

# 2026

## WINTER TRAINING CONFERENCE

*“Rooted in Hope”*



## Beyond the Toolbox: Why Soft Skills Matter

[www.nascsp.org](http://www.nascsp.org)



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# **Beyond the Toolbox: Why Soft Skills Matter**



# What is Everblue?

**Software & Training Provider** with deep experience in energy efficiency, process improvement, and digital transformation for state government agencies.

- ✓ **Founded in 2008**
- ✓ **Veteran Owned**
- ✓ **Award Winning**



# How Everblue Works in Weatherization Spaces

We support state and local agencies delivering WAP training, T&TA, and workforce development nationwide.

[www.goeverblue.com](http://www.goeverblue.com)

[www.everbluetraining.com](http://www.everbluetraining.com)



# Why Soft Skills Matter in Weatherization Work

- ❖ Technical skills complete the work
- ❖ Human skills make it successful
  - By building trust, safety, and program impact





Shorts

# Client Trust Is Central to Program Success



- ❖ Weatherization takes place inside private, personal spaces
- ❖ Clients may have limited familiarity with the program
- ❖ Trust directly affects access, cooperation, and outcomes



# This Is Not a Technical Problem — It's a Human One

- ❖ Most complaints aren't about insulation
- ❖ Most escalations aren't about modeling
- ❖ Most delays begin with miscommunication



# What This Is — and What It Is Not

## **This is:**

- ❖ A way to reduce rework, escalations, and monitoring burden
- ❖ A shift in how existing training and supervision are delivered
- ❖ A consistency and risk-management strategy

## **This is not:**

- ❖ A new training mandate
- ❖ A replacement for technical standards
- ❖ An added burden on already stretched staff



# What Are Soft Skills?

*In the context of weatherization work?*

- ❖ Clear **communication** and active listening
- ❖ **Empathy, professionalism, and respect**
- ❖ Managing conflict and setting boundaries

These skills shape how technical work is delivered and received.



# Why “Soft” Skills Have Hard Impacts

- ❖ These are performance tools that amplify technical expertise
- ❖ They directly influence safety, cooperation, and outcomes
- ❖ They affect whether technical solutions succeed or fail in practice



# What States Are Seeing in the Field

*From monitoring, technical assistance, and field observations*



- ❖ Strong technical training and standards are in place
- ❖ Client interaction expectations vary widely across agencies
- ❖ Communication gaps often surface as complaints or findings



# Common Challenges Clients Bring to the Door

- ❖ Uncertainty or mistrust based on past experiences
- ❖ Confusion about what the program includes and when
- ❖ Language, cultural, or communication barriers
- ❖ Stress related to health, finances, or home conditions



# What Happens When Communication Breaks Down



- ❖ Misaligned expectations and missed appointments
- ❖ Refused or delayed measures
- ❖ Complaints, callbacks, or escalations
- ❖ Increased safety risks for staff and clients



# Technically Correct — Practically Ineffective

- ❖ “We don’t really control what measures get installed. It’s based on cost effectiveness and SIR calculations. The computer decides what makes sense.”
- ❖ “If the numbers don’t work out, then the measure just won’t be done, even if it seems like it would help. That’s just how the model works.”
- ❖ “It’s not really something we can explain in detail, it’s more of a technical formula that’s handled on the back end.”



# Same Decision — Different Delivery

- ❖ “We follow cost-effectiveness guidelines to make sure improvements provide real, long-term benefit. Let me explain what that means for your home.”
- ❖ “Some measures may seem helpful, but if they don’t meet program guidelines, we’re not able to install them. That helps us use funds fairly and consistently.”
- ❖ “The calculations behind these decisions are technical, but my job is to explain the results and focus on the improvements that will make the biggest difference for you.”



# Why This Matters to States

- ❖ Client communication issues surface as findings and complaints
- ❖ Inconsistency creates inequitable service delivery
- ❖ Monitoring burden increases when expectations are unclear
- ❖ Consistent soft skills improve statewide alignment



# First Steps for Programs

- ❖ Identify recurring client-related findings or complaints
- ❖ Clarify soft skills expectations by role
- ❖ Integrate soft skills into existing training and QA
- ❖ Reinforce expectations through supervisors and QCIs



# Soft Skills Drive Hard Metrics



- ❖ Fewer client complaints and escalations
- ❖ Higher rates of measure acceptance and job completion
- ❖ Reduced safety incidents and work stoppages



# Table Discussion

- ❖ Think of a recent interaction that was technically correct but didn't land well.
- ❖ Where did the communication break down?
- ❖ What was the impact on the client or the program?
- ❖ (optional) What could have been said differently without changing the decision?



# Every Role Touches the Client

## *Soft skills matter throughout the process*

- ❖ Intake and scheduling
- ❖ Auditors and assessors
- ❖ Installation crews
- ❖ Quality control inspectors
- ❖ Office and management staff



# Common Failure Points

*Where communication most often breaks down*



- ❖ Initial contact sets unclear or incomplete expectations
- ❖ Home entry feels rushed or transactional
- ❖ Technical language replaces explanation and context
- ❖ Follow-up is inconsistent or unclear



# Soft Skills as a Workforce and Risk Management Tool

- ❖ Reduced client escalations
- ❖ Clearer role boundaries
- ❖ More confident field staff
- ❖ Lower burnout and turnover
- ❖ Stronger supervisory consistency



# What Effective Soft Skills Training Looks like

- ❖ Role-based and context-specific
- ❖ Scenario-driven and practical
- ❖ Interactive and reflective
- ❖ Reinforced over time
- ❖ Integrated with technical training



# Interactive Scenario

A client is approved for weatherization services.

During the audit, air sealing and attic insulation are scoped and approved.

On install day, the crew arrives on time and begins setup.

Midway through the visit, the client says:

*"I don't want anyone going into the attic. I didn't agree to that."*

The client refuses the attic insulation measure.

- ❖ The measure is eligible, funded, and scheduled.
- ❖ No safety hazard is present.
- ❖ The refusal is unexpected.



# Integrating Soft Skills into Existing Training

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- ❖ No need to start from scratch
- ❖ Embed scenarios into audit, install, and QCI training
- ❖ Use real client interactions, not hypothetical examples
- ❖ Reinforce expectations through supervisors and QCIs
- ❖ Align with job training aids and field guides



# Lessons Learned from the Field

- ❖ Staff consistently ask for guidance on client interactions
- ❖ Supervisors need shared language and expectations
- ❖ Consistency matters more than perfection
- ❖ Small changes create measurable improvements



# Key Takeaways

- ❖ Technical excellence gets homes weatherized
- ❖ Communication shapes trust, safety, and cooperation
- ❖ Programs succeed when both are developed together



# Final Reflections

- ❖ What is one small adjustment that could improve consistency or trust?
- ❖ Where do communication expectations feel unclear in your program?
- ❖ What is one conversation that now feels necessary?



# Q&A and Discussion



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**Thank YOU!**



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