**Overview**

The Better Building Residential Program Implementation Plan Template will help you develop a strategy for planning, operating, and evaluating a successful residential energy efficiency program. This document identifies the key implementation steps involved with the six program components typically overseen by a program administrator:



**How to Use this Template**

The 1st column (Step-by-Step) lists implementation steps to consider in each stage of your planning process. The 2nd column (Activities) provides space to brainstorm the activities required for completing each step. The 3rd column (Duration) provides space to define and track internal and external targets. *Note: Launching and improving an energy efficiency program is an iterative process that may not always lend itself to concrete start and end dates for each step provided in the template.*

**Additional Information**

Hyperlinks take you to detailed information about each step, found in the [Better Buildings Residential Program Solution Center](file:///C:\Users\achiu\AppData\Local\Microsoft\Windows\Temporary%20Internet%20Files\Content.Outlook\VW2BNDD8\energy.gov\rpsc).

| Market Position & Business Model  Identify your organization’s optimal market position by understanding existing market actors, gaps, competitors, and potential partners. Develop a business model that will allow you to sustainably deliver energy efficiency products and services. | | |
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| **Step-by-Step** | **Activities** | **Duration** |
| [Assess the Market](https://bbnp.pnnl.gov/handbooks/market-position-business-model-%E2%80%93-assess-market#tabs=0)   * Assess potential market demand for energy efficiency products and services * Assess how the market is served by other organizations and what gaps exist for your organization to fill * Assess your strengths and capabilities to provide products and services in the market |  |  |
| [Set Goals & Objectives](https://bbnp.pnnl.gov/handbooks/market-position-business-model-%E2%80%93-set-goals-objectives#tabs=1)   * Examine your organization’s existing vision, mission, and goals * Define your organization’s vision * Define the organization’s mission * Develop S.M.A.R.T. goals * Get buy-in from your organization’s stakeholders |  |  |
| [Identify Partners](https://bbnp.pnnl.gov/handbooks/market-position-business-model-%E2%80%93-identify-partners)   * Understand the business models of potential partners * Approach potential partners and develop a partnership framework |  |  |
| [Develop a Business Model](https://bbnp.pnnl.gov/handbooks/market-position-business-model-%E2%80%93-develop-business-model)   * Determine what services to provide * Determine how you will deliver program services * Determine the customers to whom you will provide services * Determine what assets and infrastructure you will need to implement your program * Identify sources of funding and operation costs to develop your financial model * Determine your governance structure * Outline your business model * Decide whether to proceed based on the viability of the business model |  |  |
| [Create a Business Plan](https://bbnp.pnnl.gov/handbooks/market-position-business-model-%E2%80%93-create-business-plan)   * Describe your assets and infrastructure * Describe your products and services * Describe your market and customers * Describe your partners and competitors * Summarize your organization’s governance * Describe your financial structure * Write your executive summary |  |  |
| [Develop Evaluation Plans](https://bbnp.pnnl.gov/handbooks/market-position-business-model-%E2%80%93-develop-evaluation-plans)   * Reassess your market position * Reconsider your vision, mission, and goals * Revisit your business model * Review key policies * Identify risks and uncover new opportunities * Gather sufficient information for decision-making |  |  |
| [Develop Resources](https://bbnp.pnnl.gov/handbooks/market-position-business-model-%E2%80%93-develop-resources)   * Define resources to help you reach your goals * Assess current resources and identify gaps * Take action to fill resource gaps |  |  |
| [Assess & Improves Processes](https://bbnp.pnnl.gov/handbooks/market-position-business-model-%E2%80%93-assess-improve-processes)   * Track and collect data on your organization’s performance * Review and assess the data you have collected * Make decisions and implement solutions based on your data analysis * Regularly review and re-evaluate your data to ensure continuous improvement |  |  |
| [Communicate Impacts](https://bbnp.pnnl.gov/handbooks/market-position-business-model-%E2%80%93-communicate-impacts)   * Link events, milestones, and activities to your communications strategy * Define the purpose of your communication * Identify audiences * Decide on key information and messages * Choose and develop products * Choose and use communication channels * Assess and refine your communication strategy |  |  |

| Program Design & Customer Experience  Design a residential energy efficiency program that provides customers with a positive experience by integrating marketing and outreach, contractor coordination, incentives, financing, and program evaluation in a streamlined way. | | |
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| **Step-by-Step** | **Activities** | **Duration** |
| [Assess the Market](http://bbnp.pnnl.gov/handbooks/program-design-customer-experience-–-assess-market)   * Understand market demand, local policies, and building stock * Assess your potential customers’ motivations for home energy upgrades * Assess your potential customers’ need for loans and other financial products * Assess your local contractor network and workforce development resources * Analyze program strengths, weaknesses, opportunities, and threats (SWOT) to inform design |  |  |
| [Set Goals & Objectives](http://bbnp.pnnl.gov/handbooks/program-design-customer-experience-–-set-goals-objectives)   * Set long-term program goals * Set specific and measurable program objectives * Set objectives for individual program components * Get input from stakeholders |  |  |
| [Identify Partners](http://bbnp.pnnl.gov/handbooks/program-design-customer-experience-–-identify-partners)   * Identify areas where your program would benefit from added strength * Identify potential partners that can strengthen your program * Recruit partners by understanding their goals and motivations * Establish ongoing coordination and communication with partners |  |  |
| [Make Design Decisions](http://bbnp.pnnl.gov/handbooks/program-design-customer-experience-–-make-design-decisions)   * Select your target market sector(s) * Identify barriers to overcome with customers * Select your products and/or services for customers * Determine how you will deliver services * Select and design key program coordination and communication activities * Get feedback on your program design |  |  |
| [Develop Implementation Plans](http://bbnp.pnnl.gov/handbooks/program-design-customer-experience-–-develop-implementation-plans)   * Identify the program components your program will undertake * Use workflow diagrams to illustrate and refine program processes * Establish staffing requirements, roles, and responsibilities for all aspects of program implementation * Develop a program budget * Use a project management approach to integrate and sequence program pre-launch, launch, and operational activities |  |  |
| [Develop Evaluation Plans](http://bbnp.pnnl.gov/handbooks/program-design-customer-experience-–-develop-evaluation-plans)   * Establish program metrics that reflect your goals and objectives * Establish direct and indirect customer experience metrics * Document measurement strategies for collecting data * Establish responsibilities for internal review of evaluation results |  |  |
| [Develop Resources](http://bbnp.pnnl.gov/handbooks/program-design-customer-experience-–-develop-resources)   * Decide who will implement the program * Hire and train a program team * Develop project tracking systems * Develop customer care resources * Develop customer intake process templates and forms * Develop financial processing systems for incentives (as needed) |  |  |
| [Deliver Program](http://bbnp.pnnl.gov/handbooks/program-design-customer-experience-–-deliver-program)   * Before launch, ensure that all resources and processes are in place for delivering the program * Consider a soft launch to test systems, workflows, and processes * Launch the program * Manage the program effectively over time |  |  |
| [Assess & Improves Processes](http://bbnp.pnnl.gov/handbooks/program-design-customer-experience-–-assess-improve-processes)   * Track quantitative and qualitative information for assessing program process and impacts * Establish internal and external processes for reviewing and communicating program performance * Regularly review and assess program metrics and feedback to determine what is working well and what is not * Make decisions about program design changes and communicate them |  |  |
| [Communicate Impacts](http://bbnp.pnnl.gov/handbooks/program-design-customer-experience-–-communicate-impacts)   * Determine communications requirements and purpose * Develop a communications strategy * Gather quantitative and qualitative information, including customer feedback * Evaluate communications channels * Develop communications products * Evaluate and refine your communications strategy |  |  |

| Evaluation & Data Collection  Develop evidence-based insights into your program’s performance through third-party process and impact evaluations. Craft data collection strategies and timely evaluations to identify important program achievements and opportunities for making improvements. | | |
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| **Step-by-Step** | **Activities** | **Duration** |
| [Develop Evaluation Plans](https://bbnp.pnnl.gov/handbooks/evaluation-data-collection-%E2%80%93-develop-evaluation-plans#tabs=0)   * Determine the type(s) of evaluation * Determine the scope of the evaluation(s) * Develop a timeline for evaluation activities * Decide how to determine your program’s cost-effectiveness * Solicit proposals for evaluation services * Evaluate proposals * Negotiate and execute the contract |  |  |
| [Develop Resources](https://bbnp.pnnl.gov/handbooks/evaluation-data-collection-%E2%80%93-develop-resources)   * Identify the types of data you need and how you will collect the data * Identify the processes and tools for collecting and assessing program data * Test your tools and processes before program launch |  |  |
| [Conduct Evaluation](https://bbnp.pnnl.gov/handbooks/evaluation-data-collection-%E2%80%93-conduct-evaluation)   * Oversee evaluation activities * Review evaluation deliverables * Identify and mitigate potential risks * Adjust scope and timeline to accommodate evaluation changes * Communicate progress throughout the evaluation process |  |  |
| [Communicate Impacts](https://bbnp.pnnl.gov/handbooks/evaluation-data-collection-%E2%80%93-communicate-impacts)   * Understand and interpret evaluation results * Choose appropriate communications products and channels to reach your stakeholders * Determine how to present pertinent evaluation results in your communications products * Share evaluation results with program managers |  |  |

| Marketing & outreach  Spur customer demand for your program’s services by understanding your target audience and motivating them to act using effective messaging, marketing and outreach tactics, and attractive program offers. | | |
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| **Step-by-Step** | **Activities** | **Duration** |
| [Assess the Market](https://bbnp.pnnl.gov/handbooks/marketing-outreach-%E2%80%93-assess-market)   * Develop a market research plan based on available resources and research techniques * Conduct audience research to determine who should be the focus of your marketing and outreach * Categorize your target audiences to narrow the focus of your marketing and outreach efforts |  |  |
| [Set Goals & Objectives](https://bbnp.pnnl.gov/handbooks/marketing-outreach-%E2%80%93-set-goals-objectives)   * Review program goals * Set marketing and outreach objectives that tie to your program goals * Obtain management and stakeholder buy-in and approvals |  |  |
| [Identify Partners](https://bbnp.pnnl.gov/handbooks/marketing-outreach-%E2%80%93-identify-partners)   * Assess gaps that marketing and outreach partners could help fill * Determine and evaluate potential partners * Recruit marketing and outreach partners * Develop a partnership agreement * Engage partners early and often |  |  |
| [Make Design Decisions](https://bbnp.pnnl.gov/handbooks/marketing-outreach-%E2%80%93-make-design-decisions)   * Finalize your priority target audiences * Articulate your value proposition for customers * Develop messages to motivate action * Build a consistent brand platform * Design financial and non-financial incentives * Communicate your decisions to partners |  |  |
| [Develop Implementation Plans](https://bbnp.pnnl.gov/handbooks/marketing-outreach-%E2%80%93-develop-implementation-plans)   * Develop marketing and outreach strategies and tactics * Define marketing and outreach staff needs, roles, and responsibilities * Create a marketing and outreach workplan * Establish a marketing budget * Communicate your plan with stakeholders |  |  |
| [Develop Evaluation Plans](https://bbnp.pnnl.gov/handbooks/marketing-outreach-%E2%80%93-develop-evaluation-plans)   * Identify metrics and evaluation criteria for each marketing and outreach objective * Draft a marketing and outreach evaluation plan * Share your evaluation plan with partners |  |  |
| [Develop Resources](https://bbnp.pnnl.gov/handbooks/marketing-outreach-%E2%80%93-develop-resources)   * Staff and plan to develop marketing and outreach resources * Create a distribution plan * Develop materials that motivate with a call to action * Brand your outreach consistently * Use traditional and modern materials * Share your materials internally and with partners |  |  |
| [Deliver Program](https://bbnp.pnnl.gov/handbooks/marketing-outreach-%E2%80%93-deliver-program)   * Assess your marketing program’s readiness * Consider a pilot or “soft launch” * Launch your marketing efforts * Build on what works and adjust as needed |  |  |
| [Assess & Improves Processes](https://bbnp.pnnl.gov/handbooks/marketing-outreach-%E2%80%93-assess-improve-processes)   * Track progress using key metrics * Collect customer and partner feedback * Review and evaluate data * Decide how to improve marketing efforts mid-stream and reconsider overall marketing strategies if necessary * Communicate decisions to partners |  |  |
| [Communicate Impacts](https://bbnp.pnnl.gov/handbooks/marketing-outreach-%E2%80%93-communicate-impacts)   * Collect marketing and outreach successes and lessons learned as you go * Share marketing and outreach impacts internally and with partners |  |  |

| Financing  Ensure that your program’s customers have access to affordable financing, so they can pay for the products and services you offer. | | |
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| **Step-by-Step** | **Activities** | **Duration** |
| [Assess the Market](https://bbnp.pnnl.gov/handbooks/financing-%E2%80%93-assess-market)   * Assess the characteristics of target customers and identify gaps * Identify lenders and understand available loan products |  |  |
| [Set Goals & Objectives](https://bbnp.pnnl.gov/handbooks/financing-%E2%80%93-set-goals-objectives)   * Review program goals * Set financing objectives that tie to your program goals * Reach out to stakeholders for insight and refinement |  |  |
| [Identify Partners](https://bbnp.pnnl.gov/handbooks/financing-%E2%80%93-identify-partners)   * Identify lenders * Engage lenders * Determine the process for soliciting proposals from prospective lending partners * Evaluate proposals * Negotiate and execute the lending agreement |  |  |
| [Make Design Decisions](https://bbnp.pnnl.gov/handbooks/financing-%E2%80%93-make-design-decisions)   * Define the financing problem or opportunity that you intend to address * Decide on your program’s financing activities * Determine which functions your program will perform and which functions your partners or subcontractors will perform * Plan for the long-term |  |  |
| [Develop Implementation Plans](https://bbnp.pnnl.gov/handbooks/financing-%E2%80%93-develop-implementation-plans)   * Identify steps relevant to your financing model to implement your financing activities * Document the flow of funds * Establish internal staffing requirements and roles/responsibilities * Develop a timeline for key milestones and a budget for implementing your financing activities * Share your implementation plan with your lending partners |  |  |
| [Develop Evaluation Plans](https://bbnp.pnnl.gov/handbooks/financing-%E2%80%93-develop-evaluation-plans)   * Establish metrics based on your goals and objectives * Design the measurement strategies relevant to your financing model * Establish how data will be transferred, stored, and managed * Design the process and the schedule for data review and assessment |  |  |
| [Develop Resources](https://bbnp.pnnl.gov/handbooks/financing-%E2%80%93-develop-resources)   * Hire and train staff * Identify the resources needed to implement your financing activities * Develop internal and external resources that conform to your program’s brand |  |  |
| [Deliver Program](https://bbnp.pnnl.gov/handbooks/financing-%E2%80%93-deliver-program)   * Prepare to implement your financing activities * Consider a soft launch or pilot to test systems, workflows, and processes * Launch your financing activities and manage them over time, including adjustments to program design based on feedback from stakeholders |  |  |
| [Assess & Improves Processes](https://bbnp.pnnl.gov/handbooks/financing-%E2%80%93-assess-improve-processes)   * Collect and track data * Review and evaluate data * Make decisions to improve your financing activity processes * Communicate process change decisions to your partners |  |  |
| [Communicate Impacts](https://bbnp.pnnl.gov/handbooks/financing-%E2%80%93-communicate-impacts)   * Collect examples, stories, lessons learned, best practices, and data trends that highlight financing successes * Communicate program impacts with your lending partners |  |  |

| Contractor Engagement & Workforce Development  Engage your most important partners, the workforce that delivers your program’s products and services in customers’ homes. Identify what kinds of support local contractors need to help achieve your program’s goals. | | |
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| **Step-by-Step** | **Activities** | **Duration** |
| [Assess the Market](https://bbnp.pnnl.gov/handbooks/contractor-engagement-workforce-development-%E2%80%93-assess-market)   * Identify existing home performance contractors in your market * Find other contractors that could expand their services to include energy upgrades * Assess the need for new skills and certifications for contractors * Evaluate existing training and education providers who could become workforce development partners * Identify organizations that can help find workers and match them to jobs |  |  |
| [Set Goals & Objectives](https://bbnp.pnnl.gov/handbooks/contractor-engagement-workforce-development-%E2%80%93-set-goals-objectives)   * Review program goals related to contractor engagement and workforce development * Establish specific contractor engagement and workforce development objectives * Discuss and refine the goals and objectives with potential contractor and workforce development partners |  |  |
| [Identify Partners](https://bbnp.pnnl.gov/handbooks/contractor-engagement-workforce-development-%E2%80%93-identify-partners)   * Assess potential contractor partners * Develop strategies for contractor recruitment * Establish ongoing relationships with contractors * Engage and recruit workforce development partners * Evaluate potential workforce development and employment partners * Establish partnership agreements with workforce development partners |  |  |
| [Make Design Decisions](https://bbnp.pnnl.gov/handbooks/contractor-engagement-workforce-development-%E2%80%93-make-design-decisions)   * Establish standards for ensuring quality work * Determine contractor participation requirements * Set guidelines for how your program will interact with contractors * Decide on contractor incentives and financial support * Outline contractor engagement and support activities * Decide on the content and approach for training * Outline workforce development activities * Collaborate with contractors and workforce development partners to develop program design |  |  |
| [Develop Implementation Plans](https://bbnp.pnnl.gov/handbooks/contractor-engagement-workforce-development-%E2%80%93-develop-implementation-plans)   * Plan contractor recruitment and enrollment activities * Plan for program process and business support for contractors * Outline contractor training, incentives, and financial support * Establish contractor participation procedures * Define the quality assurance plan for your program * Create a workforce development plan * Plan for ongoing coordination and feedback with contractors and workforce development partners * Develop a staffing plan, timeline, and budget |  |  |
| [Develop Evaluation Plans](https://bbnp.pnnl.gov/handbooks/contractor-engagement-workforce-development-%E2%80%93-develop-evaluation-plans)   * Establish metrics and qualitative evaluation questions based on goals and objectives * Design measurement strategies and a process and schedule for data review and assessment * Design an approach for managing and sharing data internally and with partners * Integrate these metrics and strategies into your overall evaluation plan |  |  |
| [Develop Resources](https://bbnp.pnnl.gov/handbooks/contractor-engagement-workforce-development-%E2%80%93-develop-resources)   * Hire and train program staff * Create program forms and materials for contractors * Create contractor recruitment and enrollment materials * Plan for regular contractor meetings * Develop training resources for participating contractors * Create other resources and processes to support contractors * Develop contractor marketing support materials * Develop process evaluation materials |  |  |
| [Deliver Program](https://bbnp.pnnl.gov/handbooks/contractor-engagement-workforce-development-%E2%80%93-deliver-program)   * Ensure that your program partners, procedures, plans, and resources are ready * Consider a soft launch or pilot to test systems, workflows, and processes * Recruit and bring contractors onboard * Provide program delivery support for participating contractors * Verify the quality of your program services * Integrate workforce development with contractor engagement |  |  |
| [Assess & Improves Processes](https://bbnp.pnnl.gov/handbooks/contractor-engagement-workforce-development-%E2%80%93-assess-improve-processes)   * Track program operations and external feedback from program partners, contractors, and customers * Review and evaluate the collected data * Share performance data and feedback * Make improvement decisions with relevant partners and stakeholders * Communicate decisions and changes to contractors |  |  |
| [Communicate Impacts](https://bbnp.pnnl.gov/handbooks/contractor-engagement-workforce-development-%E2%80%93-communicate-impacts)   * Highlight contractor and workforce development successes * Communicate program impacts to contractors and training provider partners |  |  |