

# Marketing & Outreach – Set Goals & Objectives

## Description

Clearly defined goals and objectives will help direct marketing and outreach activities, communicate the value of your program services to target audiences, and guide decisions about the approaches you choose to implement.

Your program's goals will serve as a starting point from which you will develop specific marketing and outreach objectives. Use the information collected during your [market assessment](#) and [program design](#) activities to align the objectives of your marketing and outreach with overarching [program goals](#).

Objectives are specific and measurable, and should be realistic. They support goals and represent desired outcomes. Marketing and outreach objectives typically include:

- Raising consumer awareness (e.g., number or percentage of target audience members reached through websites, materials, or events)
- Behaviors that you want customers to undertake (e.g., number of customers scheduling an assessment or attending a home energy efficiency demonstration)
- Customers showing interest in the program (e.g., responses to a call for action or click-throughs on a website)
- A time-frame during which the objective should be met.

Programs should be flexible and realistic when setting marketing and outreach objectives. Make sure you have a way to measure each objective, and keep in mind that objectives may need to evolve as your program is implemented.

This handbook describes key steps to setting your marketing and outreach objectives:

- Review program goals
- Set marketing and outreach objectives that tie to your program goals
- Obtain management and stakeholder buy-in and approvals.

### Marketing & Outreach

#### Stages:

##### [Overview](#)

1. [Assess the Market](#)
2. [Set Goals & Objectives](#)
3. [Identify Partners](#)
4. [Make Design Decisions](#)
5. [Develop Implementation Plans](#)
6. [Develop Evaluation Plans](#)
7. [Develop Resources](#)
8. [Deliver Program](#)
9. [Assess & Improve Processes](#)
10. [Communicate Impacts](#)

Find related information across other program components:

- **Market Position & Business Model – Set Goals & Objectives**  
*Establish or update your organizational mission, vision, and goals to encompass energy efficiency programs.*
- **Program Design & Customer Experience – Set Goals & Objectives**  
*Establish program goals and objectives to clarify what you want your program to achieve and to guide program design and implementation over time.*
- **Financing – Set Goals & Objectives**  
*Establish goals, objectives, and timeframes for your financing activities.*
- **Contractor Engagement & Workforce Development – Set Goals & Objectives**  
*Establish objectives, targets, and timeframes for your program to support local contractors and the type and quality of service they provide to help meet your program's goals.*

## Step-by-Step

Goals and objectives will help direct marketing and outreach activities, communicate the value of your program services to stakeholders, and guide decisions about the approaches you choose to implement. By establishing marketing and outreach objectives, you can determine when or whether your marketing and outreach efforts have been successful.

These steps will help you establish marketing and outreach objectives:

### Review program goals

Program goals identify what your program aspires to accomplish over the long term. Program goals should be set as part of your [Program Design](#).

Your marketing and outreach efforts should not need separate goals, but should be designed to support overarching program goals. You will want to review these program goals to determine a vision for how marketing and outreach can help meet them. Using that vision, you will be ready to develop specific marketing and outreach objectives.

### Set marketing and outreach objectives that tie to your program goals

After reviewing your overall [program goals](#), develop marketing and outreach objectives that tie into them. Objectives are specific, measureable, achievable, relevant, and include a timeframe. They specify targets for how you will achieve your goals.

Goals vs. Objectives vs. Tactics

## GOALS

### Define and prioritize broad program direction

**Example:** Educate and motivate homeowners in a particular neighborhood about program offerings to make home energy upgrades

## OBJECTIVES

### Specific and measurable actions that support the program's goals

**Example:** Reach 2,000 single-family homeowners with information on rebates and financial incentives

## TACTICS

### Specific actions taken to achieve objectives

**Example:** Direct mail campaign, door-to-door outreach from a trusted organization

Source: U.S. Department of Energy, 2014.

Example marketing and outreach objectives that tie into program goals are displayed in the table below.

### Examples of Marketing & Outreach Objectives

PROGRAM GOAL	MARKETING AND OUTREACH OBJECTIVES
Educate and motivate homeowners in a particular neighborhood/demographic on program offerings.	<ul style="list-style-type: none"><li>Reach 20,000 homeowners with information about rebates and financial incentives; get 20% of them to follow up within 2 weeks of outreach.</li><li>During the program's first six months, identify and hold outreach events in 20 targeted neighborhoods.</li></ul>
Build credibility for the program and its offerings through partners the community trusts.	<ul style="list-style-type: none"><li>Form partnerships with 10 organizations or individuals the community trusts.</li><li>Recruit five partners to actively promote program offerings (or support specific campaigns or outreach events) with their constituents in the program's first year, and five in</li></ul>
Demonstrate the benefits of home energy improvements to create demand for home energy assessments and upgrades.	<ul style="list-style-type: none"><li>Hold 30 events in upgraded homes with friends and neighbors invited in the program's first year, with a call to action to sign up for a home energy assessment.</li><li>Identify 15 satisfied homeowners and share their story in marketing material and on the Web within one month of their home energy upgrade.</li></ul>

Source: U.S. Department of Energy, 2014.

As your marketing and outreach objectives are decided, make sure you have a way to [measure progress](#) toward each. You may need to revise or change your objectives over time. Programs often have to make adjustments based on valuable customer and community feedback.

Also make sure your marketing and outreach objectives align with program capacity. For example, if your marketing and outreach objective is to reach 20,000 homeowners with information about rebates and to get 20% of them to follow up within 2 weeks of outreach, make sure your program is ready to handle this spike by having enough staff on hand to respond to inquiries and enough contractors ready to perform home energy assessments and upgrades. Learn more about preparing for a spike in upgrades in the U.S. Department of Energy's case study, [Spotlight on Austin, Texas: Best Offer Ever Produces Upgrades in Record Time](#).

#### Energy Upgrade California's Goal and Related Marketing Objective

Program Goal:

- Promote job creation and reduce aggregate greenhouse gas emissions through energy and resource-saving upgrades of existing building stock through three funding sources.

Marketing and Outreach Objective:

- Make marketing kits available for all program partners (i.e., contractors, realtors).

Source: [Energy Upgrade California in Los Angeles County Marketing and Communications Plan](#), [Energy Upgrade California](#), 2010.

## Obtain management and stakeholder buy-in and approvals

Engage both your program's leadership and stakeholders early in the planning process to determine when you will need or want their input and approval moving ahead. You would not want to develop and start working toward a set of objectives only to find out later that your program manager has different ideas.

Marketing and outreach stakeholders can include contractors, community leaders, utilities, nonprofit organizations, and other groups with which your program might form [partnerships](#). Stakeholder input into your planned marketing and outreach objectives will help inform your analysis of what is possible and can also be a valuable first step for tapping into their support later. When asking for stakeholder input, be sure to mention that input will be critical to helping your program meet its marketing and outreach objectives, and any support provided could also benefit their efforts as well.

## 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.

### Set realistic expectations for launching and scaling up your program

Many program administrators have found that launching and scaling up a program often takes longer than planned for, especially when forming partnerships with contractors and lenders. New energy efficiency programs often need at least 2-3 years to launch and become fully operational. Across programs, the amount of time it takes to get to full operations depends on many factors, including the number of qualified contractors working in the area, the availability of funding, the level of stakeholder and partner support that is available, the program's goals and strategies, and the presence of unique program features that may take time to develop, such as community workforce agreements or loan products. Many program administrators found it helpful to set realistic expectations internally—and with key partners and stakeholders—about how long it takes to get programs fully up and running. And, they suggest celebrating and communicating achievements along the way.

- [emPowerSBC](#) in Santa Barbara, California, found that launching its program and scaling up took more time than expected. The launch of the program was delayed more than a year as the program modified its financing strategy from one that relied on residential PACE to one focused on a loan-loss reserve. Following the launch, hiring delays kept the program from being fully staffed for around six months. Contractors working with the program reported that it took three to twelve months for a lead to turn into a signed contract for upgrade services because homeowners took their time deciding whether to invest in energy efficiency.
- The [Virginia State Energy Program](#) (SEP) found that it was difficult for its three programs around the state—the [Local Energy Alliance Program](#) (LEAP), the [Richmond Region Energy Alliance](#), and Community Alliance for Energy Efficiency (Cafe2)—to meet their upgrade targets in three years because the home performance industry in the state was still developing when the programs were initiated. These in-state programs started with little to no infrastructure in place and had to address barriers such as lack of qualified contractors before they could even begin offering home energy upgrades. For example, the programs found that contractors were reluctant to modify their business models and agree to undertake the paperwork and data collection the programs required. Over time, the programs developed strategies to work more effectively with contractors, such as holding monthly contractor meetings (in the case of LEAP) and establishing written Memoranda of Understanding with contractors to clarify mutual expectations (in the case of Cafe2). Virginia SEP advised that programs' goals and timelines should reflect the starting conditions and the work that needs to be accomplished in order to achieve program goals.
- [Enhabit](#), formerly Clean Energy Works Oregon, began with modest goals for a [pilot project](#) in Portland and then ramped up its ambitions as it expanded statewide. The goals for the program's pilot project were to upgrade 500 homes in Portland, build a qualified workforce, and test its approach to service delivery. After the pilot, the program expanded to all of Oregon and upgraded over 3,000 homes around the state in three years.

## 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.

### Program Presentations & Reports

#### [Community Power Works of Seattle Planning Presentation](#)

Author: Community Power Works

Publication Date: 2010

This planning document from Community Power Works of Seattle, Washington, includes flow charts and tables designed to help guide both the initial launch of the program, which includes setting goals, and its ongoing development.

### Program Materials

#### [Energy Upgrade California Marketing and Communications Plan](#) (2 MB)

Author: Energy Upgrade California

Publication Date: 2010

This marketing and communications plan from Energy Upgrade California includes a goal to reduce aggregate greenhouse gas emissions through energy and resource-saving upgrades of existing building stock. The plan also outlines several objectives the program developed to help them meet this goal.

#### [Clean Energy Works Oregon \(now Enhabit\) Marketing Plan](#) (124 KB)

Author: Clean Energy Works Oregon (now Enhabit)

Publication Date: 2010

A marketing and communications plan from Clean Energy Works Oregon (now Enhabit) outlines the program's marketing vision and objectives, as well as the strategies the program planned to undertake to meet these goals.

#### [Boulder County \(now EnergySmart\) Marketing Plan and Implementation Guide](#) (4 MB)

Author: The Cadmus Group, Inc.

Publication Date: 2011

This marketing plan and implementation guide includes the marketing goals and objectives for Boulder County, Colorado (now EnergySmart).

#### [EnergyWorks Kansas City Marketing Plan](#) (181 KB)

Author: EnergyWorks KC

Publication Date: 2011

This marketing plan from EnergyWorks Kansas City includes a strategic focus for the program's outreach activities, as well as three core marketing objectives Kansas City set out to meet.

#### [Greater Cincinnati Energy Alliance: Strategic Plan](#) (349 KB)

Author: Greater Cincinnati Energy Alliance

Publication Date: 2011

This strategic plan describes the goals, objectives, market, and business model for the Greater Cincinnati Energy Alliance's energy efficiency program and service offerings.

## 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

None available at this time.

### Tools & Calculators

None available at this time.

## 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

#### [Overview of Business Planning and Business Models](#)

Author: U.S. Department of Energy

Publication Date: 2011

This presentation is aimed at program administrators and describes business planning concepts such as program mission, vision, and goals.

### Publications

#### [Cambridge Energy Alliance's Residential and Small Business Communications and Marketing Strategy \(663 KB\)](#)

Author: Hattaway Communications

Publication Date: 2007

This marketing strategy includes the goals and objectives the Cambridge (Massachusetts) Energy Alliance set out to meet.

#### [Powering the New Energy Future From the Ground Up](#)

Author: Climate Solutions

Publication Date: 2012

This report from Climate Solutions analyzes small- to medium-sized American cities that are using successful methods to further clean energy economic development. Better Buildings Neighborhood Program partners that are featured in the report include Bainbridge Island and Bremerton, Washington; Boulder, Colorado; Bedford, New York; Madison, Wisconsin; and Grand Rapids, Michigan. The report includes details on the how the featured cities funded their projects, found successful models to reach their goals, and to see which new projects are off to a promising start.

#### [Massachusetts Joint Statewide Three-Year Electric and Gas Energy Efficiency Plan](#)

Author: Mass Save

Publication Date: 2012

This plan was jointly developed by gas and electric companies in the state of Massachusetts to set aggressive goals for 2013-2015 through a sustained and integrated statewide energy efficiency effort in accordance with Green Communities Act.

### Webcasts

None available at this time.

