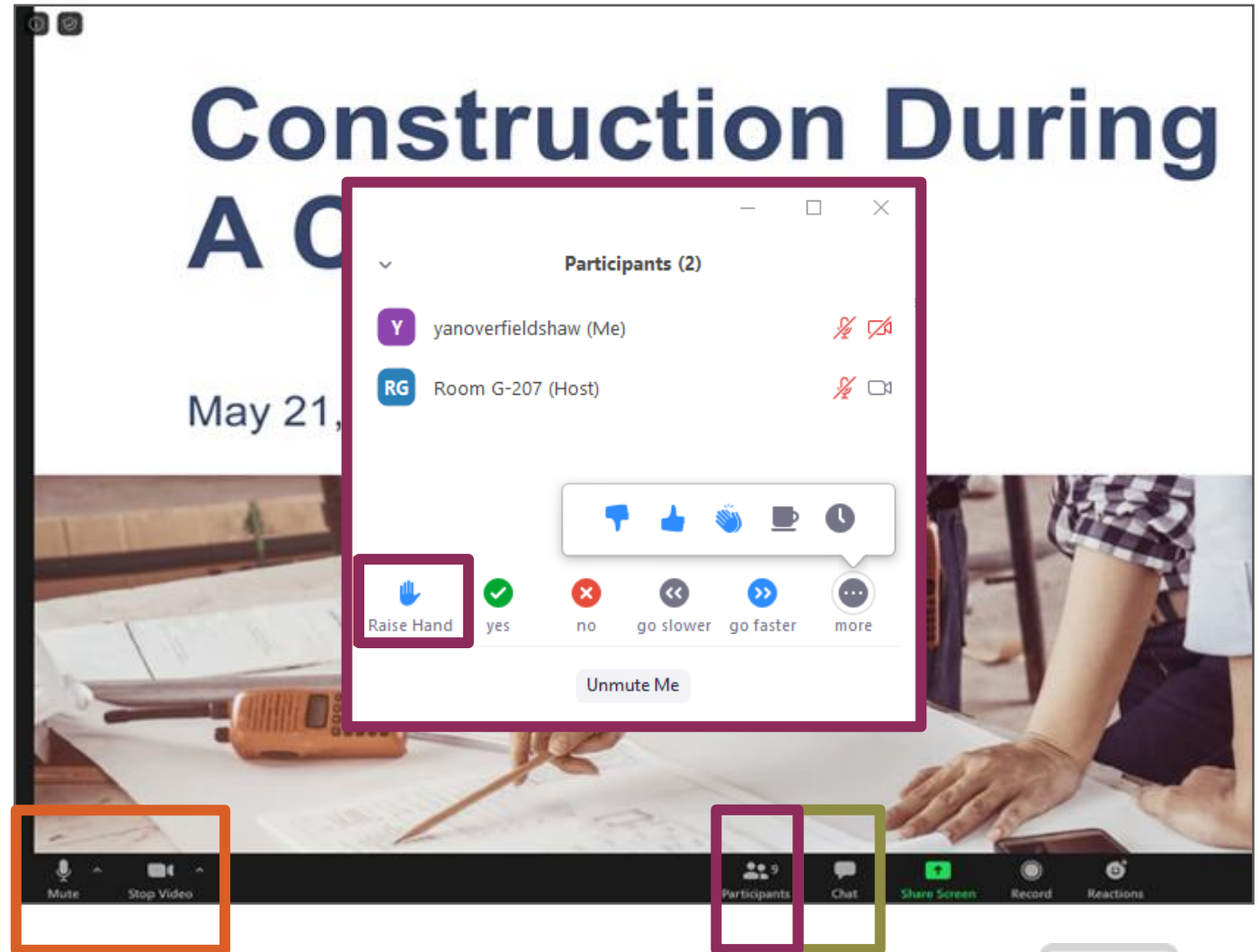
October 16, 2025

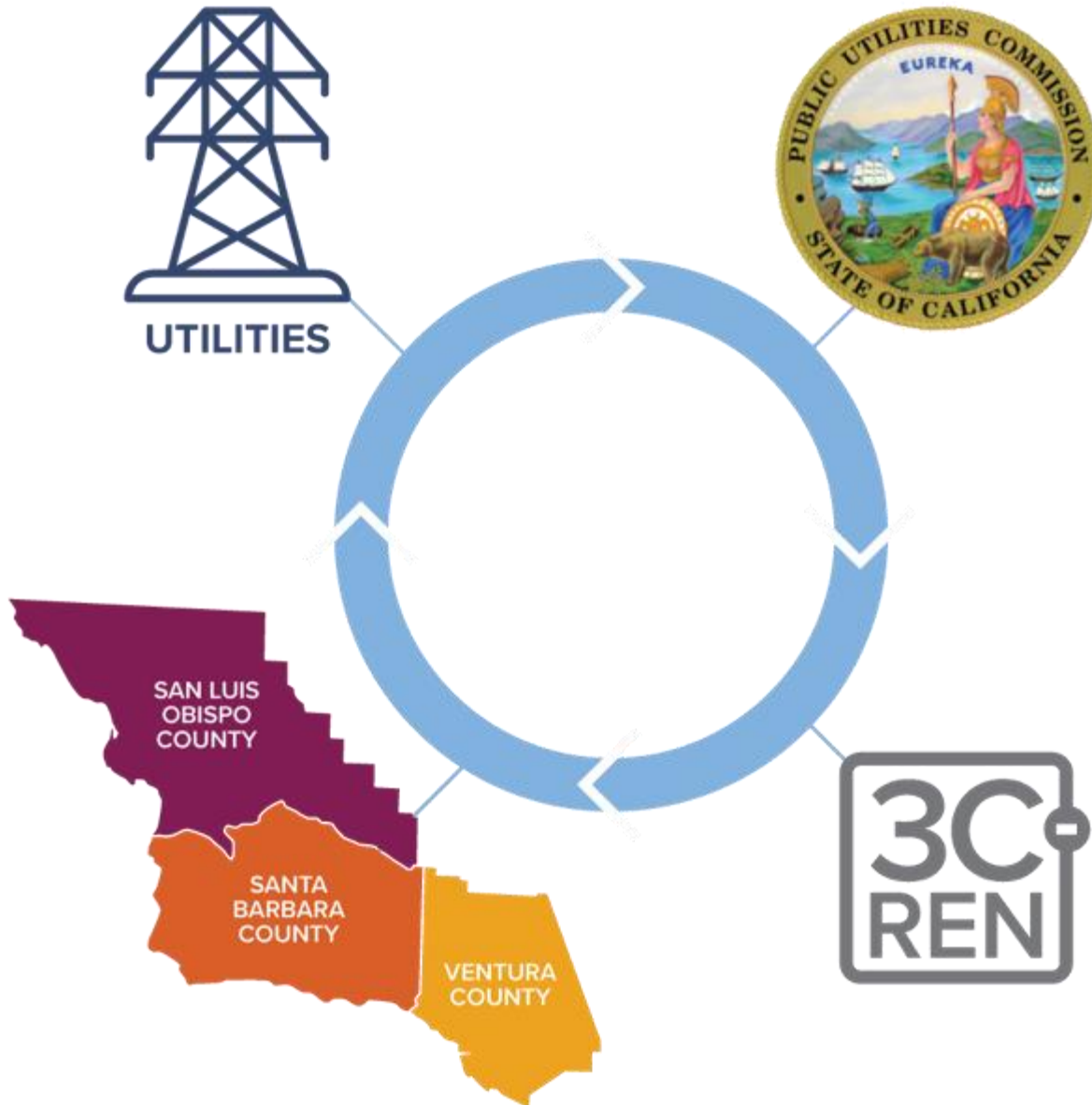


Before We Begin

Here are some quick reminders:

- Did you call in? Please **share** full name to confirm attendance
- Use the "**Chat**" to share questions or comments.
- Session may be **recorded** and posted to 3C-REN's on-demand page
- 3C-REN does **not** allow **AI notetakers**, unless used to accommodate a disability





Tri-County Regional Energy Network

3C-REN is a collaboration between the tri-counties

Our programs reduce energy use for a more sustainable, equitable and economically vibrant Central Coast

Our free services are funded via the CPUC, bringing ratepayer dollars back to the region



Our Services

Incentives



HOME ENERGY SAVINGS

3c-ren.org/for-residents
3c-ren.org/multifamily



COMMERCIAL ENERGY SAVINGS

3c-ren.org/commercial

Contractors can enroll at
3c-ren.org/contractors

Training



BUILDING PERFORMANCE TRAINING

3c-ren.org/events
3c-ren.org/building



ENERGY CODE CONNECT

3c-ren.org/code

View past trainings at
3c-ren.org/on-demand

Technical Assistance



AGRICULTURE ENERGY SOLUTIONS

3c-ren.org/agriculture



ENERGY ASSURANCE SERVICES

3c-ren.org/assurance



3C-REN Achievements



4,000+

Individuals Attended
Training



1,374

Energy-Saving
Projects Completed



334

Title 24/CalGreen
Questions Answered



\$155M

Secured for investment
in the tri-county region
through 2028

Data from 2019-2023 for three programs



Electrify My Home – Electrification Pioneers

Our Mission:

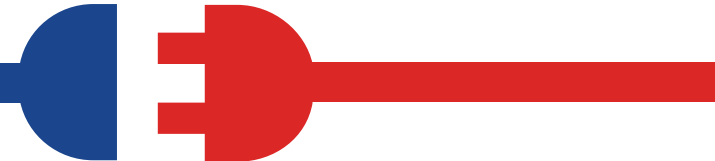
*To provide the **most efficient** cost-effective solutions, practice responsible **electrical management**, and **train and influence** others to do the same.*



Agenda

Part 2 (Connecting The Dots)

- 🔌 Welcome & Part 1 Review
- 🔌 Comprehensive Assessments
- 🔌 From Intel to Plan
- 🔌 Setting Expectations
- 🔌 Wrap-Up



Part 1 Takeaways

-  Believe in What You're Selling
-  Understand Personalities (DISC)
-  Do Your Research and Prepare
-  Start with Emotion, Support with Logic
-  Intake Sets the Tone



Open & Strategic
Questioning

CONSULTATIVE SELLING SKILLS

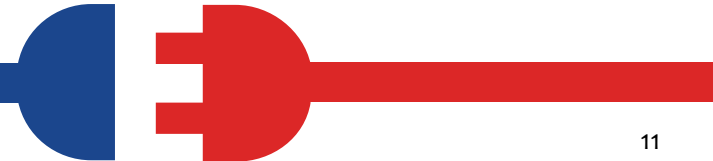
Let your customer sell themselves

Must-Have Sales Process – Open

The Approach & Observation



- ❖ Be observant as you approach the customer's home; look for clues that could help guide you
 - ❖ Electric or hybrid car?
 - ❖ Solar panels?
 - ❖ Modern home design?
 - ❖ Drought-tolerant landscape?



Two Ears, One Mouth



Opening

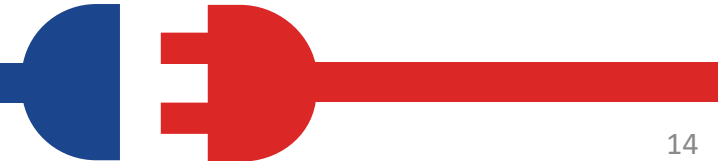
- 🔌 Why?
 - 🔌 What's led to the meeting?
- 🔌 Expectations:
 - 🔌 Confirm the goal of the call or meeting
 - 🔌 How long will it take?
- 🔌 Initiate The Relationship
 - 🔌 Opportunity to discover DISC type
 - 🔌 Rapport-building steps
- 🔌 Worst case – you discover misalignment early



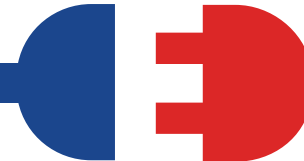
Take Some Time to Chat and Build Rapport, Gather Clues to Guide Your Approach



- ✦ Listen your way to success
- ✦ Starts with first impression call first and be on time
- ✦ Always give a sincere compliment
- ✦ Be observant of the decor
- ✦ Look for conversation starters
- ✦ Try to pinpoint personality type: Analytical, Empathetic, Influencer, Alpha, or Driver



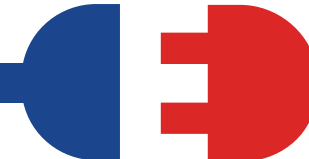
Meet Mr. Jones



Meet Mr. Jones

Greeting

- 🔌 “Mr. Jones, it’s a pleasure to meet you. And wow, I love those stone pavers!”
- 🔌 “Oh thanks, we finally got the contractor to come back and address the last row...they weren’t quite right but we’re happy with how it came out”

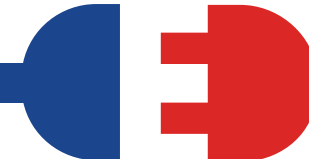


Meet Mr. Jones



Why?

- ❖ “It sounds like you’re interested in a heat pump water heater, is that correct?”
- ❖ “Oh, I thought you were here to look at the furnace?”



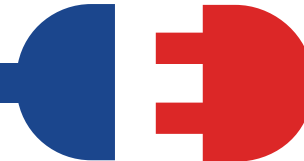
Meet Mr. Jones

Expectations:

🔌 “This visit should take roughly 1.5 hours. The plan is to learn more about what you’re looking to do, I’ll conduct a full assessment, and then we’ll go over the findings and discuss numbers. Does that sound good?”

🔌 “Yes, that’s fine”

Warning – some personalities will pull you off course. It’s OK to be flexible.



Must-Have Sales Process – Questioning

The Art of Asking Good Questions

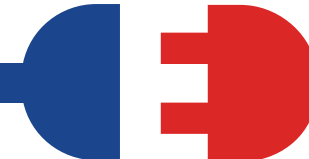
“ Successful people ask better questions, and as a result, they get better answers
— *Tony Robbins*

” Most people do not listen with the intent to understand; they listen with the intent to reply
— Stephen R. Covey

“ The ability to ask questions is the greatest resource in learning the truth
— Carl Jung

Benefits of Strategic Questioning

- ⚡ Introducing questions leads to providing **more value**
- ⚡ Lowers the barrier to being **honest** and **candid** because it provides a basis for your questions
- ⚡ Allows you to drill down to **relevant insights**/issues they might not think of on their own
- ⚡ Allows you to establish yourself as a **knowledgeable problem solver**... Credibility and Trust



Motivations

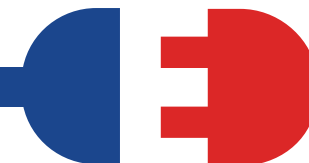
“What has led you to wanting to pursue a heat pump at this time?”

“

We're concerned about our high AC bills in the summer...we have solar and heard that heat pumps can save money.



What would you ask next?



OTHER RESPONSES – What’s Next?

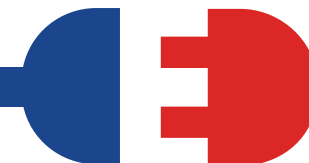
Sample Answers:

“Some friends have just installed a heat pump and are very happy with the results.”

“Our grandchildren spend a lot of time with us, and we want to make sure that the indoor air quality is OK.”

“We have been considering going all electric for a while, and now the timing seems right.”

What would you ask next?



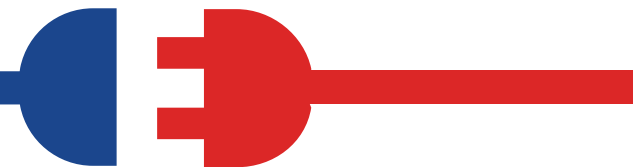
Questions to Help Determine Personality Type

Data vs Expertise:

- ⚡ Are you a person who prefers more information and data or do you make decisions based on professionals you trust?

“

More information. I always do a lot of research before pulling the trigger.



Questions to Help Determine Personality Type

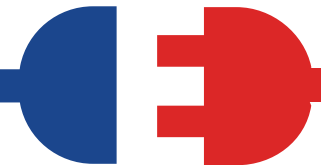


Comfort vs Savings:

- ⚡ If you had to choose, would you rather have lower utility bills or a more comfortable home?

For me, lower bills. But really, it's my wife; she's pushing me to get this done because she says it gets too cold.

”



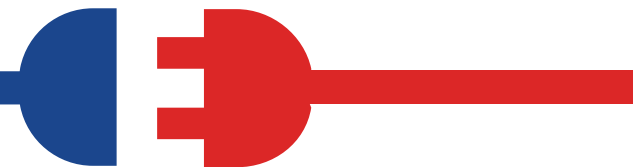
Questions to Help Determine Personality Type

Technology:

- ⚡ How important is it for you to have the latest technology in your home?

“

I'm mostly interested in making sure it actually works and has good efficiency ratings.

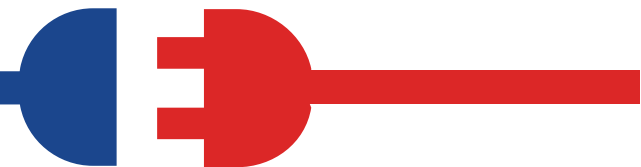


CEES (Comfort, Energy, Environment, & Sound) Questions

A few to get started:

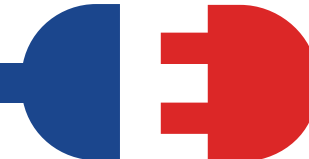
- ⚡ What are you looking to get out of your new system?
- ⚡ How do you use your thermostat?
- ⚡ Are you ever sacrificing comfort for lower energy costs?
- ⚡ Do you live a quiet lifestyle?
- ⚡ How important is reducing your home's carbon footprint to you?

If taking care of these is important to you, there might be a slight increase in cost, are you okay with that?



Understanding Their Journey

- “How long have you been thinking about this project?”
- “What’s held you back from doing it already?”
- “Have you done research on heat pumps?”
- “Have you talked to other professionals about this project? What did they say?”
- “Do you or your partner have any reservations about a heat pump?”





Open

COMPREHENSIVE ASSESSMENT

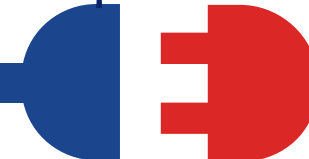
Delivering expertise through
comprehensive assessments

Assess For Success



Key steps to assessing a home for electrification:

- 🔌 Be comprehensive including crawls & attics
- 🔌 Take TONS of photos
- 🔌 Components:
 - 🔌 Site Plan
 - 🔌 Gas inventory
 - 🔌 Panel inspection
 - 🔌 Mechanical inspection
 - 🔌 Envelope & safety inspection

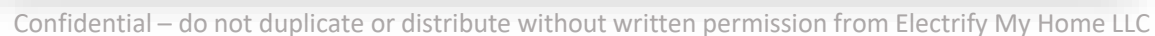
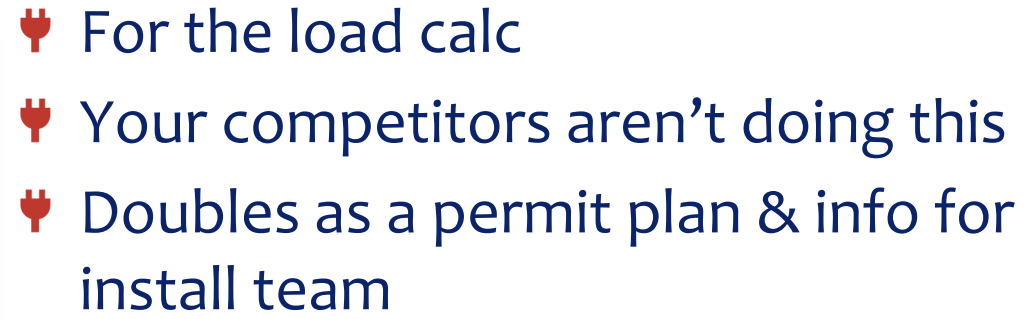


Pictures, Videos, & Notes

Document EVERYTHING!

- 🔌 Pictures are extremely important
- 🔌 Take as many pictures as possible, especially if there are concerns.
- 🔌 Your operations/installation team will thank you
- 🔌 Important for protecting company by showing original conditions of home
- 🔌 Take lots of notes, more details = better outcomes





Build Your Gas Inventory

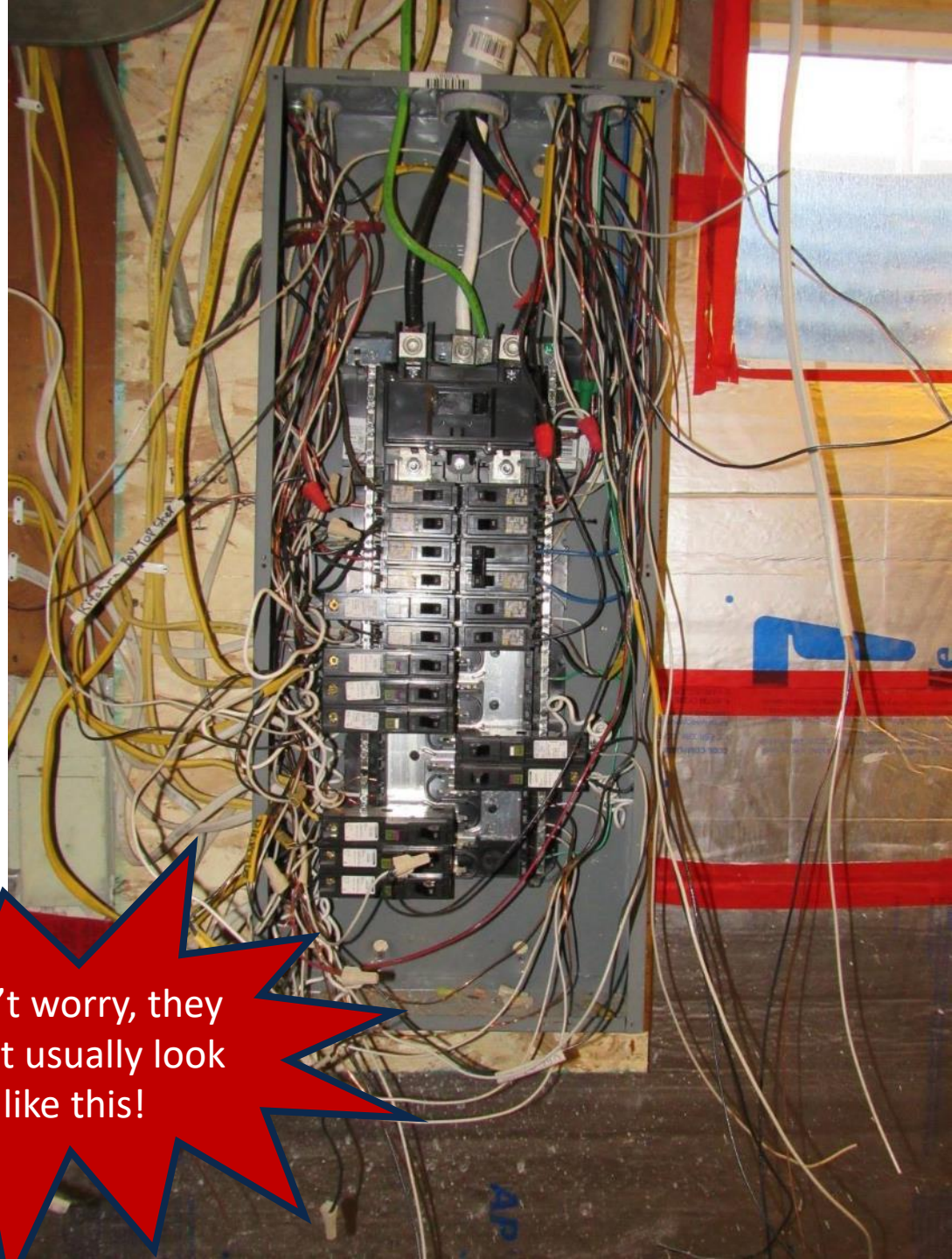
APPLIANCE	FUEL	TYPE & LOCATION	NOTES
Space Heater 	 	Type: Central split Location: Furnace in attic, AC in backyard	50A circuit in place Attic hatch 21" x 36" Customer uses AC 2x per year
Water Heater 	 	Type: Tankless Location: Outside, side yard	3.5' from house to fence, no room for a tank
Dryer 	 	Type: Standard Gas Location: Detached shed	No electrical, washer/dryer running on an extension cord to house. Will require trenching
Stove/Oven 	 	Type: Gas stove, separate elec oven Location: Stove in kitchen island	Gas in slab to island. Separate built in oven on a 40A circuit.
Fireplace 	 	Type: Gas insert Location: Living room	10' from panel to chimney



Get To Know The Panel

🔌 **Goals of the assessment, identify the following:**

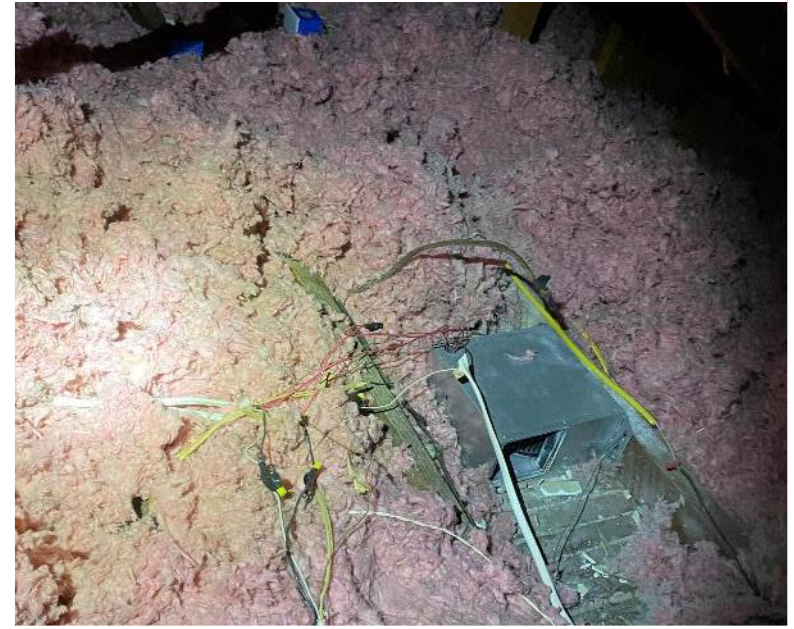
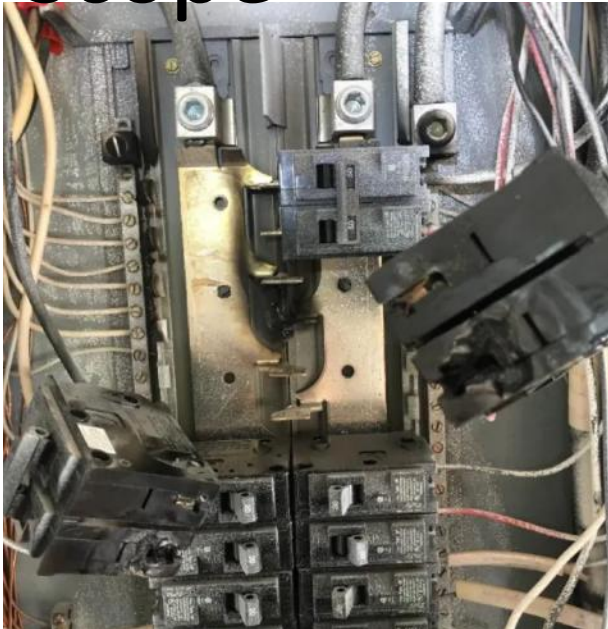
- 🔌 **Main panel capacity**
- 🔌 **Used capacity**
- 🔌 **Physically available space**
- 🔌 **Path for new wire**
- 🔌 **Safety concerns**
- 🔌 **Opportunities for retrofits to avoid panel change**



Don't worry, they don't usually look like this!



Don't Be Afraid To Address Items Out of Your Scope





Connect The Dots

FROM INTEL TO GAMEPLAN

Time to pull it all together!!!

Must-Have Sales Process – Close It

Preparing For Your Presentation

- 🔌 After the assessment, **take a few minutes** to prepare
- 🔌 Go back to the **truck** if needed
- 🔌 **Dust off**, catch your breath, **reflect** on the customer
- 🔌 **Ask AI** for tailored sales tips
- 🔌 **Be confident!** You're now armed with:
 - 🔌 Rapport with the Customer
 - 🔌 Customer personality type
 - 🔌 Customer goals/drivers
 - 🔌 Findings from the assessment



Tailoring Your Presentation

- 🔌 Customizable Pitch Deck: Have a robust set of slides or standard images of your best work that can be adapted to different situations
- 🔌 Tip: Transfer assessment photos from phone to tablet
- 🔌 Remember, emotion vs logic decisions

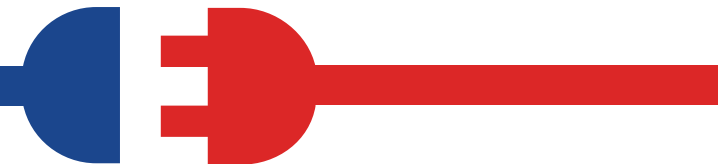
Awareness → Interest → **Emotion** → **Logic** → Commitment



EMOTION



LOGIC



Tailoring Your Presentation

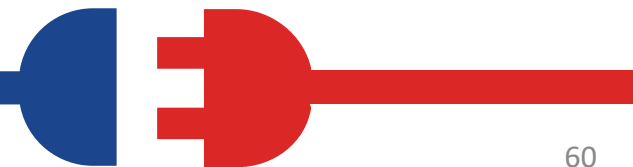
- ⚡ **Customize** messaging and cadence to customer's personality type
- ⚡ Show how **you** and **your company** will take care of them
- ⚡ Emphasize the need for **proper design & quality** installation.
 - ⚡ Load calc, envelope, addressing ductwork, registers, commissioning
- ⚡ Validate your expertise with **technical aptitude** from the walkthrough
- ⚡ Be **comprehensive** for a whole-home solution



If you don't sell the value, they won't understand it.

The Importance of Language

- 🔌 Using the **right language** is important
- 🔌 These are new concepts – being over technical or complex will be **counter-productive**
- 🔌 Some tips:
 - 🔌 Simple terms (e.g., refrigerator analogy)
 - 🔌 Benefits-oriented language (how it helps them)
 - 🔌 Visual aids (show pictures)
 - 🔌 Safety & health focus (electric = no flames)



Remember Your Customer's Starting Point (typically)

- 🔌 Always had a GAS furnace
- 🔌 Always had a GAS water heater
- 🔌 Never lived with a heat pump



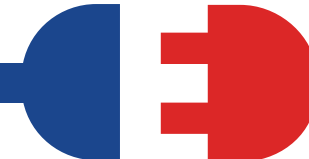
Explaining Different Heat Pump Options

- 🔌 Use takeaways from **discovery** to inform this step
- 🔌 **Don't waste time** on options that don't fit home or customer needs
- 🔌 Use **pictures** of real, installed systems
- 🔌 Many customers **think** it's best to have 1 system per room



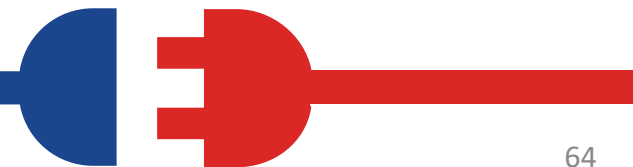
Closing Out

- 🔌 Do you have any questions?
- 🔌 Is there anything you'd like me to clarify about the design, scope, or pricing?
- 🔌 On a scale of 1–10, how confident do you feel about moving forward with this plan?
Follow-up: "What would make it a 10 for you?"
 - 🔌 If I was able to address these for you, would you move ahead?
- 🔌 When is a good time for us to meet again, or do you feel comfortable getting started now?

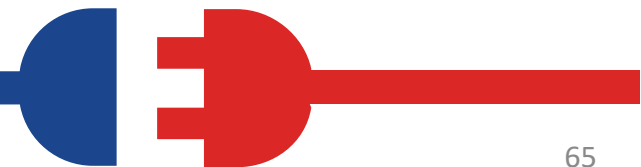


How We Approach “The Presentation”

- 🔌 Provide well-tailored education on heat pumps
- 🔌 Show images of past installs, noting the system or approach we’ll be proposing
- 🔌 Discuss how our company’s approach is the best solution to address their needs (uncovered during interview)
- 🔌 Address objections before they arise
- 🔌 Ask permission to tell them about “extra” services
- 🔌 Send customized proposal and email summary



Mr. Jones Can't Wait





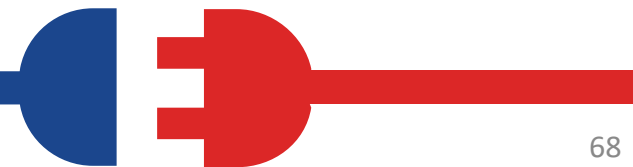
Connecting The Dots

SETTING EXPECTATIONS

Responsibly Avoiding Responsibility

Set Expectations Early & Often!

- ⚡ Economy vs comfort solution
- ⚡ Timelines/phases for project
- ⚡ Discuss workday plan – noise, dust, electrical disruptions, etc.
- ⚡ Multiple visits (HERS, permit)
- ⚡ Warranty information
- ⚡ Rebate paperwork



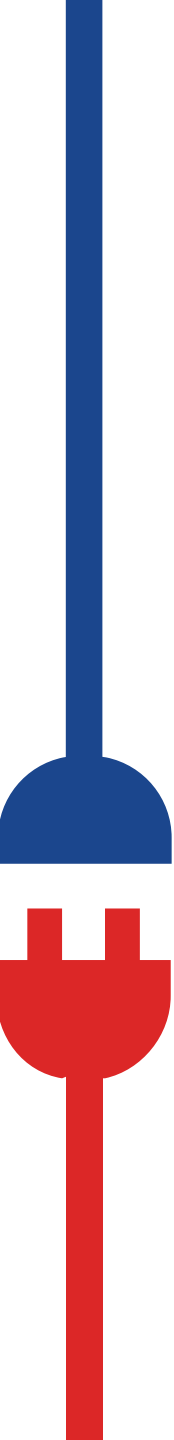
Sometimes The “Customer” Isn’t One Person

- ⚡ Spouse and other family
- ⚡ Rentals/AirBnB
- ⚡ Architects, General Contractors, Designers
- ⚡ Create a basic **user guide** for system operation. Must be as **simple** as possible.



Part 2 Takeaways

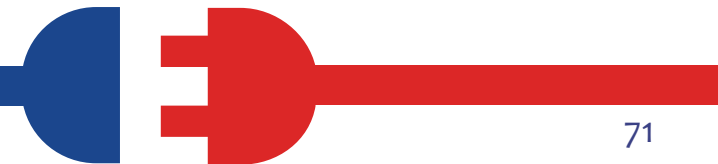
-  Ask Better Questions
-  Be the Guide, Not the Pitch
-  Perform a comprehensive assessment
-  Tailor your presentation delivery
-  Set expectations



Questions? Stay in Touch!



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Closing

- **Coming to Your Inbox Soon!**
 - Slides and Recording
- **Come back for Part 2 of this series on October 16!**
- **In-Person Events! Register on www.3c-ren.org/events.**
 - October 28 – [Renewable Energy, Energy Storage, and Resiliency](#) – In-person happy hour!
 - November 4 – [Regional Energy Forum](#)
 - Free in-person forum bringing together building professionals, policymakers, and community members to explore how the built environment can adapt to the growing challenges of wildfire.
 - Plus, a networking lunch, optional zero net energy building tour, and a giveaway for an air purifier!

Any phone numbers who joined? Please share your name!

**Preparing Buildings for Wildfire Resiliency in 2025 and Beyond**



Tuesday, Nov. 4 | 10 am - 1 pm | Santa Barbara
Louise Lowry Davis Center

Post-Forum Net Zero Building Tour
1:30pm - 2:30 pm
County of Santa Barbara Emergency Operations Center
and Regional Fire Communications Center



Scan the QR code or register at
3C-REN.org/forum



Thank you!

More info: **3c-ren.org**

Questions: **info@3c-ren.org**

Email updates: **3c-ren.org/newsletter**



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