

MISSOURI GREEN BANC

Workforce Education & Training Series

Branch Rollout & Referral Path Kit

Operationalizing the mechanism across a counter and an outside team. Keyed to Segment 7.

MGBA-EQP-JA-10

Knowing this and using this are different things. This kit covers the four operational steps and the tracking discipline that makes the effect visible in your own numbers.

STEP 1 — THE TEN-MINUTE SALES MEETING

Train the counter and the outside team on the trigger phrase, not the mechanism. Nobody needs to be an expert. Everybody needs to recognize “not in this budget” as a signal and know who to route it to. Agenda:

1. **The trigger phrases**, verbatim: “not in this budget,” “maybe next year,” “we can only do half of it,” “ownership won’t approve the capital.” (2 minutes)
2. **The one-sentence response** from MGBA-EQP-JA-07, read aloud twice by each person present. (3 minutes)
3. **The prohibitions** from MGBA-EQP-JA-06 — no rates, no approval, no savings, no tax advice, no closing tactic. (2 minutes)
4. **The referral path** — the single name below, and how to log it. (3 minutes)

STEP 2 — ONE INTERNAL REFERRAL PATH

Handoffs die on ambiguity. If a rep has to figure out where to send it, it does not get sent. Fill this in once, post it at the counter, and put it in the CRM as a required field.

FIELD	ENTRY
Internal C-PACE point of contact	
Phone / email	
Backup contact	
External destination	Missouri Green Banc · (866) 554-4083 · communications@missourigreenbanc.org
CRM tag to apply	C-PACE-INTRODUCED
Required fields at handoff	Building address · scope under discussion · approximate project value · owner contact
Turnaround commitment	Introduction email sent same business day

STEP 3 — SEGMENT THE ACCOUNT LIST

Use MGBA-EQP-JA-09. Assign the worksheet to one person with a deadline, not to the team with an intention. A list that belongs to everyone is worked by no one.

STEP 4 — ENCOURAGE CERTIFICATION IN YOUR CONTRACTOR BASE

Their capacity is your capacity. Every C-PACE-certified contractor in your customer base expands the size of project you can serve. Inform, do not sell:

- Missouri Green Banc runs a C-PACE contractor certification program through MGB Academy.
- Certified contractors can be surfaced to property owners through the program.
- Certification is a source of qualified project flow, not an administrative burden.
- Then let them decide. A contractor who feels pushed into a credential does not use it.

THE TRACKING DISCIPLINE

Tag opportunities where the mechanism was introduced. Measure against your own baseline. If the effect is real in your market, the data will show it within two to three quarters — and you will not have to argue for it internally.

METRIC	DEFINITION	BASELINE	Q1	Q2	Q3
Introductions logged	Opportunities tagged C-PACE-INTRODUCED				
Attach rate	Introduced opportunities that reached order, as a percentage				
Average project value	Order value on introduced opportunities				
Specification level	Share of orders at premium tier				
Measures per order	Average count of distinct measures				
No-decision losses	Opportunities closed as deferred or no decision				
Certified contractors in base	Count of C-PACE-certified customers				

LAST THOUGHT

The equipment you sell is, in most cases, already the right answer. The efficiency is real, the payback is real, the engineering is sound. What has been missing is not a better product — it is a way for the owner to pay for it that does not compete with everything else in the capital budget.

That mechanism exists. It is authorized by Missouri statute, administered through the Missouri Clean Energy District, and available across more than 300 member communities.

Your part is small and it is specific. Recognize the constraint. Name the mechanism. Make the connection. Then go back to doing what you do well.

Markets set in motion. It all starts with collaboration.