

Engaging Customers with Community-Based Energy Efficiency Programs: Marketing and Outreach Approaches

Presentation to Civic Spark

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About Us

Behavior & Culture Change Specialists

- Empowering Customers and Communities
- Overcoming Barriers & Increasing Energy Savings
- Providing Seamless Program Delivery



Key Questions

- What makes engagement partnerships successful?
- Why are community-based or locally targeted partners effective in reaching customers?
- How are partnerships changing customer engagement?



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Engagement Barriers

1. Discovering the right partners
2. Mobilizing your champions
3. Releasing ownership
4. Facilitating responsibility
5. Supporting contractors



Discovering the Right Partners



Mobilizing Your Champions



Releasing Ownership

<http://www.envisioncharlotte.com/energy/>



The screenshot shows the top of the Envision Charlotte website. The header includes the Envision Charlotte logo (a stylized grid of colored squares) and the text "ENVISION CHARLOTTE UNITING FOR A SUSTAINABLE CITY". To the right of the logo are three navigation links: "WHO WE ARE", "WHAT WE DO", and "GET INVOLVED". The main content area features a large, low-angle photograph of a modern glass skyscraper against a blue sky. Overlaid on this image is a white text box with the word "ENERGY" in large, bold, white letters. To the right of "ENERGY" is a white box containing the text "Reduce energy use in Uptown Charlotte by 20% in five years." At the bottom of the page, there is a white bar with the text "The goal is ambitious" on the left and the Duke Energy logo and "Smart Energy Now." on the right.

Facilitating Responsibility



Supporting Your Contractors

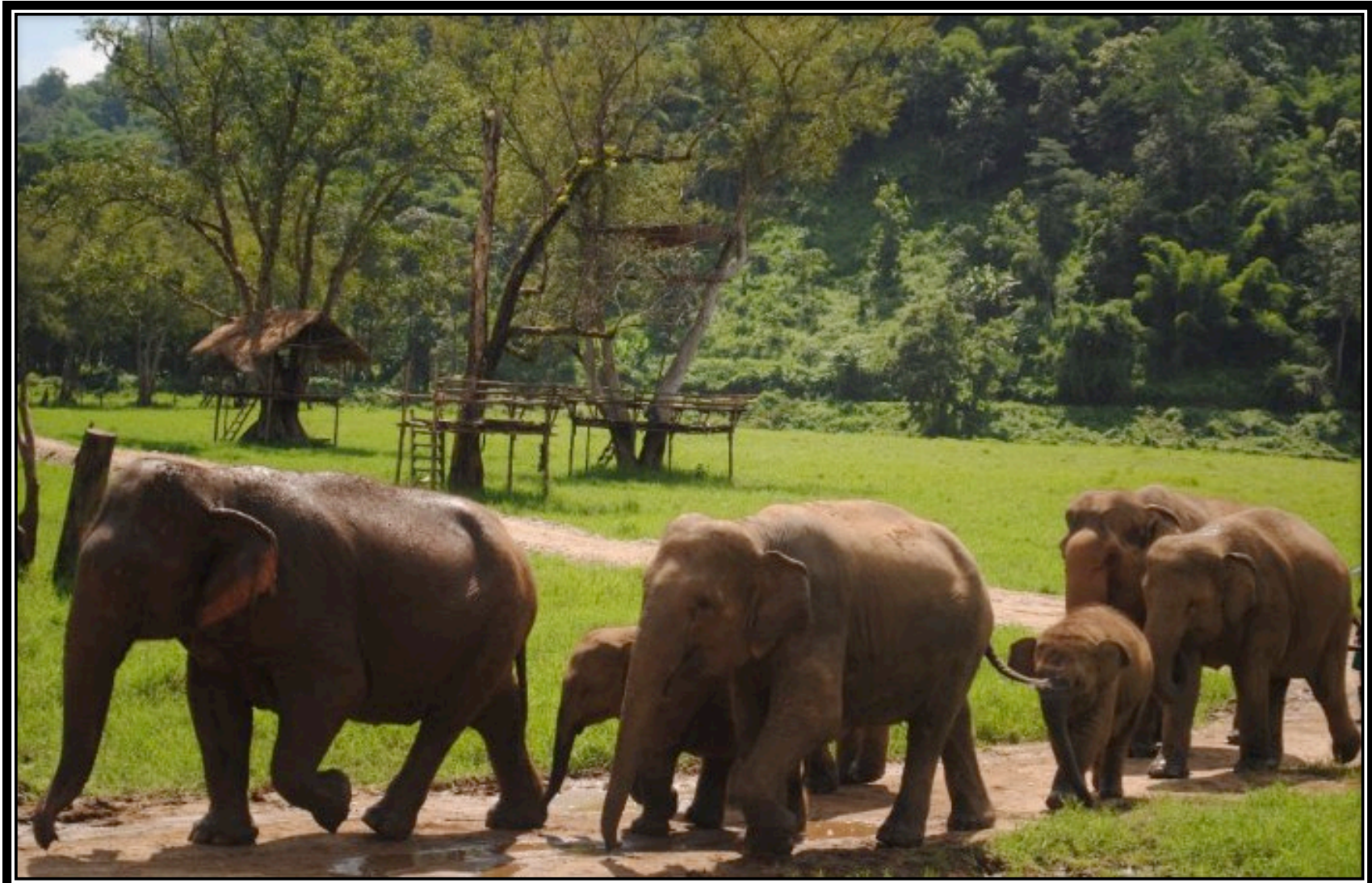


Key Questions

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We are social creatures



Trusted messenger influence



People need a reason



Key Questions

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Community



Contractor



Customer

Join Your
Neighbors



“The energy assessment is a no brainer.”

Sue Berescik
East Hampton, CT

Join Your
Neighbors



“Awareness and education will help us see energy improvements as an investment.”

Mark Wilson
Glastonbury, CT

Join Your
Neighbors



“Not only do the homeowners win, but residents in need do too.”

Dawn Egan
Director,
Weston Warm Up Fund

Join Your
Neighbors



“Neighbor to Neighbor makes it easy for us to help residents save money.”

Evelyn Solla-deCambre
Windham Area
Interfaith Ministry
Windham, CT

Join Your
Neighbors



“A Neighborhood Energy Workshop inspired me to become an ambassador for the Challenge.”

Bob Giddings
Cheshire, CT

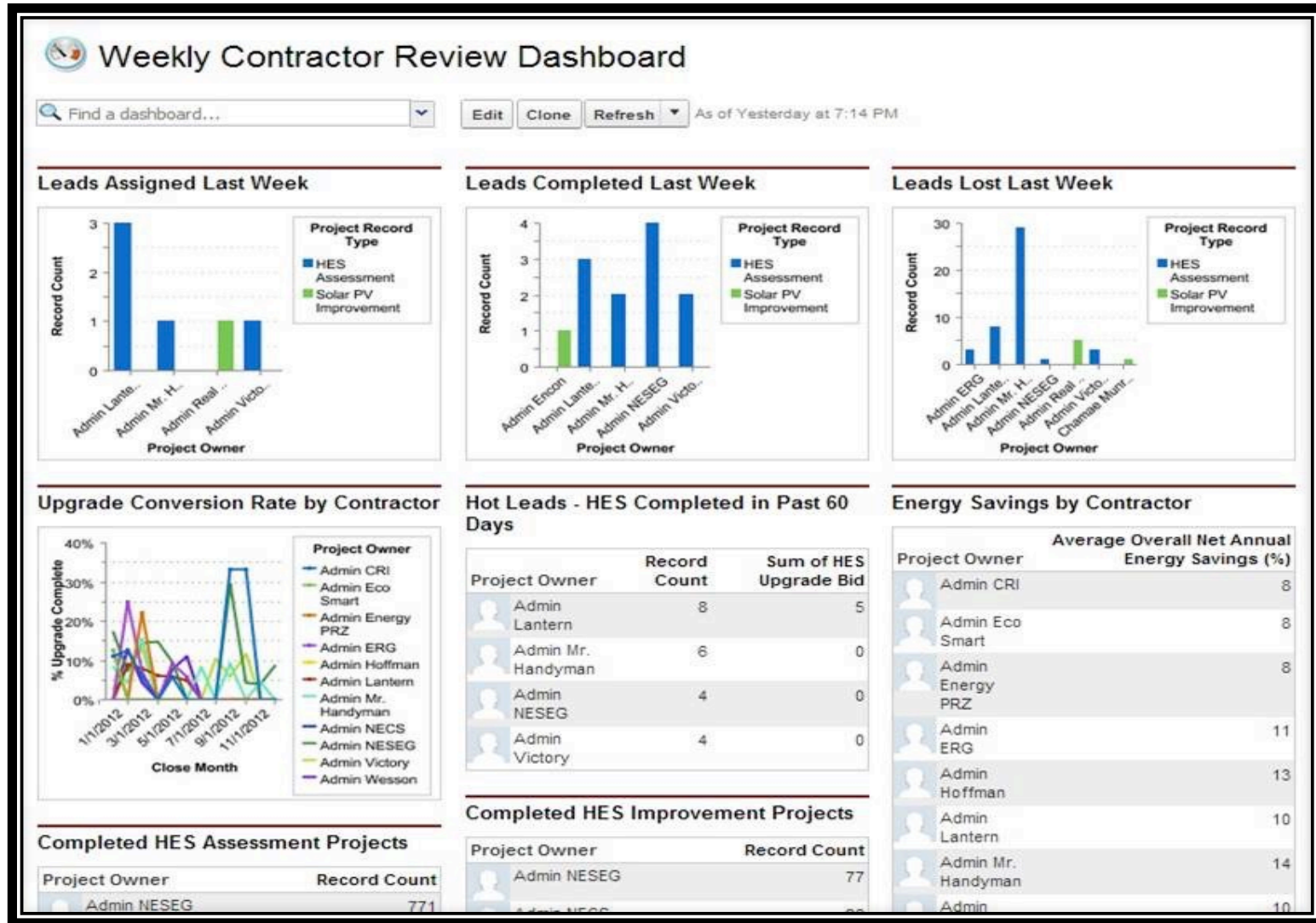
“ My wife and I have been involved in energy conservation and renewable energy since the 1970's. In January we upgraded our solar PV system and the next month we saw our usage drop from 300 kilowatts per hour to 116 kilowatts per hour. I came to a Neighborhood Energy Workshop and was inspired to become an ambassador for the Challenge in Cheshire. I'm looking forward to helping to educate and motivate my neighbors to become more energy efficient. ”



Utility Company

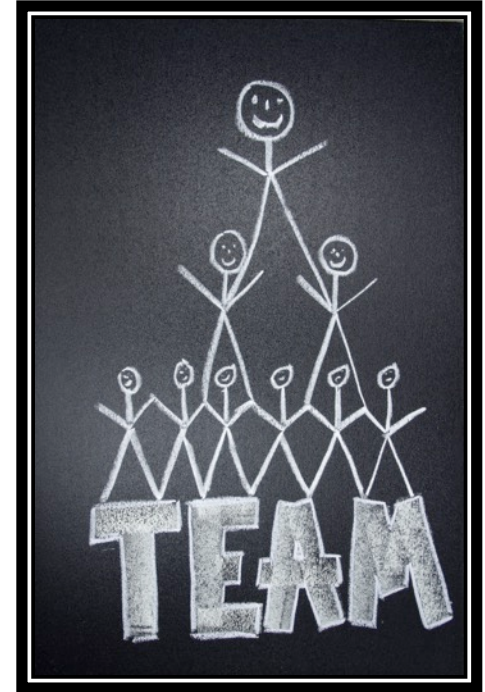


Regulators



A Way Forward

- *Lead from the Top*
- *Model Behavior from the Middle*
- *Mobilize from the Bottom*



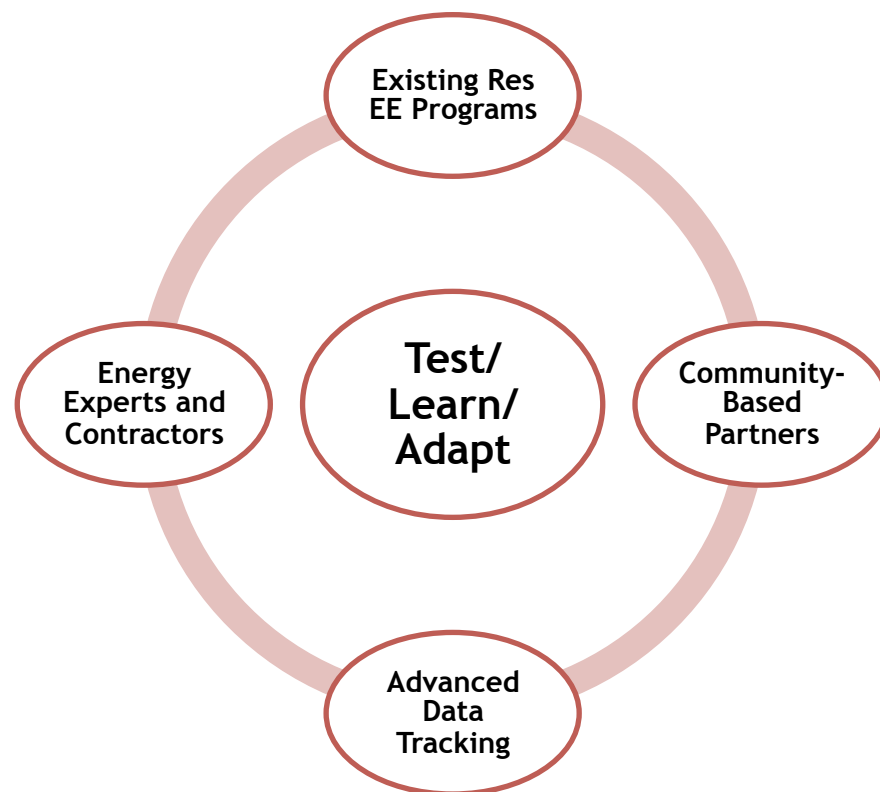
In this Half of the Presentation

- Community-Based EE Program Basics
- Highlights from Three Programs
- Test/Learn/Adapt Case Study



Community-Based Energy Efficiency Programs

- Close partnerships: cities, contractors, community organizations, customers
- Leverage existing social frameworks
- Use behavioral messaging and community-based social marketing combined with enhanced data tracking



The success of any program starts and ends with the **people** that are involved, so...



1. Use Individual and Social Behavioral Science

2. Remember: Technology supports programs; but **people** make engagements successful

It's not what
the software
does...

it's what the
user does



3. Data enhances results when it is translated into **people-friendly** information

Research Approaches

- **Participatory Action Research:**
Continuously Test/Learn/Adapt;
- **Qualitative analysis; and**
- **Behavioral experiments and surveys.**



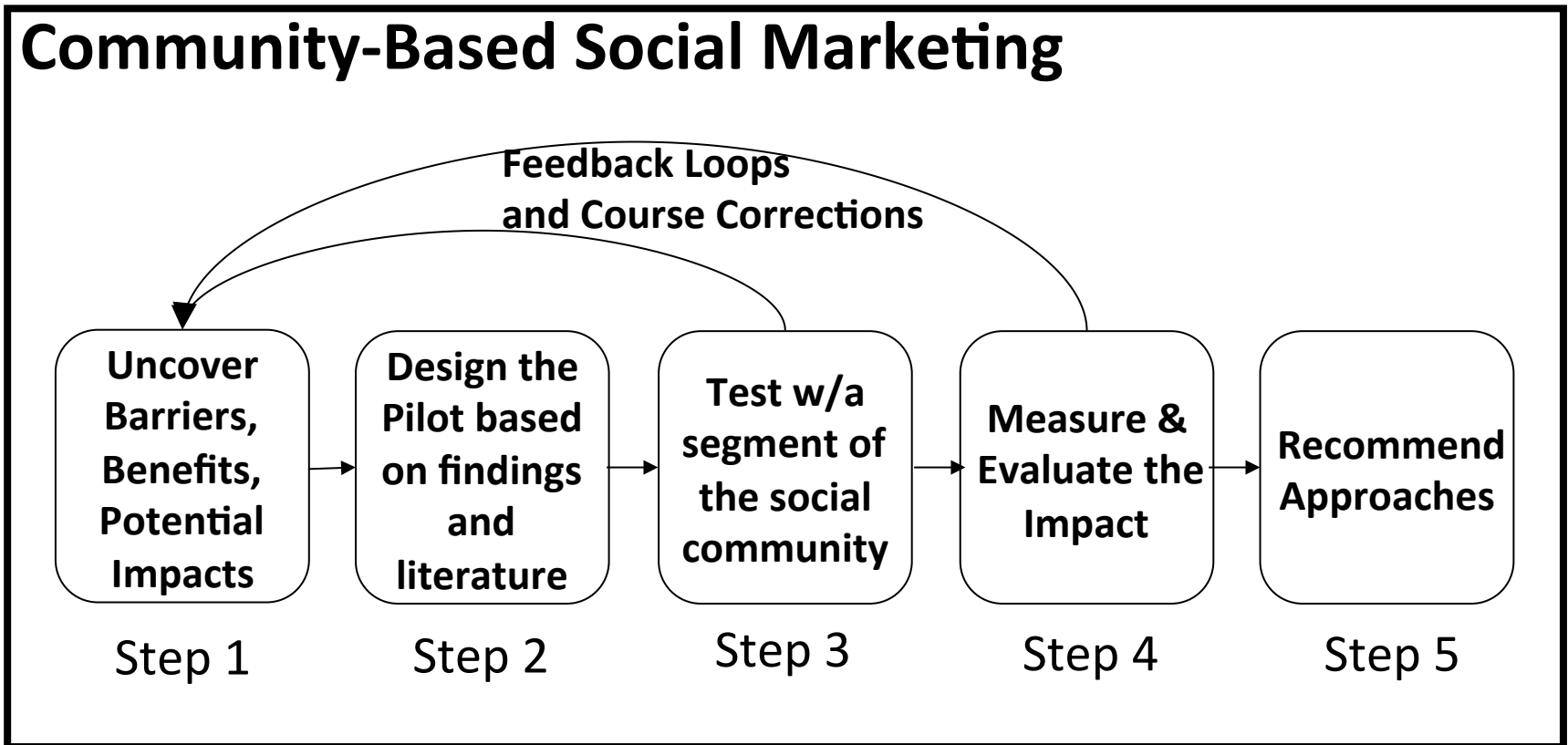
Social/behavioral approaches,
Real-time data collection,
Frequent analysis, and
Quick course correction.



empower efficiency LLC

Methodology:

Participatory Action Research



Derived from: McKenzie-Mohr, D. (2009). *Fostering Sustainable Behavior Presentation*. Paper presented at the Behavior, Energy, and Climate Change Conference.

<http://aceee.org/conf/09becc/09BECCPresentations.html - Day3>

Internal Tools for Innovation

- Technology Platform
 - Track Customer through all energy actions
 - Real-time in-field data collection, and reporting
 - Set targets and compare cost-effectiveness of outreach strategies
- Behavioral research
 - Quantitative action research
 - Qualitative analysis of outreach and messaging
 - Behavioral experiments
- Program dashboards
 - Internal and external dashboards
 - Contractor pipeline / scorecards

Action Research: Car Idling in Schools

- **Barriers** → Forget, Incorrect beliefs (3 min)
- **Benefits** → Air Quality/Health, Save fuel/\$
- **Approach:**
 1. Describe benefits and barriers first sentence
 2. Secure commitment:

“Would you be willing to make a commitment to turn your car off?”
- **Measure results of idling:**
 - Reduced frequency: 32%
 - Reduced duration: 73%

source: (MacKenzie-Mohr, 2009)

Action Research: Car Idling in Schools

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“Would you be willing to make a commitment your car off?”
- **Measure results of idling:**
 - Reduced frequency: 32%
 - Reduced duration: 73%
- **Provide Turn Key Tool Kits**
- **Follow up Regulation** → 50 Canadian Municipalities passed Idle Free laws



Public commitment,
Social diffusion,
Trigger, Social norm

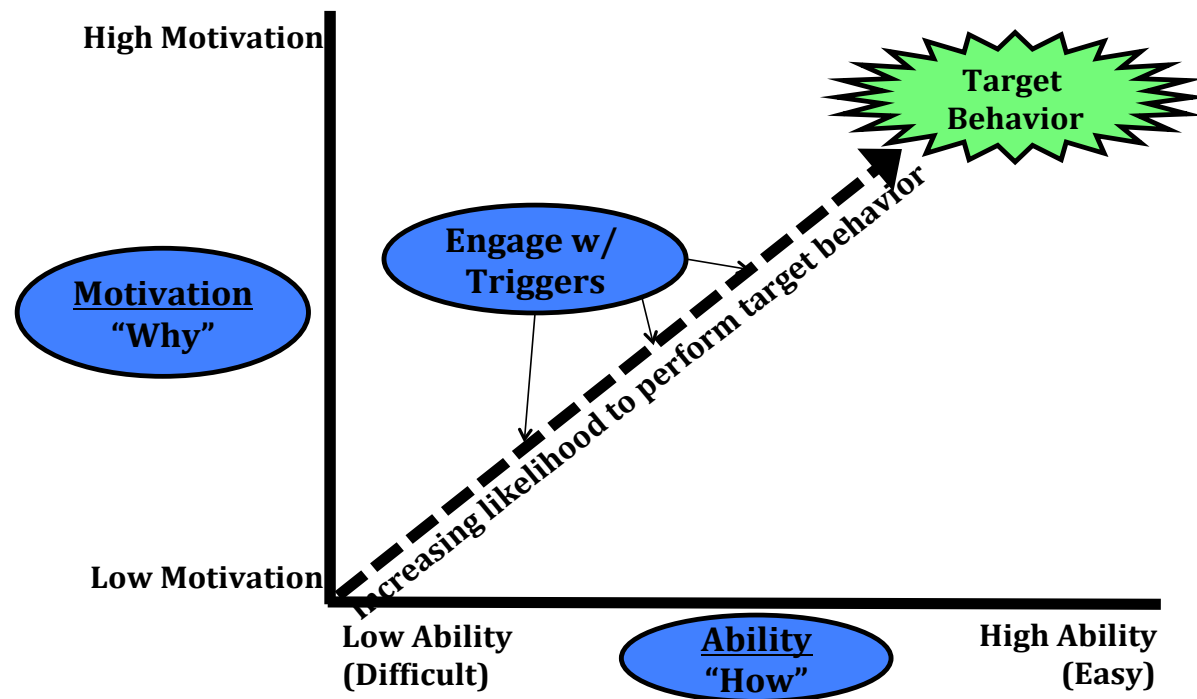
source: (MacKenzie-Mohr, 2009

Behavior Change Science

Real-world behavior change is MUCH harder than we expected.

Households have different:

- Awareness/readiness (motivation).
- Abilities to take action.



Sources:

Fogg, B. J. (2009)

McKenzie-Mohr, D. (2008)

Patterson et al (2009)

Donnelly, K. A. (2010)

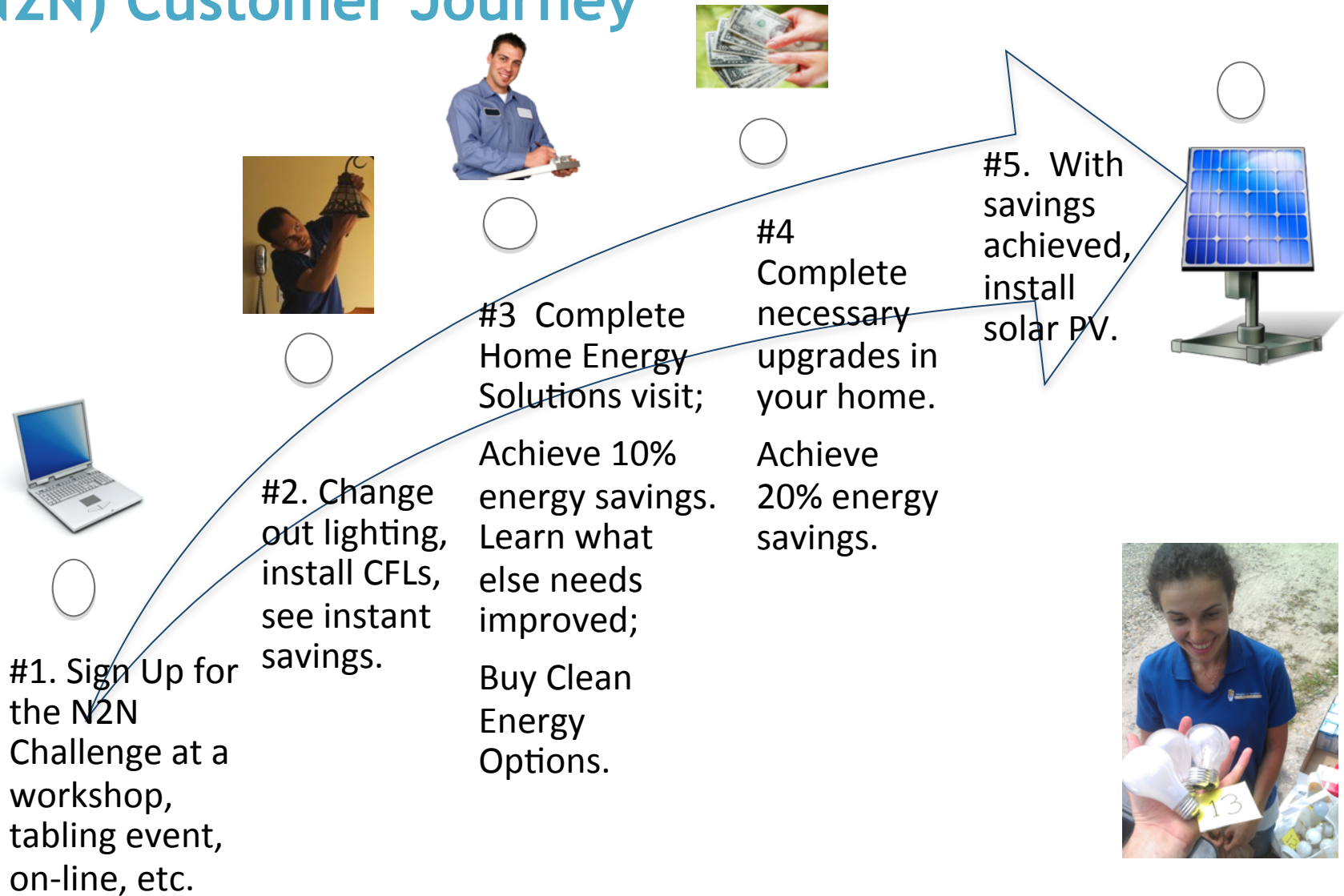
Neighbor to Neighbor Energy Challenge

- 14 diverse towns across CT
- \$4.2M, 3-year pilot funded by DOE
- Goal: Home upgrades
- Results:
 - 134 Signed Partners
 - 7,300 email list
 - 3,632 upgrades
 - Average savings 17% of household energy use
 - Total energy cost savings \$2.14MM/yr (average 12 year lifetime of savings)



*CT Gov. Malloy
announces kickoff*

Neighbor to Neighbor Energy Challenge (N2N) Customer Journey



N2N Focused on Driving Upgrades

Objectives:

- Increasing demand and cost-effectiveness
- Using community-based and behaviorally-focused outreach strategies



Methods:

- Event-based Outreach
- Workshops
- Door-to-door canvassing
- Community-partner outreach
- Passive sign-ups, and
- Contractor-generated leads

Data is Essential for Research & Evaluation

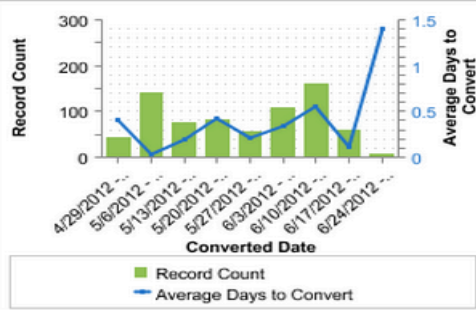
data

→ C Home <https://na11.salesforce.com/01ZG0000000a3kx>

Unconverted Leads


Full Name	Interest	Lead Age	Record Count
	HES	0	1
	HES	0	2
Total			3

Converted Web Leads Summary



This & Last Month

Average Days to Assign to Contractor



Open Projects by Type

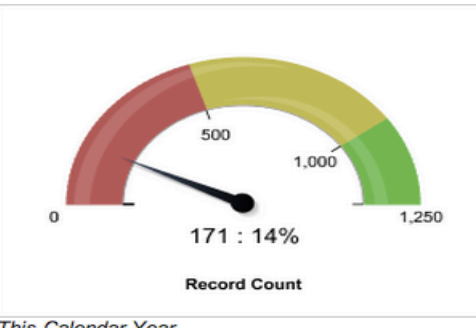
Project Record Type	Record Count
HES Assessment	467
HES Improvement	227
IE: HES Assessment	222
IE: HES Improvement	4
Lighting Retrofit	63
Total	983

All Open Projects

Open HES Assessments by Owner

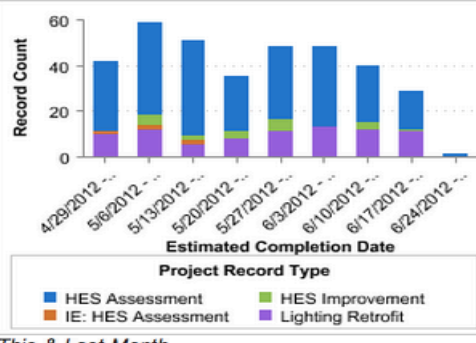
Project Owner	Record Count
	14
	36
	7
	30
	26
	108
	74
	14
	48
	6
	37
	2
	3
	10
	4
	2
	46
Total	467

Completed HES Improvement Projects



This Calendar Year

Projects Completed by Type



This & Last Month

Earned Points by Town

ts 800

Problem, Diagnosis, Solution: The Outreach Team

Problem

- Poor Close Rate (26% of leads completed Home Energy Audit)

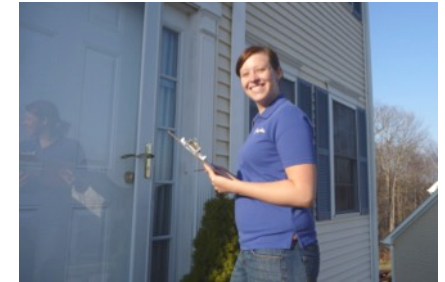
Qualitative Diagnosis:

- Low Quality Leads
- Customer Confusion

Solution—Course Correction:

- N2N All-Staff Analyses
- Refine pitches/materials
- Prime for upgrades
- Staff Training
- Sign up “receipts”

Using Data: Comparing Outreach Strategies



Learning:

- Canvasses not walking tables.
- Initial data indicated tabling/canvass had similar #s for sign-ups per staff hour.
- *But...* over time far *lower canvass complete rates*

Actions:

- In spring 2012 began to use canvassing as part of multi-touch neighborhood strategy with letter from town, house parties.
- Increase use of volunteers to improve sign-ups per staff-hour (clean energy corps not allowed to approach doors alone)
- Watching data for summer 2012 to see impact

Using Data: Comparing Outreach Strategies

■ Keeping your message simple and fun

- Messaging musts—anchor on upgrades and WIIFM
- Tailored to each segment
- Understands different motivations for different people

Using social strategies

- Need multiple touches through multiple channels with repeated messaging
- Trusted source
- Strategic messaging

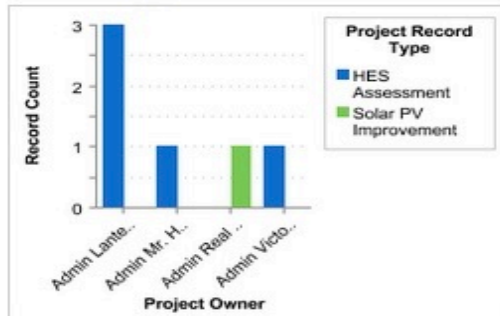
Priming for upgrades from moment one

Transparent Data Publication

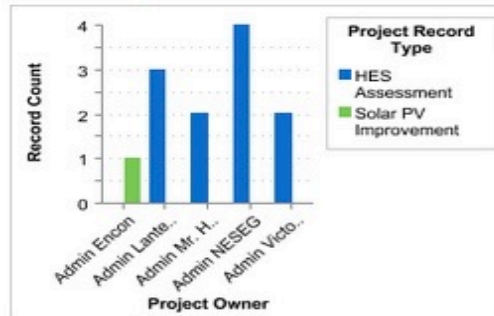
Weekly Contractor Review Dashboard

Find a dashboard... Edit Clone Refresh As of Yesterday at 7:14 PM

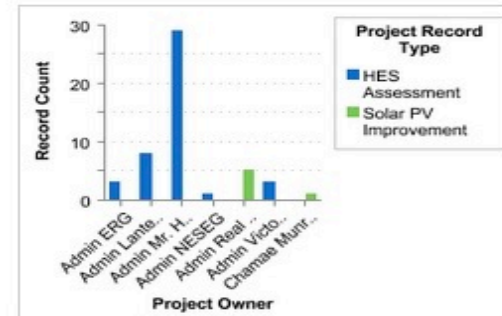
Leads Assigned Last Week



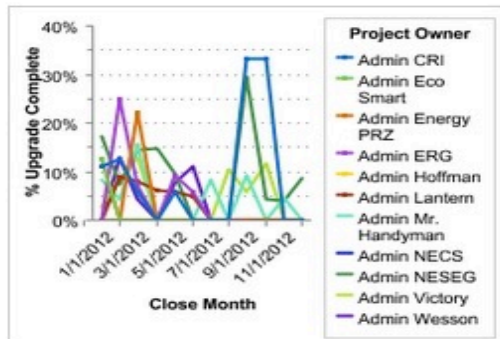
Leads Completed Last Week



Leads Lost Last Week



Upgrade Conversion Rate by Contractor



Hot Leads - HES Completed in Past 60 Days

Project Owner	Record Count	Sum of HES Upgrade Bid
Admin Lantern	8	5
Admin Mr. Handyman	6	0
Admin NESEG	4	0
Admin Victory	4	0

Energy Savings by Contractor

Project Owner	Average Overall Net Annual Energy Savings (%)
Admin CRI	8
Admin Eco Smart	8
Admin Energy PRZ	8
Admin ERG	11
Admin Hoffman	13
Admin Lantern	10
Admin Mr. Handyman	14
Admin	10

Completed HES Assessment Projects

Project Owner	Record Count
Admin NESEG	771

Completed HES Improvement Projects

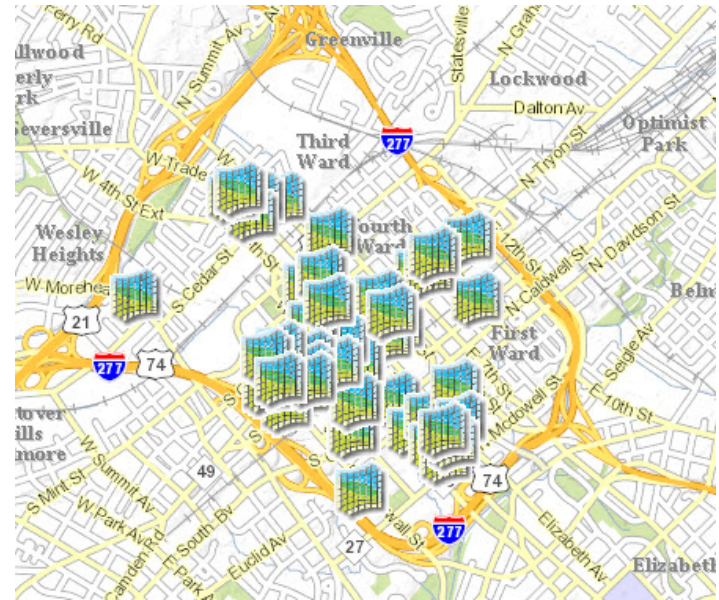
Project Owner	Record Count
Admin NESEG	77

Driving Policy Changes in CT

- **Increased regulator focus on broader statewide opportunity and issues**
 - Release forms
 - Utility data partnerships
 - Marketing efforts
 - Technology solution RFPs
 - Contractor performance metrics
 - Recognized increased lighting opportunity

Smart Energy Now[®] Envision Charlotte

- \$4.1 million dollar, 5-year uptown Charlotte, NC
- Commercial
- Goal: Office building behavioral and cross-sell utility programs
- Results: >6% savings after 18 months
- Long-term: savings up to 16% across uptown Charlotte



64 of 66 qualifying building participated

Step Up and Power Down



- Partnership between cities and PG&E (3-city pilot)
- CBSM approach
 - Encourage conservation behaviors
 - Increase engagement in PG&E programs
 - Support local Climate Action Plans
- Residential initiative implemented by Empower Efficiency

Benefits to Customers and Communities



“My home has gone from an average energy rating to an energy efficient home rating. The little changes you make every day actually do yield big results.”
- Sylvia C.



“I thought I was doing everything I could to save energy until I visited the Step Up and Power Down website.”
- Darcy A.



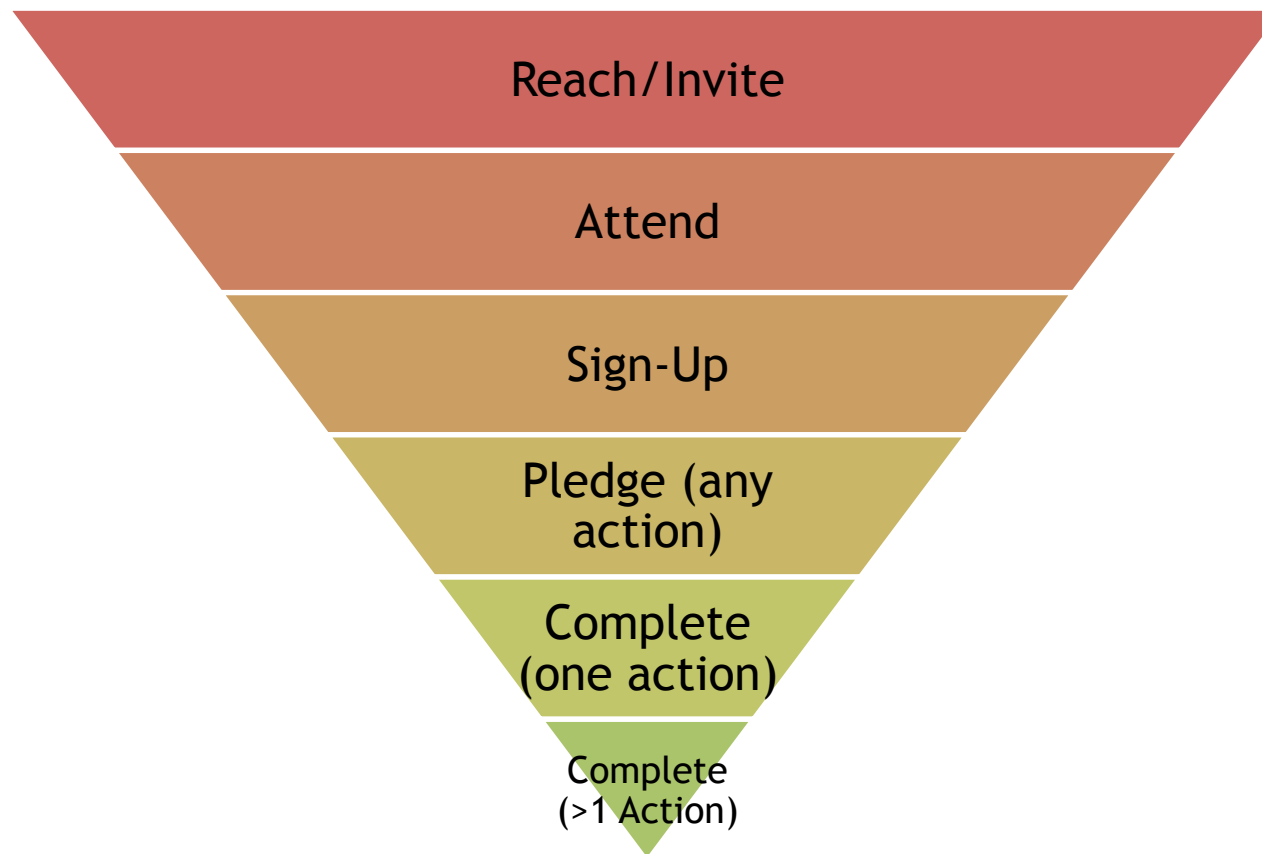
“Being part of Step Up and Power Down is a way for me to give back to my community.”
- Chelsea B.



“I pledge to save the world!”

– Alex B.

Customer Journey



Marketing & Outreach Strategy



- Build Awareness
- Broaden Engagement



- Deepen Relationships
- Motivate Action

Continuous Improvement: Perfecting the Pitch

- Behavior science gives us the tools
- Field experience dials it in



Behavioral Science Levers





Social
Pressure

Loss
Aversion

Reciprocity

F.A.C.S. &
Mimicry

Pitch Perfection

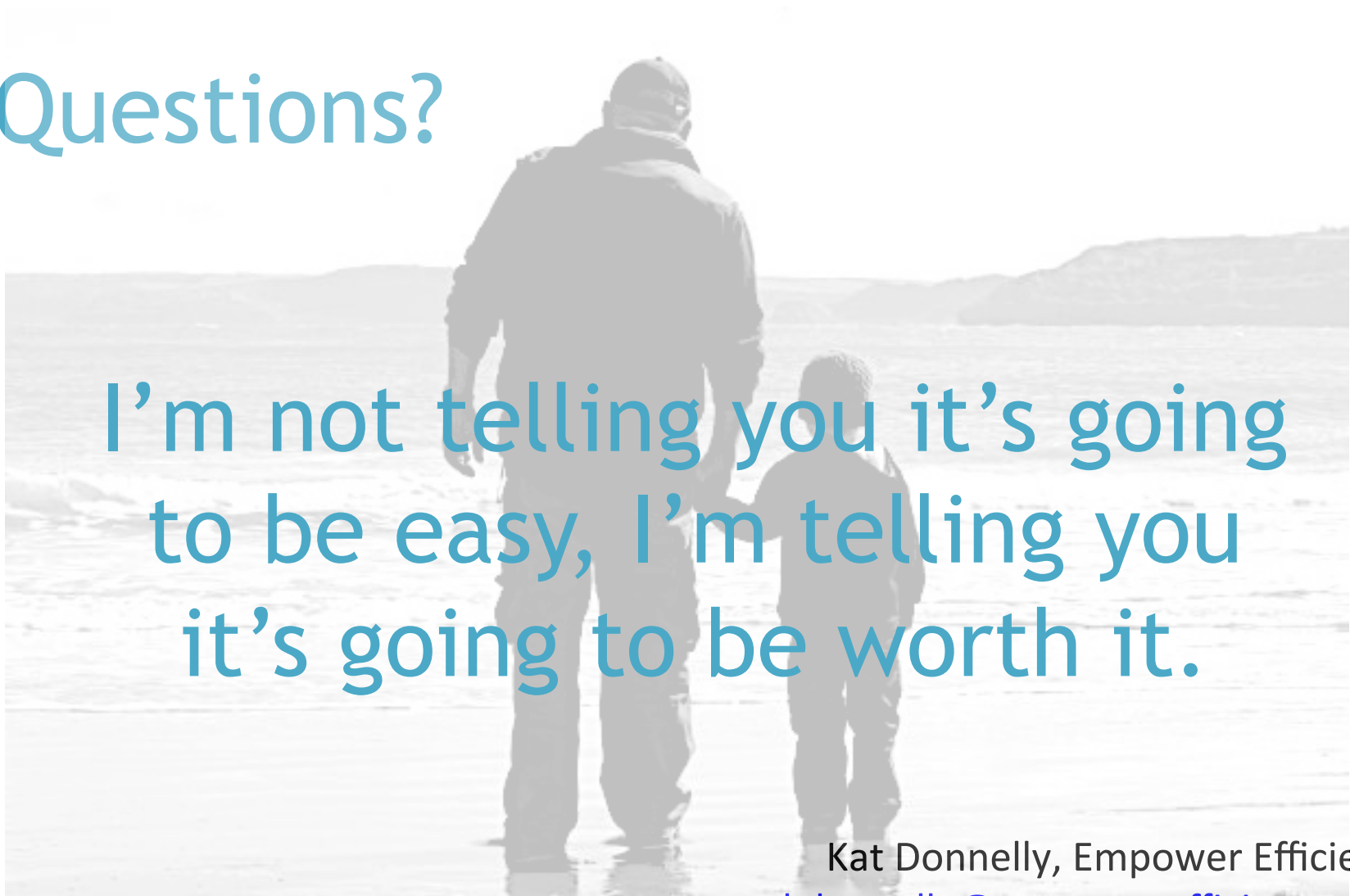
Pitch A	Pitch B (stronger)
We want to educate and empower you about your energy use and help you save money. 	We want to help you stop energy waste in your home. Let's make your energy work for you!
Do you know about Woodland, Step Up and Power Down? 	Have your friends told you about Woodland, Step Up and Power Down?
LED light bulbs will last for more than 11 years. 	If you install LEDs you won't replace another bulb until your kid turns 25!
Running a second refrigerator may be wasting energy in your home. 	If you take your old fridge to the dump, they will charge you \$10; if you have PG&E recycle it for you, they will PAY YOU \$50!

Tips for “Perfecting” the Pitch

- Assess the person before you engage
- Break down barriers and boost motivation
- Get them to take a first step on the spot



Questions?



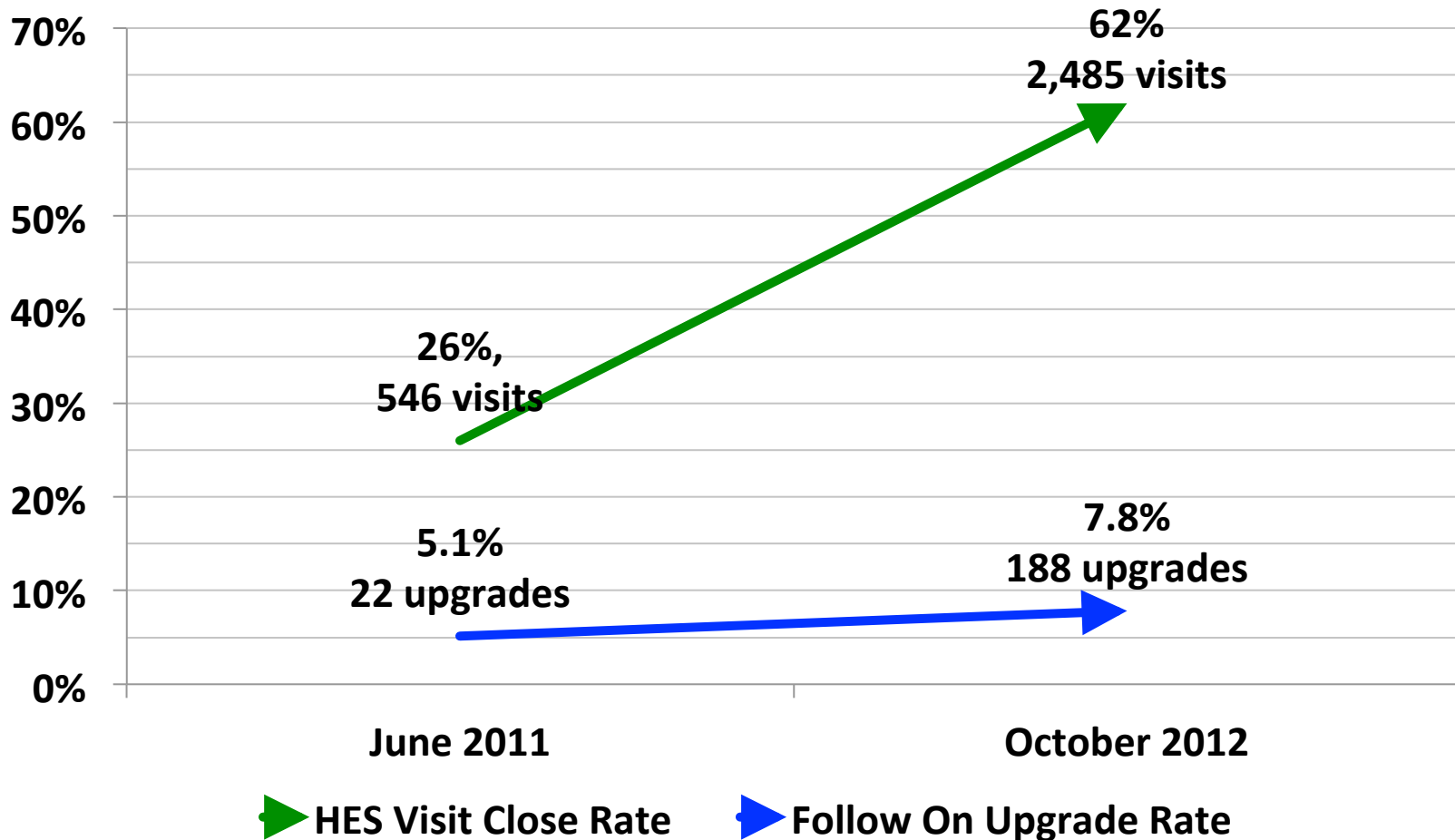
I'm not telling you it's going to be easy, I'm telling you it's going to be worth it.

Kat Donnelly, Empower Efficiency
kdonnelly@empowerefficiency.com



empower efficiency™

N2N Course Correction Results



Still, N2N was limited by contractor incentives and performance...



Problem, Diagnosis, Solution: The Contractors

Problem

- Poor Close Rate (26% of leads completed HES visit)

Quantitative Diagnosis:

- Lost leads
- Poor contractor follow up
- Low bid rates
- Low customer upgrade awareness

Solution—Course Correction:

- N2N Assign Leads
- Contractor Scorecards
- N2N Contractor RFQ
- Energy Advisors
- Customer Sales Training
- Lead “swim lanes”