

The Audit Report as a Motivator for Change

What is the Purpose of the Audit Report?

- To present EE recommendations to client
- Provide information that helps client understand the impact of implementing (or not implementing) EEMs
- Provide tools to help client move to implementation within the context of their business

Since the audit report is a sales tool...



Engage

Communicate

Motivate

ENGAGE with your customer's concerns

- Learn what concerns your customer
- View things from their perspective, and within the context of their business
- Write to them
- Don't waste their time

Communicate value to the customer

- Write about the customer & their business
- Don't "*talk*" too much about what you know
- Be polite and appropriate

MOTIVATE the customer to act

- Understand what motivates your customer
- Focus on the value proposition
- Remove barriers or obstacles
- Talk about outcomes

The Executive Summary

- Write it as a proposal and a call to action
- Aim it at the decision makers
- Limit it to one page, two at most
- Clearly capture the key points of the report in clear, non-technical language
- Save the details for the body of the report

What are the elements of the Executive Summary?

- Who conducted the audit and why
- Key findings or recommendations of the audit
- Summary table of recommended EEMs
- Financial information about implementation (costs & benefits)
- Simple implementation plan or proposal

BEST Center Curricula, Resources & Recordings

Academic Programs

Georgia Piedmont Technical College - Building Automation Systems

Milwaukee Area Technical College - Sustainable Facilities Operations

Laney College - Commercial HVAC Systems

City College San Francisco - Commercial Building Energy Analysis & Audits

Professional Development Materials, Presentations & Videos

National Institutes

Building Automation Systems Instructor Workshops

Webinars (e.g., BEST Talks)

Faculty Profile Videos

Reports & Case Studies

Marketing Resources

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