

Marketing & Outreach – Overview

Description

Key Resources

- [Marketing & Outreach for Home Energy Improvements](#) explores strategies that can be used to increase the adoption of comprehensive home energy upgrades. To get a glimpse of the information available in this guide, check out the two-page [Executive Summary](#).
- [Overview of Marketing Methods for Local Retrofit Programs](#) shares strategies for marketing local energy efficiency programs, particularly through strategic messaging, partnerships, and social media.
- [Better Building Residential Program Implementation Plan Template - Marketing & Outreach](#) will help you develop a strategy for planning, implementing, and evaluating your marketing and outreach activities.

Home energy upgrades can create greater comfort, improve indoor air quality, and significantly reduce utility bills. Despite these benefits, many people are still unaware of why and how they should invest in energy efficiency for their homes.

Effective marketing and outreach motivates a consumer to invest in home energy upgrades, creating demand for services. Successful strategies provide information that resonates with target audiences in compelling ways, such as positioning your offerings as a solution to a problem many homeowners do not realize can be solved with energy efficiency improvements.

Successful marketing and outreach campaigns use various strategies to repeatedly reach out to target audiences to build awareness and drive residents toward investing in home energy upgrades. Effective programs use a mix of market research, targeted messaging, outreach efforts, partnerships, paid media, public relations, and social marketing. Note, however, that no two programs are the same, and what works for one may not work for another.

Marketing and outreach are critical to getting the message out, but they will not result in success on their own. Important ingredients for significant program impact include a streamlined [upgrade process and customer experience](#) that is simple for homeowners; [incentives](#) and [access to affordable financing](#) that enable customers to pay for upgrades; and a [well-trained workforce](#) able and ready to complete home energy assessments and upgrades.

The Marketing and Outreach component provides program administrators with strategies to:

- Define marketing and outreach [goals and objectives](#) based on an [assessment of the market](#) to help identify target audiences.
- Identify and collaborate on marketing and outreach with current and potential [partners](#).
- Make [design decisions](#) about the program's marketing and outreach activities and create a [plan](#) to meet the program's marketing and outreach goals and objectives.
- Formulate a [plan](#) for evaluating the marketing and outreach program.
- Develop your program's brand and promote it consistently in your [program's materials](#).
- [Implement your outreach campaigns](#), with a plan to regularly [assess and improve your strategies and processes](#).
- [Communicate outreach results](#) to partners and other stakeholders.

These handbooks provide more detail on designing and implementing a cohesive and balanced residential energy efficiency program.

- **Market Position & Business Model – Overview**

Identify your organization's preferred market position by assessing existing market actors, gaps, competitors, and potential partners. Develop a business model that will allow you to deliver energy efficiency services.

- **Program Design & Customer Experience – Overview**

Design a residential energy efficiency program that integrates marketing and outreach, contractor coordination, incentives, financing, and program evaluation to provide customers with the products and services they want through a customer-centric process.

- **Evaluation & Data Collection – Overview**

Develop evidence-based insights into your program's performance through third-party process and impact evaluations. Learn how to develop effective data collection strategies and timely evaluations to identify important program achievements as well as opportunities for making program improvements.

- **Financing – Overview**

Ensure that your program's customers will have access to affordable financing, so they can pay for the services you offer.

- **Contractor Engagement & Workforce Development – Overview**

Support and partner with the workforce who will deliver your program's energy efficiency services by understanding their capacity, recruiting contractor partners, enabling technical training and business development support, fostering clear communication, and refining program processes over time, in partnership with your workforce.

Stages

The following are important stages for successful program administrators to follow when implementing Marketing & Outreach activities; however, no two programs are the same, and program administrators need to take into account the unique aspects of their market to create the most effective approach possible. Select each stage to access its handbook.

1. **[Assess the Market](#)**
Identify and prioritize potential target audiences based on their likely receptivity to your program's services.
2. **[Set Goals & Objectives](#)**
Establish specific marketing and outreach goals, objectives, targets, and timeframes.
3. **[Identify Partners](#)**
Establish relationships with organizations that will assist with program marketing and outreach.
4. **[Make Design Decisions](#)**
Decide on priority target audience segments, messages, and incentives that will motivate customers.
5. **[Develop Implementation Plans](#)**
Develop a marketing and outreach plan that details your strategies and tactics, workflows and timelines, staff roles and responsibilities, and budget.
6. **[Develop Evaluation Plans](#)**
Develop a plan and metrics to evaluate the effectiveness of your marketing and outreach strategies.
7. **[Develop Resources](#)**
Create your program's branding guidelines and materials to elevate program visibility and support your marketing and outreach efforts.
8. **[Deliver Program](#)**
Implement marketing and outreach activities in coordination with other program components to generate demand for your program's services.
9. **[Assess & Improve Processes](#)**
Monitor the effectiveness of marketing and outreach strategies and adapt as needed.
10. **[Communicate Impacts](#)**
Communicate marketing and outreach results internally and to partners.

Tips for Success

In recent years, hundreds of communities have been working to promote home energy upgrades through programs such as the Better Buildings Neighborhood Program, Home Performance with ENERGY STAR, utility-sponsored programs, and others. The following tips present the top lessons these programs want to share related to this handbook. This list is not exhaustive.

Communicate with audiences at least three times; once is not enough

All residential energy efficiency programs have found that outreach needs to be repeated to connect with and remind potential participants about program offerings. As marketing gurus note, the majority of people need to be exposed to a product message at least three times (on separate occasions) to buy into it. The more time between communications, or “touches,” the less likely the customer will take action. Some programs even coordinated marketing strategies with partners, so that potential customers get multiple, complementary touches from different communication channels or groups.

- **NOLA WISE** (New Orleans, Louisiana, Worthwhile Investments Save Energy) used a combination of traditional paid media, grassroots outreach, and earned media outlets to communicate with its audience. The program generated the highest number of high-quality leads through its homeowner showcases, which were events held at the home of a resident who completed upgrades. The NOLA Wise team and contractors were on hand to highlight the completed home energy upgrades and educate attendees on how to make their own homes more comfortable and energy efficient. NOLA WISE’s homeowner showcases were promoted through neighborhood canvassing, electronic newsletters, social media, collaboration with nearby neighborhood associations, and earned media strategies.
- Philadelphia’s **EnergyWorks** promoted its program through a multi-phased advertisement plan. This first phase focused on radio and weather-related websites to take advantage of peoples’ moods during specific weather conditions, which resulted in 15,000 visits to the EnergyWorks website and 303 completed home energy assessments. The second phase used print, online, and regional rail marketing materials to create a sense of urgency to compel consumers to act on their immediate needs by introducing the benefits of energy efficiency. In its third phase, EnergyWorks’ advertising continued to emphasize the value and comfort of energy efficiency upgrades, and introduced an educational component that defined some common home energy upgrade terms, such as insulation and air sealing, in ways customers could understand.

EnergyWorks Aligns Advertisements With Weather

Source: [Energy Efficiency Residential Marketing Keep it Simple. Keep it Focused](#). EnergyWorks, 2012.

These EnergyWorks online banner ads rotated on accuweather.com during days with anticipated temperatures of 85 degrees or above.

Follow through with customers

Following up on leads that result from your marketing and outreach efforts quickly and consistently will help your program convert them from interested parties to satisfied customers. Many programs found a sizable drop-off in action if they or their contractors were not able to follow up within a few days to a week. Additionally, contacting initially interested participants regularly (e.g., through a monthly email, with a phone call every few months) was also a successful strategy for turning potential customers into paying customers.

- **BetterBuildings for Michigan** saw more homeowners undertake upgrades in cities where it held a neighborhood sweep and followed the sweep with a city-wide offering a year later. While the program initially planned for a timeframe of four to six weeks for homeowners to decide whether or not to undertake a home energy upgrade, following up with customers after giving them time to better understand the program’s offer helped BetterBuildings for Michigan achieve success. Based on the success of the initial follow-up offers, BetterBuildings for Michigan lengthened the time for each sweep to a full year. Overall, the program was able to complete nearly 8,000 home energy assessments and more than 6,300 home energy upgrades.

One successful approach programs used to maintain this connection was through energy advisors who followed up with homeowners after their initial interest and coached them through the home energy upgrade process.

- The [Greater Cincinnati Energy Alliance](#) (GCEA) realized that many of the homeowners who signed up to learn more about the program were getting stuck between creating their online profile to initiate program participation and completing a home energy assessment, and then between the energy assessment and home energy upgrade stages. Instead of accepting these customers as losses, GCEA had its full-time energy advisor make phone calls to each of these customers to learn why they were not completing their home energy assessments or upgrades and to explain to customers how to move on to the next stage. By explaining the entire upgrade process to individuals, GCEA was able to ensure that potential customers did not drop out of the program simply because their questions were not answered, they did not understand how the program worked, or they forgot that they signed up in the first place. Of the customers the energy advisor contacted, 50% who completed assessments followed through to complete home energy upgrades.
- The [Denver Energy Challenge](#) provided customers with [free energy advisors](#) who recommended energy improvements and guided participants through the process. The program found that those advisors with a background in customer service had a better conversion rate than those whose expertise focused on building science. Overall, three out of every four customers who worked with an energy advisor went on to complete a home energy upgrade. Although not all participants made all of the improvements recommended at once, because Denver's energy advisors kept in touch with participants, program staff reported that many homeowners completed additional upgrades later on in the process.
- Connecticut's [Neighbor to Neighbor Energy Challenge](#) used energy advisors and a customer management database to help ensure that their contractors were following up on leads and following through with customers in a timely manner. Through weekly meetings with contractors and daily monitoring of contractor activities, the program's energy advisors made sure contractors were leading potential customers through the program's next steps. The program set up its database to send automatic reminders to contractors when they needed to take a new step with the homeowner. This regular follow-up helped ensure that homeowners heard back from contractors within a certain number of days, depending on where they were in the process.
- [Michigan Saves](#), formerly BetterBuildings for Michigan, saw more homeowners undertake upgrades in cities where it held a neighborhood sweep and followed the sweep with a city-wide offering a year later. While the program initially planned for a timeframe of four to six weeks for homeowners to decide whether or not to undertake a home energy upgrade, following up with customers after giving them time to better understand the program's offer helped Michigan Saves achieve success. Based on the success of the initial follow-up offers, Michigan Saves lengthened the time for each sweep to a full year. Overall, the program was able to complete nearly 8,000 home energy assessments and more than 6,300 home energy upgrades.

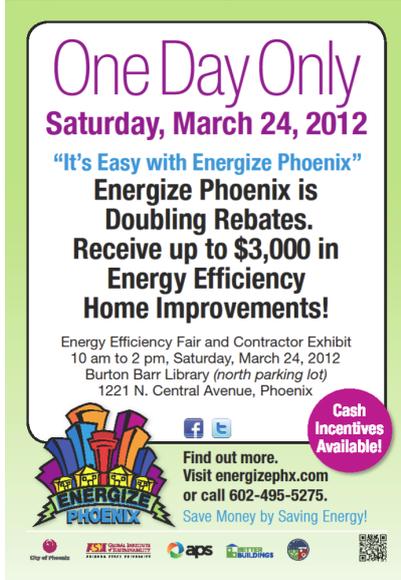
Conduct one-on-one outreach where people gather at their own homes

Programs that conducted one-on-one outreach found that community events provided good opportunities for the program and its partners to connect and build credibility with potential customers. Particularly successful events were ones that attracted the program's target audience and aligned with their program's messaging—such as an Earth Day celebration, home improvement expo, or green fair—because these events had established participants.

Programs found events to be the most successful when the program provided the opportunity for interested homeowners to take action (e.g., sign up for a neighbor-hosted information session, schedule a home energy assessment) right on the spot. Every program found that some events they thought would be great actually deliver fewer leads than expected, so it is important to track the number of leads and program participants that result from each event to determine the effectiveness of participating.

Neighborhood canvasses or "sweeps," were another tactic used by some programs to directly reach potential customers. Sweeps can be time- and labor-intensive undertakings that some programs found to have the greatest impact when targeting specific communities likely to participate in the program. Sweeps were successful for some programs, but not all. A comprehensive [evaluation](#) of more than 140 programs across the country suggests that programs engage in a concerted priming effort in the target area before canvassing the neighborhood. Learn more about neighborhood sweeps in the [Marketing and Outreach Develop Implementation Plans handbook](#).

- [Energize Phoenix](#) held a community energy efficiency exhibit and contractor fair at the local library to promote its "One Day Only" financial incentives of up to \$3,000 per home. Sixteen out of 25 approved contractors participated. More than 500 people attended, 125 homeowners signed up for a home energy assessment on the spot, and the program noted an impressive 58% conversion rate from home energy assessments to home energy upgrades.



Source: Energize Phoenix

- [Sacramento Municipal Utility District's Neighborhood Program](#)—a Better Buildings Neighborhood Program partner in California—promoted its home energy upgrade program at high school fundraisers, outdoor concerts, homeowner association meetings, parent-teacher association meetings, car shows, and other community events. The program sent direct mail pieces to invite homeowners to attend, speak directly to the participating contractors, and sign up for a free home energy assessment at the event. At some events program staff also had activities for children and prizes or giveaways for homeowners who signed up for their free assessment. The program found that 65% of homeowners who heard about the program did so through these community events.

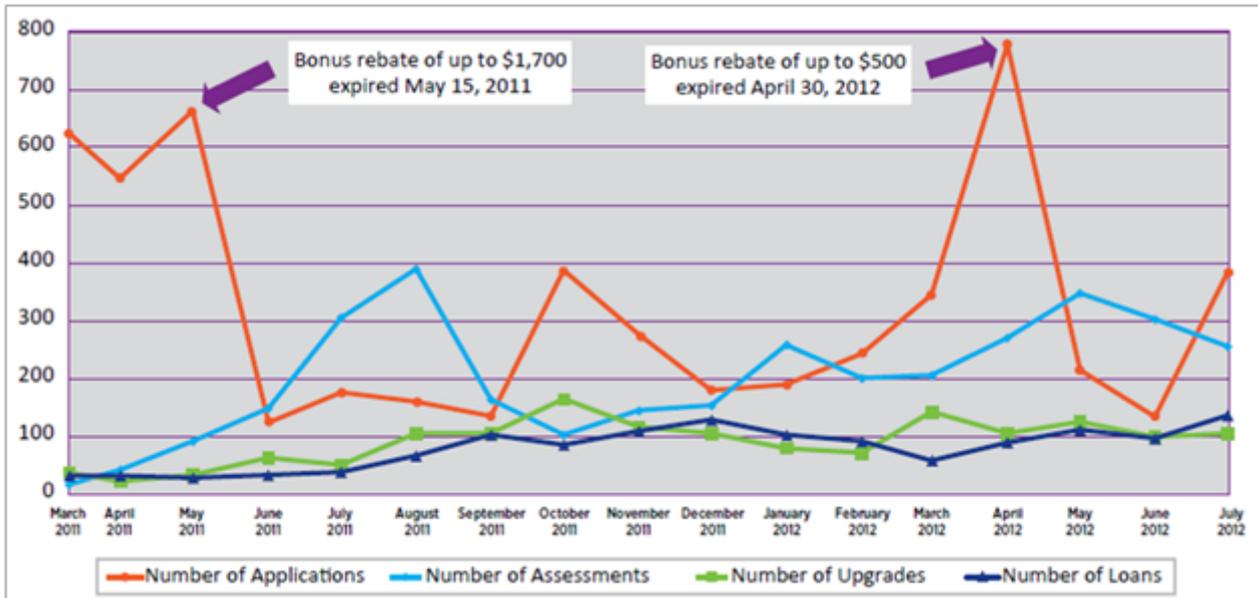
Motivate action through financial incentives and time-limited offers

Incentives can be the easiest approach to overcome motivation barriers and attract customers' and contractors' attention, as long as the upgrade and reimbursement processes are kept simple and easy to follow. Successful programs have found incentives help entice customers to complete upgrades, particularly during limited time offers when a deadline further motivates action. Because incentives are expensive for programs, determining the minimum level needed to achieve your goals or offering incentives for limited periods can be important strategies for success. Also, according to a comprehensive [evaluation](#) of more than 140 programs, successful programs were able to offer lower incentives than other programs that also had incentives.

- [Efficiency Maine](#) used large incentives during the program launch to create consumer demand for energy improvements and stimulate contractors' interest in adapting their business models to accommodate more comprehensive energy upgrades. From January 2010 through May 2011, homeowners could receive a rebate for 30% of project costs, which could total up to \$1,500 for comprehensive projects that were projected to achieve at least 25% energy savings. To further motivate consumer and contractor action, Efficiency Maine launched an additional, limited-time \$1,000 bonus incentive in the summer of 2010. As Efficiency Maine's rebate funds wound down in spring 2011, the program underwent a one-month transition period during which customers could qualify for both rebates and financing. This approach, in addition to contractor sales training, [residential direct installs](#), and other program design features, contributed to the creation of a successful market for residential energy efficiency in Maine. Learn more in the U.S. Department of Energy case study, [Spotlight on Maine: Transition to a Sustainable Level of Incentives](#).
- [Michigan Saves](#), formerly BetterBuildings for Michigan, focused its incentive dollars on completing home energy upgrades rather than on energy assessments and direct install measures, after experimenting with various incentive designs from November 2010 through March 2012. When they adjusted the program's incentive structure in this way, program staff saw the conversion rate from assessments to upgrades increase, depending on the neighborhood, from a range of 5-25% up to a range of 30-60%. The incentives for deeper energy upgrade packages, including air sealing and duct sealing, seemed to attract a higher percentage of the eligible population—20% to 30% participation for a package valued at around \$1,000 versus 10% to 15% participation for a package valued at around \$350. Learn more in the U.S. Department of Energy case study, [Spotlight on BetterBuildings for Michigan: Experiment to Find the Right Mix of Incentives](#).

- To develop momentum for its Clean Energy Accelerator program, [Austin Energy](#) started off with a 3-month [Best Offer Ever](#) promotion from October 1 through December 31, 2010, that offered a combination of rebates from local utilities that varied based on work performed and interest rates that were bought down to 0%, representing an additional \$1,200 in incentives per household compared to Austin Energy's typical offer. Contractors completed comprehensive energy upgrades in a record 568 homes in the six months after the campaign launch.
- In addition to its base rebate levels, [Enhabit](#), formerly Clean Energy Works Oregon, offered [limited-time bonus rebates](#) on top of its \$2,000 base rebates (\$500 for the assessment and up to \$1,500 for the upgrades) to grab the attention of potential customers. The first limited-time promotion occurred in spring 2011 and offered an additional \$1,700 to the program's base rebate. The second promotion was offered in March and April 2012 and added \$500 to the base rebate. The program found that repeatedly offering bonus promotions attracted the attention of new customers each time, even as the program reduced the dollar amount of the bonus from \$1,700 to \$500.

Enhabit's Applications, Assessments, Upgrades, and Loans Per Month
(March 2011 - July 2012)



Source: [Spotlight on Portland, Oregon: Use Incentives to Get Attention and Encourage Deep Savings](#), U.S. Department of Energy, 2011.

Programs often discover that offering limited time incentives can bring about a sizable surge in assessment and upgrade requests. A few programs found that they were not sufficiently prepared for the additional work and lost interested customers because they could not get back to them quickly. Some programs added temporary staff for call centers when a big push was set to take place, or created a temporary pool of contractors to help with increased workloads; others scheduled their incentives to coincide with seasonal capacity.

- NeighborWorks of Western Vermont's (NWWVT) [Home Energy Assistance Team](#) (H.E.A.T. Squad) incentivized homeowners to complete a home energy assessment by offering the assessment for \$50, which was \$200 less than the typical evaluation cost offered to Vermont residents through Efficiency Vermont. One year in, the program found that its contractors were struggling to keep up with surging demand for home energy upgrades. In 2011, NWWVT established [LaborWorks@NeighborWorks](#) (LaborWorks) as a nonprofit temporary labor pool to assist professional contractors involved with the H.E.A.T. Squad during busy periods when they could not keep up with demand or hire full-time help. The extra staffing helped reduce the number of backlogged projects.
- When planning its [Best Offer Ever promotion](#), [Austin Energy](#) collaborated with contractors to account for their seasonal workload and launched the promotion during the fall and winter, typically the slow season for contractors in an otherwise sunny and hot region of Texas. This careful timing increased the likelihood of upgrades being completed in a timely manner and helped contractors avoid seasonal layoffs. Contractors completed comprehensive energy upgrades in a record 568 homes in the six months after the campaign launch.

Examples

The following resources are examples from individual residential energy efficiency programs, which include case studies, program presentations and reports, and program materials. The U.S. Department of Energy does not endorse these materials.

Case Studies

[Spotlight on Austin, Texas: Best Offer Ever Produces Upgrades in Record Time \(555 KB\)](#)

Author: U.S. Department of Energy

Publication Date: 2011

With its Best Offer Ever promotion, Austin Energy completed comprehensive energy upgrades in a record 564 homes in only six months--more than 10 times the utility's typical participation rate. To quickly develop momentum for BetterBuildings-Austin Energy's Clean Energy Accelerator program with homeowners, Austin Energy leveraged its existing Home Performance with ENERGY STAR infrastructure, experience, and contractor base but added a comprehensive rebate/financing offer for a finite launch period. Demand soared, and due to thoughtful planning, Austin Energy and its contractors were able to keep up with requests for energy assessments, inspections, improvements, and loan origination, while learning valuable lessons along the way.

[Spotlight on Rutland County, Vermont: How Local Ties Lead to Local Wins \(552 KB\)](#)

Author: U.S. Department of Energy

Publication Date: 2011

Building on its understanding of homeowners in Rutland County, Vermont, NeighborWorks of Western Vermont (NWWVT) enlisted respected local citizens and organizations to spread the word about home energy efficiency upgrade opportunities, an effort that helped drive demand for nearly 200 home upgrades in just six months

Program Presentations & Reports

[Energy Upgrade California, Marketing and Sales Support \(1 MB\)](#)

Author: Energy Upgrade California

Publication Date: 2011

This Los Angeles County, California, presentation shares how to build broad, positive awareness of and support for programs; gain the tools and resources to align and coordinate marketing efforts; and increase flexibility and responsiveness in messaging and scope.

[Better Buildings Program Sacramento](#)

Author: Christie Rodriguez, Sacramento Municipal Utility District

Publication Date: 2012

This presentation describes Sacramento Utility District's program and Marketing & Outreach lessons learned.

[Illinois Home Performance: Successful Marketing Strategies](#)

Author: Will Baker, Midwest Energy Efficiency Alliance

Publication Date: 2012

This presentation describes the Illinois Home Performance program and marketing strategy lessons learned.

[Keep It Simple: Learning How to Think Like the Customer](#)

Author: Frank Rapley, Tennessee Valley Authority

Publication Date: 2012

This presentation describes the Kentucky Home Performance program and lessons learned on testing innovative approaches to engaging consumers.

[New Jersey's Clean Energy Program: Community Engagement as a Driver for Energy Efficiency](#)

Author: Chris Badger, Vermont Energy Investment Corporation

Publication Date: 2012

This presentation describes the New Jersey Clean Energy program and lessons learned on community engagement as a driver of demand.

[Clean Energy Durham – People Will Talk: Making Energy Efficiency a Neighborhood Issue](#)

Author: Dan Curry, Clean Energy Durham

Publication Date: 2012

This presentation discusses how Clean Energy Durham focuses on getting neighbors to talk to neighbors about energy efficiency to drive demand.

[RePower Program -- People Will Talk: Making Energy Efficiency a Neighborhood Issue](#)

Author: Helen Biersack, RePower

Publication Date: 2012

This presentation describes Washington's RePower program and lessons learned on community engagement as a driver of demand.

Program Materials

[New York State Energy Research & Development Authority Task Work Order Request Integrated Marketing Communications Program for Green Jobs - Green New York Marketing Program \(105 KB\)](#)

Author: New York State Energy Research and Development Authority

Publication Date: 2010

This is a sample request for proposals (RFP) from New York state for integrated marketing and communications support.

[Strategic Marketing Services RFP \(127 KB\)](#)

Author: Eagle County, Colorado

Publication Date: 2010

This is a sample request for proposals (RFP) from Eagle County, Colorado, for marketing services.

[Request for Proposals for the EnergyWorks Public Information and Marketing Campaign for the City of Philadelphia \(454 KB\)](#)

Author: City of Philadelphia, Pennsylvania

Publication Date: 2010

This is a sample request for proposals (RFP) from Philadelphia, Pennsylvania, for public information and marketing support.

[Request for Proposals: Development and Execution of the Communications Strategy for the Chicago Region Retrofit Ramp-Up \(CR3\) Program \(313 KB\)](#)

Author: Chicago Metropolitan Agency for Planning

Publication Date: 2010

This sample RFP from Chicago can be used as an example when developing a communications strategy.

Toolbox

The following resources are available to help design, implement, and evaluate possible activities related to this handbook. These resources include templates and forms, as well as tools and calculators. The U.S. Department of Energy does not endorse these materials.

Templates & Forms

[Better Building Residential Program Implementation Plan Template - Marketing & Outreach](#) (2 MB)

Author: U.S. Department of Energy

Publication Date: 2015

The Marketing & Outreach Implementation Plan Template will help you develop a strategy for planning, operating, and evaluating your marketing and outreach activities.

Tools & Calculators

[Home Energy Score Website](#)

Author: U.S. Department of Energy

Publication Date: 2012

Home Energy Score is an online tool used by assessors to rate a home's energy efficiency on a scale of 1 to 10, with a score of 10 indicating that the home has excellent energy performance and a score of 1 indicating that the home needs extensive energy improvements. Once a home is scored, homeowners receive recommendations on how to improve their score.

Topical Resources

The following resources provide additional topical information related to this handbook, which include presentations, publications, and webcasts. Visit [Examples](#) for materials from and about individual programs.

Topical Presentations

[Behavior, Energy, and Climate Change Conference presentation archive](#)

Author: Behavior Energy and Climate Conference

Presentations from past Behavior Energy and Climate Change (BECC) Conference. BECC is the premier event focused on understanding individual and organizational behavior and decision-making related to energy usage, greenhouse gas emissions, climate change, and sustainability. Past conference presentations include various resources related to Marketing & Outreach.

[Marketing and Communications: Marketing & Outreach \(588 KB\)](#)

Author: U.S. Department of Energy

Publication Date: 2010

This presentation discusses elements of developing an energy efficiency program marketing and communications strategy, including concepts to consider in a marketing plan.

Publications

[Marketing & Outreach for Home Energy Improvements](#)

Author: Lawrence Berkeley National Laboratory

Publication Date: 2010

This guide provides an assessment of various approaches to Marketing & Outreach for home energy efficiency improvements.

[Driving Demand for Home Energy Improvements Executive Summary](#)

Author: Lawrence Berkeley National Laboratory

Publication Date: 2010

This two-page executive summary provides an overview of the wealth of information available in the Driving Demand for Home Energy Improvements guide, provides an assessment of various approaches to driving demand for home energy efficiency improvements.

[Residential Retrofit Program Design Guide](#)

Author: Oak Ridge National Laboratory

Publication Date: 2011

The Residential Retrofit Program Design Guide focuses on the key elements and design characteristics of building and maintaining a successful residential energy upgrade program. The material is presented as a guide for program design and planning from start to finish, laid out in chronological order of program development.

[Overview of Marketing Methods for Local Retrofit Programs](#)

Author: Oak Ridge National Laboratory

Publication Date: 2011

This report shares strategies for marketing local energy efficiency programs, particularly through focused messaging, leveraging partnerships, and social media.

[Your Home Performance Marketing Plan](#)

Author: OmStout Consulting, LLC

Publication Date: 2013

This blog post outlines basic needs for a successful marketing program: a plan; a budget; and to launch, track, evaluate, adjust, repeat.

[Market Segmentation and Energy Efficiency Program Design \(481 KB\)](#)

Author: California Institute for Energy and Environment

Publication Date: 2008

This report provides an overview of market segmentation purpose, examples and methodologies.

[Behavioral Assumptions Underlying California Residential Sector Energy Efficiency Programs](#) (1 MB)

Author: California Institute for Energy and Environment

Publication Date: 2009

This report examines how to influence customer behavior and choice.

[Field Guide to Utility-Run Behavior Programs](#)

Author: American Council for an Energy-Efficient Economy

Publication Date: 2013

This report is the first comparative analysis of utility-run behavior programs. It lays the groundwork for further program development by developing a classification scheme, or taxonomy, that sorts programs into discrete categories. This study counted 281 such programs, many with multiple iterations, offered by 114 energy providers and third parties between 2008 and 2013. After sorting programs by distinguishing features such as delivery channel and incentive type, the study arrived at 20 major program categories grouped in three large families: Cognition Programs, Calculus Programs, and Social Interaction Programs.

[Long-Run Savings and Cost-Effectiveness of Home Energy Report Programs](#)

Author: The Cadmus Group, Inc.

Publication Date: 2014

This report analyzes four home energy report programs, and presents key insights about the long-term savings implications of these programs beyond the first years of operation and after the programs concluded.

Webcasts

Marketing, Communication, and Outreach: Lessons Learned In and Outside Energy Efficiency

[Presentation, Media](#) (105 MB), [Transcript](#)

Author: U.S. Department of Energy; Lawrence Berkeley National Laboratory; Booz Allen Hamilton, Inc.; Clean Energy Solutions, Inc.; Local Energy Alliance Program

Publication Date: 2010

This webcast presents lessons learned in marketing, communication, and outreach, including lessons related to marketing plans.

Tips and Tools for Promoting Your Energy Efficiency Project

[Presentation, Media](#) (53 MB), [Transcript](#)

Author: Jim Arwood, National Association of State Energy Officials; Nancy Raca, ICF International

Publication Date: 2010

This webcast provides information on why outreach is important for program success and how programs can promote their efforts.

How to Work with the Media

[Presentation](#) (3 MB), [Media](#), [Transcript](#)

Author: U.S. Department of Energy

Publication Date: 2011

This webcast offers a preview of tools and proven techniques to work with local media to increase program visibility. The webcast also features a discussion where participants shared what is working with their program's media efforts.

Quick Links

[View All Marketing & Outreach Content](#)

The following list provides access to resources with more information on these key topics. Selecting a key topic will return a list of resources related to that topic. If you have suggestions for additional key topics, [please tell us](#).

- **Branding**
Branding is a way of presenting, positioning, and talking about a program consistently to target audiences to encourage a certain feeling, action, or behavior.
- **Community-Based Social Marketing**
Community-based social marketing aims to change the behavior of a target audience within a group, neighborhood, or town based on principles of behavioral psychology and community dynamics.
- **Community Events**
Community events allow for face-to-face contact with target audiences and provide a venue where messages can be delivered to potential customers by trusted sources.
- **Competitions**
Competitions and challenges among households or towns are intended to increase program participation by creating a sense of urgency and tapping into people's competitive spirit.
- **Customer Engagement**
Customer engagement tactics aim to form a relationship between a customer and a program or contractor to increase the likelihood that the customer will participate fully in the program. From pledges (which provide contractor leads and engage potential customers without requiring a full commitment from them) to testimonials (which encourage homeowners to share their upgrade experience with others), engaging customers in multiple ways can help increase program successes.
- **Demonstration Homes and Displays**
Demonstration homes and displays allow potential customers to see energy efficiency improvements that have been completed in neighborhood homes and speak directly to homeowners and/or contractors about the process and its results.
- **Energy Advisors**
Energy advisors are typically program staff who help customers understand, manage, and successfully navigate the home energy assessment and upgrade processes. Customer services can range from providing independent technical advice to serving as the customer's primary point of contact for all program services. A program's decision to use energy advisors varies by community needs and program resources.
- **Financial Incentives**
By lowering the risk, decreasing the cost, or offering additional benefits, financial incentives (e.g., rebates, limited-time offers, special interest rates) can motivate potential or current customers to take a prescribed action.
- **Generating Media Attention**
Media can be an effective way of communicating your program and its benefits to broad audiences. Media can be paid, earned, or social in nature; each type has a different purpose.
- **Market Segmentation**
Market segmentation divides target audiences into categories based on their attitudes, attributes, or buying habits. With this information, teams can research and craft messages that will resonate with specific audience groups and implement targeted marketing tactics to reach them effectively.
- **Messaging**
Messages that resonate with key target audiences are critical to a successful energy efficiency program. Messages and materials need to resonate in the market and make a strong, immediate, and positive impression on a program's potential customers.
- **Neighborhood Sweeps**
Neighborhood sweeps are geographically targeted campaigns to reach a specific audience in an identified community over a defined period of time.
- **Non-Energy Benefits**
Energy efficiency programs provide identifiable benefits beyond energy savings, such as job creation, economic development, avoided emissions, and water savings. Quantifying these non-energy benefits may help program administrators demonstrate progress toward stated program and/or policy goals, or increase general awareness and support for program activities.
- **Non-Financial Incentives**
Non-financial incentives can entice potential or current customers into taking a prescribed action or changing their behavior at low cost to the offeror. Examples include public recognition, prizes, awards, and other tactics.

- **Pilot Projects**

Many programs run pilot projects to gain direct experience in their markets, while testing and refining program design before full-scale launch.

- **Process Flow Diagrams**

Process flow diagrams illustrate key steps, decision points, and interaction points between programs, contractors, and partners from home energy upgrade project inception to completion. They are an important tool for ensuring effective coordination at critical points in the assessment and upgrade process, and identifying opportunities to streamline program processes.

- **Program Dashboards**

A tracking tool for programs, dashboards summarize critical metrics for monitoring progress toward meeting program goals, objectives, and efficient program processes. For many programs, they are an important tool for assessing and improving programs over time and communicating results to partners and stakeholders.

- **Requests for Proposals**

A request for proposals (RFP) is often necessary to engage the services of a program implementation partner or third party evaluator. An RFP should have a well-defined scope of work and clear description of how proposals will be evaluated.

- **Word of Mouth**

Giving customers a good experience and encouraging them to refer friends to a program and its contractors are low-cost, high-trust methods for generating demand for your program services. People trust the opinions of friends, family, and co-workers more than program selling services.

- **Working with Utilities**

Public, private, and non-profit organizations often seek to work in partnership with investor-owned and municipal utilities to provide energy efficiency services. Utilities may already be offering energy efficiency services that other organizations can enhance or promote, and utilities typically have access to energy consumption data that helps track program success.

