Spotlight: Sales and Customer Service Workers

Teacher Manual: Lesson 17

Essential Question

How do sales and customer service workers contribute to individuals and companies participating in climate solutions?

Learning objectives. Students will be able to

1. Understand the role of sales and customer service workers in promoting clean energy
2. Recognize barriers to change and how these workers help overcome them
3. Identify the skills, training, and experiences needed for these careers
4. Discuss which aspects of these careers align with personal interests and skills.

Lesson Summary

This lesson introduces students to the critical role of sales and customer service workers in advancing climate solutions. Through discussion, exploration of career pathways, and hands-on activities, students will understand how these professionals promote clean energy adoption and overcome barriers to change. Students will also connect their interests to clean energy careers and practice crafting compelling sales pitches.

This is one of seven lessons to highlight specific climate-critical in-demand careers.
Other career-specific lessons include:

11. Electricians
12. Engineers
13. Lineworkers
14. Managers and Analysts
15. Construction, Installation, and Maintenance Workers
16. Wind Turbine Technicians
17. Sales and Customer Service Workers

Technology referenced in this lesson:

- Energy efficiency services
- Solar
- Wind

Careers referenced in this lesson:

- Sales consultant
- Technical sales specialist
- Business development representative
- Customer service representative
- Energy efficiency advisor
- Account manager

Agenda	Timing	PPT Slide	
Opening Activity	5 minutes	2	**Pre-lesson**
Present agenda and learning objectives	5 minutes	3–5	
Direct Instruction Video Technology introduced Careers introduced	20 minutes	6–15	
Primary Learning Activity Partner or small group work Reinforce what was learned	20 minutes	16–17	
Closing Review learning objectives Closing activity Reflection	5 minutes	19–20	
Extension			
Handouts			
TOTAL TIME	**55 mins**		

Preparation:

- Read Student Presentation Deck (PPT).
- Watch the video(s) included in the Student Presentation Deck (most are available on the MassCEC YouTube channel).
- Print worksheets before class.
- Verify that the computer hosting the presentation deck is connected to the internet for video and hyperlink viewing.
- Check any links in the slide deck to ensure they work as intended, then review the content below.

Where to learn more about the lesson's content

If additional preparation time is available, these resources will provide further background on the topics covered in this lesson:

1. Massachusetts Clean Energy Workforce Needs Assessment—the report describes the most in-demand jobs for reaching Massachusetts's 2025 and 2030 climate goals.

Overview and Opening Activity (10 mins)

Materials and resources:

- Slide deck
- Worksheet

Opening activity: Get students thinking and talking right away.
Activity objective: Encourage students to recognize the scope of questions and challenges that customer service workers help customers navigate while making decisions about home clean energy solutions. Help students understand how these workers must help tailor customer responses and solutions since these technologies will not be one-size-fits-all.

Background: You have learned a little about many climate technologies and possible solutions. How much have you considered people's questions and concerns about these solutions?

Instructions:

- Ask students to get into pairs.
- Together, partners will follow this prompt: Imagine you're a customer service worker helping customers decide whether to invest in possible upgrades for their home:
    - Installing solar panels,
    - Replacing their HVAC system with a new heat pump connected to a geothermal network or
    - Installing an EV charging station for their new car in the garage.
- Pairs should spend about one minute discussing **each** of these solutions (three minutes total):
    - Consider what questions or concerns this customer might have when learning about solar power, geothermal, or EVs.

    - Think about all phases of these solutions, including installation, cost, maintenance, impact on emissions, and resilience or reliability.
- After three minutes in pairs, ask students to share one or two common questions they discussed, setting up the importance of customer service roles in addressing these questions and educating consumers.

Present the agenda. Students should be familiar with the format:

- After the opening activity, they will learn new information. The main activity helps them apply the new information and practice in the climate-critical occupation. The closing activity helps them synthesize what they learned and transfer knowledge.

Present the big question and lesson objectives:

- How do sales and customer service workers contribute to individuals and companies participating in climate solutions?
- Understand the role of sales and customer service workers in promoting clean energy.
- Recognize barriers to change and how these workers help overcome them.
- Identify the skills, training, and experiences needed for these careers.
- Discuss which aspects of these careers align with personal interests and skills.

Key points to emphasize:

- Sales and customer service workers are key to helping people understand and access clean energy solutions.
- Clean energy is an industry that expands and changes rapidly; these roles are essential to ensuring people get accurate and up-to-date information and can make informed decisions about the best solutions for them and their community.

Direct Instruction (20 mins)

Provide information to help the students achieve the learning objectives and prepare them to actively engage with the activity.

- Use inquiry-based learning strategies to engage learners where possible.
- Highlight careers related to the technologies.
- Help the learners to relate the learning to themselves and their communities.

Sales roles:

- These roles all contribute to adopting clean energy technologies in different ways.

- Each role requires unique skills and expertise, but they all share a common goal: helping people transition to cleaner, more sustainable energy solutions.

Provide brief explanations of each role, or ask students to share their ideas and fill in the blanks:

- **Sales consultant**s work one-on-one with customers to determine which clean energy solutions best meet their needs, educate them on the benefits, and make personalized recommendations.
- **Technical sales specialist**: With more profound technical knowledge, technical sales specialists explain advanced products such as solar panels or heat pumps and often handle more complex customer questions.
- **Business development representative**s identify potential new clients or businesses and introduce them to the clean energy market by providing them with initial information and presenting options.

Customer service roles:

- **Customer service representative**: Often the first point of contact, they answer questions and guide customers through options, helping them understand available products and services.
- **Energy efficiency advisor**: Advisors conduct assessments and make energy-saving recommendations, helping customers identify where they can be more efficient.
- **Account manager**: Account managers keep in touch with existing clients, helping them stay satisfied with products and addressing any needs or issues as they arise.

Sales and customer service workers:

- Sales and customer service workers help people make informed choices.
- They guide customers through their journey:
    - First, the customer expresses interest. They could be interested in a specific solution, such as solar panels, or they could be interested in finding a solution to a particular problem. For example, they want to improve the energy efficiency of their home.
    - The sales or customer service worker then educates customers about the clean energy technologies relevant to their needs.
    - They address any concerns or questions.
    - They help the customer decide and purchase the solution they believe will work best for them.
    - They continue supporting customers and advocating for them through the installation process.

- These workers are crucial for translating complex terminology into understandable information for customers, which makes deciding between technologies and adopting new technologies easier.

Help customers access climate-critical solutions:

- Customer service roles in clean energy often involve more than explaining products; they also help customers take advantage of financial benefits that make clean energy solutions more affordable.
- These workers bridge the gap between customers and available programs by explaining, assisting with paperwork, and coordinating services.
- Sales and customer service workers educate potential customers about financial incentives, such as rebates, utility programs, tax credits, and government grants, that they may be eligible for.
- These roles require knowledge about financial incentives.
- They assist with completing paperwork and applications to help customers qualify for free or reduced-cost services.
- They help customers schedule assessments and coordinate services to make the process easier.
- This could include booking assessments, installations, or service calls.
- Incentives are important to clean energy goals because they make clean energy more accessible for more people.
- They help reduce the cost, which can be a barrier for many customers.
- Examples of incentives are rebates for solar installations, tax credits for energy-saving upgrades to your home, and utility programs that provide free services to qualifying customers.

Common Barriers to Clean Energy Adoption

Clean energy solutions are usually significant investments with long-term payoffs. Sales and customer service workers partner with potential customers to help determine whether certain technologies and solutions are worth that investment for a customer or whether there might be a better fit.

- There are three common categories of concerns that people have about clean energy or barriers preventing people from investing in clean energy solutions:
    - Knowledge: People need to understand the technology or are skeptical about the technology; maybe they are unsure whether it will work for them or their location or whether it will be reliable.
    - Financial: People are concerned about the upfront cost of transitioning their homes away from fossil fuels or installing solar systems and EV chargers. They

also have questions about the long-term savings of these technologies and when they will start to see those payoffs.
    - Convenience: Change can be uncomfortable and disruptive. People want to know what the adjustment to using these new technologies will be like and how it will affect their day-to-day lives and the other systems they use in their home or businesses.
- Ask students why they think people might hesitate to adopt new technologies and relate this to common experiences, such as buying a new cell phone.
- Highlight that sales and customer service workers provide trusted information that helps people overcome these barriers.
- Excitement about a topic helps build confidence in communication.

Skills and knowledge:

- Strong communication and people skills—your whole job will be about people!
- The ability to simplify complex information and help others understand it is essential.
- You need to be familiar with clean energy products and technologies.
- You'll want to have a learning mindset and enjoy staying up to speed on the latest innovations in clean energy tech. You'll undoubtedly have customers asking you about something they've seen on the news recently or curious about the latest advancement. Therefore, you want to be able to explain how it relates (or does not relate) to the solution you'd recommend for them.
- Emphasize that a sales or customer service career can begin with strong communication skills, and students can continue to receive specialized training on clean energy technologies through the job itself.

Education and training:

- Although a four-year bachelor's degree is not required to work in sales or customer service, about half of current sales and customer service workers have one.

Wages:

- According to the Massachusetts Clean Energy Workforce Needs Assessment report, sales and customer service jobs begin at above-minimum wage. Salespeople may earn a commission, which increases their total income.

Anticipated Student Questions

What kinds of tasks do these sales and customer service roles involve?

- A: Tasks vary but include educating customers on clean energy options, managing renewable energy systems, and promoting energy solutions through presentations, events, or one-on-one interactions.

What skills are needed to succeed in these careers?

- A: Key skills include strong communication, problem-solving, and organization. Public speaking, relationship-building, and a willingness to learn about clean energy technologies are also critical.

Do I need specific training or a degree for these jobs?

- A: Some roles benefit from a degree, but many offer on-the-job training, certifications, or online courses to build the necessary expertise.

Video - *This is a placeholder slide for now. There is a Massachusetts-specific video being produced in 2025.*

Primary Learning Activity (20 mins)

Materials:

- Worksheets

Sell Your Solution

Activity Objective: Students will practice understanding and addressing customer concerns and needs, preparing an appropriate solution, and providing education.

Instructions:

- Divide the class into four groups, and assign each group one of four customer profiles from their worksheets:
    - **Anna**: a homeowner interested in saving on energy bills but concerned about high upfront costs (solar)
    - **David**: a small business owner in a coastal area who is interested in sustainable energy but unsure about the reliability of offshore wind (offshore wind)
    - **Maria**: a city planner looking into geothermal networks for a new community project but worried about community pushback (geothermal networks)
    - **Kevin**: a school principal interested in energy-efficient upgrades but concerned about disruptions to school operations during installation (energy-efficient building upgrades)
- Working in their groups, students will
    - Review the customer profile and discuss their assigned customer's specific needs, interests, and concerns.

- Develop a one-minute pitch (explanation) for how their clean technology could benefit this customer, tailored to the customer's profile.
- Identify one or two potential questions or concerns this customer might have and prepare how to address them.
- Present their pitch to the class, including a brief explanation of how their tech meets the customer's needs and an outline of the anticipated questions/concerns and how they'd address them.

Presentations and debrief:

- How did you adapt your pitch to be specific to your customer?
  - Help students reflect on the importance of tailoring communication to meet customer needs and concerns.
  - Encourage students to share how they adapted their pitch to be customer-centered.
- Could your explanation help customers feel more comfortable or confident about adopting this new technology?
- What career skills did you practice in this activity?
  - Encourage students to consider how these roles require empathy, clear communication, and problem-solving skills.
  - Emphasize that well-informed and supportive communication helps drive clean energy adoption.

Summarize key takeaways:

1. Sales and customer service roles are essential for the adoption of clean energy.
2. These professionals help overcome common barriers through education.
3. Communication, problem-solving, and adaptability are crucial skills in this field.

Differentiations and Adaptations—Learning Activity

For students who struggle with role-playing: Use a different format of customer information.
Adaptation: Provide groups with prewritten customer dialogue samples or FAQs specific to their customer's profile. This gives students examples of questions or objections the customer might have rather than asking them to generate these. Groups can build their pitch and responses from these provided materials.
Goal: Reduce the anxiety of generating customer interactions from scratch while still allowing students to practice tailoring their pitch and responses effectively.

For students who prefer more visual representation: Create a customer profile portal.
Adaptation: Provide each group with a visually engaging customer profile card, including a photo, a brief bio, and a list of needs, interests, and concerns. Groups can use these cards to reference while designing their pitch and addressing concerns.
Goal: Engage visual students by offering a tangible, easy-to-reference representation of their customer, making it easier for some students to connect to the idea of the customer and their needs.

For students who benefit from more structured collaboration: Assign specific roles in groups.
Adaptation: Divide the task into roles, such as "customer specialist" (analyzes the profile and identifies customer needs), "pitch creator" (develops the tailored explanation), and "objection handler" (crafts responses to anticipated concerns). Each student focuses on their role, and the group brings everything together for the presentation.
Goal: Encourage balanced participation and reduce the cognitive load by breaking the task into smaller, manageable pieces tailored to individual strengths. In each role, students still practice skills relevant to sales and customer service workers.

Closing Activity (5 mins)

Materials:

- Presentation/Slide deck, slides
- Reflection journal or worksheet

Activity objective: Encourage students to reflect on key takeaways and identify areas of curiosity for further exploration.

How would you respond to the question or statement below? Remember, the goal is to explain the benefits of these technologies clearly and simply so that they are easy for someone to understand, even if they know nothing about climate science!

Imagine you mention this class to a friend or family member. Maybe they're curious about what you've learned, or perhaps they have questions about clean energy:

1. "Why are solar panels so expensive, anyway?"
2. "I don't understand how offshore wind is better for the environment than offshore drilling."

Check individual understanding of learning objectives.

Extensions—if learners are loving this topic and want more …

Extension Activity: Clean Energy Funding Assistance Programs

Prompt: Imagine you are a clean energy consultant helping customers find financial assistance for adopting clean energy technologies. Research local, state, or federal programs in your area, such as rebates, grants, or subsidies, that could help reduce the cost of clean energy solutions, such as solar panels, energy-efficient appliances, or EV chargers. Create a one-page guide or presentation that includes

- an overview of at least two or three programs
- eligibility requirements for each program
- step-by-step instructions on how customers can apply.

Goal: Help students understand the critical role of financial accessibility in promoting clean energy adoption. This activity teaches research, communication, and practical problem-solving skills while emphasizing equity and accessibility in clean energy transitions.

Further extension: Have students role-play a scenario in which they guide a "customer" (another student or the teacher) through the process of finding and applying for these programs, practicing clear and empathetic communication.

Create a Marketing Campaign for Clean Technology

Prompt: Design a marketing campaign to promote your assigned clean technology to a specific customer demographic (e.g., homeowners, small businesses, or local governments). The campaign should include slogans, social media posts, print ads, and podcast or television commercials.

Goal: Encourage students to think about broader communication strategies and how to reach and persuade different audiences beyond individual customer interactions effectively.

Design a Customer Journey Map

Prompt: Map out a customer's journey when adopting one of the clean technologies covered in this course. Start with their initial inquiry, include learning about the benefits and addressing concerns, and end with purchase and implementation. Highlight key moments when customer service or sales interactions are crucial.

Goal: Help students understand the customer experience from start to finish and how tailored communication plays a role in successful clean energy adoption.

Role-Play Complex Customer Scenarios

Prompt: Create more complex customer profiles with nuanced needs or objections, such as budget constraints or concerns about environmental impact. Have students role-play these scenarios in pairs or small groups, focusing on addressing the customer's concerns while building trust and interest in the technology.

Goal: Challenge students to practice empathy, adaptability, and problem-solving in realistic and nuanced situations.

Handouts—Group Activity (below)

Sell Your Solution

Instructions

You have received an email from a new potential customer. Review the message, paying close attention to the customer's needs, questions, and concerns. Complete the worksheet below to build a customer profile and tailor an initial pitch to share with the customer when you speak with them later today.

Customer Profile Prompts

Customer's name:

What is this customer looking for?

What seems especially important to this customer?

What 1–2 questions should you be prepared to answer? How will you answer them?

What 1–2 concerns should you be prepared to address? How will you address them?

How will your clean energy technology meet their needs and benefit this customer?

Solar Power

Group 1

You have just received the following email from a new potential customer. Review the message, build the customer profile, and then tailor a short pitch to share when you speak with them later today.

Subject: Interested in Solar for My Home—But I Have Some Concerns

Hello,

I'm reaching out to learn more about solar power options for my home. I live in a single-family house with a south-facing roof that gets a good amount of sunlight throughout the day. I've been considering solar energy as a way to save on my monthly energy bills, but I'm concerned about the upfront costs—they seem pretty high, and I'm on a tight budget.

I'd love to know if there are financing options that could help make this more affordable for me. Also, I'm curious about how long it would take for the savings on my energy bills to make up for the cost of installation. Another thought that's crossed my mind: How much maintenance would be involved? I don't have much experience with technology like this, so something low-maintenance would be ideal.

Thanks for any guidance you can offer. I'm really interested in reducing my carbon footprint, but I want to make sure this is a sound investment.

Best,
Anna

Notes:

Offshore Wind

Group 2

You have just received the following email from a new potential customer. Review the message, build the customer profile, and then tailor a short pitch to share when you speak with them later today.

Subject: Exploring Wind Power Options for My Business

Hi,

I own a small business near the coast, and I'm exploring ways to make our energy usage more sustainable. Offshore wind power has caught my attention, but I have some concerns, and I was hoping you could help me get a clearer picture of whether it's the right fit for us.

My main question is about the reliability of offshore wind energy. We get some pretty wild weather here, so I'd like to know how dependable wind energy is, especially during storms or unpredictable conditions. Another thing I'm thinking about is whether switching to wind power would help reduce our energy costs over time. As a small business, we have a limited budget for upgrades, so I need to make sure this would be cost-effective.

Lastly, I'm curious about how offshore wind might impact the local environment and coastline. Sustainability is important to me, but I want to make sure this change would be positive for our area.

Thanks for your time,
David

Notes:

Networked Geothermal

Group 3

You have just received the following email from a new potential customer. Review the message, build the customer profile, and then tailor a short pitch to share when you speak with them later today.

Subject: Exploring Geothermal Networks for New Housing Project

Hello,

I'm a city planner for Sunnyville. I'm reaching out because I'm working on an urban housing development project, and we're interested in exploring sustainable options for heating and cooling. Geothermal networks have come up as a potential solution, and I'd like to understand more about how they might benefit our project and community.

One thing I'd like to know is what kinds of community benefits a geothermal network could offer. I also need some insight into the installation process—will it be disruptive, and how long would it take? This is a pretty large-scale project, so we're trying to assess all potential impacts carefully.

Also, are there any grants or incentives available for using geothermal systems? We're working with a tight budget, and community approval is important to us, so I'd like to see how this option compares to others in terms of long-term viability and environmental benefits.

Thank you for your expertise on this.
Maria

Notes:

Energy-Efficient Upgrades

Group 4

You have just received the following email from a new potential customer. Review the message, build the customer profile, and then tailor a short pitch to share when you speak with them later today.

Subject: Exploring Geothermal Networks for New Housing Project

Hi there,

As the principal of a high school with older infrastructure, I'm interested in learning more about energy-efficient upgrades that could help us reduce utility costs and improve our building's overall sustainability. We've been experiencing some inefficiencies with our heating, cooling, and lighting systems, so I think it's time to consider updates.

However, I'm concerned about the potential disruptions these upgrades could bring to our daily school operations. Do you know if there are ways to minimize any interruptions during installation? We're also working within a tight budget, so if there are any financing options, rebates, or grants available, I'd love to know more.

Finally, I'm curious about how other schools have benefited from similar upgrades, both in terms of cost savings and environmental impact. I want our school to be a positive example of sustainability for our students, and I think this could be a great step forward—as long as it's feasible.

Thank you for any information you can provide.
Kevin

Notes: