

MISSOURI GREEN BANC

Workforce Education & Training Series

Approved Introduction Language & Clean Handoff Script

What to say, and what to do next. Keyed to Segment 5.

MGBA-EQP-JA-07

Use this language. It has been written to state what exists and offer a connection — nothing more. Read it once and notice what it does not do: it does not quote a rate, does not promise approval, does not project savings, and does not opine on tax or accounting treatment.

THE APPROVED INTRODUCTION

SAY THIS

“Before you cut scope, there’s a financing mechanism you should know about. It’s called C-PACE — it’s authorized under Missouri statute and administered through the Missouri Clean Energy District. It can cover one hundred percent of a project like this, repaid through the property tax bill over a term matched to the useful life of the equipment, up to twenty years. I’m not the right person to structure it, but I can connect you with who is.”

Short form, for the counter

“There’s a statutory financing program in Missouri that covers this kind of work at one hundred percent, repaid on the tax bill. I can put you in touch with the administrator. Want the contact?”

Written form, for a quote cover note or email

“The scope above reflects the full recommended package. If the capital budget is the constraint, Missouri has a statutory financing mechanism — C-PACE — administered through the Missouri Clean Energy District, which can fund up to one hundred percent of eligible project cost, repaid through the property tax bill. I am not able to structure or quote that financing. I can connect you with Missouri Green Banc, which administers the program, if you would like to explore it.”

THE CLEAN HANDOFF

- 1. Ask permission.** “Would it be useful if I connected you?” A referral the owner did not agree to is a referral that does not get answered.
- 2. Send one contact, not three.** One name, one destination. Ambiguity is where handoffs die.
- 3. Send the introduction the same day.** Email both parties together, with the building address, the scope under discussion, and the approximate project value. Nothing else.
- 4. Log it in your CRM.** Tag the opportunity as C-PACE-introduced. This is the data that later tells you whether the program is working in your market — see MGBA-EQP-JA-10.
- 5. Return to your job.** Specifying and supplying the right equipment. Do not follow the financing conversation into underwriting.

INTRODUCTION EMAIL TEMPLATE

SUBJECT: INTRODUCTION — [OWNER NAME], [BUILDING ADDRESS]

[Owner], meet [contact] at Missouri Green Banc, which administers the Missouri Clean Energy District — the statutory C-PACE authority in Missouri.

[Contact], [Owner] owns [building address], approximately [square footage]. We are scoping [brief scope: e.g. rooftop unit replacement with controls and envelope work], in the range of [approximate project value]. The constraint is capital budget, not merit.

I have told [Owner] that C-PACE exists, that it is authorized under §67.2800 RSMo, and that it can fund up to one hundred percent of eligible project cost through a special assessment on the property tax bill. I have not quoted rates or terms and have not represented that the project qualifies. That is your conversation.

I will stay in it on the equipment side. Thank you both.

HANDOFF DESTINATIONS

Missouri Green Banc — program administrator. (866) 554-4083 · communications@missourigreenbanc.org · 16305 Swingley Ridge Rd, Suite 220, Chesterfield, MO 63017.

A C-PACE-certified contractor in your customer base — where the owner needs a performing party before they need a financing conversation.

Where the owner asks specifically about capital sources, route through Missouri Green Banc rather than naming a capital provider yourself. The program surfaces best-fit candidates; a supplier recommending one provider over another creates an appearance problem for everyone, including you.

Markets set in motion. It all starts with collaboration.