

Stages	Learning about Program/ Research Phase	Schedule Assessment	Energy Assessment	Post-Assessment, Pre Measure Installation	Installation Scheduling	Equipment Installation	Post Installation
<b>Program Interaction</b>	<ul style="list-style-type: none"> <li>Program provides marketing, education and outreach materials through various channels</li> </ul>	<ul style="list-style-type: none"> <li>Program representative schedules a Home Energy Assessment</li> <li>Program representative sends introduction, initial outreach and education email</li> </ul>	<ul style="list-style-type: none"> <li>Energy specialist visits home, completes installation work.</li> </ul>	<ul style="list-style-type: none"> <li>Program sends home energy assessment summary report by email.</li> <li>Program follows up with customer by email and phone to provide guidance and answer questions related to the assessment or recommended improvements.</li> </ul>	<ul style="list-style-type: none"> <li>Program works with customer to prepare them for installation work including coordinating with installation contractor and facilitating completion of appropriate program paperwork.</li> </ul>	<ul style="list-style-type: none"> <li>Contractor visits home, completes installation work.</li> </ul>	<ul style="list-style-type: none"> <li>Program representative follows up with customer by email and phone to resolve any issues or questions that may have arisen during installation.</li> </ul>
<b>Doing</b>	<ul style="list-style-type: none"> <li>Talking with friends</li> <li>Talking with a program representative</li> <li>Visiting webpage</li> <li>Reviewing program materials</li> </ul>	<ul style="list-style-type: none"> <li>Calling to schedule an assessment</li> <li>Documenting key details about appointment (date, time, etc)</li> <li>Needing to reschedule due to unexpected changes</li> </ul>	<ul style="list-style-type: none"> <li>Present during assessment</li> <li>Asking questions</li> <li>Overseeing</li> </ul>	<ul style="list-style-type: none"> <li>Reviewing home energy report and recommendations</li> <li>Deciding whether to install additional measure and if so, which ones</li> </ul>	<ul style="list-style-type: none"> <li>Working with program representative to schedule equipment installation</li> <li>Unexpected changes, need to reschedule</li> </ul>	<ul style="list-style-type: none"> <li>Present during installation</li> <li>Asking questions</li> <li>Overseeing</li> </ul>	<ul style="list-style-type: none"> <li>Sharing experience with friends and family</li> <li>Getting used to the new equipment/ changes made to home</li> <li>Working with program representative to fix error made by contractor.</li> </ul>
<b>Thinking</b>	<ul style="list-style-type: none"> <li>What can I expect from an assessment?</li> <li>How do I schedule an assessment?</li> </ul>	<ul style="list-style-type: none"> <li>How much time do I need to set aside for this?</li> <li>What times can I be available?</li> <li>What can I expect from an assessment?</li> <li>Who will be entering my home to conduct the assessment?</li> <li>What do I do if I need to cancel?</li> </ul>	<ul style="list-style-type: none"> <li>What is the energy specialist doing and why?</li> <li>How am I going to remember everything the energy specialist tells me? What am I going to do with this information?</li> </ul>	<ul style="list-style-type: none"> <li>How do I prioritize which upgrades to make?</li> <li>How much are these upgrades going to cost? How am I going to pay for them?</li> <li>How do I find a contractor and execute this project?</li> </ul>	<ul style="list-style-type: none"> <li>How much time do I need to set aside for this?</li> <li>What times can I be available?</li> <li>Who will be entering my home to perform the installation?</li> </ul>	<ul style="list-style-type: none"> <li>What is the contractor doing and why?</li> <li>Is there anything else I need from the contractor?</li> </ul>	<ul style="list-style-type: none"> <li>Will the contractor fix the error? Will I have to pay for it?</li> </ul>
<b>Feeling</b>	<ul style="list-style-type: none"> <li>Curiosity- This is an opportunity to learn about my home.</li> <li>Overwhelmed- I don't have time to look over the program materials!</li> <li>Confusion- Terminology used in the marketing materials is confusing!</li> <li>Hesitancy- Will an assessment identify costly upgrades?</li> <li>Skepticism- Can I trust my utility to give me unbiased advice?</li> </ul>	<ul style="list-style-type: none"> <li>Frustration- I wish there were other methods of scheduling this and more convenient times.</li> <li>Relief- I'm glad the program provided materials, I have a better sense of what to expect.</li> </ul>	<ul style="list-style-type: none"> <li>Apprehension- Will the energy specialist show up on time? What happens if they don't?</li> <li>Apprehension- Stressed to have someone I don't know in the house.</li> <li>Delight- This energy specialist is very friendly, I am learning so much!</li> <li>Overwhelmed- The energy assessment provided me with a lot of information, what now?</li> </ul>	<ul style="list-style-type: none"> <li>Overwhelmed- I wish there was someone I could talk to who could give me a more in depth breakdown of these results and how to proceed.</li> <li>Confusion- Terminology used in the report is confusing!</li> <li>Relief- Happy to hear from a program representative who was able to answer my questions.</li> <li>Skepticism- Will I save enough energy to justify the costs?</li> </ul>	<ul style="list-style-type: none"> <li>Relief- Happy to have a dedicated representative who is able to help facilitate follow-up work with contractors.</li> <li>Apprehension- How do I know that the program contractor will be of good quality?</li> </ul>	<ul style="list-style-type: none"> <li>Apprehension- Will the contractor show up on time and complete all the work they are supposed to? What happens if they don't?</li> <li>Apprehension- Stressed to have someone I don't know in the house.</li> </ul>	<ul style="list-style-type: none"> <li>Frustration- A bit annoyed to have to be dealing with an error made by the contractor.</li> <li>Delight- Excitement for new equipment/ the upgrade made and to see that the energy savings are real!</li> </ul>