

# Coaching Principles

These overarching principles guide our coaches' behavior and actions for the benefit of clients, coaches, and the Concord Clean Comfort Program:

- **Conduct yourself professionally**  
Respond in a timely manner; be clear and respectful; set clear expectations on actions you'll take (and when) and follow through; disengage if a client is disrespectful.
- **Avoid conflicts of interest**  
Do not accept favors, gifts or payments from clients, installers, or organizations that have the potential for financial gain from the sale or installation of heating/cooling equipment.
- **Be transparent about your motivations, affiliations, and interests**  
Be clear that you're doing this for the reasons stated in the Concord Clean Comfort mission and goals.
- **Understand and respect the client's values and priorities**  
Elicit the client's priorities from discussion and the homeowner questionnaire, and use that information to guide your engagement.
- **Enable the clients to reach their own decisions--don't make decisions for them**  
Your role is to help a client become sufficiently informed that they feel confident about making their own decisions about choosing an installer and equipment options. You can provide information, suggest options, suggest questions for installers, and (optional) help with evaluating quotes, but avoid making decisions for the client.
- **Be objective and factual about installers, brands, and equipment**  
When discussing installers, brands, or equipment, state the basis for your knowledge. Avoid strong negative or positive language or guidance.
- **Set realistic expectations about comfort, cost and GHG emissions impact**  
Be clear about uncertainties underlying any projections of cost and/or GHG emissions.

- **Know your limits; Strive for continuous learning and improvement**

Approach every engagement as a learning opportunity. Be forthright when you don't know something and seek help from Abode's Heat Pump Specialist, and other resources. Remember that there is nothing wrong with saying "I don't know." as long as you follow it with: "But let me find out and get back to you or put you in touch with somebody who does know."

- **Take satisfaction from your coaching**

Your coaching practice should provide you with satisfaction for doing something worthwhile. Some satisfied clients will offer verbal appreciation. Take it in!

© 2021 HeatSmart Alliance

This work is licensed under the Creative Commons Attribution 4.0 International License.

To view a copy of this license, visit <http://creativecommons.org/licenses/by/4.0/> or send a letter to Creative Commons, PO Box 1866, Mountain View, CA 94042, USA.