

HOME PERFORMANCE REFERRAL PROGRAM

Expand Your Business with Contractor-to-Contractor Referrals!

We are inviting members of Xcel Energy's Whole Home Efficiency Program to take advantage of our new **Home Performance Referral Program**. This is your chance to get \$500 in exchange for three referrals and to expand your network while helping homeowners realize their energy efficiency goals.

WHO IS ELIGIBLE?

Xcel Energy's Trade Partners who are part of the Whole Home Efficiency Program and provide at least one of the following services:

- Energy audits
- Insulation and air sealing
- Heat pump and heat pump hot water heater installations

PROGRAM HIGHLIGHTS

- Earn \$500 by completing a combination of at least three:
 - Providing referrals to another Whole Home Efficiency Program contractors and/or
 - Receiving a referral from another Whole Home Efficiency Program contractor
- Help customers move efficiently through the whole home energy efficiency process
- Build your network of trusted contractors through our network activities

HOW TO PARTICIPATE?

1. Finish Your Project

- Complete a project (Project A) for a customer.
- Make sure the rebate application for that project is approved.
- Talk to the customer about other potential projects for their home.

2. Make a Referral

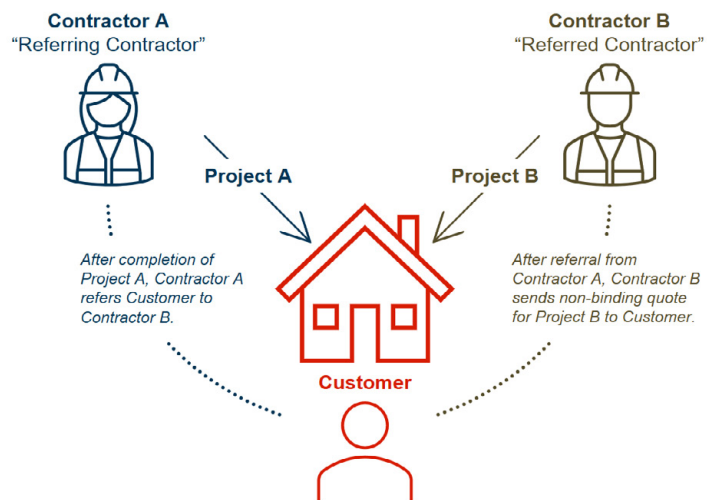
- Refer the customer to another Whole Home Efficiency Program contractor (Contractor B) for their next project (Project B).
- Submit the online referral form by scanning the QR code below.

3. Referred Contractor Follow Ups

- Contractor B sends the customer a quote for Project B.
- Contractor B submits referral form. Scan the QR code below.

4. Referral Confirmed and Rewarded

- Xcel Energy matches both referral forms.
- Once you have three confirmed referrals, you'll receive a \$500 referral stipend.



Scan the QR code for the Referral Form



Questions?
cleanenergycareers@brendlegrupp.com
We're here to help you connect.

Home Performance Referral Program

Referral Guidance

WHY IT MATTERS

Customers are more likely to move forward with multiple home updates when they're guided by trusted contractors. You already know their home, now help them take the next step by referring them to another qualified contractor within the Whole Home Efficiency program.

HOW TO MAKE A REFERRAL

- **Frame referrals as part of a broader home energy plan.** Example, "Since we've completed the air sealing, the next step might be looking at your heating and cooling system. I can connect you with a contractor who specializes in heat pumps."
- **Never share a customer's personal information without their permission.** Get verbal consent before making a referral. Example: "Would you like me to share your name and contact information with a trusted Whole Home Efficiency contractor who can help with the next step in your project?"
- **Make a warm handoff by introducing both parties.** Let the customer know who will be reaching out. This builds trust and avoids confusion. Once you have made the referral to the customer, reach out the referred contractor, share the customer information, and project specific information.

HOW TO RECEIVE A REFERRAL

- **Reach out on a timely manner:** Contact the customer shortly after you get their contact information, introduce yourself and make sure that you gather all the information you need to write a quote for your project.
- **Provide quote and contact information shortly after:** Make sure that the customer receives your quote including itemized pricing after initial contact.
- **Follow up with the customer, as appropriate:** Once the customer has received your quote, check in with them and see if they want to move forward with the project.

WANT HELP FINDING A CONTRACTOR YOU CAN REFER TO?

- Use the Whole Home Efficiency Contractor Directory and tap into the network to discover contractors in your region: https://hvacree.net/xcel-co/public_search.cfm

