

Client Reference Interview Prompts

THE FOLLOWING INTERVIEW PROMPTS ARE PROVIDED TO ASSIST YOU IN OBTAINING INFORMATION FROM CLIENT REFERENCES. THESE PROMPTS FOLLOW THE SAME SEQUENCE AS THE CLIENT REFERENCE EVALUATION FORM, WHICH SHOULD BE COMPLETED AS THE INTERVIEW PROGRESSES. THE PROMPTS ARE PROVIDED TO ADD CLARITY TO THE INTERVIEW PROCESS.

- 1) Are you satisfied with the energy savings achieved so far?
- 2) Did the contractor provide acceptable financing for the project in a timely manner?
- 3) Are you satisfied with the frequency and clarity of communications with your contractor?
- 4) has your contractor been responsive and cooperative to any requests or problems you've had with regard to the project?
- 5) Were you satisfied with the contractor's coordination of construction scheduling with your building staff?
- 6) Was the contractor able to complete the project on schedule?
- 7) Were you satisfied with the quality of training for facility staff provided by the contractor?
- 8) Do you feel the contractor has a thorough understanding of your facility's systems and operations?
- 9) Did the contractor install a wide range of retrofits?
- 10) Is the equipment installed by the contractor performing reliably?
- 11) Are you satisfied with the maintenance and/or monitoring and support services provided by this contractor?
- 12) Are you satisfied with the contractor's method of measuring energy savings?

Client Interview Information/Evaluation Sheet

DATE OF CALL: _____ FACILITY: _____
YOUR NAME: _____ CONTRACTOR'S NAME: _____
REFERENCE NAME: _____ SITE: _____
TITLE: _____ SITE USE: _____
PHONE: (____) _____ INSTALLED PROJECT COST: \$ _____
EQUIPMENT INSTALLED: _____

This form has been prepared as a guide to be used when conducting phone interviews with previous clients of the contractor. The rating system uses the qualities of Superior, Very Acceptable, Acceptable, Not Acceptable, and Unable To Rank to evaluate the information provided by the references in response to each of the questions outline below. Please use the space provided below each question to elaborate on and discuss any problems or instances of superior performance, if applicable.

EXPERIENCE

1. Achieved energy savings to date.

_____ Superior _____ Very Acceptable _____ Acceptable _____ Not Acceptable _____ Unable To Rank

Discussion: _____

2. Ability to arrange timely and attractive project financing

_____ Superior _____ Very Acceptable _____ Acceptable _____ Not Acceptable _____ Unable To Rank

Discussion: _____

MANAGEMENT

3. Frequency/clarity of contractor communication with client representatives.

_____ Superior _____ Very Acceptable _____ Acceptable _____ Not Acceptable _____ Unable To Rank

Discussion: _____

4. Contractor responsiveness/cooperativeness to specific user requests to resolve problems.

_____ Superior _____ Very Acceptable _____ Acceptable _____ Not Acceptable _____ Unable To Rank

Discussion: _____

5. Contractor's coordination of construction scheduling with building staff.

____ Superior ____ Very Acceptable ____ Acceptable ____ ^{Not}Acceptable ____ ^{Unable}To Rank

Discussion: _____

6. Ability of contractor to complete project on schedule.

____ Superior ____ Very Acceptable ____ Acceptable ____ ^{Not}Acceptable ____ ^{Unable}To Rank

Discussion: _____

7. Quality of training for facility personnel provided by the contractor.

____ Superior ____ Very Acceptable ____ Acceptable ____ ^{Not}Acceptable ____ ^{Unable}To Rank

Discussion: _____

TECHNICAL

8. Contractor understanding of your facility systems.

_____ Superior _____ Very Acceptable _____ Acceptable _____ Not Acceptable _____ Unable To Rank

Discussion: _____

9. Comprehensiveness of installed retrofits.

_____ Superior _____ Very Acceptable _____ Acceptable _____ Not Acceptable _____ Unable To Rank

Discussion: _____

10. Reliability of equipment performance installed by contractor.

_____ Superior _____ Very Acceptable _____ Acceptable _____ Not Acceptable _____ Unable To Rank

Discussion: _____

11. Quality of maintenance practices and monitoring and support services provided by contractor.

____ Superior ____ Very Acceptable ____ Acceptable ____ ^{Not}Acceptable ____ ^{Unable}To Rank

Discussion: _____

12. Satisfaction with methods of measuring energy savings.

____ Superior ____ Very Acceptable ____ Acceptable ____ ^{Not}Acceptable ____ ^{Unable}To Rank

Discussion: _____

PLEASE ASK YOUR CLIENT REFERENCES THE FOLLOWING QUESTIONS AND RECORD THE RESPONSES IN THE SPACE PROVIDED BELOW:

1. Why did the client choose this particular company?

2. If the client were to change any aspect or provision of the contract with this company, what would that change be?

3. Would the client enter into another contract with this company? Why or why not?

4. Did the project costs meet the client's expectations? Why or why not?

5. Did the project outcomes meet the client's expectations? Why or why not?
