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Overview of Marketing Methods for Local Retrofit Programs

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Table of Contents

Summary	4
Marketing Strategies	4
Objective	4
Messaging	4
Partnerships	5
Strategies for Effective Marketing	5
Neighborhood Canvassing	5
<i>Residential Canvassing Campaign</i>	<i>6</i>
<i>Small Business Canvassing Campaign</i>	<i>6</i>
<i>Volunteer Energy Assessments Campaign.....</i>	<i>6</i>
Social Media and Community Engagement	7
Blogs.....	8
Social Networks	8
Meetups	8
Photo Sharing.....	9
Videos	9
Widgets.....	9
Email Lists.....	9
On-line Competition and Games	9
Traditional Media.....	10
Partnering with Affinity Groups.....	10
Partnering with Contractors	10
References.....	11

Summary

This paper discusses strategies for marketing local energy efficiency programs - from the point of view of the entity operating the program. The paper discusses activities that are especially effective in the local context including community focused messaging, leveraging partnerships, and social media. The discussion is meant to be brief – particularly with regard to traditional marketing techniques as those topics are thoroughly covered in many other general business resources.

The discussion focuses on Local Energy Alliances (LEAs) - but the information pertains to any local entity engaged in the roll-out of a retrofit program.

Marketing Strategies: Objective, Messaging, and Partnerships

Objective

An energy efficiency marketing campaign will consider the full range of program operations being offered to customers - from initial consumer contact thru to final inspection and quality assurance procedures. When designing a campaign, programs should address the following questions:

1. How will the campaign inform customers about the services and programs available?
2. How will the campaign motivate customers to sign up and follow through with recommended actions?
3. How will the marketing campaign generate a sense of commitment and buy-in?
4. How will the outreach strategy provide feedback to customers on their progress compared to peers, and the progress of the program as a whole?
5. How will the program reward customers for their actions/ investments?
6. How will the feedback about the campaign be integrated into the evolution and improvement of the marketing tactics?
7. How will the campaign leverage existing customers to motivate others?

One important aspect to consider in the development of marketing and messaging strategies is timing. If a program is not ready to provide services, premature outreach will lead to disappointment, and a loss of credibility in the target community. The most effective marketing strategies are timed so that the program is ready to provide rapid response to customers who have been motivated by the campaign to contact the program.

Messaging

Messaging should be customized around the primary groups of end customers, since each group poses unique challenges. As such, using targeted focus groups to test messaging ideas before the outreach program is launched will enhance the impact. This step will help the program manager to understand which messages resonate. (Programs should also conduct follow-up surveys to assess the impact of the outreach strategies.) In general, saving money, improving comfort, and similar messages have proven to be a more powerful approach than messages around Greenhouse Gas (GHG) reductions, or similar environmental impacts. Other ideas include:

1. In the residential sector, messages from homeowners can be a very effective approach.

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2. In the commercial and industrial sectors, testimonials from business owners will generate interest, and will motivate target customers.
 3. Larger businesses often require more direct and customized outreach strategies. This is aligned with the idea that success with these customers typically requires a more focused and customized “account management” approach in all phases of an energy efficiency program.

Powerful Partnerships

There are three critical partnerships to consider when developing a marketing plan for a local program:

1. ***Community Partners.*** Partner with community organizations that can assist with getting the message out into the community. These organizations include contractors and trade groups, big-box retailers, universities and community colleges, neighborhood organizations, affinity nonprofit groups, economic development organizations, and business organizations (such as the local Chamber of Commerce or Rotary).
2. ***Utilities.*** Partnering with the local electric, gas, and water utilities can jumpstart marketing efforts, including outreach to high usage customers, bill stuffers, on-bill financing, and co-branding.
3. ***Local Government.*** Work with local government to demonstrate community support and to build trust. The local government may be able to help with other needs such as web presence, and demonstration projects.

Effective marketing requires constant assessment of progress towards goals, refinement of messages, and re-evaluation. Make sure to perform customer surveys, seek feedback, and adapt your marketing campaign over time to meet the changing needs of your community, and to maximize the effectiveness of your campaign.

Strategies for Effective Marketing

Neighborhood Canvassing

Canvassing is the process of initiating personalized contact with a targeted group of individuals - typically accomplished via telephone or door-to-door visits. In the residential and small business sectors, door-to-door canvassing can be a highly effective approach. Canvassing can be conducted through a variety of channels, including local volunteers, non-profit affinity groups (e.g., weatherization programs), school organizations (e.g., PTOs), faith-based organizations, and local building trade groups. Other methods include making use of traditional community organizing events that are built around neighborhood networks – for example, “barn-raising” events where members of the community come together to execute a project.

A well-designed neighborhood campaign will train canvassers to speak knowledgably, and to answer basic questions about the program(s). If the canvassers are not energy performance professionals, they should clearly indicate that to the homeowners (or business owners) visited. To further encourage buy-in of the program, door-to-door canvassers sometimes distribute simple, low cost, do-it-yourself materials - such as CFLs, weather stripping. These individuals need to complete their visits with clear, specific follow-up actions that the homeowner can take to follow-up – including ensuring that they understand how to easily obtain

additional information about the program. The following examples describe successful neighborhood campaigns that have been run in various parts of the country.

Residential Canvassing Campaign

Neighborhood Energy Action Partnership (Denver, CO)

<http://www.greenprintdenver.org/>

The Neighborhood Energy Action Partnership (NEAP) was brought together by the City of Denver, via Colorado's Greenprint Denver initiative, to carry out the city's climate action plan. The climate action plan is designed to reduce the city's per capita greenhouse gas emissions by at least 10% compared to 1990 levels. Comprised of municipal, utility, state and non-profit organizations, NEAP has developed a tool kit that local communities can use to form local "Green Teams" and to train local volunteers. Enrollment forms and sample scripts for door-to-door volunteers help to streamline the message. The Partnership has also made it much easier for residents to understand, and participate in, the variety of programs offered by different organizations in their area. To date, NEAP has assisted fifteen communities in Denver to canvass their neighborhoods, hand out CFLs, collect energy and water conservation information, and sign residents up for energy audits. More than 2,500 households have gone on to take at least one "energy action" as a result of these interactions.

Small Business Canvassing Campaign

Cambridge Energy Alliance (Cambridge, MA)

<http://cambridgeenergyalliance.org/>

In partnership with the local utility, NSTAR, the Cambridge Energy Alliance (CEA) worked with six summer interns and the Mayor's youth summer employment program to canvass small businesses in Cambridge. Over the course of three weeks, the interns reached out more than four hundred small businesses. During the canvass, the interns: (1) provided information to enable the building owners to participate in the NSTAR Direct Install Small Business Program, (2) conducted a survey to assess barriers to participation in the program, and (3) signed up businesses to NSTAR's Small Business Direct Install program. In response, nearly one hundred business owners signed up for the program.

Volunteer Energy Assessments Campaign

WeatherizeDC (Washington, D.C.)

www.weatherizedc.org/whyweatherize

In partnership with a local home performance contractor, WeatherizeDC trains volunteers to conduct simple home evaluations as a stepping stone to participation in a full energy audit. These volunteers meet interested homeowners by participating in local community events (e.g., farmers markets) held in their neighborhoods. These field representatives establish a relationship with the interested homeowner by explaining the benefits of energy efficiency. (Specific emphasis is placed on the fact that WeatherizeDC focuses on hiring within the local community.) The field representative then focuses on scheduling a home energy audit, and/or invites the homeowner to an energy community meeting to learn more about the benefits of the program.

Social Media and Community Engagement

One way to engage community members is to create a website for your LEA that is “sticky.” That is, the website engenders return visits - because the static content is highly informative, and/or because of frequent compelling content updates. The content might include information on current community projects, customer testimonials, tips on do-it-yourself energy saving projects, links to articles on energy efficiency, a community calendar with links to upcoming events, informational videos, and/or posts explaining different incentive programs.

The Cambridge Energy Alliance created a community blog site called Energy 2.0 that provides comprehensive information on energy efficiency and renewable energy. The site contains articles on local and national issues, highlights recent local events, and lists upcoming events. The blog is accessed from CEA’s main site, which includes an email newsletter, a calendar of local events, detailed information on products, and links to the Smarter Cambridge Network. The “Smarter Cambridge Network” highlights the energy and cost savings that have been achieved in the Cambridge area, gives users the ability to create a personalized dashboard and calculate energy savings, allows users to view other’s profiles, and to join groups. An example of one of the energy saving calculators is shown here.

The screenshot displays the Smarter Cambridge website interface. At the top, there are logos for Smarter Cambridge and Cambridge Energy Alliance, along with user information for Jennifer McFadden. The main navigation bar includes links for Dashboard, Profile, People, Groups, Events, My Energy Use, My Savings Plan, and My Neighborhood. The current page is titled "My Savings Plan" and "Ways to Save » home". A prominent calculator is shown for installing a programmable thermostat. It includes input fields for current temperature (68), desired temperature (60), and hours of use (7 during the day, 5 during the night). The calculator shows a CO2 reduction of 1,452 lbs/yr and total savings of \$168/yr. Below the calculator, there is a section titled "Also saved:" with a water drop icon and the number 102, and a "cancel" button. On the right side, there are sections for "Dollar Savings" showing \$0 and "Energy Savings" showing 0 hours. At the bottom, there are links for Terms & Conditions, Privacy Policy, and Have a question? Let us help., along with a copyright notice for © 2010 Smarter Cambridge.

Within the context of a social media strategy, there are many tools that can be used to engage with the community and to provide opportunities for creating dialogue between community members. LEAs stand in an optimal position to initiate and facilitate these conversations in a community. There are multiple levels of conversation that can occur:

- Between the LEA and consumers, contractors, and financing organizations
- Between consumers and consumers
- Between consumers and contractors
- Between contractors and contractors
- Between consumers and financing organizations

The LEA's social media strategy (and underlying technical and IT system capabilities) needs be flexible enough to easily facilitate and track all of these conversations.

There are several key social media tools that can be harnessed to expand outreach and inform community members, including the following.

Blogs

Blogs are an excellent way for LEAs to communicate new legislative updates, describe emerging energy efficiency technologies, highlight community members, and/or talk about the environmental and financial impacts of energy efficiency projects.

For those who are new to this approach, they will find that setting up a blog is a simple process – and can be done using any number of free ([WordPress](#), [Moveable Type](#), [Blogger](#)), paid ([SquareSpace](#)), or micro-blogging ([Tumblr](#), [Posterous](#)) platforms. All of these platforms provide free templates and the ability to brand your blog by uploading your logo and to customize your layout. Although SquareSpace charges a nominal monthly fee, this site has a more intuitive user-interface for a novice user who is trying to quickly build a unique, customized site.

Services like [Kapost](#), which is a Word Press plug-in, enable community members to upload posts and provide an additional social level. This can be a useful way for LEAs to engage with their community members and “crowdsource” - essentially use the community's discourse and feedback on the blog to define and acquire content for their website. For instance, the LEA might ask a community member to chronicle the progress of their retrofit project and upload it to the site. When these stories are shared, they provide real examples of how energy efficiency upgrades can benefit consumers and the community. This can be a compelling way to convince people to take action.

Social Networks

LEAs can create new social network sites by using services like [Ning](#), or use [Facebook](#) tools to tap into existing networks. For instance, the Greater Cincinnati Energy Alliance has an active Facebook page where they upload photos of recent canvassing activities, post events, and provide a forum for discussion. The page also prompts users to sign up for a Twitter feed, or to receive a GCEA email newsletter. A customizable Facebook widget can be added to your site's home page to provide a live stream of updates from members of the community.

Meetups

[Meetup.com](#) is an online social networking portal that enables groups to organize offline gatherings/meetings, as well as facilitating online dialogues. Meetups can be an effective way for local organization to get out into the community and educate constituents on their programs. In order to publicize the event, the LEA can contact local newspapers to get coverage and include a link to the Meetup's site in the article. Meetup's software provides a forum for Meetup members to talk with one another, and also makes it easy for LEAs to invite new members and communicate to the group once members have joined.

Photo Sharing

Photo sharing sites such as [Picasa](#) and [Flickr](#) allow consumers to upload and share photos with others in the community. This can include photos of projects that are in progress, new products that have been introduced into the market, recent events, or community members who have won recent contests. Twitter photo services like [Twitpic](#) and [Twitpix](#) allow LEAs to upload photos to Twitter and then share them with followers.

Videos

Uploading and embedding videos into a site can be easy using tools like [YouTube](#), or other similar video hosting sites. A LEA can use these sites to host “how-to” videos, document ongoing projects, post videos of recent local newscasts, and similar ideas.

Widgets

In order to provide additional content on a site, websites can embed energy efficiency-related “widgets.” A list of popular energy efficiency widgets can be found at [WidgetBox](#). Additionally, most major news sites provide topic-specific widgets that provide live feeds of relevant articles. These can be great sources for articles relevant to consumers. Resources for topic-specific widgets include:

- <http://www.eere.energy.gov/socialmedia/#widgets>
- <http://www.widgetbox.com/widget/energy-efficiency-and-renewable-energy-news>
- <http://www.nytimes.com/services/timeswidgets/>
- <http://www.google.com/ig/directory?synd=open&hl=en&gl=&q=renewable+energy>

Email Lists

Developing lists to target customer groups is a widely used marketing method. These lists can be used to advertise workshops, events, incentives programs, local or national legislative alerts, and other similar information.

On-line Competition and Games

Most of the items above are geared toward fostering greater awareness and communication. In the end, the overall intent is to leverage that attention to help the audience engage and take action. Strategies that deeply integrate ideas around group social behaviors and collaborative goal-setting are an exciting and rapidly evolving area of development. The right combination of these techniques may be the most effective way to translate attention into action.

Core ideas around peer-group comparison including supplemental mechanisms for group competition, achievement, status, and rewards are emerging as a way to tap into powerful intrinsic motivators. A few examples of these types of efforts can be seen in the work of [OPower](#) and [Efficiency 2.0](#).

More overt efforts to use the appeal of games and contests to drive action are also active areas of development and exploration. [Carrotmob](#) has been operating on a model through which a coordinated collective buying event is connected to contributions to enabling a desired outcome (in this case, it would be efficiency improvements). [eMission](#), a Facebook game aimed at teams, attempts to connect online social gaming to real-world activity.

While this is a new and evolving marketing/messaging arena, there are many ways to apply the retention and engagement strengths of social relationships (and perhaps games) to drive participation in local efficiency programs.

Traditional Media

Programs should leverage traditional media to market programs and services by promoting newsworthy events such as organization launch, special offers, community canvassing, and other noteworthy activities. LEAs should also work to establish a relationship with local and regional news staff, even before the program has begun to generate newsworthy information. On a related note, finding a well-known, local, engaged champion for your program can be a powerful way to generate media attention. More information on these, and similar ideas, can be found in the [DOE Communications Resource Kit](#) for EECBG and SEP programs.

By way of example, a local news story on the [Greater Cincinnati Energy Alliance](#) featured on their website generated over 500 audit requests over one weekend.

Partnering with Affinity Groups

The Cambridge Energy Alliance works with local environmental organizations, green business groups, and the City of Cambridge to accomplish a variety of things including: (1) cross-promotion of programs and events, (2) organizing collaborative workshops, and (3) tying existing programs together. For instance, the city's "Façade Improvement Program", which provides grants for exterior upgrades, requires that businesses undergo an energy assessment (when feasible) as a prerequisite to program participation. For its small commercial marketing activities, CEA has partnered with the city's Sustainable Business Leader Program around events that promote energy efficiency programs and sustainable business services. CEA's residential program targets both low-income and moderate-to-high-income customers using various partners, including houses of worship, community centers, neighborhood groups, and other community service organizations.

Partnering with Contractors

Training and equipping building contractors to effectively market programs is essential to on-going program success. Training programs designed for contractors often focus on technical material, and tend to spend little (or no) time teaching sales/marketing skills. LEAs need to recognize that contractors end up sitting across the kitchen table with the homeowner – and usually make the final sales pitch for a retrofit project. Program managers need to recognize that contractors are a primary sales force for the program - and can contribute strongly to the overall public perception of the program. When significant sales training has been provided within the contractor technical training program, contractors have responded very favorably since they recognize the benefit to their businesses.

References

In addition to the links found in the body of this document, the following references may also be of interest:

- [Project Porchlight](#)
- Philip Kotler and Eduardo Roberto, Social Marketing: Changing Public Behavior
- Doug McKenzie-Mohr and William Smith, Fostering Sustainable Behavior: An Introduction to Community-Based Social Marketing
- Northwest Energy Efficiency Taskforce, [The Role of Marketing and Public Awareness in Energy Efficiency](#)
- [Cambridge Energy Alliance](#)
- [PG&E Energy Watch Partners](#)