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2009



On-the-Job Mentoring

What is missing from the online courses, and from most classroom training, is in-field training or mentoring.

by Tamasin Sterner

Since 1980, I've worked as a contractor, primarily with electric utility weatherization and conservation programs. At first, I thought I could get by without learning how to do combustion appliance testing. I did get by until a few years ago, when it became important for my staff and me at Pure Energy to learn how to assess combustion appliances. It wasn't easy for me. I struggled to learn the proper test procedures, but I finally got it, and the procedures and protocol are fully integrated. The time I spent struggling proved to be time well spent. I can understand why others struggle with topics such as combustion testing, and teaching them how to perform the tests is now easy.

However, it is just about impossible to teach others how to perform complex diagnostics unless one is in the field with typical systems to test. Therefore, we are huge fans of on-the-job teaching and mentoring. And teaching a technician who is being paid to learn takes some stress off a potentially stressful situation.

We are big fans of Saturn Online's Energy Auditor course. Several of our own staff have taken that training.

What is missing from the online courses, and from most classroom training, is in-field training or mentoring. Many technicians don't really digest the information they have been taught until they get to set up the blower door in a real house and play with the manometer and hoses, a thermal imager, and a combustion analyzer. Therefore, most of the training sessions Pure Energy offers, as a BPI Affiliate, start with an in-field audit rather than classroom training.

We believe these are some of the benefits of on-the-job training and mentoring:

- Peers who honestly share lessons and experiences in a real-life situation seem to appreciate the training more, and appear to learn more easily.

- The challenges that occur in real houses on real jobs cannot be ignored when the training occurs in the field. They must be dealt with. There is no sugar coating.
- The trainer can observe communication between the customer and the trainee. The trainer can then evaluate the effectiveness of the communication.
- Classroom training is cost-effective, useful, and necessary. In-field training is essential. We like to introduce a topic in the classroom and get into the field as soon as possible! We then like to return to the classroom for review and sharing.



Pure Energy provides in-field quality assurance observation sessions for field technicians.

In-House Training

I have been very fortunate to find excellent human beings to work for Pure Energy. When choosing employees and independent contractors for our fieldwork, I've focused on choosing people with high ethics and strong people skills. The technical parts of the jobs can be taught, but the soft skills and heart-centered skills must be part of the person. The success of the work we do as energy auditors, quality assurance inspectors, and trainers or teachers relies on effective communication.

We can do things to a house or an appliance or a light fixture—but if we don't explain why we are doing what we are doing, and get the customer to agree that what we are doing is the best thing for them, our efforts to conserve energy will fail.

Once I find a good person who likes people, communicates well, passes a background check, and wants to be an energy auditor or a quality assurance inspector, I arrange for that person to observe me in the field. Then he or she shadows another Pure Energy field technician or two. After that, he or she will spend two to four weeks being mentored by a seasoned technician. During these weeks, the trainee is receiving lessons, either through a course such as the Saturn Online training, or through

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lesson plans I've written. After the mentoring, an experienced person will observe the trainee working alone on an as-needed basis, depending on scope of work changes, home performance field developments, new tools and equipment, and so forth.

Training for Other Companies

Pure Energy provides in-field quality assurance observation sessions for field technicians such as energy auditors, home performance contractors, and installers while they perform services for utility conservation and efficiency and weatherization programs. We watch the field worker as he or she audits a home, educates the homeowners, and installs efficiency measures in utility customers' homes. We are the eyes and ears in the field on behalf of the utility.

On these observation visits, we assess the skills of the field technicians and determine what, if any, additional training they need. We can mentor these field technicians on-site at the end of the observation period and follow up with particular documents, tools, or resources that the technician needs. Most field technicians say they appreciate the one-on-one attention and focused learning, even though the experience can be a little tense. The technicians appreciate being mentored by people who perform the same services. We've walked in their shoes, so to speak.

But No Free Advice

Another service we offer is something relatively new to us. In the last year or so, we've been inundated with calls from individuals who want to start a home performance or energy auditing busi-

ness. They are not shy about asking for advice on how to start and how to become successful. At first, we gave advice freely. Then we got to thinking about how we were essentially offering free advice to individuals who planned to compete against us for business. We began to tell callers that we charge for business advice and mentoring, and that they can have an appointment if they want us to tell them how to start a business. The information on our Web site gets truly interested individuals started. There they can find other trainers and resources. ♣

For more information:

For more on Pure Energy, go to www.pureenergyaudits.com.

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Tamasin Sterner is the founder of Pure Energy, in Lancaster, Pennsylvania.