

Congratulations!

- You've gotten your certifications.
- What now?
- How do you translate those achievements into a successful business?



Today's Information

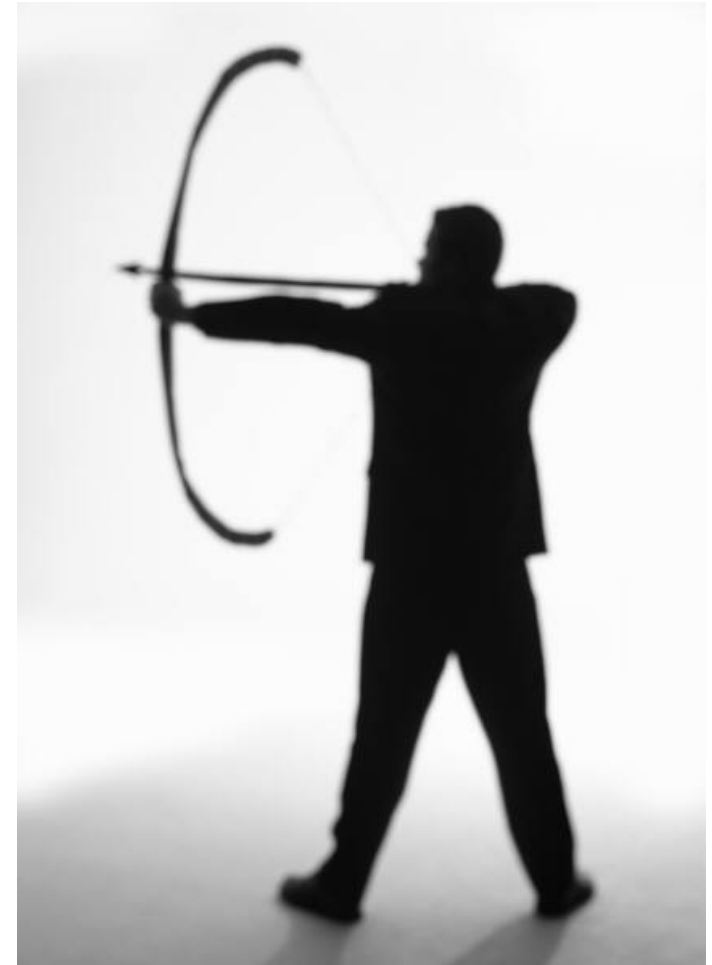
- Lots to cover: Bulk is business plan
- Will try to keep it neutral but lean toward new homes
- Hold questions until end
- Available on RESNET ebsite

Today's Information

- Lots to cover: Bulk is business plan
- As outlined, this is a 40-Hr. course
- Will try to keep it neutral but lean toward new homes
- Hold questions until end
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Learning Objectives

- Business Plans
- Marketing Tactics
- Tools & Equipment
- Efficiency Technologies
- Office Technologies
- Policy
- Utility Programs
- Franchising



Why Me?

- 2007
- Continued to Try New Home Consulting
- Trend Worsened
- Incorporated Existing Homes for Another Revenue Stream



Why Me?

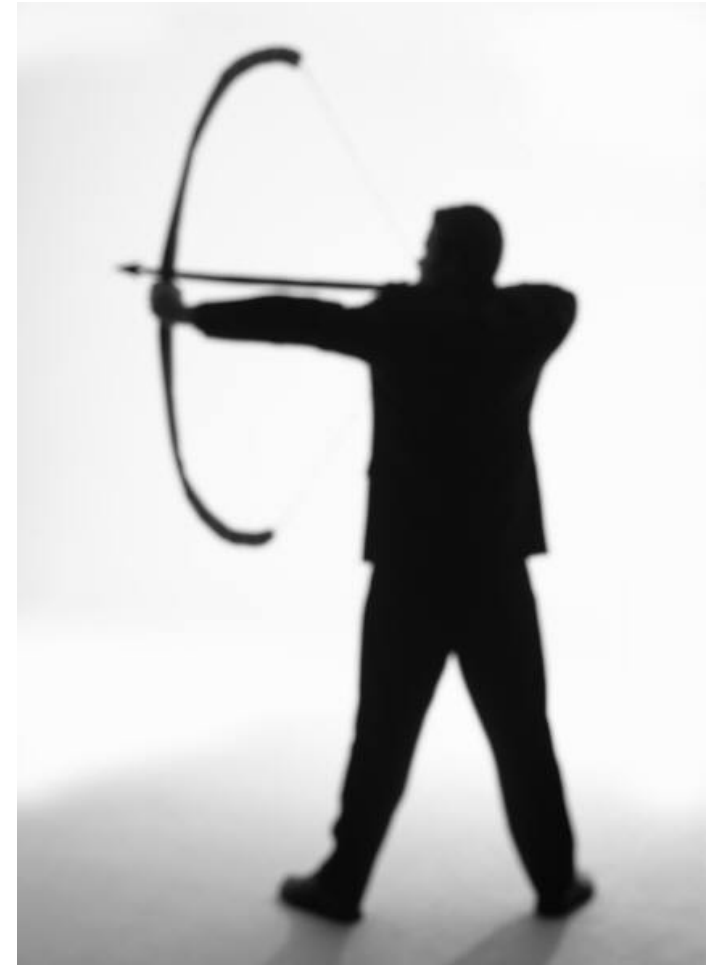
- I earned it! I am Not a Business Expert!
- Everything Was Off-The-Cuff
- No Sequencing
- Completely Reactive
- Four Years of Success DESPITE IT ALL!



Welcome to **Eco-Anthracite**, North Carolina's energy and conservation specialists. We are committed to the wise use of ALL our natural resources by helping people limit or reduce their impact on the environment. Let us help you make your home or building the healthy, efficient, comfortable place you want it to be. Remember, "The greenest homes and buildings can be those that are already built!"

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Business Plan in General

- Business success starts with a good plan.
- At a some point, you need to stop thinking about it and write down your ideas.
- Thorough and well thought out.
- Business Plan is an investment. It takes time.
- Get others to read it!

After The Exams

A business plan answers a lot of questions, among them are:

- How will you measure success? This gets to your Mission Statement and/or BHAG!



Big, Hairy, and Audacious



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A business plan answers a lot of questions, among them are:

- How will you measure success? This gets to your mission statement or BHAG!
- What is your market and how does your business fit in it?
- Estimating costs and projecting revenue
- Goal setting: 6 month; 1 year; 2 year; 5 year and beyond

A business plan has several necessary elements:

- Executive Summary
- Company Analysis
- Industry Analysis
- Customer Analysis
- Competitive Analysis
- Barriers to Entry
- Marketing Plan
- Operations Plan
- Financial Plan

Executive Summary

Hook them on the first page. Green and Energy Efficient is not enough! Your first page must make them want to keep reading.

Keep it simple. After reading the first page, people or investors often do not understand the business. If your business is truly complex, you can give the details later on.

Be brief. The executive summary should be 2 to 4 pages in length.

Company Analysis

Give some history. Provide background or future info on the company, including date of formation, office location, legal structure, and stage of development.

Show off your track record. YOU AND YOUR TEAM! Detail certifications and education, prior accomplishments and experience, and partnerships secured, among others. **Ryan?**

Why you? Demonstrate your team's unique unfair competitive advantage, whether it is technology, stellar management team, or key partnerships.

Industry Analysis

Demonstrate the need for your product. Ideally, people are willing to pay money to satisfy this need.



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Cite credible sources when describing the size and growth of your market like NAHB, RESNET, Builder Magazine, etc.



Customer Analysis

Define your customers precisely. For example, it's not adequate to say your company is targeting homebuilders, since there are lots of these. Define the type of builder, contractor, or subcontractor. Maybe even real estate agents or home inspectors.

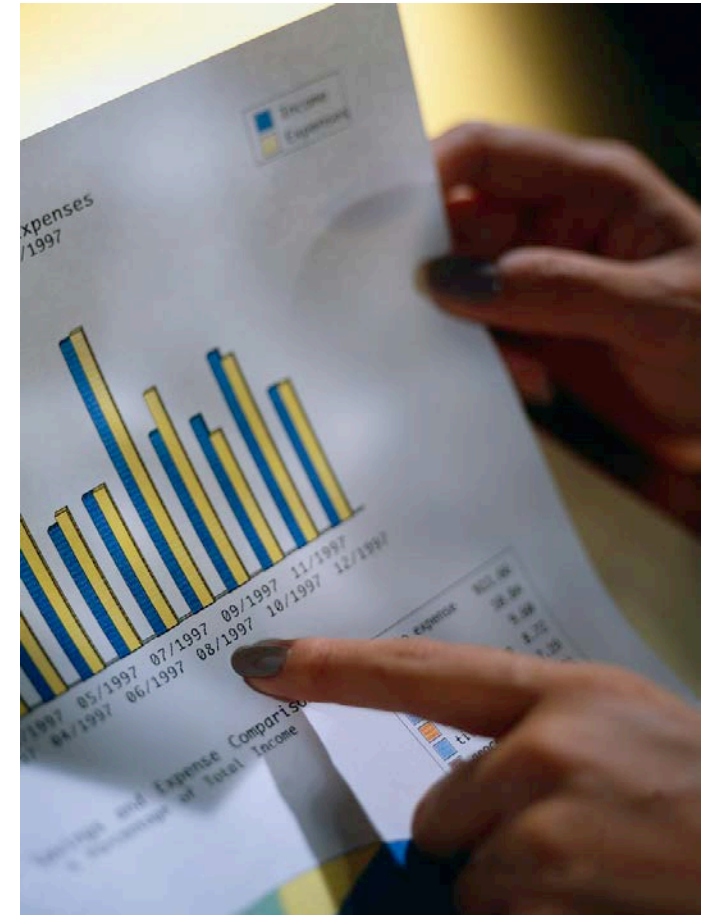


After The Exams

Customer Analysis

Detail their demographics. How many customers fit the definition? Where are these customers located? What is their average income or revenue?

Identify the needs of these customers again using credible sources.



Customer Analysis

Example: Customer Analysis leading to Revenue Projection. In this Case 5-Year

- 200,000 Post-War Ranches in Your Market.
- Your Goal is 1% for Deep Energy Retrofit
- \$16,000 is Avg. Cost With HVAC
- $200,000 \times .01 = 2000$
- $2000 \times \$16,000 = \$32,000,000$

Competitive Analysis

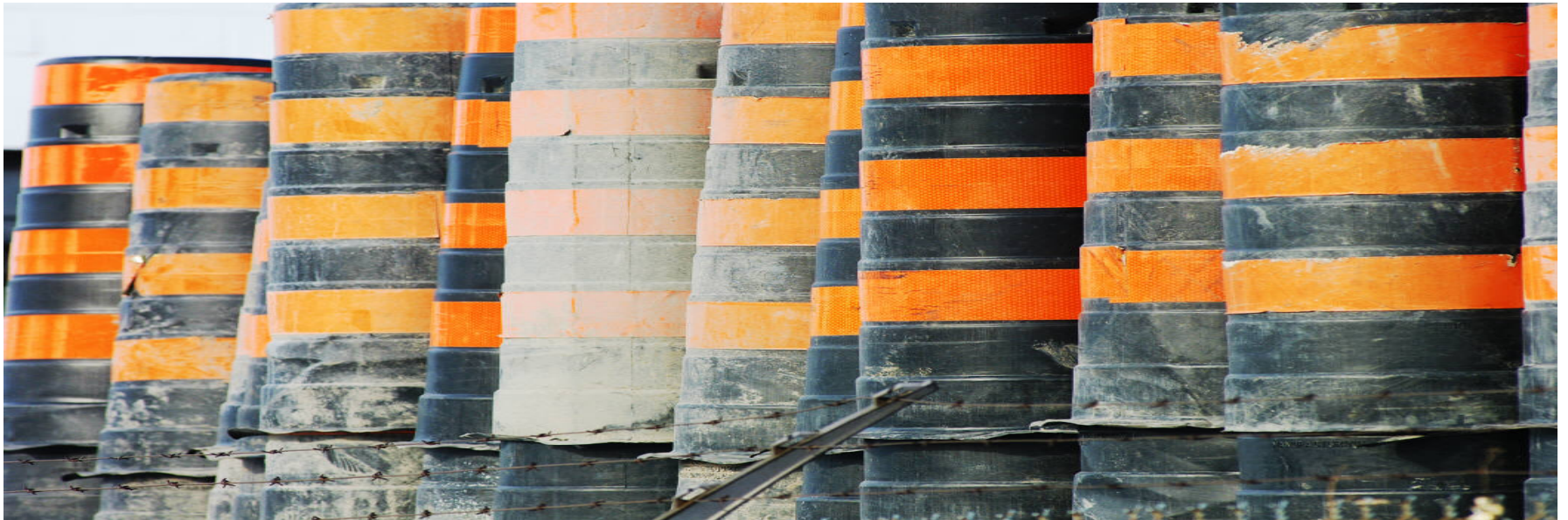
List competitors.

- Don't make the mistake of saying that you have few or no real competitors.
- If you claim you have no competitors, you may not have a market!
- Carefully describe their strengths and weaknesses, as well as your plan to differentiate yourself.

Barriers to Entry

Demonstrate barriers to entry.

Don't hide these. Be honest. Could be the “Good ol’ boy network” or the Goliath on the block.



Marketing Plan

Focus on Getting to the right people:

- Explain exactly which marketing and advertising strategies will be used and why.
- Chances are they will be directly tied to money.
- What percentage of revenue will you devote to these activities?
- Will these activities increase with revenue?

Operations Plan

Concept vs. reality. The operations plan details who will do what and you will get everything done. Document how this will change with increased revenue.

Everyday processes. Detail the short term processes and systems that provide your customers with your products and services as you start out.

RYAN?

Financial Plan

Detail all revenue streams. Be sure to include all revenue streams. Depending on the type of business, these may include sales of products/services, referral revenues, advertising sales, licensing/royalty fees, and/or data sales.

Don't leave anything out!

Enough About Business Plans! Let's Get it Done!



Business Entities

- “Two things that can make or break your success: A good lawyer and a good accountant.”
- You will need to consult with an accountant and/or attorney to determine what is right for your situation regarding what type of business form. Each of the different forms have different tax implications, along with different levels of liability.

Business Entities

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After The Exams

everblue®



Business Entities

- “Two things that can make or break your success: A good lawyer and a good accountant.”
- Insurance: Be honest
- Business Licenses: Mostly a pain to keep up with

Tools

- Staples for residential energy efficiency:
 - Truck/Van
 - Blower Door and Duct Blaster set-up
 - Flow Hood
 - IR Camera
 - Pressure and Flow Pans
 - Duct Mask
 - Booties
 - Combustion Gas Analyzer
 - CO Monitors
 - PPE's

Tools

- Smaller helpful tools:
 - Radiometer
 - Tactical Vest
 - Measuring Wheel
 - Laser Tape Measure
 - Hands Free Lights
 - Pull Behind
 - Camera (No Phone)
 - Collapsible Ladder
 - Wheeled Job Box



Efficiency in the field and the office

- It's all about data collection
- Sequence your data collection based on your HERS inspection or audit process, not the other way around.
- Hardware: Phones, Tablets, Laptops, Personal Action Cameras. The easier, the better!
- Software: Not just capture, but utilization afterward and import/export options.
- Try to get as paperless as possible
- Be lean, try to eliminate duplication or double entry.
- Try to make the field and office as seamless as possible

Now that we have the work figured out, lets make the phone ring!



Marketing Tactics: Get Out There!

- Article Marketing
- Blogging
- Email
- News Release
- Print Magazines & Newsletters
- Social Media Sites
- Trade Associations
- Conferences & Trade Shows
- White Papers

Guerrilla Marketing Tactics: strategy in which low-cost unconventional means are utilized.

- Vehicle recognition and placement
- Flyers at the local Whole foods about HERS
- Funny pictures in email blasts for no reason
- Cards left EVERYWHERE in odd places
- Unmanned displays at flea markets
- Partnerships with other “Green” companies
- Truck parked at Home Depot all weekend



DON'T LET YOUR
DINNER BREATH
BECOME YOUR
MORNING BREATH

Colgate
WAKE UP FRESH

PIZZA

PIZZA

Policy – Making it Work for You

- Know your policy and codes
 - Focus on local policy & codes

- Know your policy makers
 - Focus message on jobs and economic value

Utility Programs

- Large utilities
- Co-ops
- Munis



To Franchise or Not to Franchise

To Franchise

- Proven Success
- Established Business Formula
- Support
- Financing Availability
- Less Likely to Fail

Not To Franchise

- High Start Up Fees
- Limited Independence
- Royalty Payments
- Non-compete agreements
- Advertising Fees

Questions

**Remember I am not a
business expert!**