




# Retro-Commissioning Past Participant Conversation Guide


This guide is intended to be a tool for Service Providers to use in conversations with RCx past participants. When contacting a past participant, you may realize that your original contact has moved onto a different role or is not at the facility anymore. Use and/or modify the conversation prompts below to explain to a new contact how to get involved with an RCx project once again.

 **Service Provider:** "Hi, I'm trying to get connected with **[Original Contact]** please."

 **Customer:** They would often say, "Oh, I'm sorry, **[Original Contact]** doesn't work here any more."

 **Service Provider:**

- "Oh! Well that doesn't surprise me!
- It's been **[XX]** years since we last worked with this location.
- My name is **[Your Name]**, I'm calling from the ComEd RCx offering,
- We worked with **[Original Contact]** on a project back in **[20XX]**, and I'm following up on that project.
- Is there someone else I could talk to?"

 **Customer:** "Sure! Let me transfer you to **[New Contact]**."

 **Service Provider:**

- "Hi **[New Contact]**, my name is **[Your Name]** and I'm calling from the ComEd RCx offering.
- I was trying to get connected with **[Original Contact]** and was transferred to you.
- We worked with **[Original Contact]** on an RCx project back in **[20XX]**.
- The reason I'm reaching out is because it has been **[X years]**, you are eligible to participate in the program again.
- If you have 30 seconds, I'd be happy to give you a quick overview of the program."

 **Customer:** "Sure."

 **Service Provider:**

- "The objective of the program is to identify ways to save energy and improve comfort through optimizing your existing HVAC system.
- ComEd fully funds a study, conducted by one of our engineering partners, to investigate your building and generate a list of opportunities.
- You work in-house or with your controls contractor to implement measures that make sense for you and that have a payback period of less than 1.5 years.
- The engineer comes back to verify everything is working as intended.
- ComEd pays you cash incentives for energy savings realized to help you offset the cost of any controls work.
- If this is of interest, all I would need is 30 minutes of your time over the phone to collect some information. I can fill out the application for you, and send it to you for your review/signature.
- The program team reviews with ComEd, if everything looks good, we start the study!"

 **Customer:**

**Typically, they have a few questions, and then say something like,**

"Sounds pretty good, can you send me some information I can share with my manager/team?"

 **Service Provider:** "Sure! I'll send you:

- A summary of what we discussed today
- The RCx participant manual
- Your past Verification report"

"When do you think you will have a chance to connect with your team?"

 **Customer:** "Sometime this week."

 **Service Provider:** "Are you available to meet next week, same time, same place?"

 **Customer:** "Sure!"

 **Service Provider:**

- "Great! I'll schedule 30 minutes to collect some information to fill out the application for you."
- **If not interested,** "No problem, thank you for your time."