



EnergySmart Marketing Plan and Implementation Guide

Prepared for
Boulder County

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EnergySmart Marketing Plan and Implementation Guide

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1. Introduction

1.1 Background

Consistent with long-term environmental and sustainability goals, Boulder County and the City of Boulder sought to increase the number of County residents and businesses engaging in energy audits and, more importantly, converting audit recommendations into energy efficiency improvements. They understood this would require innovative energy efficiency services and financial incentives to progress consumers from interest to action.

To achieve these goals, Boulder County and its municipal partners applied for and received a competitive grant from the Department of Energy, entitled ‘Colorado’s Retrofit Ramp-Up Program.’ With this funding, Boulder County and its municipal partners have designed energy efficiency services and set aside incentive funds for residents and businesses across the County.

The Colorado Retrofit Ramp-Up Program, now called EnergySmart, will bring both new and existing energy efficiency model programs to market via regional collaboration and funding partnerships. The County’s goals for the EnergySmart service are to conduct Energy Assessments in 10,000 homes and 3,000 businesses by the end of 2012.

Boulder County and the cities and organizations within the County have led environmental initiatives for many years. These complement a range of regional programs, services, and financial incentives available from Xcel Energy, Longmont Power and Communications (LPC), the Colorado Governor’s Energy Office (GEO), and the Center for Resource Conservation (CRC). EnergySmart will leverage partnerships with these organizations to increase the use of energy efficiency resources, while stimulating economic growth and investment in Colorado and advancing the state’s energy independence.

Despite ongoing efforts, there is still a great deal of untapped potential for increasing the efficiency of Boulder’s existing housing stock. A large percentage of Boulder County homes are more than 20 years old, offering significant opportunities for insulation, air sealing, HVAC tune-ups and upgrades, and appliance replacements.

Boulder County’s commercial sector also represents significant potential for energy efficiency improvements. Commercial facilities are generally more energy intensive than residential structures, and are therefore an important component in reaching overall greenhouse gas and energy reduction goals.

EnergySmart services were designed specifically to capture these potentials. The innovative delivery model bundles turnkey services with aggressive incentives and ongoing engagement with customers.

1.2 Marketing Objectives

Boulder County has partnered with its cities to design a program to overcome identified residential and commercial customer barriers to investment in energy efficiency services.

The primary objectives of the EnergySmart services are to enhance the existing marketplace for energy efficiency service in Boulder County with a new, more robust set of services and

incentives, a more coordinated delivery, and incentives that will contribute to a sustainable energy efficiency contractor sector.

Boulder County hired The Cadmus Group Inc. to design a consumer-awareness and branding campaign to raise awareness among Boulder County residents and businesses of the availability of EnergySmart services and to increase customer participation in Energy Assessments.

In order to dedicate more of its grant funding to the provision of enhanced services and financial incentives, the County has limited funds for paid media such as print, radio, and outdoor media. Therefore, Cadmus' marketing plan relies largely on a social mobilization approach that leverages social networking and word-of-mouth momentum to create an efficient, low-cost, high visibility campaign that raises consumer awareness and drives customers to the service. We have included recommendations and materials for newspaper and radio ads to which the County has allocated funds.

Boulder County will use this approach to encourage participation from a wide variety of social and community networks, such as neighborhoods groups, schools, business organizations, faith-based organizations, and other networks to engage communities and create excitement that translates into taking action on energy efficiency.

This marketing plan is Cadmus' key deliverable. Over the course of the EnergySmart program, County staff will implement marketing and outreach activities. This plan is intended to support those efforts by providing actionable guidelines and material templates that County EnergySmart staff can deliver throughout the duration of the EnergySmart services.

1.3 How to Use this Guide

The marketing plan is presented in two distinct sections focused on residential and commercial EnergySmart services. Within each section, the plan includes detailed information to support Boulder County staff's and its service delivery contractors' with ongoing delivery of effective marketing and social mobilization for EnergySmart services. For these implementation staff, we provided a wide range of strategies and tactics to broaden the customer base by targeting audiences most likely to participate with messaging specifically designed to address their key motivating factors and barriers. Additional strategies include engaging social networks through referrals, grassroots community outreach, and sponsoring competitions.

1.3.1 Structure of the EnergySmart Marketing Plan

Multiple elements of the marketing plan must work in concert to maximize successfully reaching and engaging residential customers. This plan focuses on the following key elements to inform the EnergySmart marketing approach for the residential and commercial sectors.

- **Market Intelligence:** Using primary and secondary research to identify barriers and approaches that work.
- **Communications Channels:** Reaching customers through the most effective marketing mix.
- **Targeting:** Identifying customers most likely to act on marketing messages.
- **Messaging:** Finding the right messages for different customer groups.

- Social Marketing/Mobilization: Using the power of social norms to activate behavior change among a targeted audience

1.3.2 Hyperlinked Resources

This plan provides overarching marketing strategies that support detailed marketing tactics. There are, however, important relationships and dependencies between different strategies and tactics that are not easily outlined in a linear document. In consideration of the County and EnergySmart staff, we have connected resources within this document through the use of hyperlinked text to aid users moving between and among sections. Each section reference also includes a section number so that users can easily navigate to the appropriate resource or section as needed. This will allow the reader to easily access related information without referring back to the table of contents.

2. Residential EnergySmart

Boulder County's residential sector represents a diverse mix of housing types, income levels, and energy efficiency awareness. Although the commercial sector offers a better “bang for the buck” in terms of efficiency potential per dollar of marketing investment, residential efficiency is generally easier to capture—traditional marketing achieves greater exposure to residential customers, total investment requirements are smaller, and incentives are more meaningful for those customers amenable to making upgrades.

Market barriers to residential efficiency are well known, with the greatest being 1) lack of perceived need, 2) lack of capital, and 3) lack of time. The most successful programs in the United States address these barriers by offering turnkey solutions *and* providing rebates that cover a significant portion of the initial capital outlay for improvements. Both of these features have been designed into the EnergySmart service.

A strategic marketing approach is required to address barriers to participation among residential customers. Key strategies include a combination of traditional [paid advertising](#), [grassroots and community-based outreach](#), [earned media](#), and [social networking](#). Also, engaging [strategic marketing partners](#) that can play a key role in marketing the program to customers is critical. Finally, this approach requires a [creative and messaging platform](#) that directly addresses key consumer barriers around cost, convenience, and need for efficiency.

In this plan, we have provided information on using conventional marketing tactics such as [direct mail](#), [newsprint and radio advertising](#). We have also included [social media and online tactics](#) as well as [grassroots outreach](#) techniques that leverage word-of-mouth and peer-to-peer communications.

While people like to think of themselves as independent thinkers, they typically tend to move towards [social norms](#). They talk to one another and tend to adopt the practices and attitudes of their friends, neighbors and family. EnergySmart is well-positioned to leverage this word-of-mouth advertising and peer-pressure to attract new customers and influence action among these social networks.

The following sections provide EnergySmart staff with guidelines on how to use all of these methods to reach residential customers and maximize its marketing resources.

2.1 Market Intelligence

Market intelligence helps us understand residential customers so that we can design marketing strategies based on their needs, preferences, attitudes and behaviors. This information plays a useful role in all of the other aspects of marketing to the residential sector, from identifying appropriate marketing channels to creating [targeted messages](#) that specifically address this sector's priorities and barriers.

To understand the mindset of Boulder County residential customers, Cadmus conducted two separate surveys, a brand preference survey and a residential baseline awareness survey. In November 2010 Cadmus sent a survey through the social and professional networks of Boulder County and City staff, requesting feedback on several brand name concepts proposed for the

County's energy efficiency services. In addition, several questions were asked about preferences and attitudes about energy efficiency services; some of these are included below. The residential survey received 916 responses.¹

A baseline awareness survey was conducted in January 2011. The results of this study and a subsequent follow-up study will reveal whether EnergySmart marketing outreach efforts have been successful in raising awareness of the EnergySmart brand and energy efficiency services in general. The residential baseline awareness survey received 424 responses. A summary of the survey results is provided in [Appendix A. Residential Baseline Survey](#).

To supplement its primary research, Cadmus also conducted extensive research on residential energy efficiency market trends and data that would be applicable to Boulder County and that would inform the development of the EnergySmart marketing strategy, [targeting](#) and [messaging](#).

2.1.1 Key Residential Findings

Several key findings from both primary and secondary research sources have informed our focus and [messaging](#) of the residential EnergySmart services. These research sources provide a national and local perspective on consumer attitudes towards efficiency services and practices.

Some of these findings are not new to the industry's understanding of consumers' attitudes towards residential energy efficiency: cost is a significant barrier to improving the efficiency of homes and the availability of rebates can be a powerful motivator. The EnergySmart services were designed, partly, to overcome this particular barrier, so the key findings, summarized below, focus on two additional findings relevant to messaging:

Our research revealed several meaningful statistics and findings that we used to craft our messaging.

1. Homeowners tend to overestimate the energy efficiency of their homes

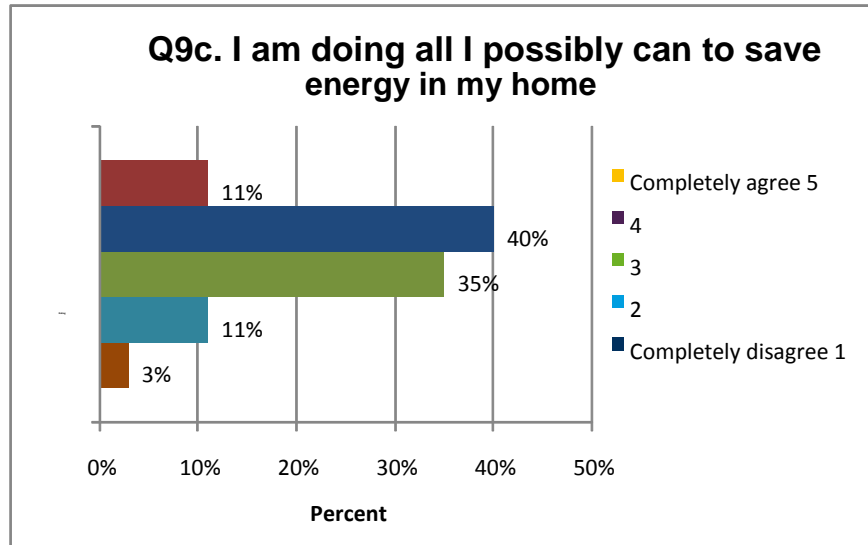
The first key finding is that homeowners typically believe their homes are already as efficient as they can be, leading to lack of perceived need for these services.

- Fifty-one percent agree or strongly agree with the statement: "I'm doing all I possibly can to save energy in my home." Another 35 percent were neutral, neither strongly agreeing nor disagreeing (Cadmus residential baseline survey). (See Figure 1 below.)
- Avoiding "waste" was identified as most powerful single motivator, but linkages with action were weaker than expected (California Energy Commission ethnographic study).
- Forty-nine percent of homeowners think their house is energy efficient (Shelton Group *EnergyPulse*).

¹ This survey was distributed to the professional and personal networks of the staff from Boulder County, City of Boulder, City of Longmont and the Cadmus Group. Accompanying the survey link was a request for recipients to forward on their networks. While this approach cannot be considered random sampling, the recipient networks represented a diverse range of interests and backgrounds. Cadmus assumes, however, that responses represent a slightly to moderately higher-than-average proportion of "early adopters" of energy efficiency services.

- There was a 44 percent increase between 2009 and 2010 in the number of respondents who said they had reduced their energy consumption in the last 5 years. (Shelton Group *EnergyPulse*).

Figure 1. Residents' Estimates of Home Efficiency

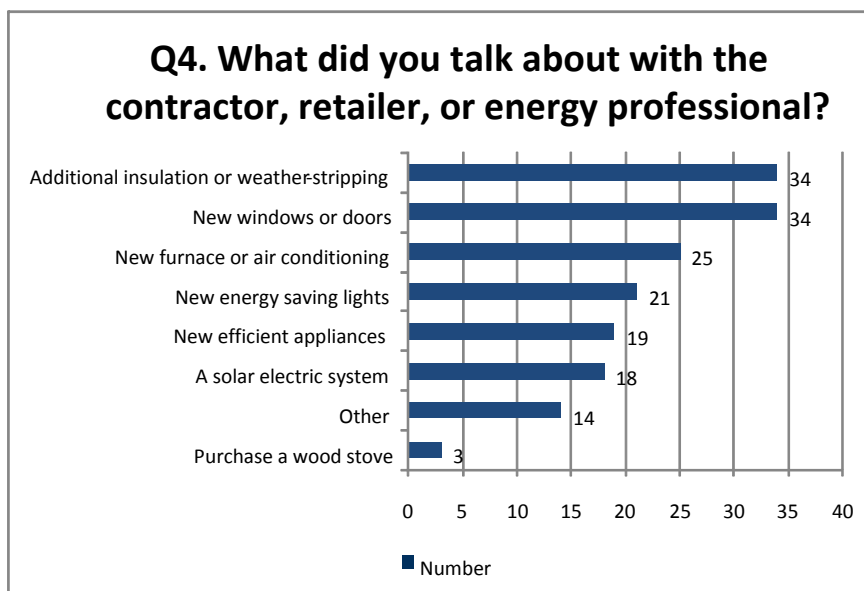


Residential Baseline Survey, January 2011 (n=424)

2. Consumers respond to energy efficiency messages as they relate to (thermal) comfort

The second key finding indicates that, when there is interest in energy efficiency, this interest is related to the building envelope and, by association, to the customer benefit of comfort.

- Twenty-five percent had spoken with an energy professional or contractor, mostly about insulation, weather-stripping, windows—e.g., building envelope/comfort (Figure 2). This indicates an interest in energy efficiency measures that impact the building envelope and comfort (Cadmus residential baseline awareness survey). See [Appendix A for the Residential Baseline Survey Summary](#).
- Fifty-one percent ranked “making my home more comfortable” as a very important EnergySmart service feature (Cadmus brand testing survey).

Figure 2. Residential Interest in Efficiency Measures

Residential Baseline Survey, January, 2011 (n=424)

3. Cost is a barrier, but rebates can be an incentive

A third key finding is that the cost of an audit or energy efficiency upgrades is a primary driver in consumers decisions to purchase that service or product. They may also be influenced to action with incentives to bring these costs down.

- Sixty percent said cost was the biggest barrier to residential efficiency (Cadmus brand testing survey).
- Fifty-eight percent ranked “availability of rebates” as a very important EnergySmart service feature (Cadmus brand testing survey).
- Fifty-five percent ranked “audit is low-cost” as a very important EnergySmart service feature (Cadmus brand testing survey).
- Sixty-two percent cited “Financial Barrier” as a primary reason for not making energy efficiency renovations (Shelton Group *EnergyPulse*).
- *“I can’t afford it” or “the expense” were the most frequently given reasons for not taking energy efficiency actions. Very few Americans, the report states, say that they are simply unwilling to spend money on energy efficiency, indicating that incentives can still motivate consumers* (excerpt, Yale Project on Climate Change, 2008 survey)².

4. There is a need for personalized assistance and guidance

The fourth key finding is that customers believe implementing even small energy efficiency actions is too time-consuming or unfamiliar, or it requires too much effort and skill. Those who have experience with a service similar to EnergySmart, the Residential Energy Action

² In 2008, the Yale Project on Climate Change conducted a focused survey of over 2,000 people in the U.S. <http://environment.yale.edu/uploads/SavingEnergy.pdf>

Program (REAP), strongly favor the personal attention and assistance they received from “Energy Counselors”.

- In post-service surveys, REAP customers ranked “one-on-one counseling” and “personalized energy action plan” as the two most valuable features of that program.
- *Many Americans say they simply don’t know how to take some actions or don’t have the time to research the options or do the work. For example, for two actions – insulating one’s attic and caulking and weather-stripping one’s home – approximately 20 percent of Americans say they don’t know how. An additional 20 to 24 percent say they have not taken these two actions to save home energy because it would take too much effort or they were too busy* (excerpt, Yale Project on Climate Change, 2008 survey).

These key findings reveal some strong barriers to actions. Strategies to overcome several of these barriers are inherent in the design of the EnergySmart services. Cadmus has also used these key findings in the development of its [creative message platform](#).

2.2 Residential Segmentation and Target Marketing

Target marketing will maximize the effectiveness of EnergySmart marketing funds. Using the methods outlined in this section, EnergySmart staff will be able to identify specific customers and neighborhoods with higher than average likelihood of being a strong candidate for energy efficiency retrofits and upgrades. Targeting these households with outreach efforts and [appropriate messaging](#) will, in turn, help maximize energy savings per marketing dollar expended.

Target marketing uses data on residential home ownership, location, building type, building age, and home value as well as other, more qualitative data, informed by our market intelligence, on customer characteristics and attitudes. By overlaying specific data that point to higher *technical* and *attitudinal* propensities to participate in energy efficiency programs and services, Boulder County will be able to generate a list of addresses for customers residing in this “sweet spot” for target marketing. As the program matures, the County will be able to expand its targeting criteria to cast a wider net for potential EnergySmart participants.

The database administered by the County (currently under development) will be the primary engine for identifying target homes. This database incorporates data from multiple sources, primarily the county assessor’s database, which has a record of each residence in Boulder County, and Nielsen’s Prizm geodemographic marketing segmentation database. Over time, the database may be expanded with data from other sources (e.g., city planning and building departments, Xcel, LPC) for conducting database queries with different or more granular criteria indicating high participation potential. The expanded database could also be used for targeting residents for other energy efficiency measures, such as behavior change, equipment tune-ups, or appliance upgrades.

2.2.1 The Data Sets

There are two primary data types used to define target markets, as outlined below.

Data for Segmentation Method 1: Technical Potential

The data used to develop the targeting strategies described below include the home's age, structure, and value and come primarily from the Boulder County Assessor's database. These data are best used for identifying potential savings through insulation and air sealing, upgrades to heating and air conditioning, and occasional window replacement.

Specific data elements and their usefulness for target marketing include:

- **Physical address:** Physical address data 1) allow the County to specifically target individual homes that meet the sweet spot criteria; 2) allow the County to more broadly target neighborhoods with strong participation potential for [grassroots outreach](#) and [social networking](#) tactics; and 3) allow the City of Boulder, by overlaying locations within the City of Boulder with data on home ownership (rental versus owner-occupied), to identify specific properties for targeting via the SmartRegs ordinance.
- **Home size (square footage).** In general, larger homes represent more attractive program targets, because—other things being equal—larger buildings use more energy and offer larger energy savings opportunities.
- **Type of home (single, multifamily).** In general, single family units are better targets than other building types: single family residences make up the vast majority of residential savings potential in Boulder County and are relatively straightforward to assess; condominiums and apartments present a range of market and technical barriers that make achieving real energy savings a costly endeavor.
- **Existence of central cooling.** Homes with central air conditioning systems offer a good target for [summertime marketing messages](#) related to air conditioner tune-ups and replacement.
- **Year built.** In general, older units represent more attractive program targets because—other things being equal—older units are more likely to require the insulation and air sealing measures targeted by the program. Newer units are more likely to have been built according to stringent building codes.
- **Home value (assessed).** Higher value homes typically indicate homeowners with higher levels of disposable income as well as possibly a higher propensity to invest in improvements that might increase resale values.

This data set will enable EnergySmart implementation staff to target homes based on their technical potential, described below. For example, EnergySmart staff will be able to conduct specific data queries, such as homes built between 1945 and 1960 that are between 2,000 and 3,000 square feet and located in Longmont.

Data for Segmentation Method 2: Likely Prospects

To identify targets using segmentation method 2, the County has acquired proprietary market segmentation data³ to determine potential for energy efficiency retrofits; it is Nielsen's Prizm geodemographic marketing segmentation database⁴. Prizm contains 66 unique market segments in the residential sector, each reflecting a variety of customer demographic, lifestyle, and attitudinal characteristics. Segments are applied geographically to neighborhoods within Boulder County by their Zip+4 locations (i.e., clusters of four to six homes).

We can apply an additional filter to the Prizm segments using the results of a national survey, conducted by E Source, in conjunction with Nielsen, to identify specific customer characteristics that indicate high and low propensities to participate in energy efficiency programs and services.

By applying these survey data, the County will be able to distill Prizm's broad sectors down to approximately 15 specific customer segments representing the highest likelihood of engaging energy efficiency services. Individual segments can then be tagged by their Zip+4 codes in the database as having "high potential."

2.2.2 Targeting Residential Customers

There are two primary methods for segmenting the market into high-potential targets for a "push" campaign; that is, marketing to specific homes. These methods use the corresponding data sets described above.

Targeting by Technical Potential

This segmentation approach is based on the age and structure of the home.

- Larger homes and single family homes provide higher savings potential. An initial filter for homes that are 2,500 square feet (SF) or larger is recommended. Over time, the County may lower this threshold to cast a wider net.
- For *weatherization*: Target homes of vintage of 1945 – 1985, as these frequently are characterized by inadequate insulation, easy access to add insulation, and high potential for air sealing. Homes older than 1945 also have high potential for savings, but measures are generally more difficult to install from a structural standpoint. Homes built after 1985 are more likely to have adequate amounts of insulation, although air leakage is still often a problem.
- For *HVAC improvement*: Target homes built before 1998, which are likely to have older furnaces and/or air conditioning systems.

³ Developed by E Source

⁴ Prizm is a proprietary segmentation system that includes every household in the United States. It was first developed to help businesses better target their products and services to customers that have different preferences. It can be used to target customers for certain types of cars, or soap, or restaurants, for example. Please note that the Prizm data is proprietary and is not the property of Boulder County. Therefore the specific segments cannot be published in this document. They may, however, be used for targeting purposes for this project. Details on Prizm can be found at <http://www.claritas.com/MyBestSegments/Default.jsp>.

- For *cooling system upgrades*: Target homes identified as having central air conditioning systems.
- For *other energy efficiency upgrades*: All types and vintages of homes have the potential for upgrades to appliances, lights, thermostats, and potentially, solar or other renewable energy systems.

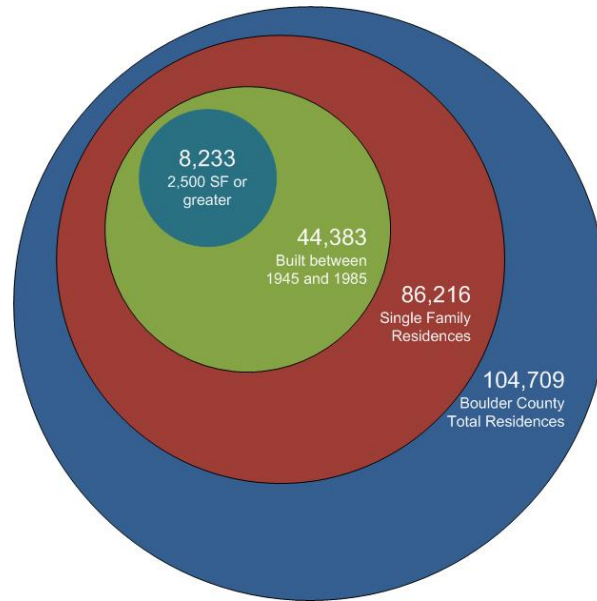
Targeting by Likely Prospect

This segmentation approach is based on demographics, psychographics, and other homeowner characteristics. General program marketing can be targeted to homes with the following characteristics.

- Owner-occupied homes or homes located within the City of Boulder (as SmartRegs will drive energy efficiency in non owner-occupied homes).
- Higher-income homeowners. These customers will have disposable income to spend or be more likely to borrow.
- Customers who have previously participated in similar programs. Programs include utility-, city-, county-, and/or state (GEO)-sponsored programs, including water rebates. Utilities and cities have information on these customers.
- Homeowners moving into a home. These homeowners have a high propensity to invest in upgrades. Using data on home sales in the County records, EnergySmart staff should target new homeowners with program mailings or other marketing approaches.
- Homeowners that are completing major renovations are also a good target for EnergySmart services. These homeowners can be identified via City and County permitting records and should be targeted soon after their permits are approved. Coordination with the cities will be required for this.

2.2.3 Using the Data for Target Marketing

Using available market data for Boulder County residences, we are able to distill the number of homes that meet first tier recommendations or “sweet spot” for targeting. Figure 3 shows the numbers of homes within each increasingly-refined target segment and the final subset of target customers that fall into this “sweet spot” according to housing type (i.e., single family), size (i.e., 2,500 SF or greater), and vintage (i.e., built between 1945 and 1985).

Figure 3. Number of Participants in Initial EnergySmart Marketing Target

As this graphic shows, applying a simple three-step filter to the set of total residents in Boulder County narrows the field of potential marketing targets to 8,233 homes. This is a good first step in the target marketing process; however, the graphic also shows that Boulder County will need to apply a variety of different targeting filters, or expand the indicated targeting parameters over time, to identify the quantity of homes needed to achieve penetration of 10,000 homes as is the program's goal.

The County can generate a final list of high-potential targets by overlaying data sets discussed above in segmentation methods 1 and 2⁵. In other words, data used to identify homes with high technical potential (i.e., based on size, age, and type), will be overlapped with the Prizm segments with high likelihood of participating (based on lifestyle, demographic, or attitudinal characteristics) to refine the subset of Boulder County residences to be targeted. The County can develop database queries to expand targeting characteristics to cast a wider net or to narrow criteria to test various marketing tactics.

⁵ As of the release of this Plan, Symbiotic Engineering has not acquired all necessary data for this targeting.

EnergySmart staff will use this final dataset to:

- Develop lists for direct target marketing
- Identify neighborhoods to engage with targeted social marketing such as:
 - door-to-door campaigns
 - school-based outreach

These tactics are discussed further below, and in [Grassroots and Community Outreach](#).

2.3 Creative Message Platform

The primary objective of marketing for EnergySmart services is to drive residents of Boulder County to schedule an Energy Assessment. From research and experience we know that there are significant barriers to residential customers' taking an interest in and action on energy efficiency services. It is critical that our EnergySmart messaging address these barriers while raising awareness of the [unique EnergySmart service attributes](#).

Insight from our primary and secondary market research informs the messaging strategy. This research helped us to identify [primary barriers to action and key motivations](#) driving residential customers to invest in energy efficiency. For details on our research and findings, please see: [Market Intelligence](#).

Using our market research, we have identified several key messages that may be the most influential in either overcoming barriers to action, or in triggering key motivations to efficiency investment.

Because we are driving homeowners to initiate an Energy Assessment, a key plank of the messaging platform is informing customers that an Assessment is critical to identifying the ways homeowners can reduce energy waste and increase comfort. We know from our research, however, that there are key challenges to getting consumers to undertake Assessments:

- Homeowners tend overestimate how energy efficient their homes are and, consequently, don't perceive the need for an Energy Assessment.
- Homeowners are often concerned efficiency upgrades will be costly and don't want this confirmed with an Assessment; they are also often unaware of the range and value of the incentives available to them.
- The energy efficiency "process" of coordinating audits, contractors and financing is perceived as confusing, time-consuming and a hassle.

Therefore in order to increase participation in Energy Assessments, our messaging needs to:

1. Raise awareness of the need to do more regarding efficiency in homes.
2. Address specific barriers of the costs and "efficiency process."

2.3.1 Messaging Strategy

The main task of messaging is to motivate consumers to schedule an Energy Assessment. To be successful, our key messages must address specific [customer needs and barriers](#) throughout their decision making process, anticipate and mitigate potential “drop-off points,” and lead customers through a continuum of message points that keep them on a path toward scheduling an Assessment. Messaging must also be mindful of the need for precision and brevity.

Cadmus has developed the messaging hierarchy below to address a customer’s thought process during the decision to schedule an Energy Assessment. The sequence of the messages is ordered to proactively address the barriers discussed above. Note that each message is intended to overcome one of the identified main barriers, leading up to the final call to action.

Barrier: I believe my home is already efficient

- **Your home may be wasting energy and money and may not be as comfortable as it could be. Cut your home’s energy waste and improve its comfort by scheduling an EnergySmart Assessment**

Barrier: The Energy Assessment and upgrade/incentive process can be daunting

- **EnergySmart makes this process easy and affordable**
 - An Advisor navigates you through the entire process
 - The Advisor helps you secure all available incentives and financing to reduce the cost of upgrades
 - EnergySmart is a low-cost service and a great value

Call to Action

- **Call 1-303-544-1000 to schedule your EnergySmart Assessment**

The final telephone number can be replaced with directions to the website where customers can also sign up.

2.3.2 Message Hierarchy

Based on the market intelligence discussed above, we have identified the key messages that rank highest in their ability to [overcome barriers and motivate customers to act](#). Much of the creative marketing platform is based on these key messages.

2.3.2.1 Hidden Waste

The first-tier messaging strategy emphasizes raising awareness that customers’ homes may not be as efficient as they think and/or that they could be more comfortable. In particular, our messaging focuses on waste in the building envelope and efficiency solutions such as insulation and air sealing.

Raising awareness of unknown energy waste is a key lead message for several reasons:

- Research shows that consumers often feel they’ve done all they can to be efficient in their homes.

- Most of Boulder County’s housing stock was built well before the implementation of modern building codes. We know that many of these homes remain underinsulated and leaky.
- It is not always obvious to consumers that a home is wasting energy, even if there are drafts.

After we have raised awareness that there may be a problem with a lead message, our next messaging objective is to address the barriers of perceived hassle and of costs, expressed as secondary messages below.

- **Lead Messages**
 - Your home is wasting energy in ways you don’t know about. It may not be as energy efficient as you think it is.
 - Your home could be more comfortable.
 - EnergySmart makes energy efficiency easy and affordable.
- **Secondary Messages**
 - Find and stop this waste with an Energy Assessment.
 - Trained EnergySmart Advisors provide expert help with contractors and financing.
 - EnergySmart is a good value.
- **Call to Action**
 - Call today or go online to schedule your EnergySmart Assessment.

2.3.2.2 Special Considerations Messaging

In addition to the key messaging around waste, comfort, and the benefits of the EnergySmart services, there are other messages that can augment these key messages to highlight the urgency associated with short-term rebates and the season in which the messages are used. These are described below.

2.3.2.3 Limited-Time Rebates

A fundamental marketing tool that consumers respond to is an “act now” promotion based on urgency and scarcity. We recommend, when it is appropriate, that promotional materials call out the availability of the limited-time EnergySmart rebates, as well as partner rebates. These copy points should augment the [messaging hierarchy](#) outlined above. Language should be brief and attention-getting in the form of starbursts, callouts, or bolded copy on promotional materials. Sample language includes:

- **Call now, before limited-time rebates are gone!**
- **Your rebate is waiting for you, but it won’t wait for long!**
- **Limited-time rebates available. Make sure you get yours!**

It also important to note in messaging that limited-time EnergySmart rebates are provided *in addition* to other state and utility rebates.

2.3.2.4 Seasonal Messaging

While the lead messaging in the above strategy is applicable throughout the year to motivate consumers, additional messaging can be used to highlight seasonal energy use.

We know that utility-based energy audit programs are the most active during the heating season. Messaging leading up to and during heating season (beginning of September through the beginning of March) should focus on cold infiltration, wasting heat, insulation, air-sealing, and furnace tune-ups and upgrades.

Messages delivered leading up to and during cooling season (May-August) should focus on expensive conditioned air escaping (wasting cooled air), air-sealing, and air-conditioning tune-ups and upgrades.

Please see [Appendix B. Marketing Calendar](#) for the marketing calendar with recommendations for promotional frequency and details on seasonal message emphasis.

2.3.2.5 Addressing Barriers with Messages

County employees, contractors, volunteers, and partners representing the EnergySmart programs may encounter barriers when talking to consumers and potential customers about energy efficiency investments.

EnergySmart representatives should become extremely familiar with common barriers below and be able to speak knowledgeably about the EnergySmart benefits and features that offer *value* to the customer and help overcome those barriers. Table 1 provides a list of the most common customer barriers to energy efficiency as well as a selection of key messages EnergySmart representatives should use to assure customers that EnergySmart services have been designed to meet their needs.

The barriers and responses below can be used when speaking with potential customers at [events](#), during [presentations](#), during [Assessments](#), [outbound calls](#) or in written communications ([direct mail](#), [promotional email](#) and [service staff email](#)) when specific barriers can be anticipated.

Table 1. Residential Barriers and Key Messages to Overcome Them

| Barrier | EnergySmart Key Messages |
|--|---|
| The service is too expensive | <ul style="list-style-type: none"> EnergySmart services provide up to \$555 in value at a cost to you of only \$120 (show brochure with breakdown of cost/value). EnergySmart is subsidized through a short-term federal grant through the American Recovery and Reinvestment Act, which offsets more than three quarters of the cost of the service. EnergySmart provides free direct installation items worth up to \$85 that provide immediate and lasting energy savings and customer value. |
| Lack of capital for equipment investment | <ul style="list-style-type: none"> EnergySmart rebates are available right now to reduce incremental upfront cost of equipment investments. Advisors will help you make a long term plan for installing upgrades. You can start with something affordable and do more expensive things later. |

| Barrier | EnergySmart Key Messages |
|---|--|
| | <ul style="list-style-type: none"> • EnergySmart provides free direct installation items worth up to \$85 that provide immediate energy savings and customer value. • EnergySmart offers low-cost financing and microloans so you can spread the cost over several years. Often your monthly payment is less than the savings on your energy bill. • Energy efficiency investments save energy and money over the long term, increase the value of your home, and will help reduce the impact of rising energy prices. • Energy efficiency investments will improve the comfort of your home. |
| Lack of time | <ul style="list-style-type: none"> • Advisor does most of the work and keeps you on track. • EnergySmart provides resources to create a seamless process. • EnergySmart representatives check in and follow up throughout the process to keep you on track. • Rebates are only available for a limited time so it doesn't pay to put off action until later. |
| Don't understand where I'm losing energy and money | <ul style="list-style-type: none"> • EnergySmart Assessment identifies where energy and money is lost. • Auditors are trained and certified in identifying energy waste and calculating energy and cost savings. • Auditors use industry-leading software that incorporates your home's specific circumstances to calculate energy waste and savings. • Energy auditors use advanced tools and software to find sources of waste that may otherwise be invisible. • Provide case studies of actual projects showing energy and cost savings. |
| Don't trust contractors to make decisions in my best interest | <ul style="list-style-type: none"> • Advisors are independent, third party experts, with no incentive to steer you the wrong way. • EnergySmart offers a robust contractor network so that customers (with Advisor assistance) can easily get competing bids for installation work. • EnergySmart contractors must be preapproved and meet quality standards. |
| Don't understand energy efficiency; it's complex and the terminology is confusing | <ul style="list-style-type: none"> • Advisor is a trained energy expert and will present options in terms you understand. • Audit reports provide a prioritized list of simple to understand recommendations. • Advisor will answer questions throughout the process and help keep you on track. • Provide simple to understand case studies to show customers an example of energy saving benefits. |
| Don't know what contractors to choose; don't have time to deal with selection | <ul style="list-style-type: none"> • EnergySmart offers a list of preapproved contractors. • Advisor will help you through the selection process. • Rebates are only available for a limited time so it doesn't pay to put off action until later. |
| The process is too complex | <ul style="list-style-type: none"> • The Advisor's primary objective is to facilitate the process for you. They will help simplify the whole experience. |
| I'm doing everything I can to save energy in my home | <ul style="list-style-type: none"> • The assessment may discover things that you haven't thought of before. Many people find leaks in their homes they didn't know existed. • Energy auditors use advanced tools and software to find sources of waste that may otherwise be invisible. |
| I'm a renter; is there anything I can do? | <ul style="list-style-type: none"> • Renters can still participate in EnergySmart! If you plan to be in your home for more than a year, the investment in the program is worth it: you get free direct installation items worth up to \$85 that provide immediate energy savings and customer value. |

| Barrier | EnergySmart Key Messages |
|---|---|
| (continued) I'm a renter; is there anything I can do? | <ul style="list-style-type: none"> • Your landlord may be willing to take the cost of the program out of your rent. • In the city of Boulder, your landlord is required to meet energy efficiency standards required by the SmartRegs ordinance. You can encourage your landlord to meet SmartRegs requirements early and take advantage of <i>limited time rebates and compliance assistance</i> offered through the program. • The city offers free energy awareness classes, which you can take to help your landlord meet compliance with SmartRegs early. • Your energy assessment will help you identify low-cost measures that you can adopt, such as putting in CFLs, installing a programmable thermostat, and sealing up windows and leaks. |

2.3.2.6 Targeted Messaging

As indicated in the section above, consumers need messaging related to the services' benefits and features in order to help them overcome practical barriers to participation. But consumers can also be steered towards energy efficiency services through motives based on values and emotions.

General marketing such as [direct mail](#), [newspaper ads](#), and other promotions for general audiences will follow the primary themes outlined above in the [Messaging Hierarchy](#). When communicating with specific target audiences, however, EnergySmart staff should use messages based on values and emotions associated with those audiences to motivate their participation in EnergySmart services.

In Table 2 and Table 3 below we have provided suggestions for message points linked to specific groups and individual attributes for which particular messages resonate. These messages do not necessarily substitute for the [key message platform](#) but are meant to bolster it with target-specific reasons for the consumer to take action.

These messages should be used when EnergySmart staff is communicating with one of the specific groups identified, through [presentations](#), direct communications, and other contact with the group, such as [group newsletters and websites](#). When providing a group with written content for a newsletter or website, these values-based messages should be appended to the [EnergySmart message segments](#) supplied in [Appendix C. Message Segments Describing EnergySmart Services and Benefits](#). The message segments in Table 2 are intended to be suggestive of the values-based theme for the group; the specific language and content can be modified or adapted for different applications.

Those cells that contain two marks (XX) indicate the message has stronger resonance with a particular group than cells with just one mark (X).

Table 2. Target Group Value Messages

| Residential Groups | Savings | Comfort | Easy, Convenient | Control | Global Environment | Local Environment | Energy Independence | Local Jobs | Knowledge, Info/Smart | Social Norms |
|--------------------------------------|---------|---------|---------------------|---------|-----------------------|----------------------|------------------------|------------|--------------------------|--------------|
| Churches/ Congregations | XX | XX | XX | X | X | X | XX | XX | X | XX |
| PTAs | XX | XX | XX | X | X | X | XX | | X | XX |
| Civic Groups: Older | XX | XX | XX | XX | | | XX | X | | XX |
| HOA, or normal Neighborhood Group | XX | X | XX | X | Varies | Varies | X | XX | X | XX |
| Civic Groups: Middle | XX | X | XX | X | Varies | Varies | X | XX | X | XX |
| Civic Groups: Younger | XX | X | XX | XX | Varies | Varies | X | X | X | XX |
| Environmental Groups | X | X | XX | X | XX | XX | XX | X | XX | XX |
| Energy Consulting Firms | X | X | XX | X | XX | XX | XX | X | XX | XX |
| Neighborhood Group, Advanced | XX | X | XX | X | XX | XX | XX | X | XX | XX |
| Outdoor groups | X | X | XX | X | XX | XX | X | X | X | XX |

Table 3. Target Individual Value Messages

| Residential Customer Attributes | Savings | Comfort | Easy, Convenient | Control | Global Environment | Local Environment | Energy Independence | Local Jobs | Knowledge, Info/Smart | Social Norms |
|------------------------------------|---------|---------|---------------------|---------|-----------------------|----------------------|------------------------|------------|--------------------------|--------------|
| Affluent | X | XX | XX | XX | Varies | Varies | X | X | XX | XX |
| Moderate Income | XX | XX | XX | X | Varies | Varies | X | X | X | XX |
| Older, Retired | XX | XX | XX | XX | Varies | Varies | XX | X | X | XX |
| Middle Age, with Kids | XX | X | XX | XX | X | X | X | X | XX | XX |
| High Tech, gadgets | X | X | X | XX | X | X | X | X | XX | XX |
| Landlords, Property Managers | | X | XX | | | | | | X | XX |

Table 4 below identifies additional individual customer attributes that can have a strong correlation to specific values-based messages. Sample messages are provided below the matrix.

Table 4. Values-based Messages

| | |
|---------------------|---|
| Savings | Everybody hates waste. Energy efficiency stops the waste of energy and money. |
| | You save every month and you can use that money for other things that you like/need. |
| | The sooner you make improvements, the sooner you'll start saving. |
| | Fighting rising energy costs? Fight back with efficiency and conservation. |
| Comfort | Do you have cold/hot rooms? Fix them so you can actually use ALL of your house. |
| | Sealing up your house is like putting a blanket on. Keep the heat in. |
| | Did you know that most houses have enough cracks in them to equal a 2 foot diameter hole in the wall? (equal to a box fan). |
| Easy, Convenient | We know that all this energy information is overwhelming. But we're here to walk you through.. |
| | You don't need to be an expert, because we'll help you make smart decisions. |
| | Filling out paperwork is a pain. But we can help you. |
| | Don't know who to hire? We have a list of qualified contractors. |
| | Don't know which upgrades to make? We can help you decide. |
| Control | You may think you don't have control over your utility bills, but you do. |
| | You can manage energy costs with simple decisions about things like thermostat settings and turning the lights off. |
| | Knowledge is power. The first step to controlling your energy costs is knowing where to start. An Energy Assessment gives you that power. |
| Global Environment | You can lower your carbon footprint. Take the first step with an Energy Assessment. |
| | If everyone makes efficiency changes, together we can reach our carbon reduction goals. |
| | Leave a better world for your kids/the next generation. |
| | The U.S. generates 25 percent of the world's greenhouse gases, so we can all do our part. |
| | The cheapest way to lower greenhouse gases is by investing in efficiency (not renewables). |
| | Everybody needs to work together to achieve Boulder's emissions reduction goals. |
| Local Environment | Over half of Colorado's electricity is generated from coal. The more we reduce, the less pollution (including mercury) goes in our air and water. |
| | Power plants generate a lot of our air pollution. Reducing household energy use can help lead to a cleaner environment. |
| Energy Independence | The more we save energy at home the less we have to buy from other countries. |
| Local Jobs | Energy efficiency creates more local jobs than building power plants does. |
| | EnergySmart services help local people find good jobs doing energy assessments, upgrades, and tune-ups. |
| Social Norms | Most/Many homes on your street have already added insulation and have sealed air leaks. |
| | We are working to get most homeowners in the County to reduce their energy use; here are some examples. |
| | This case study will show you one example of how a homeowner like you increased their comfort while lowering their bill. |
| | Most people want to save energy, but don't know how to go about it. We're here to help. |

2.3.2.7 Message Segments Describing EnergySmart Services and Benefits

EnergySmart staff will be communicating with individuals and groups of potential customers through a variety of written and online tools, such as newsletters, articles, blogs, and emails. In order to maintain message consistency about EnergySmart benefits and features, we have provided copy segments of various lengths that EnergySmart staff can use or supply to groups for their use in the media above. These message segments are included in [Appendix C. Message Segments Describing EnergySmart Services and Benefits](#).

2.4 Social Marketing for Residential Sector

Social marketing is the primary, overarching *strategy* Boulder County will use to market the EnergySmart services. A social marketing approach relies on the power of social networks to influence actions and create new or enhanced “social norms.” The goal of social marketing is to make EnergySmart the “new normal.” [Appendix D. Social Marketing Fundamentals](#) has additional background information on the science of social marketing.

Social marketing uses a variety of innovative marketing *tactics* to deliver participants to EnergySmart services. EnergySmart staff, especially Advisors, can play a large role in using social marketing to sell EnergySmart services and encouraging homeowners to invest in efficiency upgrades. They have many tools at their disposal and should use them at every opportunity to convince residents to take the next step, and even more importantly, to spread the word about EnergySmart to their friends, families and other communities. See [Appendix Q. Staff Communications Social Marketing Reference](#) for a summary of social marketing communications tactics and examples. This is the engine that drives social marketing, and it can be more powerful than providing residents with financial analysis of savings potential or technical descriptions of problems with their homes. These types of socially based connections resonate with potential customers at an emotional level, which can be a very effective approach.

To be effective, social marketing relies on a series of key implementation standards that follow the continuum of consumer involvement: normative messaging, social networking, gaining commitment, and providing recognition. All of these are described below.

2.4.1 Normative Messaging

It is possible to influence a person’s behavior by sharing information about the behavior of others. To get someone to try a new restaurant, you might say “my friend Amy went there and said it was the best sushi in Boulder.” Or to get someone to stop smoking, you could cite statistics that “smoking has dropped from 51 percent to 27 percent of the population over the past two decades.” People tend to do what they think other people in their peer groups do, even if it’s at a subconscious level.

EnergySmart staff and Advisors should try to use normative messaging as much as possible when interacting with potential customers. Some approaches might include:

- Explaining how homes, particularly in their neighborhood, are already engaged in EnergySmart and efficiency practices. For example, “*The homeowner on the corner has already done a retrofit, blown insulation into the walls and changed out an old furnace. Our calculations showed that this would save him 15 percent on his heating bill.*”

- Mentioning that EnergySmart is moving rapidly through the marketplace and lots of people are getting on board. For example: *“EnergySmart has already done Energy Assessments on over 40 homes just in this part of Longmont. They are all on their way to making their homes more comfortable and lowering their energy bills.”*
- Focusing on a “don’t be left behind” message. This can be done by mentioning how others are taking advantage of limited-time rebates and EnergySmart services.

For additional background information on social norms and social marketing, please see [Appendix D. Social Marketing Fundamentals](#).

2.4.2 Social Networking

Social marketing relies on community networks as a vehicle for deploying normative messaging. It leverages the tremendous power of social networks, the trust built among network members, and the impact of these networks on normative or aspirational behaviors to influence individual action. Social networking uses both [electronic](#) and [social media tools](#) and [peer-to-peer and in-person interaction](#) to influence individuals in and among social groups toward a collective message or action. For example, a suggestion to take action on energy efficiency is much more powerful when delivered by a friend, relative, or coworker than if the message comes from EnergySmart staff or a contractor. [See Appendix F. Community Mapping Tool](#) for a description of the tool developed to foster social networking opportunities including a list a community groups targeted.

Social networking takes many forms, and the marketing tactics outlined in the following sections provide numerous examples of social networking and community-based outreach activities, including strategies to translate group behavior attributes into positive word-of-mouth recommendations, referrals, and the spread of information across the entire county. When executed effectively and consistently, social networking can result in a cumulative effect on consumer awareness.

EnergySmart implementation staff—Energy Advisors in particular—have an opportunity to facilitate one of the most fertile social networking tactics; that is, using customers to recommend the program to other potential participants. Advisors can gain networking commitments when engaged with customers during Assessments or retrofits. Some specific actions the Advisor should take include:

- Asking the customer about other neighbors, friends, or coworkers who should take advantage of EnergySmart.
- Finding out if the customer is active in any social or networking groups, and then asking if EnergySmart or the customer can make a presentation at a group meeting.
- Asking the resident to help engage people at the workplace by displaying an EnergySmart poster, making word-of-mouth recommendations, or referring the EnergySmart commercial program to his or her employer (if appropriate).
- Asking the resident to “like” EnergySmart on Facebook.
- Asking permission to display a yard sign during the upgrade process.
- Asking permission to use the customer’s name when speaking with other neighbors.

The influence of EnergySmart Advisors on social marketing implementation cannot be overstated. It is critical that they be able to identify social networking opportunities, have the

knowledge to capitalize on them effectively, be able to address barriers as they come up, and have the skill to “complete the sale.” For a summary of this tactic and more examples, see [Appendix Q. Staff Communications Social Marketing Reference](#).

2.4.3 Pledges and Commitments

Pledges have been shown to be a powerful social driver; research shows that once a person makes a commitment to another person, especially publicly, he or she is much more likely to follow through than if he had not made a formal agreement. County, service staff, or other marketing partners should try to gain commitments during group meetings or presentations, at events, or during one-on-one interactions with potential customers.

In Groups: Group dynamics dictate that people make commitments when authority figures are in the room (the EnergySmart staff), in the presence of others in their peer groups, and when information is fresh in their minds. Therefore, it’s very important that EnergySmart staff get pledges of action during meetings and presentations. This can be done by simply collecting participants’ contact information via pledge cards or attendance sheets.

Individually at Events: Similar pledge and commitment techniques should be used when EnergySmart meets with people at various events such as fairs, games, and meetings.

During Home Visits: During EnergySmart Assessments and follow-up meetings, the Advisor can ask for commitments on taking action to implement some or all of the recommended measures.

For a summary of this tactic and more examples, see [Appendix Q. Staff Communications Social Marketing Reference](#).

2.4.4 Recognition

Recognizing residents who demonstrate the desired behavior (i.e., participating in EnergySmart services) is the final piece of the social marketing continuum. For a customer who has had a generally good experience with EnergySmart services, recognition of his or her contribution to the overall program and community goal can be a key motivating factor in getting that customer to share their experience with others. Recognition can be in the form of mentions in a newsletter or on the website (similar to donors), specific awards for accomplishments of note, or a temporary yard sign. Recognition can also be a powerful tool for encouraging participation and promotions among local contractors.

Recognition can be as simple as giving residents the ability to post something on their homes such as a window sticker proclaiming “I’m an EnergySmart Home.” This is a low-cost method to deploy social networking as part of EnergySmart.

A range of innovative, grassroots, and [community-based outreach tactics](#) support the social marketing strategy. These complement a traditional [media advertising](#) strategy, also an element of the EnergySmart marketing approach. The sections that follow provide implementation guidance on several proposed social marketing tactics that seek to influence behavior in the residential sector. These all dovetail with other, more standard marketing methods.

2.5 Tactics

Distinct customer types may respond differently to marketing conducted through different marketing channels. The most effective marketing leverages marketing channels that gain not only *exposure* to the target customers, but also action on the message. In other words, the goal of marketing is to reach target customers in a way that compels them to listen to, comprehend, evaluate and act on the intended message.

We use market intelligence to identify those marketing channels best suited to reaching a desired customer segment and create a message that compels them to act. Many methods have been used to reach residential customers, but the marketing channels that have been found to be most effective in conveying an energy efficiency message include:

- Strategic Marketing Partners
- Service Staff Communications and Direct Contact
- Online Marketing and Website
- Social Media Tools
- Video Commercial
- Newspaper and Radio Advertising
- Earned PR

Boulder County has been using several of these methods successfully for several years and has gained valuable market intelligence on those channels most effective for reaching business customers. This plan leverages that knowledge and increases the intensity of involvement to reach even more businesses successfully.

2.5.1 Strategic Marketing Partners

EnergySmart services will benefit in several ways from marketing partnerships with other energy service organizations. These organizations provide access to individuals, information, and outreach opportunities that EnergySmart may not have on its own. As established organizations with brand name recognition, the organizations also bring credibility to the newly introduced EnergySmart service.

The following entities have agreed to co-promote the EnergySmart services to their customers or constituents: Xcel Energy, Longmont Power and Communications (LPC), and the Colorado Governor's Energy Office (GEO). To date there have been no formal commitments from the municipal water utilities within Boulder County, but there is support for EnergySmart services from municipal leaders in these cities. EnergySmart staff should initiate conversation with city water utilities regarding co-promotion of EnergySmart services to their customer bases. These could take the form of bill inserts or letters to customers.

Table 5 below summarizes the partner agreements made to date, promotional materials to be used, timing of the promotion, message control, funding sources, and the audiences they reach. See [Appendix B. Marketing Calendar](#) for the placement of these tactics in an annual promotional calendar.

Because LPC is a municipal utility with close ties to the City of Longmont and several promotional channels, we have listed its activities in a separate table in [Appendix E. LPC Marketing Channels](#).

Table 5. EnergySmart Partner Agreements

| Partner | Marketing Piece | Timing | Message Content | Control over Message | Sender | Budget | Audience/Target | Approx # recipients |
|----------------------|--|-------------------------|--------------------------------------|----------------------|-----------------|-----------------|---|---------------------|
| Xcel | Direct mailer or letter | 2x/year Spring /Fall | Xcel create with EnergySmart content | Xcel | Xcel | Xcel | All residential homes in Boulder County – owned and rentals | Approx. 104,700 |
| GEO | Email | TBD | GEO create with EnergySmart content | GEO Cadmus | GEO | GEO | All customers reserving or receiving GEO rebates | TBD |
| City water utilities | Letter or bill insert | TBD | Cadmus/ County | Cadmus/ County | Water utilities | Water utilities | All customers of water utility | Varies |
| LPC | See Appendix E. LPC Marketing Channels for LPC marketing and outreach channels | | | | | | | |

Contact information for the organizations:

Xcel Energy

Susannah L. Pedigo
Xcel Energy | Responsible By Nature
Community Energy Efficiency Manager

Phone: 303-294-2353
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Email: Susannah.L.Pedigo@xcelenergy.com

GEO

Jennifer Hampton
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Governor's Energy Office

Phone: 303.866.2259
Email: jennifer.hampton@state.co.us
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LPC

Deborah Cameron
Customer Services and Marketing Manager
Longmont Power & Communications

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2.5.2 Service Staff Communications

While [direct mailing](#), [newspapers](#), [radio](#) and other forms of marketing may reach a large number of residents, personal and direct contact is one of the most effective ways to engage potential customers in energy efficiency programs. The significant benefits of direct contact are the ability to target specific customers or sectors with specific [target](#) and [normative messaging](#), [address customer barriers with immediate responses](#), and solicit [commitments](#) for action and/or referrals on the spot.

EnergySmart implementation and service staff are the County's most active and most successful ambassadors for selling EnergySmart services. Service staff will find several opportunities to reach and communicate with customers directly. Two of these are outlined below and others, including [events](#), during [presentations](#) and at [community group meetings and other social networking opportunities](#), are discussed in other sections of this document.

For a summary of social marketing tactics to be used by service staff with each of the communication channels below, see the section on [Social Marketing](#), [Appendix D. Social Marketing Fundamental](#) and [Appendix Q. Staff Communications Social Marketing Reference](#).

For additional recommendations for messages to keep customers motivated and overcoming customer barriers, see sections: [Addressing Barriers with Messages](#) and [Targeted Messaging](#).

2.5.2.1 Service Staff Email

The EnergySmart process has several steps from initial interest contact to final post-installation follow-up. At each step there is the potential for a customer to lose interest or the staff (and services) to lose credibility. Each step also provides an opportunity to check in with customers and keep them moving in the right direction. EnergySmart staff should consider emails with customers to be part of an ongoing, multi-stepped sales process. Emails sent to customers during their decision-making process are an excellent opportunity for using [normative messages](#).

Emails used for service purposes need to be extremely succinct, with a very narrow message, no clutter and a clear call-to action. A poorly written, unfocused, delayed, or unclear email can leave the customer confused (not knowing what's going to happen next or when) and lacking confidence about the overall professionalism of the EnergySmart service.

Guidelines for effective email communications are outlined below:

- **Lead with good news.** If you have some good news for a customer (“Your recommended upgrades are eligible for \$500 in rebates”), use it early in the email.
- **People don't want to read a lot.** Keep information clear, complete, accurate and brief. Most people get more email than they can handle. Don't include unnecessary details that could distract the reader from the main message.

- **People hate not knowing.** Because this is multi-stepped process, customers want to know about the next step or action, who is responsible, and the timing.
- **Try to keep emails to a minimum.** Consolidate information in one email rather than several. This is especially important for information that people need to compare, such as contractor bids.
- **Subject lines are headlines.** When specifying a subject for your email, remember how the subject line is used. The more descriptive you can be the more likely they will open and remember the email.
- **Provide references.** Include a link to the EnergySmart website or service-related content like local press coverage.
- **Proofread and spell-check.** Few things can make a customer question credibility more than an email with typos or misspelled words.
- **Avoid jargon.** Readers may not have the same specialized professional knowledge that you do, so avoid using energy efficiency terms that lay-people may not understand.
- **Bullets, not paragraphs.** Turn any series or list of items into a bulleted or numbered list.
- **Don't forget your manners.** If you would say "please" and "thank you" speaking to someone in person, include those words in your emails as well.
- **Include a call-to-action.** Be succinct and specific.

2.5.2.2 Energy Assessments

Because Energy Assessments alone generate very little in terms of energy savings, it is essential that Advisors take every opportunity to encourage and facilitate following up on Assessment recommendations. As discussed in the previous section, Energy Advisors can have a great deal of influence with customers, especially with regard to [gaining their commitment to take action](#) on efficiency recommendations made during an Energy Assessment.

Examples of questions the Energy Advisor can use to solicit commitments might include:

- “Can I get a date by which you will choose a contractor to make these upgrades?”
- “Which specific upgrades are you going to follow through on?”
- “When is a good time for me to return to sit down with you on the Assessment findings?”
- “Do you need to talk to your spouse before making a commitment? I’d be happy to come back to go over the options with both of you.”

Energy Assessments also provide a good opportunity for Energy Advisors to leverage social marketing opportunities, particularly where they are able to establish a good rapport with customers. Energy Assessments are an excellent opportunity for using [normative messages](#). Advisors should use these opportunities to request that customers refer the program to their friends, co-workers, and other members of their community.

2.5.2.3 Outbound telephone calls

While not a common method to reach new customers, phone calls can be effective when calling on potential customers with whom the County, Cities or partners already have a relationship. The call can be simple, informing the business that there are limited-time offers we want to let them know about. It never hurts to mention that other businesses have already taken advantage of these benefits. Outbound telephone calls can also be very effective for keeping customers who have had an Assessment moving through the EnergySmart continuum of services. When making these calls, EnergySmart staff should be aware of the potential barriers customers might have to completing installation of EnergySmart recommendations, to request testimonials, case studies or referrals to friends and co-workers.

2.5.3 Online Marketing

2.5.3.1 Email

Email is now a very common channel for reaching consumers, and it can also be an effective social networking tactic. Having the email come from a trusted source, such as an organization, association, utility, or even the local government can help increase credibility and improve the chances that the email will be read and acted upon.

The ability to conduct cost-effective email marketing campaigns will be dependent on access to lists of email addresses. The [Community Mapping Tool](#) includes target groups and individuals that can provide email lists or distribute emails on behalf of EnergySmart services.

Emails used for promotional purposes need to be extremely succinct, with a very narrow message and no clutter; a specific call to action; and a link to the [EnergySmart website](#) or service-related content like local press coverage. A well-designed *subject line* is crucial. Additional email guidelines are provided under [Service Staff Email](#) above. Having the email come from a trusted source, such as an organization, association, utility, or even the local government can help increase credibility and improve the chances that the email will be read and acted upon.

The Colorado Governor's Energy Office (GEO), an EnergySmart [Strategic Partner](#), will be sending monthly emails to people in the state who reserved or received a state efficiency rebates. Those emails going to recipients in Boulder County will have a few sentences describing the EnergySmart service and a link to the EnergySmart website.

2.5.3.2 Website

The EnergySmart website (www.EnergySmartYES.com) is a comprehensive sales tool. It contains several functions that engage potential customers, provide information, and answer questions about the service features and benefits. Staff should send prospective customers to the website to reinforce information shared in conversations and emails. The website URL should be in all EnergySmart staff email signatures. As is it a "living" sales tool, certain functions of the website need to be [maintained and updated](#). The website is built to allow staff to make changes and updates without the need for a web professional.

Website functions include:

- An online intake process linked to the Populus Customer Relation Management (CRM) tool
- Customer engagement via multiple access points, including videos and testimonials
- Benefit-focused information
- Service-related questions and answers (FAQs)
- [Social media](#) platform integration
- Dynamic and nimble data features, including regular updates on the value of rebates and number of homes receiving Assessments

2.5.4 Social Media Marketing

Because grant funds available for paid media are limited, our social mobilization and marketing strategy highlights social media outreach to gain service exposure. Social media can exponentially increase message sharing among community groups that can facilitate word-of-mouth advertising. Further, online social networks offer a low-cost platform to connect with and share information among interested audiences. However, while the upfront cost of social media marketing is relatively low compared to paid media, it requires an inversely high labor investment by EnergySmart implementation staff.

General best practice social media engagement guidelines can be found in [Appendix H. Social Media Best Practices](#). For the EnergySmart outreach staff social media training PowerPoint and summary notes, see [Appendix R. Social Media Staff Training](#).

Cadmus has developed an [EnergySmart Facebook page](#) and [Twitter handle](#) for staff use and maintenance. The proposed LinkedIn strategy may include the eventual creation of a LinkedIn group but will initially leverage outreach through individual staff LinkedIn accounts. The EnergySmart Facebook page will become another connection point for EnergySmart participants and prospects. In addition, the Facebook page will support special offers and allow an easy way for EnergySmart customers to share messages with other participants.

All of the marketing collateral and [messaging](#) is integrated into the social media outreach plan. Below, we include a hierarchy of potential customer touch points, or moments when service staff can engage with EnergySmart customers. Each interaction provides an opportunity for customers to share their EnergySmart experience with friends, family, or colleagues. Our interactive marketing plan also integrates with print media mobile Quick Response (QR) tags. Smartphone users will be able to scan and send these tags to open the EnergySmart video “commercial” URL.

These messages resonate in a way traditional marketing simply cannot. Additionally, QR tag and social media campaign URLs offer an analytics and tracking capability that can help inform the [analysis of marketing impacts](#) and will allow the County to fine tune marketing efforts.

2.5.4.1 Referrals and Promotion

We recommend automation of this process as much as possible, and both Populus’ Salesforce CRM applications can be utilized for this effort.

The links below provide an overview of how popular applications integrate into the Salesforce customer management system, along with an overview of the most recent social media application updates within Salesforce (April 2011).

[Social Networking with Salesforce.com](#)

[SalesForce Cloud Collaboration Platform](#)

Automating with Salesforce is not necessary, however, to leverage social media networks for EnergySmart referrals and promotion. Cadmus has created the messages listed below to correspond to customer touch points along the EnergySmart customer engagement process. In each case, the call to action will encourage customers to share their EnergySmart experiences with friends and family via [social media networks](#) or email.

2.5.4.2 Touch Points and Messaging

Below is a list of customer “touch points” that present opportunities for EnergySmart service staff to engage customers and make a social media “share” request.

- The first bullet text under each touch point is suggested language for making the “share” request of the customer; it is to be included in the communications with the customer.
- The second bullet -- *the italicized text* – is the suggested message that will be posted on the customer’s social media channel.

EnergySmart and implementation staff have two options for providing customers with the “share” language:

1. Include a “share” widget⁶ within the email or survey. IT/webmaster assistance will be needed to automate this tactic using a widget. This method allows customers to click on the widget and indicate to which social media network (e.g. Facebook, LinkedIn) they would like to post. The message supplied in the widget will automatically be added to the selected network.
2. Include the “share” message in italics along with the communication text and add a request for the customer to copy and paste the “share” message into a Facebook, LinkedIn, Twitter post, or email message. Ideally, the process can be automated, but this lower tech option requires no IT assistance.

Implementation staff and recipients can also modify the language if desired.

“Thank you” webpage after online registration

- Thank you for your interest in EnergySmart and congratulations for taking the first step towards improving your home’s energy efficiency! Do you know anyone who needs a nudge to do the same? Click here to share the following message on Facebook, Twitter, or LinkedIn, or forward an email to friends.

^[1] Widgets come in many shapes and sizes, but two of the major types today are Web widgets and Desktop widgets. Web widgets, the type discussed in this Marketing Plan, are intended for use on (embedding in) webpages for special functionality.

- *I'm about to find out how I can save money and be more comfortable in my home! I'm doing it with EnergySmart, only available for Boulder County homes and businesses. (include EnergySmartYES.com link)*

Scheduling Confirmation Email

- We're excited to come to your home soon for a custom Energy Assessment. Show your friends just how "EnergySmart" you are! Click here to share the following message on Facebook, Twitter, or LinkedIn, or forward an email to friends.
- *I just scheduled my EnergySmart Energy Assessment. I can't wait to find out how much I'll save by being more energy-efficient and what rebates I'll get to help pay for it. You can too! (include EnergySmartYES.com link)*

Energy Assessment Visit

- Verbal message from Advisor: Are you on Facebook? EnergySmart is! Please "Like" us to be in the loop for special sponsor offers from local businesses like McGuckin Hardware and Ellie's Eco Design. We'll also be doing promotions rewarding referrals, and Facebook will make it easier for you to share information with your contacts. After you "Like" us, suggest that your friends do too. Every month, we'll choose someone at random to win a free EnergySmart Assessment or equivalent prize.
- Cadmus Recommendation: Create a half-sheet with the Facebook and sponsor logos, outlining the following message. This leave-behind will serve as a reminder as well as a sponsor exposure benefit.
- *I just got almost \$50 worth of energy-efficient items like CFLs and low-flow showerheads for free with my expert Energy Assessment for my home. How? I got EnergySmart! Check out this link for more info. (include EnergySmartYES.com link)*

Post-Visit Meeting/Call/Email

The application of this tactic depends on Timing and Customer Needs, per Populus.

- Did you know there were so many rebate and financing options to pay for your energy upgrades? Plus, if you complete one of our recommended measures you'll get \$250 back automatically. Click here to share the following message on Facebook, Twitter, or LinkedIn, or forward an email to friends.
- *I just learned there are EnergySmart rebates to help me make my home more comfortable and energy-efficient. Plus, I'll get AN EXTRA \$250 for acting now. I feel EnergySmart! (include EnergySmartYES.com link)*

Advisor Check-In After Contractor Work is Complete

- Congratulations for taking advantage of EnergySmart services to upgrade your home. As a leader in the energy community, you can be proud of your contribution. And wasn't it relatively painless? Please share this important piece of the service with your friends who remain on the fence. Sharing a community value for energy independence will make all of Boulder County stronger. Click here to share the following message on Facebook, Twitter, or LinkedIn, or forward an email to friends.

- *I just made my home more comfortable and energy-efficient with Boulder County's EnergySmart. And it was EASY! You can feel EnergySmart too...just click here.* (include EnergySmartYES.com link)
- Alternate Message: Visit EnergySmartYes.com to share a testimonial and help convince others to get EnergySmart. ESYES.com link
- If via Phone: “Tell me what you liked about EnergySmart and I’ll enter it online for you.” (Advisors, please review [Testimonials and Case Studies](#) for more information on how to collect effective testimonials.)

Post-EnergySmart Service Survey

- At the conclusion of this survey you’ll have a chance to forward/share the EnergySmart contact information via LinkedIn, Facebook, or Twitter, or forward via email to friends. Congratulations on taking this efficiency step for yourself and your home!
- *I just made my home more comfortable and efficient with Boulder County's EnergySmart. And it was EASY. You can feel EnergySmart too...but funds are limited—click this link to see how many homes have already completed assessments. Don't miss out!* EnergySmartYES.com link.
- Alternate Message: Visit EnergySmartYes.com to share a testimonial and help convince others to get an EnergySmart Home Assessment today—tell them funds are limited! (include EnergySmartYES.com link)

2.5.4.3 Outreach and Engagement Assistance Tool

The plan includes targeted use of Radian 6, a robust social media analytics tool. Radian 6 will minimize the time necessary to locate and connect with key online influencers interested in topics related to the EnergySmart mission. Radian 6 also offers a data collection and engagement interface that allows staff to identify online personalities likely to promote the EnergySmart message.

The Cadmus Group will deliver the Radian 6 tool fully “tuned” with key words and optimized for the lowest monthly fee. Cadmus will also provide general guidance regarding outreach and engagement best practices, along with in-person training. Radian 6 tool membership includes a wide variety of online tutorials as well, which are particularly useful for new staff members and interns.

2.5.4.4 EnergySmart Brand Reputation Management and Measurement

Radian 6 provides the means to track conversations about the EnergySmart brand over the grant period. As earned media becomes more prevalent, EnergySmart staff will want to monitor online discussion about the service. Engaging with both positive and negative comments allows EnergySmart advocates to provide useful information to prospects. The FAQ answers provided on EnergySmartYES.com can be updated to respond to these comments and also provide content resources for these situations. The section covering “[Residential Social Media Touch Points and Messages](#)” provides specific timing and message guidance. General best practice social media engagement guidelines can be found in [Appendix H. Social Media Best Practices](#).

2.5.5 Video

Boulder County's EnergySmart services are innovative in their comprehensive service delivery and funding options. Because the service *is* so innovative, potential customers may not be familiar with its service model. A video is a simple and effective tactic to make them familiar with the program, in a way that is clear and easy to understand. Because consumers today are more inclined to watch information than they are to read it, EnergySmart will use a short 3-5 minute "infomercial" to walk potential customers through the program process, and highlight its unique service offerings.

Videos offer high value; they will serve as a "virtual roadshow" for the EnergySmart residential service. Videos are portable, can be easily shared, are available at all times, and are accessible by individuals who may be hard to reach with conventional marketing and media. The EnergySmart video can be presented by community and group leaders at meetings without the presence of knowledgeable implementation staff.

Once the video commercial has been created, County staff will create a Quick Response (QR) "tag" to be placed with existing communications channels and allowing instant access to the video on Smartphones, independent of the website.⁷ Combined with a compelling message ("ask me how to save \$500") the tag will enable smartphone users to instantly view the video strategically placed on yard signs, contractor trucks, print media, and event signage, among other spots.

2.5.6 Direct Mail

Direct mail can be a fairly low-cost tool to get a message in front of prospective customers, especially when a mailer is targeted to high-potential customers with a [segmented data-driven recipient list](#). Cadmus recommends Boulder County use the Prizm/Nielsen segmentation data to generate mailing lists for direct mail campaigns. Xcel Energy, GEO, and LPC are [Strategic Marketing Partners](#) that have committed to execute some form of direct mailing to their customer bases. Please see [Appendix B. Marketing Calendar](#) for recommendations of promotional frequency and message emphasis.

Cadmus recommends the use of two types of direct mail: postcards and letters. These two forms of direct mail incur different costs but also provide different benefits.

2.5.6.1 Postcard Mailer

Direct mail postcards are a relatively low-cost means of promoting the EnergySmart services. Cadmus has created 3 versions of 5.5" x 8.5" postcards that Boulder County can use or provide to Strategic Marketing Partners for direct mailing.

2.5.6.2 Direct Mail Letter

Although letters sent in envelopes have a higher cost-per-unit than a single postcard mailer, there is a key reason to use this tool rather than the postcard. Customers are more likely to read letters

⁷ Cadmus has shared all QR information with county staff, which will move forward on QR strategy as appropriate.

when the sender is a recognized institution or organization, such as a utility or government entity. Utility research has found that letters are the most successful direct mail approach, particularly when letters appear to be formal, include a message of urgency, and are targeted to appropriate customer groups.

The direct mail letter should be a formal letter from the City or County, or one in partnership with the utility, as this format has proven to have much higher response rates than cards, brochures, or self-mailers. The letter should be straightforward, explain the specific offer, and emphasize that EnergySmart is a local program, offering limited-time rebates and a personal Energy Advisor. The call to action should be very specific.

2.5.7 Media Advertising

ARRA funding does not allow for traditional media advertising, so this strategy is minimized in the overall EnergySmart marketing plan. However, traditional media advertising is an important part of a diverse marketing portfolio. Boulder County has allocated a portion of its overall program funds to ensure traditional media advertising can be used appropriately to support and reinforce the social marketing strategy. Media advertising will include newspaper and radio advertising as well as earned media.

2.5.7.1 Newspaper and Radio

The County has allocated \$25,000 for the 2011 calendar-year to promote EnergySmart services in three local newspapers (the Longmont Times-Call, Boulder Daily Camera and the Boulder County Business Report) and on one local public radio affiliate serving Boulder County.

Kickstand Communications has created newspaper advertisements and Cadmus has developed a 15 second radio spot to support Boulder County's media advertising campaign. All traditional media advertising, with the exception of newspaper ads in the Boulder County Business Report, are targeted to residential service customers.

The marketing calendar in [Appendix B. Marketing Calendar](#) provides recommendations for promotional frequency and message emphasis.

2.5.7.2 Earned Media

Earned media is essentially free advertising; EnergySmart staff should garner "earned" media coverage whenever possible. To capture earned media, however, County staff must be diligent about identifying media-worthy events and milestones and promoting them to the appropriate media targets. Below are recommendations for several opportunities to generate earned media coverage:

- Appearances on local radio stations (KBCO, KGNU) by program administrators, municipal leaders, and/or satisfied customers.
- Op-ed pieces in local newspapers written by program administrators, municipal leaders, and/or satisfied customers.
- Service milestones can drive press releases; examples include: 2,000 homes receiving Assessments, \$20,000 in rebates distributed, etc.

- The [Social Mobilization Initiatives](#) included in this report provide great opportunities for press coverage and public attention; they are innovative, constructive, and involve communities. These initiatives have been created to provide interesting ways to raise awareness of the EnergySmart services, but also because they are general interest stories.
- [Social media outreach](#) to local online influencers on Facebook, Twitter and blogs will increase the likelihood that EnergySmart content and messages will be shared with followers and friends. See [Appendix H. Social Media Best Practices](#).
- Complimentary Energy Assessments for reporters and online influencers (bloggers) to generate coverage and reviews of the service.

2.5.8 Grassroots and Community Outreach

The key to any efficient, widespread movement is generating a buzz and garnering support on a grassroots level. For EnergySmart, grassroots outreach to the residential sector is the most essential driver for achieving robust social networking results.

While direct mail, newspaper advertising, and other forms of mass media marketing may reach a large number of residents, the value of human interaction cannot be overestimated. EnergySmart will leverage a variety of interactive platforms to access potential program participants. In these instances EnergySmart staff and service staff will play a key role. An even more powerful opportunity for conveying targeted EnergySmart messaging and tapping into [social norms](#) to motivate action comes from peer-to-peer contact among [community and group leaders, professionals, and allies](#). See [Appendix F. Community Mapping Tool](#) for a description of the tool developed to foster social networking opportunities including a list a community groups targeted.

There are multiple opportunities for EnergySmart staff to tap into grassroots and community outreach opportunities. As the County embarks on the strategies included in this section, it will be important to keep in mind that for a grassroots campaign to be successful, organization and a call to action are key.

2.5.8.1 Local Social Networks

Individuals are often engaged with one or more social, interest, or civic group, and often these groups have meetings or means of communicating to and between members.

Community leaders involved in these social networks also carry substantial stature, influence, and trust. Tapping into these individuals can be an extremely powerful method to influence community members to action. EnergySmart staff should work closely with local leaders, such as county commissioners, city council members, school board members and principals, church leaders and heads of other community groups to give them the information and tools they need to promote EnergySmart services to members of their community.

EnergySmart staff should engage in existing social networks and groups, offer tools such as presentation slide decks, or provide [short presentations](#), articles, short [copy segments](#) (for use in their own materials) and collateral for members to use to explain the importance of the program to their audiences. See [Appendix F. Community Mapping Tool](#) for a description of the tool developed to foster social networking opportunities including a list a community groups targeted.

2.5.8.2 Testimonials and Case Studies

While testimonials are tried and true methods for promoting any product or service, they can be especially powerful in creating new [social norms](#). Testimonials and case studies tell success stories but come from a more credible source (another customer) than Boulder County.

Cadmus recommends the County develop a minimum of 10 strong testimonial and image combinations and several case studies for the residential sector. Case studies and testimonials should cover a variety of homeowners, single-family housing, and location scenarios. Applications for testimonials and case studies include the [website](#), press releases, [staff communications](#) and [presentations](#). Testimonials can also be used informally by EnergySmart staff to [share information in conversation](#).

Examples of active use of case studies include:

- During the Assessment, the Advisor reviews a case study with the customer to reinforce the fact that others have participated and seen positive results. In this application, the Advisor can share case studies via electronic media (i.e., iPad), but they should be formatted and include pictures of upgrades.
- The Advisors can memorize facts and figures from the case studies to share with customers as the topics arise in conversations. Specific examples are always more powerful than general ideas: “Jim Brown invested in a new high efficiency furnace even though his wasn’t broken yet. He figured that he’d start saving energy right away and take advantage of the rebates that are available now.”

Service staff should actively request testimonials from satisfied customers. If customers are open to suggestions for their testimonials, they can be asked to respond to one of the following topics:

1. **Comfort:** How, specifically, did the retrofit create a more comfortable home? Can they now use a room that was too cold or hot before? How about wearing sweaters or coats around the house? Was it drafty?
2. **Helpfulness of the Energy Advisor:** How did the Energy Advisor facilitate the whole process? Without the Energy Advisor, would they have done the work? In what way did the Advisor help that was unexpected? What helped customers make a decision?
3. **Too Much Work/Confusing:** Did they fail to make upgrades in the past because it was too difficult and confusing to decide what to do? Did their Assessment provide the guidance they needed to take action?
4. **Home Value:** How did the energy upgrade add value to the home? Was it part of a remodel? Does it look better?
5. **Maintenance:** A lot of older equipment costs a lot to maintain and fix. Did new appliances and equipment help to lower hassle and repair costs?
6. **Dollar Savings:** How did the money savings help make their decision? Did some information from the Energy Assessment sway them to act? Have their energy bills gone down?
7. **The Energy Assessment:** What did they discover during the Energy Assessment that really surprised them?
8. **Simplicity:** Was the process less scary and difficult than they had thought? Be specific.
9. **Environment:** How did “helping the environment” come into play with their decisions? Did they think about their carbon footprint?

EnergySmart staff and Advisors should also look for opportunities to develop case studies around completed customer projects. Strong case study opportunities include:

- Customers who are particularly enthusiastic about the EnergySmart service.
- Customers who have completed comprehensive upgrades facilitated by the full suite of EnergySmart services.
- Customers whose EnergySmart upgrade projects result in particularly good energy cost savings and other tangible benefits.

Under these circumstances most customers will be happy to agree to and provide information to support the development of case studies. Boulder County staff will be responsible for compiling case study data and formatting case studies using a modified version of the case study template developed by Cadmus and included in [Appendix I. EnergySmart Marketing Collateral](#) and provided in the digital files CD.

The following guidelines should be applied to the development of testimonials and case studies to support EnergySmart services.

Photos: Cadmus recommends at least one photo accompany all testimonials and case studies. However, stand-alone testimonials can function effectively as well. Try to get a picture of the whole family (if there are kids) standing in front of their house, near the front door. Be creative to try to get some of the house itself in the frame, but the real focus should be faces with smiles.

Target homeowners: The testimonials and case studies should be from people who have completed upgrades through the EnergySmart services. It's also important that a non-participating resident be able to identify with the individuals in testimonials. The Advisor should have a few different testimonials available that can be matched to the type of resident with whom he or she is working.

Pre-Written Testimonials: Occasionally customers will be willing to provide a testimonial but will not know what to say. Below are blocks of copy, some of which can be provided to customers based on service features for which they have expressed satisfaction. Energy Advisors need to make sure customers have "signed off" on a specific piece of copy and provide media releases for their testimonials before using them for outreach purposes.

- Comfort Statement, Too Cold:** Before our EnergySmart upgrades, our house was cold and drafty all winter. Now the whole house is comfortable and we don't have to put on extra layers all the time.
- Helpfulness of Energy Advisor:** Our Energy Advisor was so great. He/she was very patient and explained all of our options to us, and was able to point out all the rebates we could get to lower our costs. He/she even helped us fill out the paperwork.
- Helpfulness of Energy Advisor 2:** We had always wanted to make energy upgrades to our home, but didn't know where to start. Our Energy Advisor walked us through all the steps, helping us understand where we could increase comfort and lower costs. He/she really helped us get going on something we'd always put off before.

- D. **Maintenance/Equipment:** Our furnace (air conditioner) was so old that it needed repairs all the time. Instead of waiting for it to completely break down, we used the EnergySmart service to help us find an excellent heating (or AC) contractor that got us a great deal on a high efficiency model. This has really lowered our heating (or cooling) bills.
- E. **Money Savings:** Our bills kept going up, and we needed to do something. Fortunately, the EnergySmart service came along to help us add insulation and seal up our leaky house (or, came along and helped us get a high efficiency furnace). It was so easy, and now our bills are much more affordable.
- F. **Energy Assessment:** We decided to check into the new EnergySmart service and complete an Energy Assessment to learn where we could save energy. Our Advisor uncovered many problems, including lots of air leaks and a lack of insulation in the (walls, basement, attic). So we got the weatherization package and are more comfortable while our bills are lower.
- G. **Simplicity:** We always knew that we should upgrade our home to be more energy-efficient, but we never got around to it. So when this EnergySmart service came along with the offer of a personal Energy Advisor, we jumped at the chance. They made choosing a contractor really simple. Now the work is all done and we're enjoying the results.

2.5.8.3 Presentations

Presentations are a core tactic in the social networking approach. In-person presentations to [small and large groups](#) provide great opportunities to sell the EnergySmart services and make interpersonal connections with potential program participants, while enabling discussion, answering questions and [addressing customer barriers](#) on the spot. Boulder County should leverage program and service staff, [marketing partners](#), and community leaders to the greatest extent possible to present the EnergySmart services to a wide range of [community groups and social networks](#). Presenters should be familiar with [common consumer barriers and the messaging provided for addressing them](#) as well as the [targeted messaging that motivates specific consumer segments](#). See [Appendix F. Community Mapping Tool](#) for a description of the tool developed to foster social networking opportunities including a list a community groups targeted.

Cadmus has created a short presentation detailing the features and benefits of the residential EnergySmart service. This presentation is available on the accompanying digital files CD. The presentation slide deck includes basic EnergySmart services slides and a series of target group motivation slides based on the values-based messages section of this report. Presenting staff and partners should insert the appropriate slide(s) containing the messages identified to motivate specific target groups.

The Center for Resource Conservation (CRC) is under contract to deliver longer presentations at workshops called "Energy 101." These presentations cover residential energy efficiency in depth and discuss the features and benefits of the EnergySmart services. Cadmus has recommended CRC presenters ask attendees if they are involved with other groups that may be interested in presentations or an Energy 101 workshop to expand social networking opportunities.

2.5.8.4 Events

Events, like presentations above, are excellent social networking venues and provide great opportunities for personal interaction with large numbers of interested consumers and to sell EnergySmart services. EnergySmart and service staff attending events should be familiar with [normative messaging concepts](#) (see also [Appendix Q. Staff Communications Social Marketing Reference](#)), [common consumer barriers and the messaging provided for addressing them](#), as well as the [targeted messaging that motivates specific consumer segments](#). Staff attending events should also be ready to solicit commitments from the residents and be equipped with “[pledge cards](#)” for residents to sign for an Energy Assessment.

Boulder County is host to a vast range of community events ranging from the weekly farmers market to the annual Lafayette Peach Festival. Tapping into this key social marketing tactic will require planning and time on the part of EnergySmart staff to negotiate booth space or coordinate a presence at events, prepare for, and attend the events. Cadmus has produced an EnergySmart banner for use at events. Residential and commercial EnergySmart service brochures should be handed out to prospective customers. Staff should have contact information sheets or sign-up cards for customers who have expressed an interest in the service.

Cadmus has compiled a list of key events in Boulder County with large numbers of visitors. Please see [Appendix J. Calendar of Key Boulder County Events](#)

2.5.8.5 Teach for Sustainability

Teach for Sustainability is a school based energy education program targeting 30, 4th and 5th grade classrooms (or around 800 households) in Boulder County between January 2011 and December 2012. Each classroom will participate in a 4 week “Kilowatt Kidz EnergySmart Challenge” that involves in-class presentations and take-home activities. The “Challenge” is designed to engage students – with their parents – in energy conservation behaviors in their homes. Classrooms compete on how much energy they can save over the course of a month. Characters in costume present the energy curriculum, focusing on a particular area of energy use in the home, to help the students better assimilate the objectives of the lesson plans. These characters include the Kilowatt Kid, Count Plugula (vampire loads) and Dr. Drafty (air sealing and insulation). Between six and 12 classrooms will participate in each of the four semesters over this two year period.

This Teach for Sustainability program was piloted in the fall of 2010 with funding from the Governor’s Energy Office. Surveys were administered at the end of the program and results show that students were actively engaged with the curricula during the energy challenge and that the parents were impacted as follows:

- 70% of the parent responses said that they observed changes in their child’s behavior as it relates to energy saving actions, including turning off lights, power strips, or unplugging vampire loads.
- 68% of the parents said that conversations about energy use in their home increased as a result of this program.
- 29% of families that had not had an energy audit said that the energy challenge has increased their interest in obtaining one.
- 35% of the parents said that they are now planning steps to save energy this year.

- 25% said that they have thought about taking steps to save energy but do not have the time or the money to implement them.

The goal of the Kilowatt Kidz EnergySmart Challenge is to not only increase the awareness and number of conversations about energy use in students' homes, but to make it easier for interested parents to find information about the EnergySmart program. Homes that have been driven into the EnergySmart program through the Kilowatt Kidz EnergySmart Challenge will be tracked in the CMS through an in-take questionnaire administered by Populus.

The Kilowatt Kid is the EnergySmart Challenge in schools mascot and has been color coded to match the EnergySmart color scheme. All in-class and take-home materials will have prominent EnergySmart branding and messaging to assist with the social mobilization campaign.

Symbiotic Engineering staff will act as the direct liaison for the social mobilization campaign in school programs and activities, particularly school competitions at the elementary, middle and high school levels. School competitions that include incentives for EnergySmart participants are currently being designed by the City of Boulder and the Center for Resource Conservation. To maximize the impact of these efforts, Symbiotic Engineering staff will coordinate with each of these groups to ensure that the branding and messaging used in these efforts align with the EnergySmart campaign.

2.5.8.6 Residential Social Mobilization Initiatives

Social mobilization is a social marketing tactic that is designed to bring the EnergySmart services to people in ways that are innovative and unexpected. Cadmus has designed a series of social mobilization initiatives that leverage local events or innovative concepts to reach hard-to-reach customers and deliver the EnergySmart message in new and compelling way. Each social mobilization initiative description includes information implementation staff needs to execute the plan. Because these are innovative, some of them do not have well-publicized precedents. Therefore, Cadmus was not able to provide estimates of costs or staff hours necessary to execute each plan.

Many of these social mobilization initiatives require an incentive or prize to drive motivation and action. Cadmus recommends the County offer free Energy Assessments as incentives as much as possible. These Assessment winners could invest in energy efficiency upgrades and will increase the number of customers communicating about the service to their personal networks.

Each initiative description contains information on:

- Concept
- Benefits of this Endeavor
- Target Audience
- Models
- How the Initiative Drives Savings
- Design Concept
- Level of Effort
- Potential Impacts
- Tasks and Activities

Brief descriptions of the social mobilization initiatives are listed below. [Appendix K. Residential Social Mobilization Tactics](#) contains more detailed descriptions, benefits, and task lists for each initiative.

Energy Savings Contest between Cities/Towns/Communities in Boulder County

Contests can be between communities, colleges, homes, neighborhoods, social groups, schools, classrooms, or any entities that might drive interest and involvement. Entities would compete over the course of a year to see who can save the most energy as measured by several actions. Winners would get tangible prizes as well as bragging rights.

Energy Efficiency Barn-Raisings

An energy efficiency barn-raising is an event in which the community gets together and spends the day working to weatherize a house, making it more energy-efficient. The day usually consists of several hours of learning and working and ends with a fun celebration of food and possibly music. A barn-raising can be a strong way of getting the community catalyzed around the idea of efficiency.

IgNite Boulder County Energy

IgNite is an existing, national form of social entertainment. The concept is simple. Regular people submit ideas that they want to talk about for 5 minutes at the bi-monthly IgNite event. People vote online for the ideas they like best, and those with the top votes get to talk. Our twist on the concept is to host IgNite show focused on energy and sustainability. Boulder has a very active IgNite chapter.

Middle and High School Basketball/Volleyball/Indoor Ball Sports Games

The average home has enough drafts and cracks to add up to a basketball-sized hole in the wall. During halftimes (or before games) there is typically some sort of crowd interaction (e.g. basketball shoot for a prize, such as a free Energy Assessment). At this time a staff person will have the opportunity to talk about the EnergySmart services, the basketball-sized hole in a home, and the benefits of air sealing.

Neighborhood Action Kits

“Community energy kits” provide step-by-step actions to engage the individuals in their communities, whether that “community” is a neighborhood, civic club, interest group, or entity. To meet the needs of a variety of groups, the kits are flexible and include templates, sample flyers and ads, and recommendations on events and outreach. These kits enable these existing groups to gain knowledge about the benefits of energy upgrades, to engage their peer group with interesting energy information, to commit to doing something themselves to save energy, and to feel that they are working with others to accomplish a common goal.

Video Contests in Boulder County

People can create powerful messages through their own experiences and creativity. The videos will be shown on the County and cities’ websites, and contest winners will be awarded prizes and heralded in the media raising awareness of EnergySmart.

2.5.9 Promotions and Sponsorship

Sponsorship cash and/or donations provide EnergySmart implementation staff with flexibility to manage contests and other promotions. Even small prizes help generate leads and can drive action. The opportunity to win local products and services is attractive to potential customers and can be used in many different ways to generate awareness and excitement about EnergySmart. Indeed, many of the plan's [social mobilization tactics](#), as well as other [social marketing](#) and [grassroots outreach tactics](#), provide ample opportunity to leverage prizes or provide rewards for customer commitments to schedule Assessments or take efficiency actions or for providing referrals.

We recommend staff pursue local sponsors in a focused and systematic way. Hardware stores, eco-home design services, and local retail/restaurants can provide gift cards and/or value-added offers. In exchange, the County is in a position to offer sponsorship benefits attached to specific events, recognition on the EnergySmart website and other exposure linked to EnergySmart's mission-driven message. In addition, products and gift cards drive customers to the businesses themselves. This structure is congruent with ARRA's mission to support the local economy.

Cadmus also recommends the County offer free Energy Assessments as prizes, for those tactics in this plan for which prizes are a key driver of motivation and action, such as with the [Social Mobilization Initiatives](#).

A step-by-step plan to prospect for and land sponsorships is provided in [Appendix L. Soliciting Sponsorships](#).

2.5.10 Collateral Materials

Cadmus has developed collateral marketing pieces to support marketing for EnergySmart services. These include a residential brochure, a residential SmartRegs brochure, and event banner. [Appendix I](#) provides a list of available collateral and recommended uses. Electronic collateral files are also provided on the digital files CD.

2.6 Measuring Effectiveness of Marketing Tactics

Efficient and productive marketing is key to meeting the aggressive goals set by EnergySmart services for the residential sector. The ability to make mid-course corrections to maximize marketing return on investment (ROI) over the course of the grant period is a critical part of implementation management. Creating a robust system to track and analyze marketing data and customer response will facilitate a continuous improvement process.

We recommend the County assign one point person to interface with the IT/webmaster on URL analytics and with implementation contractors to set up systems to monitor the effectiveness of marketing efforts and report results. In [Appendix M. Measuring Effectiveness of Marketing Tactics](#), we provide basic guidance and best practices for staff involved in marketing ROI assessment and implementation of the continuous improvement process. These are designed to become as automated as possible, but require consistency and attention to ensure quality data results.

3. Commercial EnergySmart

The commercial sector in Boulder County uses substantially more energy than the residential sector and is therefore a very important group to reach in order to meet overall greenhouse gas and energy reduction goals. For the purposes of this marketing plan, we consider a “small business” to be any business that isn’t considered a “key account” for the County, the cities, or utilities. Key accounts are those large energy users that utilities typically assign to an account representative, or a business that the County or cities pay particular attention to due to its size and influence. Please see the sections on [Target Marketing](#) for additional details.

Marketing energy efficiency to small businesses is notoriously difficult. Across the United States and Canada, utilities struggle with this sector more than any other. Market barriers are well known, with the greatest being 1) lack of capital, 2) lack of control over the building facilities (they don’t own the space), and 3) lack of time on the part of decision-makers. The most successful programs address these barriers by offering turnkey solutions *and* providing rebates that pay a significant percentage of project installed costs. Another key feature of the top small business programs is a heavy reliance on contractor networks to promote services and bring in customers. National Grid’s small business program in Massachusetts provides a good example of strong small business program participation and delivery. National Grid’s program has served about half of its small commercial customers over 10 years.

Because small businesses are very difficult to reach with energy efficiency programs, this plan uses both proven methods for reaching businesses as well as innovative social marketing tactics. The plan will also use the power of [social and business norms](#) to influence customers. While business people like to think of themselves as independent thinkers and strategists, they tend to move towards business norms just like people move towards social norms. They talk to one another and tend to adopt their peers’ business practices. EnergySmart is well-positioned to leverage this word-of-mouth advertising and peer-pressure in its favor to attract new customers and influence action among business sector participants.

Structure of the Business Marketing Plan

There are many elements of the marketing plan that must work in concert with each other to maximize the chance of successfully reaching business customers. This plan focuses on the following key elements to inform the EnergySmart commercial sector marketing approach.

- [Market Intelligence](#): Using information on business-sector practices and attitudes to identify barriers and approaches that work
- [Communications Channels](#): Reaching customers through the most effective marketing mix.
- [Targeting](#): Identifying customers most likely to act on marketing messages
- [Messaging](#): Finding the right messages for different customer groups
- [Social Marketing](#) and [Mobilization](#): Using the power of social and business norms to encourage customer participation

3.1 Market Intelligence

Market intelligence helps us understand small business customers so that we can design marketing strategies based on that segment's needs, preferences, attitudes and behaviors. This information plays a useful role in all of the other aspects of marketing to the small business sector, from identifying appropriate marketing channels to creating targeted messages that specifically address this sector's priorities and barriers.

To collect feedback from the residents and businesses of Boulder County, Cadmus conducted two separate surveys. In November, 2010 Cadmus sent a survey through the social and professional networks of Boulder County and City staff requesting feedback on several brand name concepts proposed for the County's energy efficiency services. The survey received responses from 111 representatives from the business community. In addition, several questions were asked about preferences and attitudes concerning energy efficiency services; some of these are included below.

So that Cadmus and Boulder County program administrators can test the effectiveness of EnergySmart marketing efforts, a baseline awareness survey was conducted in January 2011. A summary of the survey results are provided in [Appendix A. Residential Baseline Survey](#).

3.1.1 Targeting Behaviors, Overcoming Barriers

Small business behaviors regarding energy efficiency can be influenced by a complex range of variables. Business owners must focus on what they do best: run their business; so energy efficiency is not generally high on their list of concerns. Energy decisions tend to follow the path of least resistance, rather than the path of highest efficiency or lowest cost. Thus, in order to be successful, energy efficiency program marketing must address common small business behaviors such as:

- Fixing or replacing equipment only when it breaks
- Purchasing or repairing equipment based on the low bid, without considering long term operating costs
- Keeping all energy-using equipment "on" as a default position, instead of managing use by time or need
- Treating energy costs as a "fixed" component of expenses, as opposed to a cost that can be managed
- Requiring that all investments either directly benefit the core business product/service, *or* provide inordinately short paybacks (e.g., 6-12 months)

Cadmus has collected market intelligence on small business behaviors through independent research, data gathering, and surveys of small businesses in Boulder County. Below is a summary of findings from an informal survey of Boulder County businesses conducted in

November 2011.⁸ From this research, we understand that barriers and attitudes in Boulder County tend to track those at the national level, namely:

- Cost is the number one concern among business leaders. Our survey found that 57 percent of respondents say cost is the biggest barrier to increased energy efficiency; 37 percent say it's a significant barrier.
- Sixty-two percent are “very” or “somewhat” interested in the Energy Assessment
- Fifty-two percent say availability of rebates is very important in motivating them to invest in energy efficiency
- Sixty-seven percent say guidance from an energy expert is important or very important
- Sixty-nine percent say making their business more comfortable is important or very important
- Seventy-seven percent say upgrading equipment to work better and require less maintenance is important or very important

Each element of this marketing plan leverages our market intelligence about small businesses in Boulder County to address business owners' concerns and overcome barriers to adopting energy-efficient practices and installing energy-efficient equipment. This approach will help Boulder County maximize its scarce marketing resources to penetrate this difficult-to-reach sector and provide a compelling argument for action and investment.

Strategies for using market intelligence and overcoming barriers through targeting and messaging are covered in other sections of this document. The Section [Targeting Business Customers](#) includes a detailed discussion of target marketing strategies and [Section Addressing Barriers with Messaging](#) provides messaging tactics for overcoming barriers through marketing materials and while interfacing with potential business customers.

3.2 Commercial Segmentation and Target Marketing

Not all business customers are created equal when it comes to energy-savings potential. Certain characteristics are inherent in businesses that are both able and willing to invest time and money in energy efficiency.

Ultimately, targeting specific businesses will be most useful for EnergySmart. The methods for targeting the business sector are similar to those outlined for the residential sector. County Commercial EnergySmart staff will use existing data available through the County Assessor's database to search for specific criteria indicating a business' likelihood of participating in EnergySmart services. The results of these queries will facilitate targeted marketing to specific business sectors and businesses.

⁸ This survey was conducted to gather feedback on EnergySmart brand name options and included additional questions about service features. The survey was distributed through City and County networks. The retail and office building sectors represented 70 percent of respondents; additionally, 70 percent of respondents represented businesses located in the City of Boulder.

3.2.1 The Data Sets

EnergySmart staff will use the County Assessor database to identify specific customers with the desired market characteristics. This database includes a list of most Boulder County businesses and categories of segmentation information that enable more precise identification of specific high-potential customers.

The County Assessor database includes the following attributes for Boulder County businesses:

- Type of business: EIA business type
- Size of business: number of employees, sales volume, square footage, business expense
- Ownership: private, public, headquarters, branch, franchise
- Age: number of years in business
- Geography: sorted by town, radius around location, zip codes, etc.
- Length of lease: (County staff can obtain this data from property managers and owners)

The County Assessor database does not provide data on energy bills, which ideally should be captured through utility data. However, Assessor data will allow the County to predict customers characterized by high potential to participate in EnergySmart services, including the following attributes:

- Businesses that have been in operation for many years
- Companies with local headquarters
- Businesses in key market segments
- Businesses whose size is most likely to justify infrastructure expenditures

In addition to the County Assessor data, EnergySmart staff can add other available information to the database, such as past participation in programs, whether a business is part of a business group or association, or other data that could help discern a high potential customer.

EnergySmart staff can access this database information through queries that sort for any desired parameters of a given group of customers, such as: restaurants in Longmont over 25,000 square feet.

3.2.2 Targeting Business Customers

To target businesses with the highest potential to participate in EnergySmart, as well as the highest potential energy savings, Cadmus recommends screening businesses based on the following characteristics:

- Owner-occupied businesses
- Facilities over 25,000 square feet (analysis of County Assessor data may show that this threshold should be adjusted to increase/decrease target numbers)
- Companies whose headquarters are located in Boulder County

These businesses are most likely to offer significant energy-savings potential, as well as the ability to make local decisions about energy upgrade investments.

Additional indicators of high potential businesses can include special cases, such as those identified in Table 6, which should be captured in the targeting database as data becomes available.

Table 6. Special Characteristics of High Potential Businesses

| Business Type | Source of Information |
|---|---|
| Businesses that have participated in other energy, carbon, or water programs from the utility, city, county, or state | Xcel, LPC, cities, County, water utilities |
| Businesses that have made a pledge to be or position themselves to be sustainable or have green image | Partners for a Clean Environment (PACE) http://www.pacepartners.com/ 10 for Change http://10forchange.net/ Naturally Boulder vendor directory http://www.naturallyboulderproducts.com/vendor-directory Colorado Green Tech Group http://www.meetup.com/ColoradoGreenTechMeetup/ http://coloradogreentech.net/ Boulder Green Building Guild http://www.bgbg.org/directory , Organic Consumers http://www.organicconsumers.org/ GenGreenLife http://www.gengreenlife.com/ ReDirect Guide http://www.redirectguide.com/ |
| Businesses moving into a new space that need to build it out | City/County building permits, sales records, leasing records |
| Businesses that are doing a major remodel | City/County building permits |

3.2.2.1 Segmentation by Industry

Determining the best business industries (or market segments) for energy efficiency has been a challenge for efficiency service providers. Many factors may contribute to an industry's potential, such as energy intensity, local decision-making, profit margins, type of equipment, and non-energy concerns. Table 7 shows market segments that are likely to have high potential, the number of businesses in each type located in Boulder County, and the pros and cons of targeting each type for EnergySmart.

Table 7. Boulder County Businesses with High Potential to Participate in EnergySmart*

| Business Type | Presence in Boulder County | Pros | Cons |
|----------------------|--|--|---|
| Retail | 314 businesses over 10,000 square feet in Boulder County | May have multiple stores, high lighting requirements, comfort important for customers, green image can be important | Many chains with out of state headquarters, many small shops, not traditionally active in energy efficiency programs. |
| Offices and Services | 839 businesses over 10,000 square feet | High square footage of space in Boulder County, significant lighting and HVAC needs, comfort and productivity important to workers | Energy costs tend to be low compared to other operating costs |
| Manufacturing | 416 businesses above 10,000 square feet | Good number of facilities in Boulder County, high energy intensity with lights, motors, compressed air; often looking to increase productivity | Need for customized solutions |

* Based on research of other utility programs, EIA data analysis, and data from InfoUSA Website accessed on February 24, 2011.

While Table 7 lists the top targets, they are certainly not the only sectors with high potential for efficiency services. Other high-potential targets include:

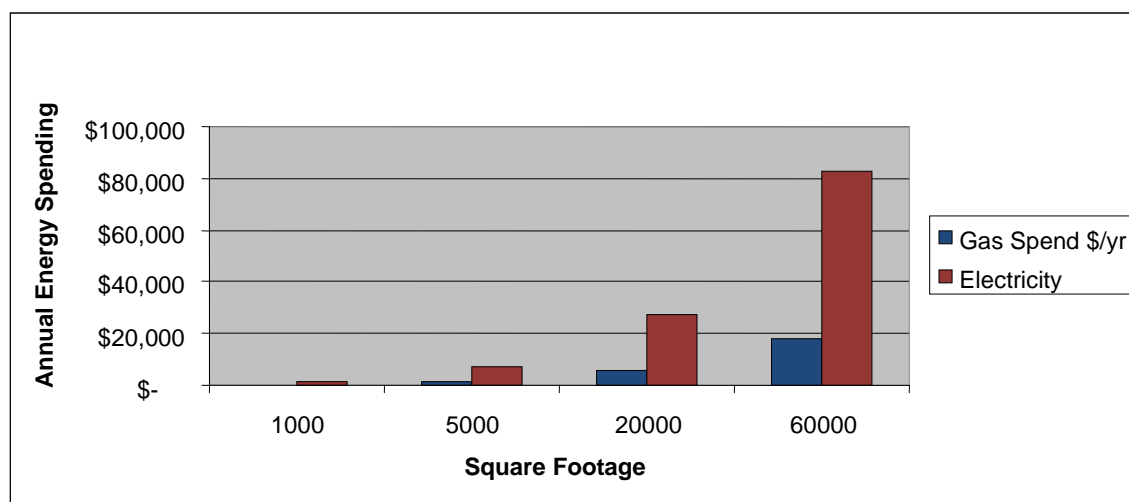
- Restaurants and lodging can offer significant measure upgrade opportunities when the management is willing to work on efficiency.
- Smaller independent grocers, convenience stores, and liquor stores have high lighting and refrigeration loads and very long run hours.
- Faith institutions and congregations can be motivated by factors other than cost, although they tend to have low operating hours.
- Warehouses may offer easy lighting retrofits and the need for improved safety through better lighting.

For additional information on sector energy use, attitudes, and targeting, please see [Appendix N. Targeting Specific Commercial Market Sectors](#).

3.2.2.2 Segmentation by Business Size

Gaining the attention of business customers and convincing them to invest in retrofits takes similar effort for a very small business as for a mid-sized or large business, yet the potential energy savings is greater for larger business. Cadmus conducted an analysis on the benefits of targeting larger businesses vs. smaller businesses. Figure 4 shows the vast difference in energy spending for businesses at different square footages, using the retail sector as an example.⁹

Figure 4. Retail Sector Energy Spending by Size

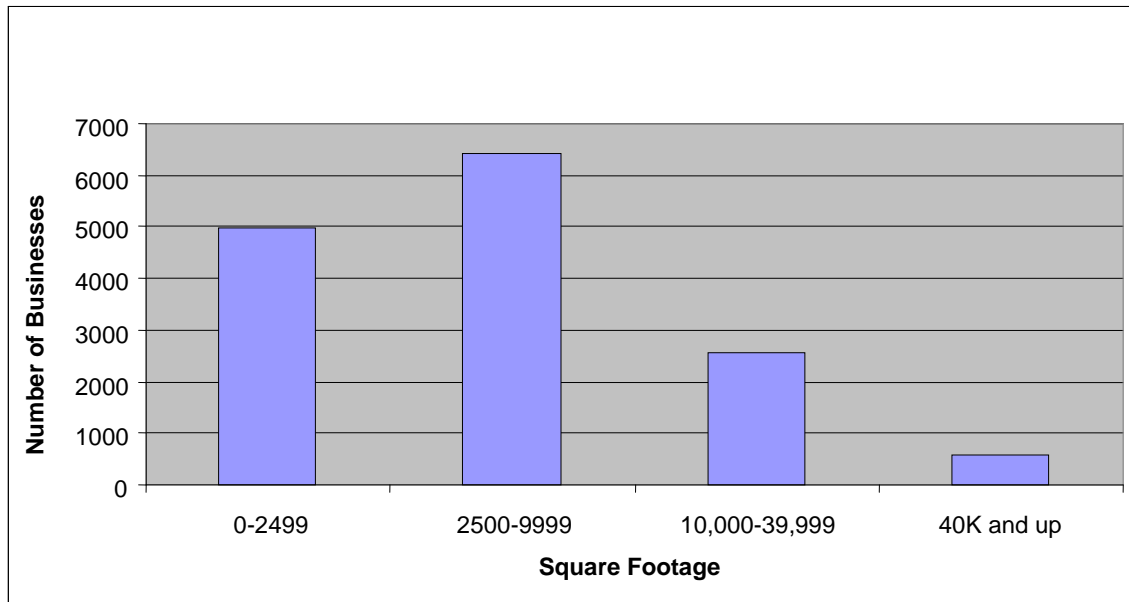


While a 60,000 square foot retail business has roughly 12 times the annual energy use (and savings potential) of a 5,000 square foot building, there are many more small businesses in Boulder County than mid-sized or large businesses. It should be noted, however, that the largest Boulder County businesses do not represent good targets for EnergySmart services. Because energy represents a significant portion of these businesses' operating expenses, most pay very close attention to their energy use and have already implemented available cost-effective energy retrofits. Many of the largest Boulder County businesses employ full-time facility managers or energy managers whose responsibilities include maximizing output per unit of energy so available savings potential may be quite low. Thus, mid-sized businesses are the "sweet spot" for EnergySmart building size targets.

Figure 5 shows the total number of businesses by floor size category.¹⁰ While there are over 11,000 businesses under 10,000 square feet, larger facilities have a much greater potential to result in significant energy savings. Thus, targeting larger facilities is a more efficient use of EnergySmart marketing resources. As an example, we estimate that the 574 Boulder County businesses over 40,000 square feet use about the same amount of energy as the entire 6,000+ businesses between 2,500 and 9,999 square feet.

⁹ E Source. *Retail Sector Snapshot, MAS-S-20*. December 15, 2008.

¹⁰ InfoUSA Website data, accessed February 24, 2011.

Figure 5. Boulder County Businesses by Square Footage

3.2.3 Using the Data for Target Marketing

EnergySmart staff can query the Assessor database based on any of the available data for specific marketing activities. For example, the County may wish to market its short-term lighting rebates specifically to small manufacturing businesses with 10,000 square feet or more of facility space. Queries can be expanded or altered over the program period to accommodate specific marketing activities, to identify specific business segments, or to expand the overall target business community.

Once high-potential businesses are identified, EnergySmart staff can use direct marketing tactics such as [phone calls](#), [direct mail](#), [email](#), and [Energy Assessments](#) to reach business customers. EnergySmart staff can also target business customers with [social marketing approaches](#), such as presenting the EnergySmart services at these sectors' [trade association meetings](#). The data can also steer Energy Advisors *away* from conducting door-to-door outreach to low-potential businesses. Specific marketing and outreach approaches are discussed in greater detail in the section covering [Tactics](#).

3.3 Creative Message Platform

The primary objective of the marketing for EnergySmart services is to drive Boulder County businesses to schedule an Energy Assessment. From research and experience we know that there are significant barriers to small businesses' interest and action on energy efficiency services. It is critical that our EnergySmart messaging address these barriers while raising awareness of the unique EnergySmart service attributes.

Insights from our [primary market research](#) inform the following messaging strategy. This research helped us to [identify primary barriers to action and key motivations](#) driving commercial customers to invest in energy efficiency.

A key plank of the messaging platform is informing customers that an Assessment is critical to identifying the ways that a business can reduce energy waste and its impact on profits. We know from our research, however, that there are key challenges and motivators to getting businesses to undertake Assessments:

- Cost is the biggest barrier to most businesses engaging in energy efficiency improvements or upgrades.
- Rebates can be a significant motivator to moving business towards action.
- Upgrading equipment to work better and require less maintenance is important.
- There is interest in the personal assistance provided in Assessments and by Energy Advisors.

Therefore, in order to increase participation in Energy Assessments, our messaging needs to:

1. Raise awareness that energy efficiency can reduce expenses, make equipment run better, and reduce maintenance needs.
2. Address the cost barrier, specifically through the use of "short term rebate" messages.
3. Highlight personal assistance and the support provided by Energy Advisors.

3.3.1 Messaging Strategy

The main task of messaging is to motivate businesses to schedule an Energy Assessment. To be successful, the key messages must [address specific customer needs and barriers](#) throughout the decision making process, anticipate and mitigate potential "drop-off points," and lead customers through a [continuum of message points](#) that keep them on a path toward scheduling an Assessment. Messaging must also be mindful of the need for precision and brevity, and lead the audience to a final call to action.

Cadmus has developed the messaging hierarchy below to address a customer's thought process in the decision to schedule an Energy Assessment. The sequence of the messages below is ordered to proactively address barriers we know exist as identified in the research. Note that each message is intended to overcome one of the identified main barriers, leading up to the final call to action.

Barrier: I can't afford to complete energy efficiency upgrades.

- **Your business is wasting energy and it's cutting into your bottom line**
- **There are rebates available to help you cut your business's energy waste**

Barrier: I'm too busy running my business; I don't have time to deal with energy.

- **An EnergySmart Advisor makes this process easy and affordable**
 - Your Advisor navigates you through the entire process and will help you secure all available incentives and financing to reduce the cost of upgrades

Barrier: "Saving energy isn't an urgent matter for me. I don't need to do it now."

- **There are limited funds available that will run out if you don't act fast.**
- **Other businesses are making upgrades, and you'll be left behind.**

Call to Action:

- **Call 1-877-505-6722 to schedule your EnergySmart Assessment**

The final telephone number can also be replaced with directions to the website where customers can also sign up for Assessments.

3.3.2 Message Hierarchy

Based on the [market intelligence](#) discussed above, we have identified the key messages that rank highest in their ability to overcome barriers and motivate customers to act. Much of the creative marketing platform is based on these key messages:

- **Lead Messages**
 - Reduce operating expenses and improve your bottom line profits.
 - You work hard for your money; keep more of it.
- **Secondary Messages**
 - Act now to take advantage of limited time rebates.
 - Act now to get your personal Energy Advisor to help you identify your priority investments, available rebates, and the best contractors.
- **Call to Action**
 - Call today to schedule your free EnergySmart Assessment or to have an EnergySmart Advisor work with you on upgrades.

In addition to these first-tier messages, businesses may be attracted to additional messaging approaches that resonate with values-based attitudes.

Table 8 below is intended to be suggestive of values-based themes; the specific language and content can be modified or adapted for different applications

Table 8. Key Message Platform

| | |
|--------------------------|---|
| Cost/Savings/ Rebates | Everybody hates waste. Energy efficiency stops the waste of energy and money. |
| | Rebates are available now to reduce the upfront cost of long term energy savings. |
| | When you install efficiency upgrades, you save every month. You can use that money for other investments. |
| | By acting now to make efficiency improvements, you can get rebates to help reduce the capital cost and start saving energy right away. |
| | Every dollar you save on energy goes to your bottom line profits. |
| | Fighting rising energy costs? Fight back with efficiency and conservation. |
| Easy, Convenient | Energy information can be overwhelming. But EnergySmart provides the support you need to make it manageable. |
| | You don't need to be an expert, because we'll help you make smart decisions. |
| | Filling out paperwork is a pain. But we can really help you there. |
| | Don't know who to hire? We have a list of qualified contractors. |
| | Don't know which upgrades to make? We can help you decide. |
| Business Value | With rebates, free services and efficiency measures and personal assistance and support, EnergySmart is a good value offers and a solid return. |
| | Think of energy efficiency as an investment in comfort, savings, AND improvement to your business. |
| Comfort | Do you have cold/hot areas? Are your workers and/or customers uncomfortable? EnergySmart can help. |
| | Increase your employees' productivity with better lighting and a more comfortable workspace. |
| Control | A lot of business owners think they don't have control over their utility bills, but they do. |
| | Simple actions such as adjusting thermostat settings, adding lighting controls, and tuning up equipment can give you a lot more control over your energy costs. |
| Sustainability | You can lower your carbon footprint through upgrades and tune ups. |
| | The sooner you make efficiency changes the faster we can get to our carbon reduction goals |
| | Leave a better world for your kids/others |
| | The commercial sector produces 4 times the emissions compared to the residential sector (in Boulder). We need to do our part |
| | The cheapest way to lower greenhouse gases is with efficiency (as opposed to renewables) |
| | Everybody needs to work together to achieve the Boulder emissions reduction goals |
| Local Jobs | Energy efficiency creates more local jobs than building more power plants. |
| | The EnergySmart is stimulating new, good paying, local jobs related to energy assessments, and equipment upgrades and tune ups. |
| Business Norms | Boulder businesses that have already taken an initiative on energy issues are seeing solid returns on their investment. |
| | Hundreds of businesses like yours have already taken advantage of efficiency upgrades. Keep up with the competition by taking advantage of EnergySmart. |
| | Many Boulder businesses are working hard to be as sustainable as possible. |
| | Here are some case studies of other businesses like yours that are already seeing the benefits of their upgrades. |

3.3.2.1 Limited-Time Rebates

Research shows that consumers respond to “act now” promotions that emphasize urgency and scarcity. We recommend, when appropriate, that promotional materials call out the availability of the limited-time rebates. These copy points should augment the messaging hierarchy outlined above. Language should be brief and attention-getting in the form of starbursts, callouts or bolded copy on promotional materials. Sample language includes:

- **Call now, before limited-time rebates are gone!**
- **Significant rebates are available to help pay for a more efficient business.**
- **Limited-time rebates available. Make sure you get yours!**

It also important to note in messaging that limited-time EnergySmart rebates are provided *in addition* to other state and utility rebates.

Withholding to Encourage Action

In addition to limited-time rebates to create urgency, EnergySmart can use the concept of “withholding” to make people move and make a decision. The threat of losing something can be much more powerful than the potential to gain something. Some examples of withholding, or removing benefits could include:

- Telling a business that they are going to be taken off the “high potential” list for getting information and service and rebates.
- Making it clear that other businesses are drawing down the rebate pool, implying that they’ll lose their chance if they don’t act quickly.
- Creating a small window of opportunity to do sign up for special benefits. If they don’t sign up, the chance of gain is gone.

3.3.2.2 Seasonal Messaging

The periods when business customers tend to be receptive to messages about energy-efficiency investments (“high activity periods”) varies more over the year than for residential customers because of variability in business types, concerns, and decision-making processes.

Businesses, more than residential customers, typically budget larger expenses over a one to five-year planning horizon. Consequently, they are more likely to consider investments during annual planning and budgeting stages. Cadmus recommends [increasing paid media](#) and [outreach activities](#) to coincide with these times, before the end of the most common commercial fiscal year calendars when customers are thinking about budgeting for future investments. Although each business determines its own fiscal year, common end dates are May 31, June 30, and December 31. However, also note that the majority of retail/hospitality businesses experience their highest sales activity during December and are not likely to engage EnergySmart services during this time.

Another time during which businesses may be more receptive to these messages is during low sales periods when they are able to focus on business improvements. For many business sectors this occurs just after the New Year. For targeted marketing, Cadmus recommends focusing on

sectors during their low sales periods, especially when these overlap with common planning and budgeting periods. Table 9 includes the percent of sales each month by key business sectors.

Table 9. Percent of Sales Each Month by Business Type

| Business Sector | January - February | March - May | June - August | September - October | November - December |
|---|------------------------------------|-------------|---------------|---------------------|---------------------|
| Appliances, TV, computer, Other Electronics | | | | Low | High |
| Automobile Dealers | | High | | | Low |
| Automotive Parts, Accessories, and Tires | Low | | High | High | |
| Beer, Wine, and Liquor | Low | | | | High |
| Books | High | Low | High | Low | High |
| Building Materials and Supplies | Low | High | High | | Low |
| Clothing, Shoes, and Jewelry | Low | | | | High |
| Department Stores: Conventional/Chains | Low | | | Low | High |
| Department Stores: Discount | Low | | | | High |
| Gas Stations | | | High | | Low |
| Groceries | No significant high or low periods | | | | |
| Home Furnishings | Low | | | | High |
| Pharmacies and Drug Stores | No significant high or low periods | | | | |
| Restaurants and bars | Low | | High | | |
| Sporting Goods | Low | | High | Low | High |
| Warehouse Clubs and Superstores | Low | | | | High |

Source: *Monthly Retail and Food Service Sales, 2008 sales*: <http://www.census.gov/retail/mrts/www/data/excel/mrtssales92-09.xls>

Many sectors experience very high sales during the holiday season, starting in mid-November and lasting through New Year's Day. Although this is also the end of the fiscal year for many businesses, business owners and decision-makers are distracted and not receptive to messages about energy efficiency. The County should target business during September/October with messages that they should reduce operating expenses by putting energy-efficiency improvements in their budgets for the upcoming year, then scale back marketing beginning in mid-November.

Please see [Appendix B. EnergySmart Marketing Calendar](#) which provides recommendations for promotional frequency and message emphasis.

3.3.2.3 Addressing Barriers with Messages

County employees, contractors, volunteers, and partners representing EnergySmart services may encounter barriers when talking to consumers and potential customers about energy efficiency investments.

EnergySmart representatives should become extremely familiar with the common barriers outlined below and be able to speak knowledgeably about the EnergySmart benefits and features that offer *value* to the customer and help overcome those barriers. Table 10 provides a list of the most common customer barriers to energy efficiency as well as a selection of key messages EnergySmart representatives should use to assure customers that EnergySmart services have been designed to meet their needs.

The responses below can be used when speaking with potential customers at events, during presentations, or in written communications, when specific barriers can be anticipated.

Table 10. Commercial Barriers and Key Messages to Overcome Them

| Barrier | EnergySmart Key Messages |
|---|---|
| Lack of capital Too expensive Paybacks are too long | <ul style="list-style-type: none"> • EnergySmart rebates are available right now to reduce incremental upfront cost of equipment investments. • Tax treatment for expenses in 2011 is very favorable. • EnergySmart provides free quick installs of efficient light bulbs, water-saving devices, and LED exit signs that provide immediate energy savings and customer value. • The EnergySmart Assessment is free and may reveal low-cost/high-impact/rebate-eligible energy efficiency opportunities such as equipment tune-ups that can pay for themselves in energy savings in a few months. • You can start with something affordable and do more expensive things later. • Energy efficiency investments save energy over the long term and can be a hedge against rising energy prices. • Energy efficiency investments will improve your employees' comfort and may increase their productivity. • Investments in energy efficiency can improve your bottom line. |
| Lack of time | <ul style="list-style-type: none"> • The EnergySmart Advisor facilitates the entire process and reduces the time you need to spend scheduling the Assessment, looking for contractors, filling out paperwork, and other follow-up work. • Rebates are only available for a limited time so it doesn't pay to put off action until later. |
| My building is already efficient. I don't understand where I'm losing energy and money | <ul style="list-style-type: none"> • An EnergySmart Assessment identifies where energy and money is lost. • Auditors are trained and certified in identifying energy waste and calculating potential energy and cost savings. • Auditors use industry-leading software that incorporates your business' specific circumstances to calculate energy waste and savings potential. • Energy auditors use advanced tools and software to find sources of waste that may otherwise be invisible. • Provide case studies of actual projects showing energy and cost savings. |
| Don't trust contractors to make decisions in my best interest | <ul style="list-style-type: none"> • Advisors are independent, third party experts, with no incentive to steer you the wrong way. • EnergySmart offers a robust contractor network so that customers (with Advisor assistance) can easily get competing bids for installation work. • EnergySmart contractors must be preapproved and meet quality standards. |
| Don't understand energy efficiency; it's complex and the terminology is confusing | <ul style="list-style-type: none"> • Advisor is a trained energy expert and will present options in terms you understand. • Audit reports provide a prioritized list of simple to understand recommendations. • Advisor will answer questions throughout the process and help keep you on track. • Provide case studies to show customers examples of energy-saving benefits. |
| Don't know how to select the right contractor | <ul style="list-style-type: none"> • Your Advisor will help you prepare a request for work to solicit bids from contractors, help you understand the proposals, and help select the best contractor for your job. • EnergySmart offers a list of preapproved, fully vetted contractors. |

| Barrier | EnergySmart Key Messages |
|---|---|
| I don't own my space...that means I can't do anything to the building | <ul style="list-style-type: none"> • The <i>EnergySmart Assessment is free</i> and may reveal <i>low-cost/high-impact/rebate-eligible</i> energy efficiency opportunities; depending on how long you will be in the building, it might make sense to upgrade fast-payback items like lights, temperature controls, or to conduct maintenance on existing equipment. These changes can pay for themselves in energy savings in a few months. • EnergySmart provides <i>free</i> direct installation of efficient light bulbs, water-saving devices, and LED exit signs that provide immediate energy savings and customer value. • The commercial real estate market is very competitive right now. If you've been a good long-term tenant, your property owner may be willing to invest in or share the cost of upgrades in order to keep a good tenant happy. • Your Advisor can help you put together a plan to convince the building owner that upgrades are a good investment |
| I don't believe energy efficiency is important to my business | <ul style="list-style-type: none"> • Try a no-cost Assessment, and let us talk with you about how your <i>profits can increase</i> if your energy expenses are lower. • Studies show that comfort plays an important role in worker productivity. If your facility is cold, drafty, or has poor lighting quality your employees may not be performing their best work. • Energy costs have gone up substantially over the last few years. Energy directly impacts your bottom line. Energy efficiency investments save energy over the long term and can be an important <i>hedge against rising energy prices</i>. • A free energy Assessment provides immediate value through direct installation of efficiency measures can help identify and prioritize upgrades that pay back in just a couple of months, and gives you personal assistance throughout the process. It's a no-brainer. |
| I am not the decision-maker when it comes to capital improvements | <ul style="list-style-type: none"> • <i>An EnergySmart Assessment is free</i> and can identify maintenance and tune-ups you can do that aren't capital improvements. • EnergySmart provides <i>free</i> direct installation of efficient light bulbs, water-saving devices and LED exit signs that provide immediate energy savings and value. • Your Advisor can help you put together a plan to convince the decision-maker that upgrades are a good investment |

3.3.2.4 Targeted Messaging

Knowing what target categories your audience falls into can help Boulder County and service staff tailor their message according to key motivating factors. These messages should be used when EnergySmart staff is communicating with groups or individuals, through presentations, direct communications and other contact, such as group newsletters and websites. When providing a group with written content for a newsletter or website, these values-based messages should be appended to the EnergySmart message segments supplied in [Appendix C. Message Segments Describing EnergySmart Services and Benefits](#).

Table 11 below allows Boulder County and service staff to cross reference messaging strategies with different types of audiences identified through market segmentation or other data. Specific messages appropriate for the message categories can be found in Table 8 above. Those cells that

contain two marks (XX) indicate the message has stronger resonance with a particular group than cells with just one mark (X).

Table 11. Target Messaging Matrix

| Businesses | Savings | Comfort | Easy, Convenient | Business Value | Control | Sustainability | Local Jobs | Business Norms |
|-----------------------------|---------|---------|------------------|----------------|---------|----------------|------------|----------------|
| Owner Occupied | XX | X | XX | X | X | X | XX | XX |
| Property Mangers | | X | XX | | X | | X | X |
| Tenant Occupied | XX | X | XX | | X | X | | X |
| Smaller business/building | X | XX | XX | X | | Varies | Varies | X |
| Mid-sized business/building | XX | X | XX | X | X | Varies | Varies | X |
| Local Headquarters | XX | Varies | XX | Varies | XX | XX | XX | XX |
| Out of Town Headquarters | XX | | | X | | | | X |
| Industry-specific | XX | Varies | Varies | Varies | Varies | Varies | Varies | X |

3.3.2.5 Message Segments Describing EnergySmart Services and Benefits

EnergySmart staff will be communicating with individuals and groups of potential customers through a variety of written and online tools, such as newsletters, articles, blogs, and emails. In order to maintain message consistency about the EnergySmart benefits and features, we have provided copy segments of various lengths that EnergySmart staff can use or supply to groups for their use in the media above. These message segments are included in [Appendix C. Message Segments Describing EnergySmart Services and Benefits](#)

3.4 Social Marketing for Commercial Sector

Social marketing is the primary, overarching *strategy* Boulder County will use to market EnergySmart services. A social marketing approach relies on the power of social networks to influence actions and create new or enhanced “social norms.” The goal of social marketing is to make EnergySmart the “new normal.” [Appendix D Social Marketing Fundamentals](#) has additional background information on the science of social marketing.

Social marketing uses a variety of innovative marketing *tactics* to deliver participants to EnergySmart services. EnergySmart staff, especially Advisors, can play a large role in using social marketing to sell EnergySmart services and encouraging business customers to invest in efficiency upgrades. They have many tools at their disposal, and should use them at every opportunity to convince customers to take the next step, and even more importantly, to spread

the word about EnergySmart to their friends, colleagues and other members of their business communities. This is the engine that drives social marketing and it can be more powerful than providing customers with financial analysis of savings potential or technical descriptions of problems with their buildings. These types of socially based connections resonate with potential customers, particularly when they promote business savvy or competitive advantage, which can be a very effective approach.

To be effective, social marketing relies on a series of key implementation tenets that follow the continuum of consumer involvement: normative messaging, social networking, gaining commitment, and providing recognition.

3.4.1 Normative Messaging

It is possible to influence a person's behavior by sharing information about the behavior of others. To get someone to try a new restaurant, you might say "my friend Amy went there and said it was the best sushi in Boulder." Or to get someone to stop smoking, you could cite statistics that "smoking has dropped from 51 percent to 27 percent of the population over the past 2 decades." People tend to do what they think other people in their peer groups do, even if it's at a subconscious level.

EnergySmart staff and Advisors should try to use normative messaging with businesses as much as possible. Some approaches might include:

- Explaining how other businesses, particularly in their sector, and particularly those that are sector leaders, are already engaged in EnergySmart, efficiency practices, or installing upgrades. An Energy Advisor might say to a restaurant owner in Boulder: "The Med recently completed an entire upgrade of its HVAC system, saving about 30 percent of its cooling load and making its customers much more comfortable at the same time."
- Mentioning how EnergySmart is moving rapidly through the business marketplace with many companies getting on board. An Energy Advisor might say to an office building owner in Longmont: "EnergySmart has already done assessments on over 40 office buildings in Longmont, and they are all on their way already to making their spaces more efficient and attractive with better lighting."
- Focusing on a "don't be left behind" message. This can be done by mentioning how others are taking advantage of limited-time rebates and EnergySmart services.

For additional background information on social norms and social marketing, please see [Appendix D. Social Marketing Fundamentals](#).

3.4.2 Social Networking

Social marketing relies on community networks as a vehicle for deploying normative messaging. It leverages the tremendous power of social networks, the trust built among network members, and the impact of these networks on normative or aspirational behaviors to influence individual action. Social networking uses both electronic/online tools and peer-to-peer interaction to influence individuals in and among social groups toward a collective message or action. For example, if a business colleague or leader says that he or she is taking some action towards

energy efficiency, it is likely to be much more powerful than if the message came from EnergySmart or a contractor.

Social networking takes many forms, and the marketing tactics outlined in the following sections provide numerous examples of social networking and community-based outreach activities, including strategies to translate group behavior attributes into word-of-mouth recommendations, referrals and the spread of information across the entire county. When executed effectively and consistently, social networking can create a cumulative effect on consumer awareness.

EnergySmart implementation staff—Energy Advisors in particular—have an opportunity to facilitate one of the most fertile social networking tactics; that is, using customers to recommend the program to other potential participants. Advisors can gain networking commitments when engaged with customers during their Assessments or retrofits. Some specific actions the Advisor should take include:

- Asking the customer about other neighboring businesses, friends, or colleagues that should take advantage of EnergySmart.
- Finding out if the customer is active in any social or industry networking groups, and then asking if EnergySmart or the customer can make a presentation at a group meeting.
- Asking the business leader to help engage employees at the workplace (in the residential service) by displaying an EnergySmart poster or making word-of-mouth recommendations.
- Asking permission to use their name when speaking with other potential customers.

The influence of EnergySmart Advisors on social marketing implementation cannot be overstated. It is critical that they be able to identify social networking opportunities, have the knowledge to capitalize on them effectively, be able to address barriers as they come up, and have the skill to “complete the sale.”

3.4.3 Pledges and Commitments

Pledges have been shown to be a powerful social driver; research shows that once a person makes a commitment to another person, especially publicly, they are much more likely to follow through compared to not getting a formal agreement. While not binding, human nature dictates that we try to live up to our commitments. County, service staff or other marketing partners should try to gain commitments during group meetings or presentations, at events, or during one-on-one interactions with potential customers.

Examples of questions and actions that the Energy Advisor can take might include:

- “Can I get a date by which you will choose a contractor to make these upgrades?”
- “Which specific upgrades are you going to follow through on?”
- “When is a good time for me to return to sit down with you on the Assessment findings?”
- “Who will you talk to about getting permission to make these upgrades?”

While these are fairly normal sales techniques, they can be very influential in actually closing deals.

A program like 10 for Change can be a powerful catalyst for some businesses. It uses two powerful social marketing approaches. First, it gets the business to make a public commitment to savings. Second, it places the businesses in a competitive situation both internally and with other 10 for Change businesses. This competition creates additional encouragement for businesses to keep up with others in their community. It dovetails nicely with the business recognition benefits as well.

We recommend that the *10 for Change* program be used to engage customers during their Energy Assessment, to motivate customers to install retrofits and upgrades to reach their 10 per cent reduction goal. This would entail expanding *10 for Change* to the rest of Boulder County, cross referencing the EnergySmart services on the *10 for Change* website, and making this an explicit offer to businesses making use of EnergySmart services.

3.4.4 Recognition

Recognizing businesses that demonstrate the desired behavior (i.e., improving the energy efficiency of their operations) is the final piece of the social marketing continuum. Recognition of a business's contribution to the overall program and community goal can be a key motivating factor in getting that business to share its experience with others. Recognition can be in the form of mentions in a newsletter or on the website (similar to donors), specific awards for accomplishments of note, or a window sticker proclaiming "I'm an EnergySmart Business." Recognition can also be a powerful tool for encouraging participation and promotions among local contractors.

Recognition can be as simple as giving customers the ability to post something at their business such as a window sticker proclaiming "I'm an EnergySmart Business." This is a low cost method to deploy social networking around EnergySmart.

Another powerful social marketing approach is to recognize businesses that are demonstrating the desired behavior: participating in EnergySmart services. Recognition can be in the form of newspaper ads, mentions in a newsletter, [specific awards for accomplishments of note](#), or rolling screens on the [website](#).

Many businesses want the ability to post something that their customers or workers will see when they enter the business. This is particularly important for sectors that cater to local customers such as restaurants, retail, banks, and other local services. Some utilities provide a template advertisement or poster onto which businesses can place their own logo or name, sharing the bill with EnergySmart branding. They could choose from a variety of messages on a template, such as:

- We're reducing our carbon footprint right now!
- We're helping the community and local environment!
- We're doing our part to save energy!

In addition, EnergySmart should provide (on the website) a sample press release template for businesses that have completed substantial energy upgrades.

The business recognition tactic is written up in more detail in [Appendix O](#).

3.5 Tactics

Distinct customer types may respond differently to marketing conducted through different marketing channels. The most effective marketing leverages marketing channels that gain not only *exposure* to the target customer, but also action on the message. In other words, the goal of marketing is to reach target customers in a way that compels them to listen to, comprehend, evaluate and act on the intended message.

We use market intelligence to identify those marketing channels best suited to reaching a desired customer segment and create a message that compels those customers to act. Many methods have been used to reach business customers, but the marketing tactics that have been found to be most effective in conveying an energy efficiency message include:

- Trade Allies and Contractors
- Strategic Marketing Partners
- Service Staff Communications and Direct Contact
- Online Marketing and Website
- Social Media Tools
- Video
- Newspaper and Radio Advertising
- Earned PR

Boulder County has been using these methods successfully for several years and has gained valuable market intelligence on those tactics most effective for reaching business customers. This plan leverages that knowledge and increases the intensity of involvement to reach even more businesses successfully.

3.5.1 Strategic Marketing Partners

EnergySmart services will benefit in several ways from marketing partnerships with other energy service organizations. These organizations provide access to individuals, information, and outreach opportunities that EnergySmart may not have on its own. As established organizations with brand name recognition, the organizations also bring credibility to the newly introduced EnergySmart service.

The Cadmus Group has held conversations with several potential strategic marketing partners regarding co-promotion activities around EnergySmart for commercial customers. To date Xcel Energy has indicated an initial interest in working with Boulder County on joint marketing activities, including sending direct mail or a letter to Boulder County business customers twice per year (spring and fall). Although Longmont Power and Communications (LPC) does not actively market to its small and medium sized commercial customers, we recommend Boulder County staff work with LPC to explore ways to reach out to these customers. Further, we recommend Boulder County pursue similar co-marketing commitments with municipal water

utilities within Boulder County. Co-marketing activities could take the form of bill inserts or letters to customers.

Contact information for the organizations:

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Susannah L. Pedigo

Xcel Energy | Responsible By Nature

Community Energy Efficiency Manager

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3.5.2 Trade Allies and Contractors

Boulder County is home to a robust contractor, equipment installer, and service contractor base. The network of lighting, HVAC, plumbing, construction, and electrical contractors is large, active, and eager to boost business. These trade allies are a key source of promotion for energy efficiency programs and should be leveraged to the greatest extent possible to promote EnergySmart services to business customers.

Contractors relish utility and other programs that bring them leads, and they are even more excited when they can leverage rebates to offset some of the cost of their services. Some utility programs find that 80 percent or more of their business customers enter energy efficiency services through trade allies/contractors. Trade allies can have a significantly greater impact on customer behavior than traditional marketing approaches because:

- They often have one-on-one access to and relationships with consumers.
- They may occupy an influential position as “trusted advisors.”
- They may be in a position to promote efficiency at the time of an equipment purchase, when energy issues are at customers’ “top of mind.”

The purpose of a contractor network is to encourage and help key trade allies promote commercial EnergySmart services. The contractor network provides the tools and resources trade allies need to help them inform customers about the program, explain the benefits of the program, and facilitate consumers’ participation. But to be effective, the program has to be easy for contractors to use, and they must realize some benefit from the program in order for them to actively promote it. Benefits can include added lead generation, rebates that lower their customers’ out-of-pocket costs, or even training courses which can enhance the contractors’ knowledge base. However, contractors may also perceive that participating in the network is a burden in terms of time or paperwork, or they may not trust the County to help with their business. Thus, to really achieve active participation of a robust network of contractors, the County needs to demonstrate that participation will both boost business and not take up too much time.

This section offers recommendations for utilizing and managing a contractor network to promote EnergySmart services to commercial customers. Below are several key features of successful trade ally networks based on best practices market intelligence and research¹¹ on the use of contractors to boost market penetration for business sector energy efficiency programs. County staff should evaluate each of the features described below based on available staff and budget resources to determine which elements of a contractor network make the most sense for Boulder County.

Actively Recruit Trade Allies: Utilities have found success recruiting trade allies through industry associations such as the American Society of Heating, Refrigerating and Air-Conditioning Engineers (ASHRAE), the National Electrical Contractors Association (NECA), the Air Conditioning Contractors of America (ACCA), and local chapters of national trade groups. EnergySmart staff can leverage this industry experience by adjusting this approach to a local level. Program staff should actively reach out to local organizations such as the Chamber of Commerce, the Boulder Green Building Guild and other local trade groups. Program implementation staff should also conduct direct outreach to trade allies to explain the program benefits and protocols and encourage contractors to participate. Ongoing outreach can also have a profound impact on select, key contractors; implementation staff should make periodic calls and/or one-on-one visits to key contractors to solicit their input and ensure they stay active in the program.

Simplify Participation: Contractors must perceive the process to be simple and the benefits worth their time in increased business. Having simple forms for prescriptive rebates is one way to simplify the process. The EnergySmart services also benefit from offering the assistance of the Advisor to help customers navigate the process. Boulder County staff should emphasize these attributes in both direct marketing to trade allies and recruitment activities.

Training: Contractors like to have the latest program and industry information and to be able to ask questions and learn from their peers. The County should provide educational opportunities such as workshops, webcasts, and/or hands-on training, focused on 1) the benefits, processes and expectations associated with being an EnergySmart service contractor; and 2) industry best practices and innovations. The Department of Energy offers training resources that the county may be able to tap into for its contractor network. The county could sponsor webinars hosted by organizations such as GEO, the Association of Energy Service Professionals (AESP), the American Council for an Energy-Efficient Economy (ACEEE), E Source, and the Electric and Gas Industries Association, or co-sponsor training sessions with Xcel, Platte River, or LPC.

Ongoing Communications: Successful contractor networks provide regular communications to disseminate information about program activities, events, and changes. Communications must be useful, user-friendly and timely, and may be through a variety of media, such as:

- Newsletters. A good way to keep contractors engaged with EnergySmart is to create a simple electronic trade ally newsletter. The newsletter should be brief and to the point, highlighting technology tips, [case studies](#), upcoming events and webinars, status of rebate pools, and any success stories that are worthy of sharing.

¹¹ Keep Your Business Customers Close—but Your Trade Allies Closer. E Source SMB-RB-2, February, 2009.

- A compelling contractor page on the [EnergySmart website](#) that clearly outlines the benefits of participating in EnergySmart services as a contractor, as well as links to password-protected online resources. The newsletter should be posted on the contractors' section of the website as well.
- [Presentations](#) to trade ally groups and industry associations can be effective at expanding social marketing impacts.
- Email alerts to inform contractors about immediate action items, short-term announcements, etc.
- [Social media networking](#) venues such as Twitter, Facebook, and LinkedIn.

Recognition: Like other businesses, contractors like to be recognized as an important part of the program. [Recognition](#) for contractor accomplishments and contributions to the program (e.g., “contractor of the month” feature on the [EnergySmart website](#), case studies highlighting exceptional contractor performance) or visiting with contractors at *their* meetings can be a very beneficial show of support.

Tools and Resources: Boulder County’s contractor website should offer contractors a variety of resources to help them promote the program, such as:

- Rebate applications and online submittal
- Printable collateral material (provided by County staff)
- Downloadable case study template to allow contractors to develop case studies of successful projects that can be shared among trade allies and may be used to promote the program
- A feedback mechanism (e.g., electronic suggestion box) and tool to submit questions to program staff
- Cooperative advertising and co-branding guidelines (See [Appendix P. EnergySmart Brand and Logo Usage Guidelines](#))

A contractor network also must include a sign-up/membership process that documents quality assurance requirements. At a minimum, this should include a contractor agreement that outlines appropriate disclaimers and program requirements as well as conditions by which contractors may be removed from the program. For reference, sample contractor network membership requirements may be downloaded at [Energy Right Partners Quality Contractor Network \(QCN\) Membership Requirements](#).

While it will not be possible for Boulder County to implement all of these contractor network features, many of those listed above are low-cost and provide significant benefit to trade allies.

Table 12 below characterizes cost, implementation staff time required, and benefits (in terms of increasing contractor involvement/promotion of programs) of implementing each of the above contractor network features.

Table 12. Metrics for Evaluating Contractor Network Features

| Barrier | Cost | Staff Time | Benefit | Comments |
|-------------------------------|------|------------|---------|---|
| Actively Recruit Trade Allies | L | H | H | <ul style="list-style-type: none"> • Cost associated with staff time only; • Keeps contractors engaged |
| Simplify Process | L | M | H | <ul style="list-style-type: none"> • Supports recruitment and marketing |
| Training | V | V | H | <ul style="list-style-type: none"> • Most direct benefit for many contractors |
| Ongoing Communications | L | M | M | <ul style="list-style-type: none"> • Keeps contractors engaged |
| Recognition | V | V | M | <ul style="list-style-type: none"> • High impact for those contractors affected |
| Tools and Resources | M | H | H | <ul style="list-style-type: none"> • Staff time needed for updates and maintenance • Most direct benefit for many contractors |

Key: L=Low; M=Medium; H=High; V=Varies

3.5.3 Service Staff Communications

While [direct mailing](#), [newspapers](#), [radio](#) and other forms of marketing may reach a large number or business customers, personal and direct contact is one of the most effective ways to engage potential customers in energy efficiency programs. The significant benefits of direct contact are the ability to target specific customers or sectors with specific [key platform](#) messages, [targeted](#) messages, [normative messaging](#). Staff can also [address customer barriers with immediate responses](#) and solicit [commitments](#) for action and/or referrals on the spot.

EnergySmart implementation and service staff are the County's most active and most successful ambassadors for selling EnergySmart services. Several methods are commonly used to reach customers directly.

3.5.3.1 Service Staff Email

The EnergySmart process has several steps from initial interest contact to final post-installation follow-up. At each step there is the potential to lose a customer's interest or the staff (and services) credibility. Each step also provides an opportunity to check in with customers and keep them moving in the right direction. EnergySmart staff should consider emails with customers to be part of an ongoing, multi-stepped sales process. Emails sent to customers during their decision-making process are an excellent opportunity for using [normative messages](#).

Emails used for promotional purposes need to be extremely succinct, with a very narrow message and no clutter; a specific call to action. A poorly-written, unfocused, delayed or unclear email can leave the customer confused (not knowing what's going to happen next or when) and lacking confidence about the overall professionalism of the EnergySmart service.

Guidelines for effective email communications are outlined below. A poorly written, unfocused, delayed, or unclear email can leave the customer confused (not knowing what's going to happen

next or when) and lacking confidence about the overall professionalism of the EnergySmart service.

Guidelines for effective email communications are outlined below:

- **Lead with good news.** If you have some good news for a customer (“Your recommended upgrades are eligible for \$500 in rebates”), use it early in the email.
- **People don’t want to read a lot.** Keep information clear, complete, accurate and brief. Most people get more email than they can handle. Don’t include unnecessary details that could distract the reader from the main message.
- **People hate not knowing.** Because this is multi-stepped process, customers want to know about the next step or action, who is responsible, and the timing.
- **Try to keep emails to a minimum.** Consolidate information in one email rather than several. This is especially important for information that people need to compare, such as contractor bids.
- **Subject lines are headlines.** When specifying a subject for your email, remember how the subject line is used. The more descriptive you can be the more likely they will open and remember the email.
- **Provide references.** Include a link to the EnergySmart website or service-related content like local press coverage.
- **Proofread and spell-check.** Few things can make a customer question credibility more than an email with typos or misspelled words.
- **Avoid jargon.** Readers may not have the same specialized professional knowledge that you do, so avoid using energy efficiency terms that lay-people may not understand.
- **Bullets, not paragraphs.** Turn any series or list of items into a bulleted or numbered list.
- **Don't forget your manners.** If you would say "please" and "thank you" speaking to someone in person, include those words in your emails as well.
- **Include a call-to-action.** Be succinct and specific.

For additional recommendations on email content for keeping customers motivated and overcoming customer barriers, see sections: [Addressing Barriers with Messages](#) and [Targeted Messaging](#).

3.5.3.2 Energy Assessments

Because Energy Assessments alone generate very little in terms of energy savings, it is essential that Advisors take every opportunity to encourage and facilitate follow-up on Assessment recommendations. As discussed in the previous section, Energy Advisors can have a great deal of influence with customers, especially with regard to [gaining their commitment to take action](#) on efficiency recommendations made during their Energy Assessment.

Examples of questions the Energy Advisor can use to solicit commitments might include:

- “Can I get a date by which you will choose a contractor to make these upgrades?”

- “Which specific upgrades are you going to follow through on?”
- “When is a good time for me to return to sit down with you on the Assessment findings?”
- “Do you need to talk to your business partner before making a commitment? Can I be there during that conversation?”

Energy Assessments also provide a good opportunity for Energy Advisors to leverage social marketing opportunities, particularly where they are able to establish a good rapport with [customers to gain some networking commitments](#). Energy Assessments are an excellent opportunity for using [normative messages](#). Advisors should use these opportunities to request that customers refer the program to their friends, employees and other members of the business community. Some specific actions the Advisor could take include:

- Asking the customer about other businesses (including others owned by that same business) that they think should take advantage of EnergySmart.
- Finding out if the customer is active in any business groups, and then seeing if EnergySmart or the customer can make a presentation at a group meeting.
- Asking the business to help engage its own employee base to participate in EnergySmart.

During the Assessment, the Advisor could go over a [case study](#) (preferably from the same business sector as the one receiving the Assessment) with the customer to drive home the fact that others have done this and seen positive results.

The Advisors can memorize facts and figures from the case studies to share with customers as the topics arise in conversations. Specific examples are always more powerful than general ideas: “Grubb & Ellis just installed Super T-8s, lowering their lighting costs 25 percent. Also the color of the lighting is really excellent.”

3.5.3.3 Outbound Telephone Calls

While not a common method to reach new customers, phone calls can be effective when calling on potential customers with whom the County, Cities or partners already have a relationship. The call can be simple, informing the business that there are new, limited-time offers we want to let them know about. It never hurts to mention that other businesses have already taken advantage of these benefits. Outbound telephone calls can also be very effective for keeping customers who have had an assessment, moving through the EnergySmart continuum of services. When making these calls, EnergySmart staff should be aware of the [potential barriers businesses](#) might have to energy efficiency services. Finally, outbound phone calls are a useful tool when customers have completed installation of EnergySmart recommendations, to request [testimonials, case studies](#) or referrals to friends and co-workers.

For additional recommendations on messages that keep customer motivated and overcome customer barriers, see [Targeted Messaging](#).

3.5.4 Online Marketing

3.5.4.1 Email

Email is now a very common channel to reach consumers and can also be an effective social networking tactic. The ability to conduct cost-effective email marketing campaigns will be dependent on access to lists of email addresses. The [Community Mapping Tool](#) includes target groups or individuals that can provide email lists or distribute emails on behalf of EnergySmart services.

Emails used for promotional purposes need to be extremely succinct, with a very narrow message and no clutter; a specific call to action; and a link to the [EnergySmart website](#) or service-related content like local press coverage. Having the email come from a trusted source, such as an organization, association, utility, or even the local government can help increase credibility and improve the chances that the email will be read and acted upon. See [Service Staff Emails](#) for crafting effective emails.

3.5.4.2 Website

The EnergySmart website (www.EnergySmartYES.com) is a comprehensive sales tool. It contains several functions that engage potential customers, provide information, and answer questions about the service features and benefits. Staff should send prospective customers to the website to reinforce information shared in conversations and emails. The website URL should be in all EnergySmart staff email signatures. As is it a “living” sales tool, certain functions of the website need to be [maintained and updated](#). The website is built to allow staff to make changes and updates without the need for a web professional.

Website functions include:

- An online intake process linked to the Franklin Customer Relation Management (CRM) tool
- Customer engagement via multiple access points, including videos and testimonials
- Benefit-focused information
- Feature-related questions and answers (FAQs)
- [Social media](#) platform integration
- Dynamic and nimble data features, including regular updates on the value of rebates and number of homes receiving Assessments

3.5.5 Social Media Marketing

Because grant funds available for paid media are limited, our social mobilization and marketing strategy highlights social media outreach to gain service exposure. Social media can exponentially increase message sharing among community groups that can facilitate word-of-mouth advertising. Further, online social networks offer a low-cost platform to connect with and share information among interested audiences. However, while the upfront cost of social media marketing is relatively low compared to paid media, it requires an inversely high labor investment by EnergySmart implementation staff.

General best practice social media engagement guidelines can be found in [Appendix H. Social Media Best Practices](#).

Cadmus has developed an [EnergySmart Facebook page](#) and [Twitter handle](#) for staff use and maintenance. The proposed LinkedIn strategy may include the eventual creation of a LinkedIn group but will initially leverage outreach through individual staff LinkedIn accounts. The EnergySmart Facebook page will become another connection point for EnergySmart participants and prospects. In addition, the Facebook page will support special offers and allow an easy way for EnergySmart customers to share messages with other participants.

All of the marketing collateral and [messaging](#) is integrated into the social media outreach plan. Below, we include a hierarchy of potential customer touch points, or moments when service staff can engage with EnergySmart customers. Each interaction provides an opportunity for customers to share their EnergySmart experience with friends, family, or colleagues. Our interactive marketing plan also integrates with print media mobile Quick Response (QR) tags. Smartphone users will be able to scan and send these tags to open the EnergySmart video “commercial” URL.

These messages resonate in a way traditional marketing simply cannot. Additionally, QR tag and social media campaign URLs offer an analytics and tracking capability that can help inform the [analysis of marketing impacts](#) and will allow the County to fine tune marketing efforts.

3.5.5.1 Referrals and Promotion

We recommend automation of this process as much as possible, and both Populus SalesForce CRM applications can be utilized for this effort.

The links below provide an overview of how popular applications integrate into the SalesForce customer management system, along with an overview of the most recent social media application updates within SalesForce (April 2011).

[Social Networking with SalesForce.com](#)

[SalesForce Cloud Collaboration Platform](#)

Automating with SalesForce is not necessary, however, to leverage social media networks for EnergySmart referrals and promotion. Cadmus has created the messages listed below to correspond to customer touch points along the EnergySmart customer engagement process. In each case, the call to action will encourage customers to share their EnergySmart experiences with friends and family via [social media networks](#) or email.

3.5.5.2 Touch Points and Messaging

Below is a list of customer “touch points” that present opportunities for EnergySmart service staff to engage customers and make a social media “share” request.

- The first bullet text under each touch point is suggested language for making the “share” request of the customer; it is to be included in the communications with the customer.
- The second bullet -- *the italicized text* – is the suggested message that will be posted on the customer’s social media channel.

EnergySmart and implementation staff have two options for providing customers with the “share” language:

1. Include a “share” widget¹² within the email or survey. IT/webmaster assistance will be needed to automate this tactic using a widget. This method allows customers to click on the widget and indicate to which social media network (e.g. Facebook, LinkedIn) they would like to post. The message supplied in the widget will automatically be added to the selected network.
2. Include the “share” message in italics along with the communication text and add a request for the customer to copy and paste the “share” message into a Facebook, LinkedIn, Twitter post, or email message. Ideally, the process can be automated, but this lower tech option requires no IT assistance.

Implementation staff and recipients can also modify the language if desired

“Thank you” webpage after online registration

- Thank you for your interest in EnergySmart! Yours is a business ahead of the curve when it comes to strategic investment. As an industry leader, we’d appreciate your help sharing this knowledge with others in the industry and within your professional network. Click here to share the following message on LinkedIn, Twitter, or Facebook, or forward an email to colleagues and friends.
- *I know energy efficiency affects my bottom line and I’m doing something about it! Energy Smart, only available for Boulder County homes and businesses, is there to help. Has your business had an Energy Assessment? You’ll find more information here. ESYES.com link.*

Energy Assessment (when applicable)

- Verbal: EnergySmart has a Facebook page. Does your business? If so, you are welcome to have your page “Like” our page, or “Like” us on your personal page. We’re trying to create a movement in Boulder County and we need your help!
- Verbal: Part of the marketing process for EnergySmart involves business people sharing information with other business people, employees, and friends. Would you be willing to send out an email to your company about the service?
- Cadmus Recommendation: Offer to send an html-ready email message the next business day that includes marketing information for employees along with congratulations to their employer.

Quick Install (when applicable)

- Verbal: Would you be willing to put up a poster in the break room telling your employees about the Quick Install benefits that come with a Home EnergySmart Assessment?

¹² Widgets come in many shapes and sizes, but two of the major types today are web widgets and desktop widgets. Web widgets, the type discussed in this marketing plan, are intended for use on (embedding in) webpages for special functionality.

- Cadmus Recommendation: Create a poster-sized residential marketing collateral piece for businesses to share with employees. This leave-behind will invite cross-pollination between the two EnergySmart services.

Advisor Check-In After Contractor Work is Complete

- Congratulations for taking advantage of EnergySmart services to make your business equipment and processes more efficient. As a leader in the energy community, you can be proud of your initiative. And wasn't it relatively painless? Please share this important part of the service. Sharing a community value for energy independence will make all of Boulder County stronger. Click here to share the following message on LinkedIn, Facebook, or Twitter, or forward an email to colleagues and friends.
- *My business just got \$5000 (TBD) in rebates and will have tax credits this year. I feel good about making this choice for my bottom line. Plus, it was EASY! You can feel "EnergySmart" too...just click here. EnergySmartYES.com*
- Alternate Message: Visit EnergySmartYES.com to share a testimonial and help convince others to get EnergySmart. Also, if you'd like to be featured as one of our case studies on EnergySmartYES.com please let us know. We'd like to get your information and your successes up for others to see!
- If via Phone: "Tell me what you liked about EnergySmart and I'll enter it online for you." (Advisors, please review [Testimonials and Case Studies](#) for more information on how to collect effective testimonials.)

3.5.5.3 Outreach and Engagement Assistance Tool

For this reason, the plan includes targeted use of Radian 6, a robust social media analytics tool. Radian 6 will minimize the time necessary to locate and connect with key online influencers interested in topics related to the EnergySmart mission. Radian 6 also offers a data collection and engagement interface that allows staff to identify online personalities likely to promote the EnergySmart message.

Cadmus will deliver the Radian 6 tool fully "tuned" with key words and optimized for the lowest monthly fee. Cadmus will also provide general guidance regarding outreach and engagement best practices along with in-person training. Radian 6 tool membership includes a wide variety of online tutorials as well, which will be particularly useful for new staff members and interns.

3.5.5.4 EnergySmart Brand Reputation Management and Measurement

Additionally, Radian 6 provides the means to track conversation about the EnergySmart brand over the grant period. As earned media become more prevalent, EnergySmart staff will want to monitor online discussion about the service. In many cases, both positive and negative comments contribute to a forum within which EnergySmart advocates can provide useful information to prospects. The FAQ answers provided on EnergySmartYES.com are the recommended content resource for this situation. The section covering "[Commercial Social Media Touch Points and Messages](#)" provides specific timing and message guidance. General best practice social media engagement guidelines can be found in [Appendix H. Social Media Best Practices](#).

3.5.6 Video

Boulder County's EnergySmart services are innovative in their comprehensive service delivery and funding options. Because the program *is* so innovative, potential customers may not be familiar with its service model. A video is a simple and effective tactic to make them familiar with the program, in a way that is clear and easy to understand. Because consumers today are more inclined to watch information than they are to read it, EnergySmart will use a short 3-5 minute "infomercial" to walk potential customers through the program process, and highlight its unique service offerings.

Videos offer high value; they will serve as a "virtual roadshow" for the EnergySmart commercial service. Videos are portable, can be easily shared, are available at all times, and are accessible to individuals who may be hard to reach with conventional marketing and media. The EnergySmart video can also be presented by community and group leaders at meetings without the presence of knowledgeable implementation staff. Once the video commercial has been created, the possibilities for information dissemination are almost endless.

Cadmus will integrate the EnergySmart video into a broader "tag reader" strategy. Combined with a compelling message ("ask me how to save \$250") the tag will enable smartphone users to instantly view the video strategically placed on yard signs, contractor trucks, print media, and event signage, among other spots.

3.5.7 Direct Mail

Direct mail can be a fairly low-cost tool to get a message in front of prospective customers, especially when a mailer is targeted to high-potential customers with a [segmented data-driven recipient list](#). Boulder County has decided to data available in its County Assessor database to generate mailing lists to be used with direct mailing. Xcel Energy, GEO, and LPC are [Strategic Marketing Partners](#) that have committed to some form of direct mailing to their customer bases. Please see [Appendix B. Marketing Calendar](#) which provides recommendations for promotional frequency and message emphasis.

Cadmus recommends the use of two types of direct mail: postcards and letters. These two forms of direct mail incur different costs but also provide different benefits.

3.5.7.1 Postcard Mailer

Direct mail postcards are a relatively low-cost means for promoting the EnergySmart services. Cadmus has created 3 versions of 5.5" x 8.5" postcards that Boulder County can use or provide to strategic marketing partners for direct mailing. These are provided in [Appendix I. EnergySmart Marketing Collateral](#) and on the accompanying digital files CD.

3.5.7.2 Direct Mail Letter

Although letters sent in envelopes have a higher cost-per-unit than a single postcard mailer, there is a key reason to use this tool rather than the postcard. Customers are more likely to read letters when the sender is a recognized institution or organization, such as a utility or government entity. Utility research has found that letters are the most successful direct mail approach, particularly when letters appear to be formal, include a message of urgency and are targeted to appropriate customer groups.

The direct mail letter should be a formal letter from the City or County, or one in partnership with the utility, as this format has proven to have much higher response rates than cards, brochures, or self-mailers. The letter should be straightforward, explain the specific offer, and emphasize that EnergySmart is a local program, offering limited-time rebates and a personal Energy Advisor. The call to action should be very specific.

3.5.8 Media Advertising

ARRA funding does not allow for traditional media advertising, so this strategy is minimized in the overall EnergySmart marketing plan. However, traditional media advertising is an important part of a diverse marketing portfolio. Boulder County has allocated a portion of its overall program funds to ensure traditional media advertising can be used appropriately to support and reinforce the social marketing strategy. Media advertising will include newspaper and radio advertising as well as earned media.

3.5.8.1 Newspaper and Radio

The County has allocated \$25,000 for the 2011 calendar-year to promote EnergySmart services in three local newspapers (the Longmont Times-Call, Boulder Daily Camera and the Boulder County Business Report) and on three local public radio affiliates serving Boulder County.

Kickstand Communications has created newspaper advertisements and Cadmus has developed a 15 second radio spot to support Boulder County's media advertising campaign. All traditional media advertising, with the exception of newspaper ads in the Boulder County Business Report, are targeted to residential service customers.

The County should increase the placement of print ads in the Boulder County Business Report (BCBR), published bi-monthly, during common budget and planning periods (See [Appendix B. EnergySmart Marketing Calendar](#) for details on recommendations for promotional frequency and message emphasis). Ads should also be placed in specific issues in which the content complements commercial energy-efficiency improvements. The BCBR issue dates and editorial content are provided below.

2011 Boulder County Business Report editorial calendar

March 18: Energy and Utilities

April 1: The Green Economy

May 27: Real Estate and Development; Longmont Business

June 24: Construction and Architecture; Downtown Boulder

Sept. 2: Construction and Architecture; Budget Planning

Oct. 14: Energy and Utilities

Oct. 28: The Green Economy

Dec. 9: Construction and Architecture; Longmont Business; Investment Strategies

[Appendix C. Message Segments](#) and the digital files CD include creative copy for newspaper advertisements of each size.

3.5.8.2 Earned Media

Earned media is essentially free advertising; EnergySmart staff should garner “earned” media coverage whenever possible. To capture earned media, however, County staff must be diligent about identifying media-worthy events and milestones and promoting them to the appropriate media targets. Below are recommendations for several opportunities to generate earned media coverage.

- Appearances on local radio stations (KBCO, KGNU) by program administrators, municipal leaders, and/or satisfied customers.
- Op-ed pieces in local newspapers written by program administrators, municipal leaders, and/or satisfied customers.
- Service milestones can drive press releases; examples include: 2,000 homes receiving Assessments, \$20,000 in rebates distributed, etc.
- The [Social Mobilization Initiatives](#) included in this report provide great opportunities for press coverage and public attention; they are innovative, constructive, and involve communities. These initiatives have been created to provide interesting ways to raise awareness of the EnergySmart services, but also because they are general interest stories.
- [Social media outreach](#) to local online influencers on Facebook, Twitter and blogs will increase the likelihood that EnergySmart content and messages will be shared with followers and friends. See [Appendix H. Social Media Best Practices](#)
- Complimentary Energy Assessments for reporters and online influencers (bloggers) to generate coverage and reviews of the service.

3.5.9 Grassroots and Community Outreach

The key to any efficient, widespread movement is generating a buzz and garnering support on a grassroots level. For EnergySmart, grassroots outreach to the residential sector is the most essential driver for achieving robust social networking results.

While direct mail, newspaper advertising, and other forms of mass media marketing may reach a large number of business owners, the value of human interaction cannot be overestimated. EnergySmart will leverage a variety of interactive platforms to access potential program participants. In these instances EnergySmart staff and service staff will play a key role. An even more powerful opportunity for conveying targeted EnergySmart messaging and tapping into [social norms](#) to motivate action comes from peer-to-peer contact among [community and group leaders](#), [professionals](#), and [allies](#). See [Appendix F. Community Mapping Tool](#) for a description of the tool developed to foster social networking opportunities including a list a community groups targeted.

There are multiple opportunities for EnergySmart staff to tap into grassroots and community outreach opportunities. As the County embarks on the strategies included in this section, it will be important to keep in mind that for a grassroots campaign to be successful, organization and a call to action are key.

3.5.9.1 Local Social and Professional Networks

Business leaders tend to work with people they know and trust. Business colleagues and industry leaders also carry substantial stature and influence. Tapping into these individuals can be an extremely powerful method to influence other members of the business community to action. Businesses are typically engaged with one or more industry and business groups, and are used to getting information and advice through these channels. EnergySmart staff should work closely with local business leaders via the Chamber of Commerce, industry associations and Downtown Boulder Inc., and other business groups to give them the information and tools they need to promote the EnergySmart program to members of their community. EnergySmart staff should also engage in existing business meetings, as well as offering to provide short presentations at meetings, articles for newsletters, and collateral for members to use.

Community leaders involved in these social networks also carry substantial stature, influence, and trust. Tapping into these individuals can be an extremely powerful method to influence community members to action. EnergySmart staff should work closely with local leaders, such as county commissioners, city council members, school board members and principals, church leaders and heads of other community groups to give them the information and tools they need to promote the EnergySmart program to members of their community.

EnergySmart staff should engage in existing [social](#) and [professional](#) networks and groups, offer tools such as [presentation slide decks](#) or provide short presentations at meetings, articles for newsletters, and collateral for members to use or to help leaders explain the importance of the program to their audiences. [See Appendix F. Community Mapping Tool](#) for a description of the tool developed to foster social networking opportunities including a list a community groups targeted.

3.5.9.2 Testimonials and Case Studies

While testimonials are tried and true methods for promoting any product or service, they can be especially powerful in creating new [business norms](#). Testimonials and case studies tell success stories but come from a more credible source (another customer) than Boulder County.

Cadmus recommends the County develop a minimum of 10 strong testimonial and image combinations and several case studies for the residential sector. Case studies and testimonials should cover a variety of business types and location scenarios. Applications for testimonials and case studies include the [website](#), press releases, [staff communications](#) and [presentations](#). Testimonials can also be used informally by EnergySmart staff to [share information in conversation](#).

Examples of active use of case studies include:

- During the Assessment, the Advisor reviews a case study with the customer to reinforce the fact that others have participated and seen positive results. In this application, the Advisor can share case studies via electronic media (i.e., iPad), but they should be formatted and include pictures of upgrades.
- The Advisors can memorize facts and figures from the case studies to share with customers as the topics arise in conversations. Specific examples are always more powerful than general ideas: “Jim Brown invested in a new high efficiency furnace even

though his wasn't broken yet. He figured that he'd start saving energy right away and take advantage of the rebates that are available now."

Service staff should actively request testimonials from satisfied customers. If customers are open to suggestions for their testimonials, they can be asked to respond to one of the following topics:

- **Comfort:** How did the retrofit create a more comfortable environment for workers and customers? Be specific; what's different now than before? Can they now use a part of the business that was too cold or hot before? Were customers complaining? Were workers wearing coats around? Were areas too hot to work?
- **Helpfulness of the Energy Advisor:** How did the Energy Advisor help businesses through the whole process? Without the Energy Advisor, would they have done the work? What did the Advisor help with that was unexpected? What helped them make a decision?
- **Too Much Work/Confusing:** Did business owners previously fail to make upgrades because it was too difficult and confusing to decide what to do? Did they lack information needed from a trusted source?
- **Business Value:** How did the energy upgrade add value to the business? Was it part of a remodel? Does it look better?
- **Maintenance:** A lot of older equipment costs a lot to maintain and fix. Did new appliances and equipment help to lower maintenance and repair costs?
- **Dollar Savings:** How did the money savings and rebates help with decision-making? Did some information from the Energy Assessment sway them to act? Have their energy bills gone down? Did their profits go up?
- **The Energy Assessment and Sweep:** What did they discover during the Energy Assessment that really surprised them? How did they like the Sweep?
- **Simplicity:** Was the process less time-consuming and difficult than they had thought? Be specific. How did the process save them time?
- **Environment:** How did "helping the environment" come into play with their decisions? Did they think about their carbon footprint?

EnergySmart staff and Advisors should also look for opportunities to develop case studies around completed customer projects. Strong case study opportunities include:

- Customers who are particularly enthusiastic about the EnergySmart service.
- Customers who have completed comprehensive upgrades facilitated by the full suite of EnergySmart services.
- Customers whose EnergySmart upgrade projects result in particularly good energy cost savings and other tangible benefits.

Under these circumstances most customers will be happy to agree to and provide information to support the development of case studies. Boulder County staff will be responsible for compiling case study data and formatting case studies using a modified version of the case study template

developed by Cadmus and included in [Appendix I. EnergySmart Marketing Collateral](#) and provided in the digital files CD.

The following guidelines should be applied to the development of testimonials and case studies to support EnergySmart services.

Photos: Cadmus recommends a photo accompany all testimonials. However, standalone testimonials can function effectively as well. Cadmus recommends a photo of the business-owner standing in front of something that would allow others to recognize the business type. Be creative and try to get some activities in the background, but the real focus should be on the business owner.

Target businesses: It will be most useful to have businesses that have participated in a retrofit so they can explain their experience with the energy savings aspect, but it's also important to get testimonials that describe the benefits of the Energy Assessment.

Key Business Sectors for Testimonials:

- Retail
- Restaurants
- Offices
- Light manufacturing
- Services (auto repair, dry cleaners, etc.)
- Hotels/motels
- Groceries/convenience stores

3.5.9.3 Presentations

Presentations are a core tactic in the social marketing strategy. In-person presentations to small and large group, as well as to [trade groups and industry associations](#), provide great opportunities to sell the EnergySmart services and make interpersonal connections with potential program participants, while enabling discussion, answering questions and [addressing customer barriers](#) on the spot. Boulder County should leverage program and service staff, [marketing partners](#), and community leaders to the greatest extent possible to present the EnergySmart services to a wide range of [trade ally](#) and [professional](#) networks. Presenters should be familiar with common [barriers and the messaging provided for addressing them](#) as well as the [targeted messaging that motivates specific business segments](#). See [Appendix F. Community Mapping Tool](#) for a description of the tool developed to foster social networking opportunities including a list a community groups targeted.

Cadmus has created a commercial presentation detailing the features and benefits of the commercial EnergySmart service. This presentation is available on the accompanying digital files CD.

3.5.9.4 Events

Events, like presentations, are excellent social networking venues and provide great opportunities for personal interaction with large numbers of interested consumers and to sell EnergySmart services. EnergySmart and service staff attending events should be familiar with [normative messaging concepts](#), (see also [Appendix Q. Staff Communications Social Marketing Reference](#)), [common business barriers and the messaging provided for addressing them](#), as well as [the targeted messaging that motivates specific consumer segments](#). Staff attending events should also be ready to solicit commitments from the residents and be equipped with “[pledge cards](#)” for residents to sign for an Energy Assessment.

Boulder County is host to a vast range of community events ranging from the weekly farmers market to the annual Lafayette Peach Festival. Tapping into this key social marketing tactic will require planning and time on the part of EnergySmart staff to negotiate booth space or coordinate a presence at events, prepare for, and attend the events. Cadmus has produced an EnergySmart banner for use at events. Residential and commercial EnergySmart service brochures should be handed out to prospective customers. Staff should have contact information sheets or sign-up cards for customers who have expressed an interest in the service.

Cadmus has compiled a list of key events in Boulder County with large numbers of visitors. Please see [Appendix J. Calendar of Key Boulder County Events](#).

3.5.9.5 Commercial Social Mobilization Initiatives

Social mobilization is a social marketing tactic that is designed to bring the EnergySmart services to people in ways that are innovative and unexpected. Cadmus has designed a series of social mobilization initiatives that leverage local events or innovative concepts to deliver the EnergySmart message in new and compelling way. Each social mobilization initiative description includes information implementation staff needs to execute the plan. Because these are innovative, some of them do not have well-publicized precedents. Therefore, Cadmus was not able to provide estimates of costs or staff hours necessary to execute each plan.

Each social mobilization initiative description contains information on:

- Concept
- Benefits of this Endeavor
- Target Audience
- Models
- How the Initiative Drives Savings
- Design Concept
- Level of Effort
- Potential Impacts
- Tasks and Activities

Brief descriptions of the social mobilization initiatives applicable to the commercial sector are listed below. [Appendix O. Commercial Social Mobilization Tactics](#) contains more detailed descriptions, benefits, and task lists for each initiative.

Business Recognition Campaign

Many businesses love to have public recognition that they are making efforts to be greener and more sustainable. This outreach campaign will provide a variety of methods for EnergySmart business participants to have their companies promoted.

Carrotmobs

This social mobilization approach hits both businesses and residential customers at the same time. Businesses compete as to which business pledges to spend the highest percent of its Carrotmob revenue on efficiency on its own business. The Carrotmob is the critical mass of consumers that patronizes the winning business on a given day, providing sufficient revenue to fund the business owner's efficiency upgrades.

Energy Savings Contest between Cities/Towns/Communities in Boulder County

Contests can be between communities, colleges, homes, neighborhoods, social groups, schools, classrooms, or any entities that might drive interest and involvement. Entities would compete over the course of a year to see who can save the most energy as measured by several actions. Winners would get tangible prizes as well as bragging rights.

Video Contests in Boulder County

People can create powerful messages through their own experiences and creativity. The videos will be shown on the County and cities' websites, and contest winners will be heralded in the media, raising awareness of EnergySmart.

3.5.10 Cooperative Advertising

Cooperative advertising, or co-branding, is the effort by which EnergySmart and [trade allies](#) share promotional exposure and/or cost. Boulder County can provide elements that will both simplify the process and ensure consistency in the following ways:

- Providing [co-branding/advertising guidelines](#) for contractors to highlight EnergySmart services involvement. For example, a contractor-purchased newspaper ad could include a statement like “I’m a proud participant in the EnergySmart contractor network” and include the EnergySmart logo. Most contractors recognize value through association with the program—it both adds contractor service credibility and attaches EnergySmart brand equity to their own.
- Offering resources such as “plug and play” newspaper ad layouts, mailers, brochures and other collateral, into which contractors insert their own logos and a brief service message. Contractors can then download and use this file at their own discretion and expense. This approach, with its non-modifiable files, offers the advantage of brand control by Boulder County.
- Providing co-sponsorship of cooperative advertising—sharing the advertising cost or arranging with local advertising sources, such as *The Daily Camera*, to extend Boulder County discounts to participating contractors.

Whichever option Boulder County chooses regarding cooperative advertising for the contractor network, it is critical that Boulder County provide contractors with required co-branding guidelines and quality assurance protocols. We’ve included these specific items within the general EnergySmart brand guidelines pdf found in [Appendix P. EnergySmart Brand and Logo Usage Guidelines](#).

3.5.11 Collateral Materials

Cadmus has developed a series of collateral pieces to support marketing for EnergySmart services. These include a residential brochure, event banner, newspaper ad, and direct mailer piece. [Appendix I](#) provides a list of available collateral and recommended uses. Electronic collateral files are also provided on the digital files CD.

3.6 Measuring Effectiveness of Marketing Tactics

Efficient and productive marketing is key to meeting the aggressive goals set by EnergySmart services for the residential sector. The ability to make mid-course corrections to maximize marketing return on investment (ROI) over the course of the grant period is a critical part of implementation management. Creating a robust system to track and analyze marketing data and customer response will facilitate a continuous improvement process.

We recommend the County assign one point person to interface with the IT/webmaster on URL analytics and with implementation contractors to set up systems to monitor the effectiveness of marketing efforts and report results. In [Appendix M. Measuring Effectiveness of Marketing Tactics](#), we provide basic guidance and best practices for staff involved in marketing ROI assessment and implementation of the continuous improvement process. These are designed to become as automated as possible, but require consistency and attention to ensure quality data results.

Appendix A. Residential Baseline Survey Results

On January 24, 2011, Boulder City/County launched the EnergySmart program designed to provide energy saving education, services, and rebates to Boulder County residents. Cadmus surveyed Boulder County residents just days after the program launched to establish baseline/program launch levels of awareness for EnergySmart and other similar energy saving programs or brands.

Method

Cadmus contracted with an internet survey firm, Experion, to survey Boulder County participants from their proprietary online panel. Cadmus designed a survey instrument, which Experion programmed in an online format. Experion sent invitations to qualified panel members with a standard incentive offer for completing the survey. Within Boulder County, 400 panelists completed the survey.

- Survey respondents were qualified on the basis of residing in Boulder County and being 21 years or older.
- The survey was closed after 400 qualified responses were collected.

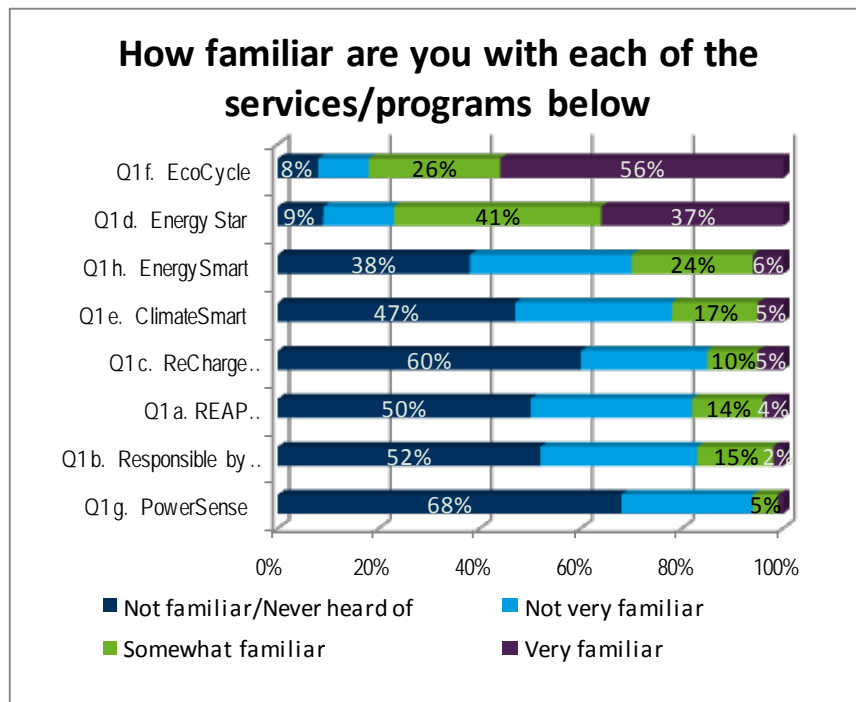
Key Findings

Energy Saving Brand Familiarity

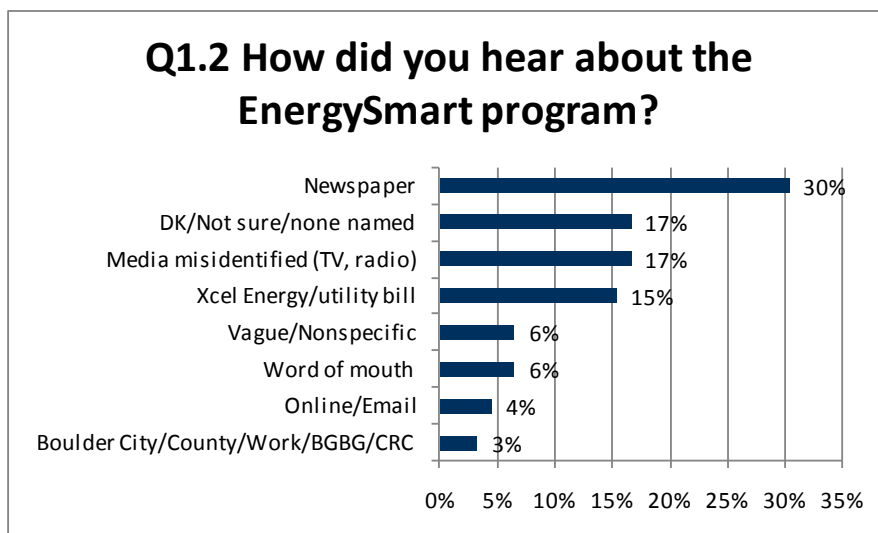
Respondents were mostly unfamiliar with the programs/services prompted. The highest level of familiarity was for Ecocycle (82 percent ‘familiar/very familiar’) and ENERGY STAR® brands (78 percent ‘familiar/very familiar’). Familiarity with all other brands tested was 30 percent or less.

Lower income respondents (in households making \$30,000 or less/year) were significantly less familiar with nearly all the brands tested.

One of the brands included, PowerSense, was a fictitious brand name included in the survey to serve as a validity check. Nearly one-third (32 percent) indicated some degree of familiarity with PowerSense, with one percent reporting being ‘very familiar’ and five percent were ‘somewhat familiar.’ A small proportion of error could be applied as a correction factor for a more reliable measure of familiarity with these items.



Boulder’s EnergySmart program was introduced the same week that the survey was fielded. Thirty percent indicated they were ‘familiar’ or ‘very familiar’ with the program, with another 38 percent indicating they had not heard of it. Respondents who indicated some level of familiarity with EnergySmart were asked how they had heard of the program. Of those familiar with EnergySmart, roughly 43 percent correctly identified channels that were actually used to promote the program. Those who were ‘very familiar’ with EnergySmart were also ‘very familiar’ with all of the other brands tested.

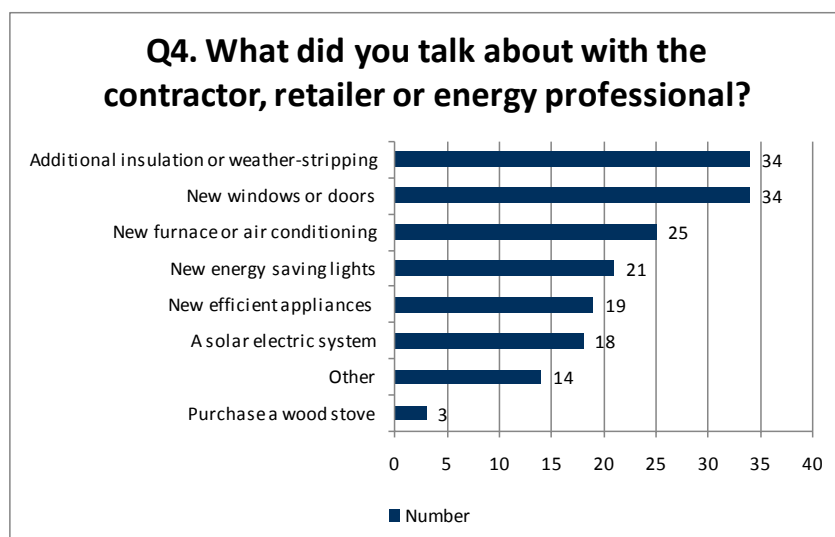


Nearly one-third (32 percent) of respondents ‘familiar’ with EnergySmart misidentified sources through which they heard about the program. Seventeen percent indicated TV or radio advertisement, and another 15 percent indicated through Xcel Energy or their utility bill. These errors are likely attributable to brand confusion, as Xcel Energy has similarly named programs such as HomeSmart and EnergyWise.

Energy Awareness and Engagement

Two-thirds (66 percent) indicated they had engaged in conversation about home energy use with family, friends, or coworkers within the past three months. Another quarter (25 percent) of respondents had spoken with a contractor, retailer, or energy professional about reducing energy use in their home within the past six months; these respondents were significantly more likely to have higher household incomes (\$75,000 or more/year).

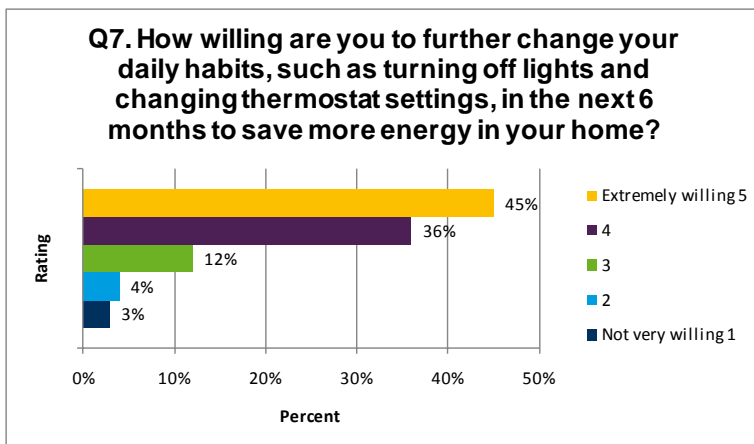
Of those who had spoken with a contractor, retailer, or energy professional, the most common topics included insulation, weather stripping, or new windows/doors.



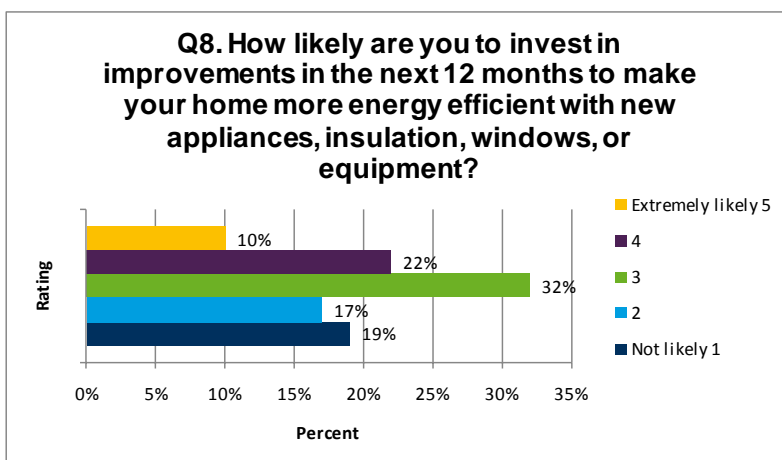
Other responses included: repairs to installed energy equipment or shell measures (four respondents), home energy audit (three), tankless hot water heater (two), wind turbine (one), energy saving blinds (one), efficient toilet (one), not applicable (two).

A strong majority (80 percent) were aware of rebates from their electric/gas utility, but less than half (47 percent) were aware of energy saving services from local city/county government.

Respondents indicated strong willingness to change their daily habits to be more energy efficient. Nearly half of respondents (45 percent) were ‘extremely willing,’ with another 36 percent indicated they were ‘willing.’ Willingness to change habits was inversely correlated with age; younger respondents were significantly more willing to change their habits than older respondents.



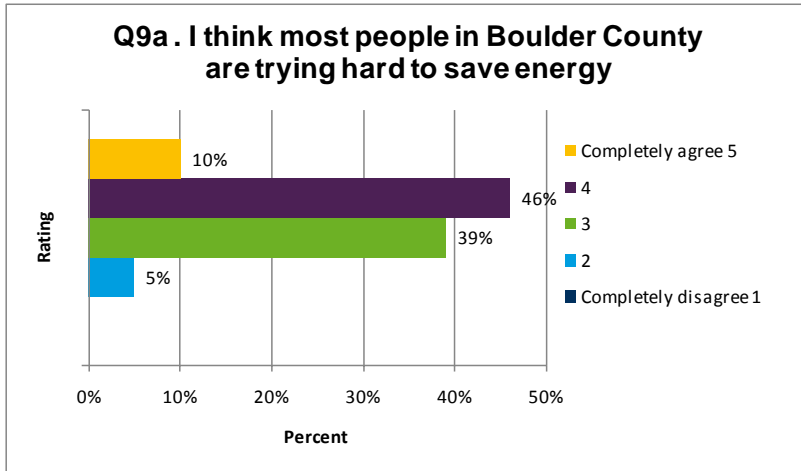
Respondents’ likelihood to invest in energy saving equipment/measures was not quite as strong as their willingness to change daily habits. Ten percent indicated they were ‘extremely likely’ to invest in energy saving equipment, with another 22 percent reporting they are ‘likely.’ Nearly one-third (32 percent) gave a neutral rating.



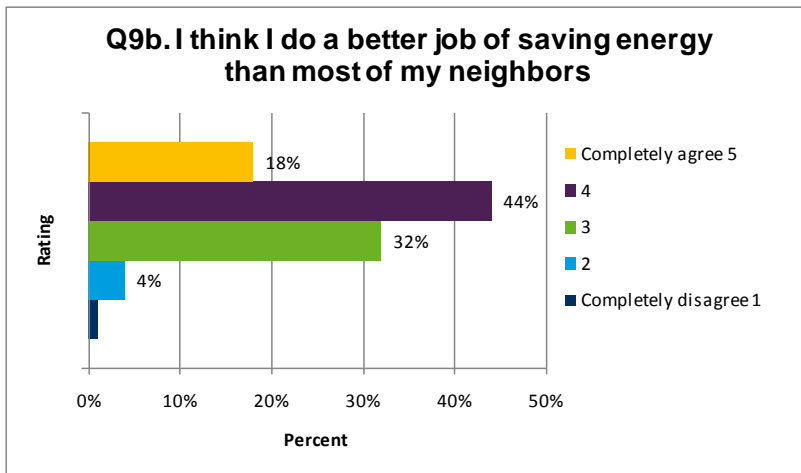
Agreement

Respondents were asked to rate their level of agreement with several statements. Responses to all statements tended primarily toward agreement (4 out of 5 rating) and secondarily toward neutral (3 out of 5 rating).

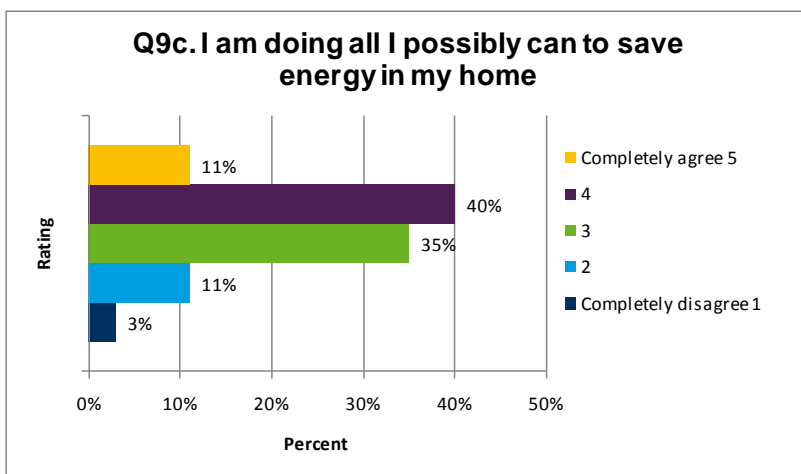
Just over half (55 percent) agreed that “*people in Boulder County are trying hard to save energy.*” Renters were significantly more likely to agree (65 percent) with this statement than homeowners (53 percent).



Respondents indicated the strongest agreement (62 percent) with the statement “*I think I do a better job of saving energy than most of my neighbors.*”



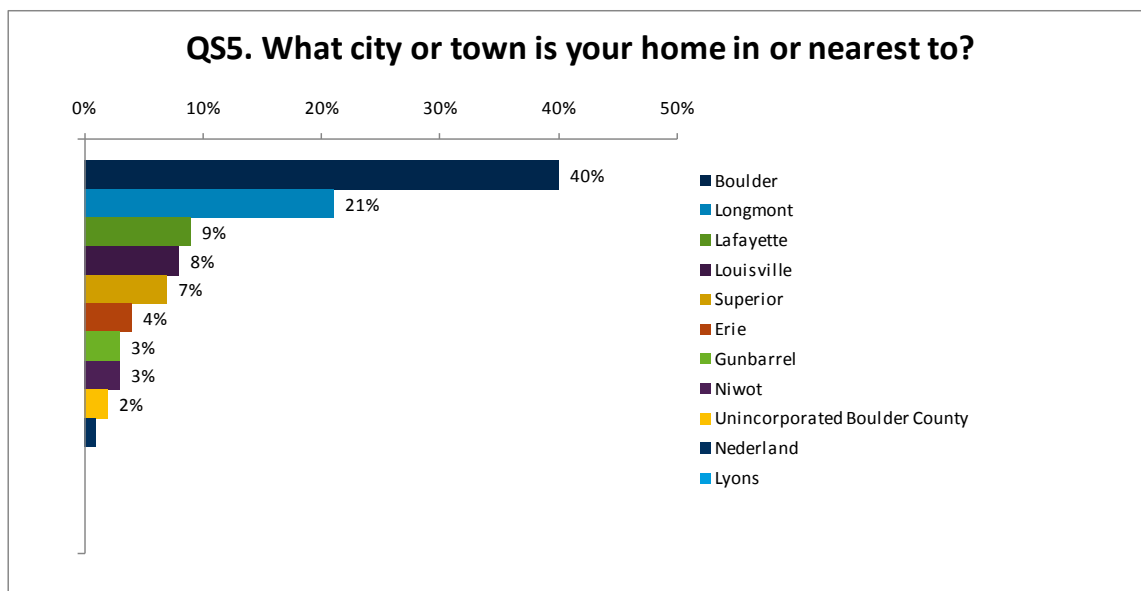
Yet, they rated the strongest disagreement (14 percent) with the statement “*I am doing all I possibly can to save energy in my home,*” indicating some room for energy saving actions or improvements. Half of respondents (51 percent) ‘agreed’ or ‘strongly agreed’ that they are doing all they possibly can to save energy.



Respondent Profile

In general, respondents most frequently indicated they live in or near the city of Boulder; they own and live in single family homes; they are female, aged 40 to 59 with no children at home; and they have annual household incomes of \$100,000 or greater.

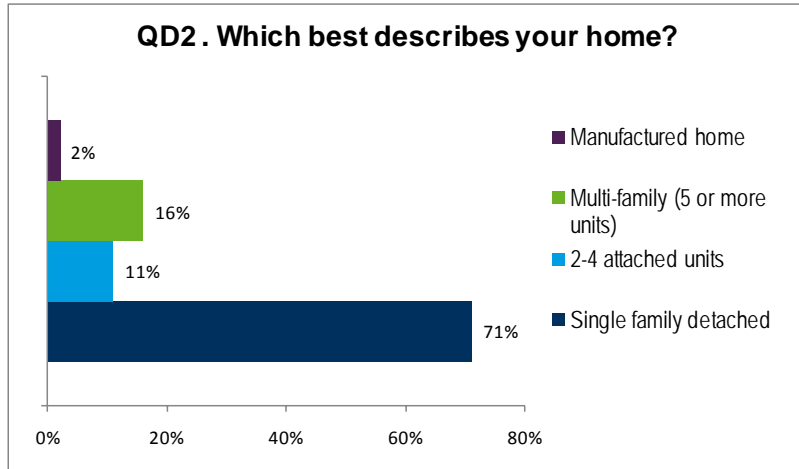
Just under half (40 percent) of respondents live in or near the city of Boulder. Longmont residents accounted for 21 percent of respondents.



Three-quarters (75 percent) of respondents own their homes, while one-quarter were renters. Renters were significantly more likely to be younger (21-29), to live in multifamily and attached homes in the city of Boulder, have lower incomes, and not have children living at home. They were also less familiar with the energy programs/services tested, were less likely to have had a conversation about home energy use, were less aware of utility and government energy saving rebates/services, and were less likely to plan to invest in energy saving measures. Yet, renters

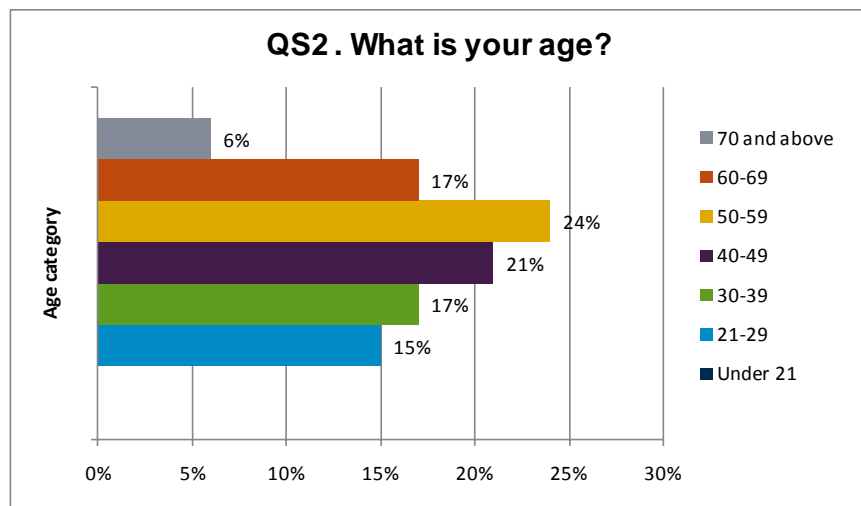
indicated a stronger willingness than homeowners to change daily habits to save energy (53 percent vs. 43 percent being ‘extremely willing’).

Most respondents (71 percent) live in single family detached homes. Just over one-quarter (27 percent) indicated they live in multifamily or single family attached homes.

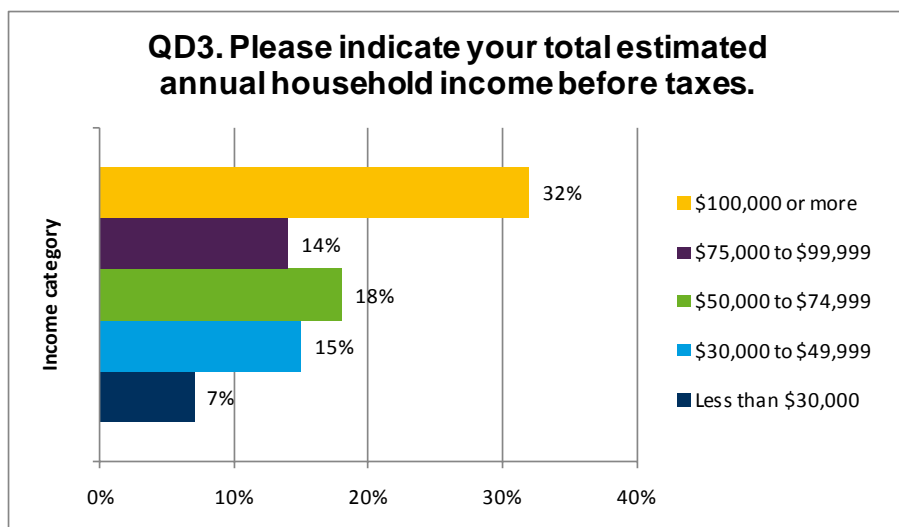


Two-thirds of respondents were female. Though a majority of respondents do not have children living at home, over one-quarter (29 percent) indicated they do have children living at home.

Respondents were fairly normally distributed by age, with the highest proportions (45 percent) in the 40 to 59 age category. Respondents under age 21 were screened out of the survey.



Consistent with Boulder City/County demographics, respondents tended to have higher incomes, with nearly one-third (32 percent) earning over \$100,000 in annual household income.



Conclusions and Recommendations

Awareness Baseline

Although the objective of the survey was to establish baseline levels of awareness across a number of energy saving programs/services, awareness for EnergySmart in particular may be somewhat inflated because the survey was fielded just days after the program launched.

- *Consider fielding the subsequent survey immediately following another promotion or press release to more closely approximate the timing and conditions for this baseline survey.*

Familiarity with the energy program brands tested tends to generalize. The same people who are aware of EnergySmart are also familiar with most of the other energy saving programs and resources.

- *In order to increase awareness/familiarity with EnergySmart, marketing efforts may need to tap less conventional methods or targets.*

Brand Confusion

While EnergySmart is enjoying higher levels of familiarity than many of the other brands tested, it also suffers from some degree of brand confusion or mistaken identity.

- *Consider co-branding aspects of EnergySmart with Xcel Energy programs to increase awareness and differentiate additional opportunities not available through the utility programs.*
- *Consider messaging that more effectively connects EnergySmart to Boulder County/City specifically.*

Segmentation

Respondents that tended to be more familiar with energy saving brands, were more engaged, and were more likely to invest in energy saving measures had a predictable demographic profile.

- *Target EnergySmart to the 'usual suspects' (middle age, upper income couples without children at home) for energy investments, but target behavior change to younger renters.*
- *Marketing media channels should match cohort targets. Traditional media, such as newspaper and press releases, are appropriate for the prime target market, while online electronic media promoting behavior change may be more effective for younger targets and renters.*

Appendix B. EnergySmart Marketing Calendars

Promotional Frequency and Message Emphasis

The County does not have a large budget for marketing EnergySmart services, and would like to maximize the effectiveness and impact of its media budget and staff time. We created the marketing calendar (found at the end of Appendix B) to maximize these resources. To this end, we recommended periods of high and low frequency in paid media and outreach activities for both the residential and commercial services, as well as periods during which the County should use specific seasonal marketing messages.

On the residential side, high and low activity periods correspond to increased or decreased demand for heating and cooling services, based on the best available market data. On the commercial side, these periods correspond to common budgeting and planning periods and at times when businesses experience low sales and are able to focus on energy-efficiency services. The County should increase marketing and outreach activities during times when potential customers may be most receptive to engaging EnergySmart services, to capitalize on these market trends. During periods of lower demand, the County should conserve its resources and engage in its own planning activities, manage customer backlogs, assess and adjust program needs, and prepare for the next period of high promotional activity.

Although we have made specific recommendations for high and low promotions, the County should also be responsive to the capacity of its service contractors. Paid media and outreach activities can be increased at any point to help fill the contractor's pipeline or be decreased to manage customer backlog.

The frequency of certain outreach tactics (e.g., presentations, group newsletters, events) will be dictated by staff availability and the opportunities they can create with target groups. Staff should sustain efforts to create these opportunities throughout the year (as indicated by a consistent bar in the calendar), and increase these efforts during the high activity periods.

Residential Marketing Calendar

Residential Promotional Activity Periods

High activity periods occur at the beginning and during heating and cooling seasons; these are the times of year when heating or cooling demand is at its highest and residential heating, cooling, and insulation contractors are most active. Paid media, outreach activities, and, when applicable, social mobilization tactics should increase during these seasons when customers are more focused on comfort issues and energy costs. The County can capitalize on this heightened activity by using the appropriate seasonal messaging.

There are three periods of low activity for residential customers. These occur when heating or cooling use is low or when customer interest in taking action on heating or cooling measures is low.

- The low activity period in the spring occurs towards the end of heating season, as weather becomes increasingly mild and customers may not be thinking about heating. Messages

about preparing for the cooling season start to increase toward the end of this low period leading up to the high summer cooling months.

- The second low activity period occurs in August as the cooling season ends and customers are not yet thinking about heating. This is also a common time for summer vacations, when homeowners may be less likely to consider home improvements.
- The third period of low activity occurs during the winter holidays, starting with the week of Thanksgiving and lasting through the first week of January. During this period, customers will be less receptive to EnergySmart messages for several reasons: they are distracted by an abundance of other messages; their lives are busier and they may travel; and most discretionary spending will be directed to holiday shopping.

Residential Messaging Emphasis

The seasonal periods identified in the calendar dictate the message emphasis for marketing activities. During low activity periods, other messages should be highlighted, or the County may wish to limit marketing to conserve scarce resources.

Below are brief descriptions of the message periods and corresponding message emphasis. All of the messages below should be integrated with the lead message in the Message Hierarchy—*“finding and reducing energy waste”*—provided in the [Creative Message Platform](#) in the Residential section of this Plan.

- The “heating/comfort” period is when customers are most receptive to messages about improving their heating system or increasing comfort (decreasing discomfort) through insulation, air sealing, and furnace replacement.
- The “cooling” period is when customers are receptive to messages about reducing high energy bills for cooling and decreasing discomfort.
- The “EnergySmart benefits and rebates” period is when customers may not be as focused on heating or cooling-related expenses. During these periods, promotional messages should focus on the comprehensive nature of EnergySmart services and available rebates.

Tactics

Each of the marketing tactics listed in the EnergySmart marketing calendar are outlined below. See the calendar key for explanations of the calendar graphics. For more detail on all of these tactics, please see their respective sections in this Plan.

Conventional and Social Marketing Tactics

Newspaper and radio. Print ads and radio spot frequency should be increased during the heating and cooling seasons, tapering off at the beginning and end of these periods, and decreasing during low activity periods.

Press releases. Cadmus recommends the County issue press releases at the beginning of seasonal activity periods. Press releases can highlight service milestones (e.g., *“Three-thousand homes have received Assessments”*) or other service-related news (e.g., *“County launches neighborhood energy-efficiency contest”*).

County direct mail. Direct mail postcards or letters should be sent to targeted homeowners at the beginning of the seasonal periods.

Social networks/community groups/Longmont and Longmont Power and Communications (LPC). Throughout the year, EnergySmart outreach staff should sustain efforts to create outreach opportunities (such as newsletter placement) with target groups. Efforts can be reduced over the winter holidays.

Presentations. Throughout the year, EnergySmart outreach staff should sustain efforts to create presentation opportunities with target groups. Efforts can be reduced over the winter holidays.

In-person communications and events. [Appendix J](#) shows a list of Boulder County public events occurring throughout the year.

Social media (includes Longmont/LPC accounts). Throughout the year, EnergySmart outreach staff should maintain social media activities, and increase these efforts during seasonal periods. Efforts can be reduced during the winter holidays.

Partner Communications

Xcel Energy “Fletter.” Xcel Energy has committed to cross-promoting EnergySmart residential services with its residential rebates: in May for the cooling season and in October for the heating season. This commitment is currently for 2011 only.

Governor’s Energy Office (GEO) e-mails. The GEO will send a monthly e-mail to all Boulder County residents who have reserved or received a GEO rebate. These e-mails will include a short description of EnergySmart services and a Website link. The EnergySmart message will not change between months.

Letters from municipal water utilities and LPC. Cadmus recommends these utilities send direct mail letters (or, if the utility prefers, bill inserts) to their customers at the beginning of the seasonal periods.

Longmont and LPC channels. City of Longmont channels include Longmont Life and Longmont E-News; LPC channels include City Line and Power Outlet. Longmont and LPC have offered to promote EnergySmart through these channels. Outreach staff should increase the use of these channels during seasonal periods. See [Appendix E](#) for a table of LPC promotional channels and their frequencies.

Social Mobilization Tactics

For details on planning and execution tasks, including timelines for each of the social mobilization tactics below, see [Appendix K](#).

Barn-raising. Barn-raising should occur during May or September when weather is mild and customer interest in heating and cooling services increases.

Energy savings contest. Cadmus recommends starting a contest in mid to late January, leveraging residential customer’s interest in heating and comfort improvements. The contest should end in the early or late spring.

Video contests. Video contests can be started a few weeks before the end of the energy savings contest to capitalize on the actions of homeowners who participated. To keep the EnergySmart services in the public eye, the video contest should end—and contest winners should be announced—several weeks after the energy savings contest is finished.

IgNite Boulder. If County staff are able to choose the timing of a sustainability- or energy-focused IgNite evening, Cadmus recommends it occur at the beginning of the heating season.

Middle and high school sports games. In local schools, volleyball season runs from early September through early December. Boy's and girl's basketball season runs from early January through the end of February.

Neighborhood action kits. Outreach staff should sustain efforts to promote kits throughout the year, with increased efforts during the heating season. We anticipated low interest from homeowners in August and over the winter holidays.

Commercial Marketing Calendar

Commercial Promotional Activity Periods

The periods when business customers tend to be receptive to messages about energy-efficiency investments (high activity periods) varies more over the year than for residential customers because of variability in business types, concerns, and decision-making processes. Businesses, more than residential customers, typically budget larger expenses over a one to five-year planning horizon. Consequently, they are more likely to consider investments during annual planning and budgeting. Cadmus recommends increasing paid media and outreach activities to coincide with these times, before the end of the most common commercial fiscal year calendars when customers are thinking about budgeting for future investments. Although each business determines its own fiscal year, common end dates are May 31, June 30, and December 31. However, also note that the majority of retail/hospitality businesses experience their highest sales activity during December and are not likely to engage EnergySmart services during this time.

Another time that businesses may be more receptive to these messages is during low sales periods, when they are able to focus on business improvements. For many business sectors this occurs just after the New Year. For targeted marketing, Cadmus recommends focusing on sectors during their low sales periods, especially when these overlap with common planning and budgeting periods. Table B1 includes the percent of sales each month by key business sectors.

Table B1. Percent of Sales Each Month by Business Type

| Business Sector | January - February | March - May | June - August | September - October | November - December |
|---|------------------------------------|-------------|---------------|---------------------|---------------------|
| Appliances, TV, Computer, Other Electronics | | | | Low | High |
| Automobile Dealers | | High | | | Low |
| Automotive Parts, Accessories, and Tires | Low | | High | High | |
| Beer, Wine, and Liquor | Low | | | | High |
| Books | High | Low | High | Low | High |
| Building Materials and Supplies | Low | High | High | | Low |
| Clothing, Shoes, and Jewelry | Low | | | | High |
| Department Stores: Conventional/Chains | Low | | | Low | High |
| Department Stores: Discount | Low | | | | High |
| Gas Stations | | | High | | Low |
| Groceries | No significant high or low periods | | | | |
| Home Furnishings | Low | | | | High |
| Pharmacies and Drug Stores | No significant high or low periods | | | | |
| Restaurants and Bars | Low | | High | | |
| Sporting Goods | Low | | High | Low | High |
| Warehouse Clubs and Superstores | Low | | | | High |

Source: *Monthly Retail and Food Service Sales*, 2008 sales: <http://www.census.gov/retail/mrts/www/data/excel/mrtssales92-09.xls>

Many sectors experience very high sales during the holiday season, starting in mid-November and lasting through New Year's Day. Although this is also the end of the fiscal year for many businesses, business owners and decision-makers are distracted and not receptive to messages about energy efficiency. The County should target business during September/October with messages about reducing operating expenses by putting energy-efficiency improvements in their budgets for the upcoming year. Marketing should be scaled back beginning in mid-November.

Commercial Messaging Emphasis

Below are brief descriptions of the message content that the County should emphasize during corresponding marketing activity periods. For more detail on messaging content and structure, see the [Creative Message Platform](#) in the Commercial section of this Plan.

- The “planning/budgeting” period is when customers are most receptive to messages that involve planning for future investments. Promotions should emphasize the lead message in the message hierarchy—*“reduce operating expenses and improve your bottom line profits”*—and consider adding a secondary message such as *“act now to incorporate limited time rebates into your annual budget planning.”*
- The “EnergySmart benefits and rebates” period is when businesses are less likely to be in a common budgeting stage. During these periods, promotional messages should focus on limited-time rebates and comprehensive advisor services.

Conventional and Social Marketing Tactics

Newspaper and radio. The County should increase the placement of print ads in the Boulder County Business Report (BCBR), published bi-monthly, during common budget and planning periods. Ads should also be placed in specific issues in which the content complements

commercial energy-efficiency improvements. The BCBR issue dates and editorial content are provided below:

2011 Boulder County Business Report editorial calendar

March 18: Energy and Utilities

April 1: The Green Economy

May 27: Real Estate and Development; Longmont Business

June 24: Construction and Architecture; Downtown Boulder

Sept. 2: Construction and Architecture; Budget Planning

Oct. 14: Energy and Utilities

Oct. 28: The Green Economy

Dec. 9: Construction and Architecture; Longmont Business; Investment Strategies

Press releases. Cadmus recommends the County issue press releases at the beginning of common planning and budgeting periods. Commercially focused press releases can highlight service milestones (e.g., “*Five-hundred businesses have received Assessments*”) or other service-related news (e.g., “*There is \$100,000 in commercial rebates still available*”).

County direct mail. Direct mail postcards or letters should be sent to targeted businesses at the beginning of common planning and budgeting periods. If the County targets specific segments only, direct mail can be sent during those sectors’ slow sales months, as indicated in Table B1.

Presentations. Throughout the year, EnergySmart outreach staff should sustain efforts to create presentation opportunities with target groups. Efforts can be reduced over the winter holidays.

In-person communication and events. See [Appendix J](#) for a list of Boulder County public events occurring throughout the year.

Partner Communications

Xcel Energy “Fletter.” Xcel Energy has committed to cross-promoting EnergySmart commercial services with its commercial rebates in May and October. This commitment is currently for 2011 only.

Letters from LPC. Cadmus recommends LPC send direct mail letters to business customers at the beginning of common budget and planning periods, and when new rebates are available.

Longmont and LPC channels. The City of Longmont has offered to promote EnergySmart through the following channels: Longmont Life and Longmont E-News. LPC will promote EnergySmart through: City Line and Power Outlet. Outreach staff should increase the use of these channels during seasonal periods. See [Appendix E](#) for a table of LPC promotional channels and their frequencies.

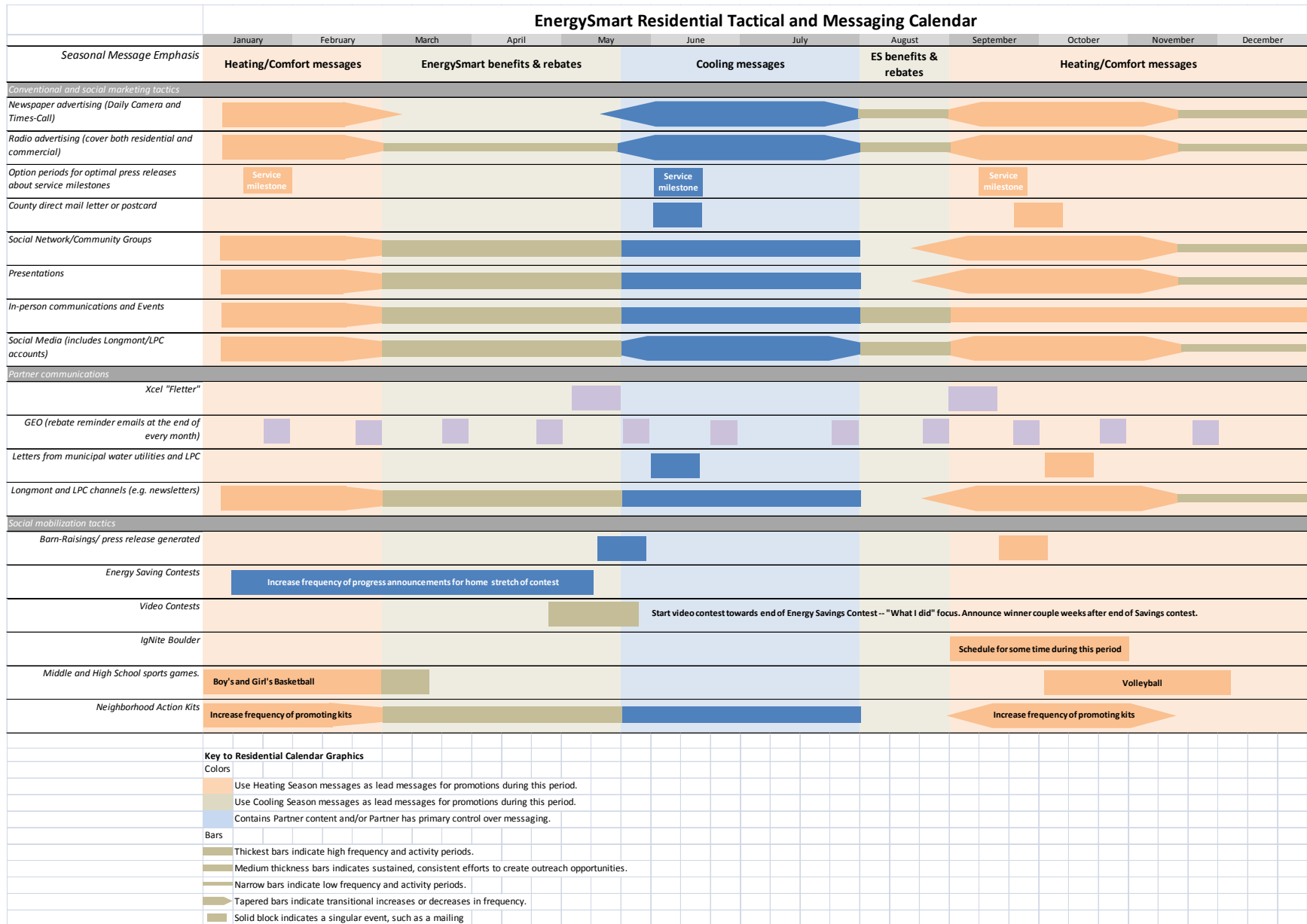
Trade ally network activities. Cadmus recommends the County initiate trade ally recruitment in the spring and conduct training in August. If the County decides to create an electronic newsletter for trade allies, these should be issued at the end of every quarter. For details on recruiting and training trade allies, see the [Trade Allies and Contractors](#) section of this Plan.

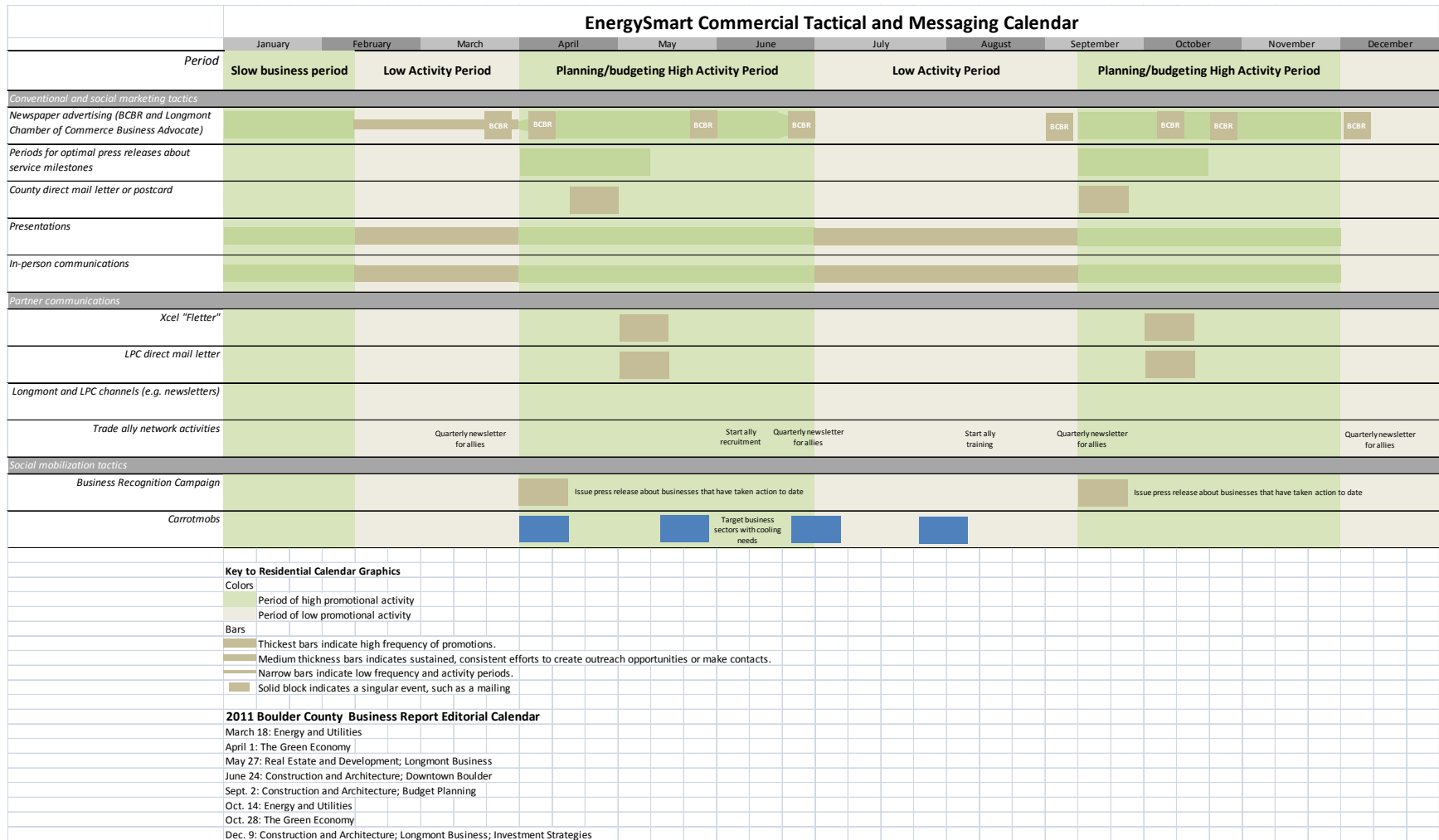
Social Mobilization Tactics

For details on planning and execution tasks, including timelines for each of the social mobilization tactics below, see [Appendix K](#).

Business recognition campaign. Cadmus recommends press releases or newspaper ads recognizing Boulder County businesses that have made energy-efficiency improvements through the EnergySmart service. These can coincide with the beginning of the common planning and budgeting periods.

Carrotmobs. Carrotmobs will have greater participation (from business' paying customers) during warmer months when customers won't be inconvenienced by waiting outside in a line. The County can target business sectors with cooling needs, such as retail and restaurants.





Appendix C. Message Segments Describing EnergySmart Services and Benefits

EnergySmart staff will communicate with individuals and groups of potential customers through a variety of written and online tools, such as newsletters, articles, blogs, and e-mails. The space available in these channels will vary by group, season, and channel. In order to maintain message consistency about the EnergySmart benefits and features, we have provided copy segments of various lengths that EnergySmart staff can use or supply to groups for media use. The copy segments below are suggestions for content and are focused at predetermined lengths.

As Cadmus (or outreach staff) cannot anticipate all the opportunities and circumstances in which these copy segments will be used, we have included several options to serve as the foundation for what County staff can provide for various applications. County outreach staff can modify these segments based on the target group (using [targeted messages](#)), [seasonal messaging emphasis](#), [emphasis on incentives](#), or other influencing factors.

Modifications to Copy Segments

Headlines. We have included headlines for each copy segment, although space may not always be available for headlines to accompany a copy segment. County outreach staff should create or modify the headlines as necessary to match copy modifications.

Targeted messages. When supplying a longer copy segment to particular group, EnergySmart staff should append one or more of the values-based messages outlined in the [Residential Targeted Messages](#) and [Commercial Targeted Messages](#) sections.

For example, if staff needs a maximum 100-word copy segment for an online newsletter to PTA members, the segment below could be used.

Did you know that most houses in Boulder County have enough cracks to equal a hole in the wall the size of a box fan? That's waste you don't have to put up with anymore. Boulder County's new **EnergySmart** service makes it easier than ever to *cut energy waste* and *improve the comfort of your home*—with expert help for every step. It's the best energy-efficiency service available, at the lowest cost. To get started, call 303-544-1000 or go to [EnergySmartYES.com](#) to learn more.

Normative messages. For general audiences, a primary normative message will highlight the number of homes or customers that received the service or followed through on recommendations (similarly, aggregated rebates used, dollars saved, or other impacts can be reported). As these numbers will grow over time, normative messages used in these copy segments should be updated regularly.

Testimonials. Space permitting, County staff may want to include a brief testimonial or portion of a testimonial. If the copy segment is being used by a group that serves a particular town or part of Boulder County, the testimonial should come from a customer in that area, if available.

Lists. If space allows, provide the copy segments with bulleted lists instead of having lists within sentences (the latter is provided below).

Service cross-reference. Space constraints may limit each copy segment exclusively to the residential or commercial sector. If space permits, however, additional copy segments can be included about the other service (i.e., “*EnergySmart services are also available for business/residential*”).

Contact information. All copy segments should always include the EnergySmart customer telephone number and/or Website link. If space constraints limit word count, provide the Website URL only, as it includes call-in information.

Residential EnergySmart Copy Segments

Word Count: 25-50

Residential Option 1 (49 words without headline)

Headline: EnergySmart: the easy and affordable way to stop energy waste

Boulder County’s new EnergySmart service provides Home Energy Assessments and personal Energy Advisors to identify cost-effective ways to save money and increase comfort. Advisors provide expert assistance with contractor bid evaluation, rebates, and financing options. Act now for an additional \$250 rebate. Cost: \$120. Call 303-544-1000 or visit www.EnergySmartYes.com.

Residential Option 2 (41 words without headline)

Headline: EnergySmart: the easy and affordable way to stop energy waste

Do you want to cut energy waste and improve your home’s comfort, but think it’s too expensive and time-consuming? Boulder County’s EnergySmart makes it easy and affordable. Act now for an additional \$250 rebate. Cost: \$120. Call 303-544-1000 or visit www.EnergySmartYes.com.

Residential Option 3 (46 words without headline)

Headline: EnergySmart: the easy and affordable way to stop energy waste

Boulder County’s EnergySmart makes it easy and affordable to cut energy waste and improve comfort. A personal Energy Advisor will find energy saving opportunities, evaluate contractor bids, and secure rebates for you. Act now for an additional \$250 rebate. Cost: \$120. Call 303-544-1000 or visit www.EnergySmartYes.com.

Word Count: 50-100

Residential Option 1 (97 words without headline)

Message Emphasis: EnergySmart is the solution to identifying and stopping energy waste.

Headline: EnergySmart: the easy and affordable way to stop energy waste

Did you know that all the gaps and leaks in an average home add up to a hole the size of a basketball? Boulder County’s EnergySmart service makes it easy and affordable to cut energy waste and improve your home’s comfort. You’ll get a knowledgeable Energy Advisor who will find your best energy-saving opportunities, evaluate contractor bids,

secure all rebates, and even complete rebate paperwork for you. EnergySmart customers are also eligible for low-interest financing. Over 950 Boulder County homes have enrolled in the EnergySmart service since October 2011. EnergySmart, Your Efficiency Solutions. Call 303-544-1000 or visit www.EnergySmartYes.com.

Residential Option 2 (82 words without headline)

Message Emphasis: EnergySmart is the easy and affordable solution to identifying and stopping energy waste.

Headline: EnergySmart: the easy and affordable way to stop energy waste

Boulder County's EnergySmart service makes it easy and affordable to cut energy waste and improve your home's comfort. You'll get a knowledgeable Energy Advisor who will find your best energy-saving opportunities, evaluate contractor bids, and secure rebates that can add up to hundreds of dollars. They'll even complete rebate paperwork for you. EnergySmart customers are eligible for low-interest financing. Over 950 Boulder County homes have enrolled in the EnergySmart service since October 2011. EnergySmart, Your Efficiency Solutions. Call 303-544-1000 or visit www.EnergySmartYes.com.

Residential Option 3 (85 words without headline)

Message Emphasis: EnergySmart reduces the cost and takes the hassle out of energy efficiency.

Headline: EnergySmart: the easy and affordable way to stop energy waste

Do you want to cut energy waste and improve your home's comfort, but think it's too expensive and time-consuming? Boulder County's EnergySmart makes it easy and affordable. You'll get a knowledgeable Energy Advisor who will find your best energy-saving opportunities, evaluate contractor bids, secure all rebates, and even complete rebate paperwork for you. EnergySmart customers are also eligible for low-interest financing. Over 950 Boulder County homes have been enrolled in the EnergySmart service since October 2011. EnergySmart, Your Efficiency Solutions. Call 303-544-1000 or visit www.EnergySmartYes.com.

Residential Option 4 (88 words without headline)

Message Emphasis: EnergySmart provides you with the confidence that you're making the right decision.

Headline: Want a more comfortable home: Start with EnergySmart

Do you want to cut energy waste and improve your home's comfort but don't know where to start? With Boulder County's EnergySmart, you'll get a knowledgeable Energy Advisor who will work to get you affordable comfort and savings. They'll find your best energy-saving opportunities, evaluate contractor bids, secure all rebates, and even complete rebate paperwork for you. EnergySmart customers are also eligible for low-interest financing. Over 950 Boulder County homes have enrolled in the EnergySmart service since October 2011. EnergySmart, Your Efficiency Solutions. Call 303-544-1000 or visit www.EnergySmartYes.com.

Word Count: Over 100

The sample copy segment below is over 125 words and includes several sub-segments (in the paragraphs below). County outreach staff can add and remove these segments or parts of these segments as needed to meet space constraints.

Did you know that homes lose energy through hidden leaks you can't see—which causes higher energy bills and less comfort. Every homeowner wants to save money and hates to waste energy. But the hassle of figuring out the smartest efficiency choices, wading through all the potential rebates and finance options, and even choosing a good contractor can be truly daunting. Boulder County residents now have some help: it's called EnergySmart.

A \$12 million award grant from the American Recovery and Reinvestment Act has funded specific, time-limited services, making it easier and more affordable than ever before for homeowners and businesses to make energy-efficiency investments. This unique suite of services is currently only available in a few U.S. locations.

Act now to receive up to \$250 in EnergySmart rebates in addition to all other utility and states rebates you may be eligible for.

Join more than 950 Boulder County homes that have enrolled in the EnergySmart service since October 2011.

[Sample testimonial] A satisfied customer in Boulder, Kathy Denault, says of her EnergySmart experience, “*I will definitely refer my friends to EnergySmart. I can't say enough about how helpful EnergySmart services were. I probably could have done this all on my own, but it would have taken a lot longer and might not have worked out as well!*”

How does the service work? The process starts with a visit from your Energy Advisor, who will be your ongoing energy-efficiency personal assistant. During this visit, the Advisor and an Energy Specialist will provide you with a Home Energy Assessment, which will identify the best opportunities to cut energy waste and increase comfort. After the Assessment, your Advisor helps you prioritize savings and get bids from a list of pre-qualified contractors. Your Advisor will also make sure you get all the state and utility rebates you're eligible for. They even complete the rebate paperwork for you!

An Energy Assessment costs only \$120, and you get personal attention from a trained Energy Advisor; unbiased energy-saving recommendations; pre-qualified contractors and help evaluating bids; knowledgeable rebate and financing assistance; and free energy-saving items like light bulbs, showerheads, and water heater pipe insulation.

To get started, call 303-544-1000 or go to EnergySmartYes.com to learn more.

Available to all Boulder County homes and businesses.

Commercial EnergySmart Copy Segments

Word Count: 25-50

Commercial Option 1 (44 words without headline)

Headline: Stop Spending Your Hard-Earned Money on Wasted Energy

Are you interested in improving your bottom line with personalized service and limited-time energy-efficiency rebates? Available to all Boulder County businesses, the new EnergySmart services take the guesswork out of energy-efficiency decisions. To talk to your expert energy team, call 877-505-6722 or visit EnergySmartYES.com.

Commercial Option 2 (50 words without headline)

Headline: Is Energy Waste Dipping into Your Cash Drawer?

Boulder County's new EnergySmart service is the easiest and most affordable way to identify and reduce energy waste that costs your bottom line. An expert Energy Advisor will help you choose the most cost-effective efficiency measures, select contractors, coordinate bids, and obtain all available rebates. Call 877-505-6722 or visit EnergySmartYES.com.

Commercial Option 3 (44 words without headline)

Headline: Is Energy Waste Dipping into Your Cash Drawer?

Join hundreds of Colorado businesses already improving their bottom lines with energy-efficiency improvements. Act now to receive an expert energy team and limited-time EnergySmart rebates, in addition to the other utility and state rebates you may be eligible for. Call 877-505-6722 or visit EnergySmartYES.com.

Commercial Option 4 (37 words without headline)

Headline: Is Energy Waste Dipping into Your Cash Drawer?

Join more than 300 Boulder County businesses that are already benefiting from limited-time rebates and experienced Energy Advisors available only to EnergySmart customers. Energy efficiency has never been easier or more affordable. Call 877-505-6722 or visit EnergySmartYES.com.

Word Count: 50-100

Commercial Option 1 (89 words without headline)

Headline: Is Energy Waste Dipping into Your Cash Drawer?

Boulder County's new EnergySmart service is the easiest and most affordable way to identify and reduce energy waste that costs your bottom line. How? With personal, step-by-step assistance from an expert Energy Advisor. They'll help you choose the most cost-effective efficiency measures, select the right contractors, coordinate bids, and get all available rebates. Act now to receive limited-time EnergySmart rebates, in addition to the other utility and state rebates you may be eligible for. Funds are limited and provided on a first-come, first-served basis. Call 877-505-6722 or visit EnergySmartYES.com.

Commercial Option 2 (80 words without headline)

Headline: Stop Spending Your Hard-Earned Money on Wasted Energy

Join more than 300 Boulder County businesses that are already benefiting from limited-time rebates and experienced Energy Advisors available only to EnergySmart customers. Advisors will help you choose the most cost-effective efficiency measures, select the right contractors, coordinate bids, and obtain all available rebates. Act now to receive limited-time EnergySmart rebates in addition to the other utility and state rebates you may be eligible for. Funds are limited and provided on a first-come, first-served basis. Call 877-505-6722 or visit EnergySmartYES.com.

Commercial Option 3 (87 words without headline)

Headline: Stop Spending Your Hard-Earned Money on Wasted Energy

Schedule a FREE EnergySmart Assessment for your business to discover low-cost and no-cost energy savings opportunities. You'll also receive FREE installation of efficient light bulbs, LED exit signs, and water-saving devices. With the assistance of an expert team, incentives, and utility rebates, energy-efficiency upgrades have never been easier or more affordable. Act now to receive limited-time EnergySmart rebates in addition to the other utility and state rebates you may be eligible for. Funds are limited and provided on a first-come, first-served basis. Call 877-505-6722 or visit EnergySmartYES.com.

Word Count: Over 100

The sample copy segment below is over 125 words and includes several sub-segments (in the paragraphs below). County outreach staff can add and remove these segments or parts of the segments as needed to meet space constraints.

Headline: Stop Spending Your Hard-Earned Money on Wasted Energy

Are you interested in improving your bottom line with personalized service and limited-time energy-efficiency rebates? Join more than 300 Boulder County businesses that are already benefiting from limited-time rebates and experienced Energy Advisors available only to EnergySmart customers.

Act now to receive limited-time EnergySmart rebates, in addition to many other utility and state rebates you may be eligible for. Funds are limited and provided on a first-come, first-served basis.

With EnergySmart you can discover low-cost and no-cost energy savings opportunities with a FREE EnergySmart Assessment. You'll also receive FREE installation of efficient light bulbs, LED exit signs, and water-saving devices.

EnergySmart contractors can help you tune-up your existing equipment for optimized efficiency. You'll save money on heating, cooling, refrigeration, and compressed air.

Upgrade your old or inefficient equipment. With EnergySmart Advisors, incentives, and utility rebates, energy-efficiency upgrades have never been more cost-effective.

Satisfied customer, Beverly Vernon of Budget Home Center in Longmont, says of her EnergySmart experience, *“We saw a 30% decrease in energy bills—this project has been saving us between \$1,000 - \$1,200/month in energy costs! The quality of the new lights is better than we had before—it is a cleaner light. Anne from the EnergySmart service was terrific and she filed all of our rebate forms for us!”*

Your business may be eligible for 100% depreciation on capital investments installed between September 8, 2010 and December 31, 2011.

EnergySmart is funded through a \$12 million award grant from the American Recovery and Reinvestment Act. This unique suite of services is currently only available in a few U.S. locations.

Call 877-505-6722 or visit EnergySmartYES.com.

Appendix D. Social Marketing Fundamentals

Social Marketing to Drive Behavior Change for Energy Efficiency and Conservation

Social marketing programs are a relatively new phenomenon in the energy industry. Over the past three years, many new programs have started at utilities and other organizations, and the learning curve has been steep. Dozens of programs in North America that utilize the fundamentals of social marketing are in the pilot or implementation stage, and many other efficiency programs are utilizing some aspect that was derived out of behavior change concepts and applications.

Cadmus infused the concepts of social marketing throughout this Marketing Plan, using social networking, social norms, community-based approaches, and pledges as tools to enhance participation and word-of-mouth advertising of EnergySmart.

Actions for EnergySmart: EnergySmart staff should have a working knowledge of social marketing and behavior change science in order to incorporate appropriate methods and messages during everyday encounters with customers, contractors, and partners. In addition, these types of methods should be incorporated into outreach efforts and program design elements. Specific suggestions for residential and business applications are in the body of the Marketing Plan.

What is Social Marketing and How Does it Relate to Energy Behavior Change?

The term “social marketing” was popularized by Philip Kotler, a long-time professor at the Kellogg School of Management and an overall marketing guru. Kotler describes social marketing as “*using the key elements of commercial marketing, but with a focus on socially desirable goals.*” Common examples of popular campaigns that are at least partially focused on social benefits include:

- Smokey the Bear: Prevention of forest fires
- Crying Indian: Anti-littering
- Click it or Ticket: Buckle up your seatbelt
- “Truth” campaign: Get kids to stop smoking

In a broader sense, the energy industry is using the notion of behavior change to promote smarter energy use. Nancy Lee, a co-author of several books and papers with Philip Kotler, sums up the key factors for success in behavior change programs. We have included features of the EnergySmart service that exemplify these success factors in the following table.¹³

¹³ Source: Adapted from Nancy Lee, MBA, Founder and President, Social Marketing. See an example online: http://www.epa.gov/owow/NPS/outreach2009/pdf/051209_0930_Lee_handout.pdf.

Table D1. Social Marketing Success Factors

| Social Marketing Success Factors | EnergySmart Element |
|---|---|
| Target markets that are most ready for action or conversion | Homeowners, environmental groups, or Prizm segments are examples |
| Promote single, simple doable behaviors | Call to get an EnergySmart Advisor visit |
| Design approaches to overcome audience barriers to behavior changes | Hand-holding element of the Advisor, easy microloans, and contractor selection assistance |
| Bring benefits closer to the present | Receive limited time rebates, gain comfort immediately |
| Include tangible objects and services that support behavior change | Rebates, recognition, expert attention from Advisor |
| Provide incentives | Rebates, microloans, Energy Advisor |
| Make messages concrete, clear, and fun | Focus on waste, how you can fix it now |
| Use popular, entertaining media focused on your target audience | Video commercial, social media |
| Be customer-centric | The inherent EnergySmart design is very focused on customer barriers |

Additionally, it is useful to also refer to Doug McKenzie-Mohr's approach that he presents in his book *Fostering Sustainable Behavior: Community Based Social Marketing (CBSM)*. This approach emphasizes that communities are most likely to have influence on personal (and business) behavior. CBSM includes the following activities, often seen in today's energy efficiency programs:

- Gain a *commitment* from an individual, group, or business to reach a goal or change a behavior.
- Use *prompts* to help remind people of the behaviors that are desirable.
- Use the power of *social norms* to help influence change.
- Create effective *messages* that don't preach but bring knowledge of benefits.
- Provide positive *incentives* and/or penalties for the wrong behavior.
- Remove external *barriers*.
- Create methods to *move actions* to larger groups.

In addition to the key success factors above, we have found that *competitions* are a new method being used to incite change.

Social Marketing vs. Social Media and Social Mobilization

Some confusion exists between the terms *social marketing* and *social media*. Social media describes a very wide variety of electronic media in which the users provide the most of the content. Facebook, Twitter, and LinkedIn are all very popular social media tools being used today.

Social mobilization is a term used by Boulder County and City staff to describe getting the citizens and businesses of the region to adopt energy efficient actions. Social mobilization is most commonly used in conjunction with getting groups of people all moving in the same direction for a cause, often in conjunction with politics, poverty, or health. We use the broader

approach of social marketing, or behavior change, as it incorporates many tools that are designed to enhance marketing effectiveness. Social mobilization is *not* a term commonly used by utilities; they tend to talk about behavior change programs, and sometimes social marketing programs.

The Power of Social Norms

Social norms are the accepted actions among given social groups. Social groups can be any group of people, such as high schoolers, co-workers, club members, neighbors, or business colleagues. Typically, at a subconscious level, people tend to do what others in their peer groups are doing. For example, people tend to dress within norms. Even rebellious teenagers all rebel using similar clothing styles.

A recent Wall Street Journal article focusing on energy behavior change looked at social norms. The article states: “*Traditional conservation campaigns have been ‘based on the premise that if we simply provide people with information, they will make changes in their lives,’ Mr. McKenzie-Mohr says. ‘We know pretty conclusively that’s not true.’ This follows with: ‘Americans routinely tell pollsters that they would conserve energy to save the environment or to save money. Ask them if they’d conserve because their neighbors are doing it, and they scoff. They have it backward. ‘We can move people to environmentally friendly behavior,’ says Mr. Cialdini, the psychologist, ‘by simply telling them what those around them are doing.’*”¹⁴

Social marketing uses this knowledge as a powerful tool in getting people to change their behavior. Forty years ago, smoking was “in.” Movie stars, cowboys, and even doctors all smoked cigarettes, and if you didn’t smoke, you were “out.” Over time, people received messages that finally reversed the smoking trend. Similarly, seat belts were a big change for people who grew up without them. Today’s children put on seatbelts out of habit.

A company called OPower works with utilities to send residential customers monthly letters that compares their home’s energy use with other homes in their area. This approach focuses on people’s need to fit within the norm and has proven to create energy savings among the target groups in the Sacramento Municipal Utility District service territory.

Some non-energy programs illustrate social marketing tactics that can be adopted by EnergySmart.

Montana Seat Belt Campaign: Survey data in Montana showed that the citizens believed that on average, about 60 percent of Montanans wore seatbelts regularly. Actual data showed that nearly 85 percent wore seatbelts. The state, recognizing this wide gap between perceptions and reality, used the power of social norms to move the market. Instead of a message of ‘*You’ll die if you don’t wear seatbelts,*’ they went with the basic message that ‘*Most Montanans wear seatbelts!*’ And it worked.

Minnesota Tax Payment Experiment: Non-payment of taxes costs states a great deal of money, both in lost revenue and in chasing down perpetrators. Using a controlled experiment, officials sent two different letter/message combinations to test the power of a normative message:

¹⁴ *The Secret to Turning Consumers Green*, Wall Street Journal, October 18, 2010.

- Letter #1: Focused on how non-payment of taxes led to a reduction in services, such as police, medical care for the poor, and children's nutrition in schools.
- Letter #2: Focused on how only a very few outliers in Minnesota cheat on their taxes.

Letter #2 was much more effective, focusing on social norms.

Evanston High School Smoking: *'Everybody smokes'* was the common belief among students at Evanston High School in Illinois. Many smoking campaigns focus on future health problems for smokers. High schoolers don't think about being 40 or 50 years old; they want to enjoy today. They believe they can stop anytime. So the campaign instead focused on the following messages that the target audience DID care about:

- Most (88 percent) students DON'T smoke (students want to fit in).
- *'I only kiss people who's breath doesn't stink'* (students want to be attractive).
- *'Exercise and smoking don't go together'* (students want to be seen as healthy).

Another interesting smoking campaign told teenagers that by buying cigarettes, they are supporting Big Business. To rebel, they challenged the students to *'stick it to the man'* by not buying cigarettes.

Social Norms and Energy Use

The following list contains social norms and commonly perceptions that influence the way people use energy.

- If the house is fairly new, I'm sure it's energy efficient.
- As long as my house is warm, my furnace is efficient.
- I'm safer with more lights on.
- One light doesn't use much energy.
- Leaving my computer on will keep it working better.
- As long as my (furnace, AC, fridge, etc.) is working I don't need a new one.
- One person can't make a difference in global warming.
- My energy bill is not under my control, the cost all controlled by the utility.
- Leaving the windows open on a warm summer day will give me a cool breeze.
- Shutting down my air conditioner when I'm out will just make it work harder when I return.

With some simple facts from a trusted source of information, these types of norms can be changed. Note that most people DO want to save energy, so getting them to convert to more efficient habits is simpler than changing behaviors that people desire (such as smoking, drinking, or eating).

Targets for Social Marketing

While the residential and commercial customers are common targets (e.g., *downstream* targets) for social marketing tactics, it is important to use similar approaches on other important targets:

Upstream: Getting the most influential people and businesses on board is a critical step to social marketing success. By influencing the influencers, the power of norms can be expanded rapidly and effectively. People and businesses pattern after leaders. In addition, leaders of different communities will not want to be left behind. For example, if Lafayette’s major businesses and council are pledging to reach efficiency goals, Louisville will have added ‘norm’ pressure to also participate. Our Energy Savings Contest social marketing plan incorporates these elements into a city competition with upstream players, one example of this tactic.

Midstream: The networks of business alliances, clubs, contractors, and schools can also be recipients of social marketing messaging and tactics. If one school’s PTA participates, so might another school’s. Contractors don’t want to be left behind, so it’s important that they all know that other contractors are improving their business through EnergySmart participation. Our approaches to reaching these networks are included in specific elements throughout the main text of the Marketing Plan.

Conclusion

Using the tools available through social marketing can enhance the effectiveness of marketing approaches. While still in its evolutionary phases in the energy industry, early results show promise in using social norms, as well as the approaches promoted by Doug McKenzie Mohr and Nancy Lee (both cited above) to mobilize action and behavior change.

Appendix E. LPC Marketing Channels

| | Target Res | Target Com | Frequency | Description | Staff Involved | Marketing Tools | Commitment to Include ES |
|------------------------------------|------------|------------|---------------------------|--|--|---|--|
| Events attended by LPC | X | X | Throughout year | Large public events in Longmont where LPC has presence | LPC; County ES staff | Banner, table, brochures | Yes, from LPC |
| <i>Longmont Life</i> | X | X | 6x/year, bimonthly | City newsletter of local events sent to Longmont citizens | LPC; County ES staff (to provide content) | Short article; can vary by season; alternate between res and com; approx. 300 words | 3 x/yr depending on space and availability |
| <i>City Talk</i> | X | X | Weekly | in Monday's Times-Call | LPC; County ES staff (to provide content) | short article; ~50-100 words; alternate between res and com | 3-5 x/yr depending on space and availability |
| <i>City Line</i> | X | | Monthly with utility bill | Newsletter | LPC; County ES staff (to provide content) | Approx. 300 words, with flexibility | |
| <i>Longmont E-News</i> | X | X | Couple x/month | Connects to LPC Facebook, Twitter | LPC; County ES staff (to provide content) | Social media blurbs; Max. 50 words | Monthly |
| <i>Power Source</i> | | X | Monthly | LPC Commercial Online newsletter | LPC; County ES staff (to provide content) | Approx. 300 words | Monthly to every other month |
| <i>Power Outlet</i> | X | | Monthly | LPC Res Online newsletter (length?) | LPC; County ES staff (to provide content) | Approx. 300 words | Monthly to every other month |
| Longmont Twitter and Facebook feed | X | X | Weekly | Facebook feeds as promotions; link to ES Website | LPC; County ES staff (to provide content) | Twitter and Facebook language | As needed |
| LPC website | X | X | Ongoing | EnergySmart copy block and link Website | LPC; County ES staff (to provide content) | EnergySmart Website | |
| City of Longmont website | X | X | Ongoing | EnergySmart copy block and link Website | LPC; County ES staff (to provide content) | EnergySmart Website | |
| Letter from LPC | X | | | Promotional letter in envelope sent by LPC; use Prizm addresses only | LPC; County ES or Cadmus staff for content | Letter | To be determined based on available budget |
| In-store promotions | X | | Ongoing | LPC has permission from ACE and Budget Home | LPC | POP display from banner file; residential brochures | LPC inquiring with stores |

| | Target Res | Target Com | Frequency | Description | Staff Involved | Marketing Tools | Commitment to Include ES |
|---|------------|------------|-----------|--|--|--|---------------------------|
| | | | | hardware stores | | | |
| Direct outreach to groups | X | X | Ongoing | Civic, interest or activity groups | LPC; County ES or CRC staff for presentation | Presentation; short promotional alert; brochures | |
| Relationship with Longmont business organizations | | X | Ongoing | Help make connections between LDD; Chamber; Latino community and County staff doing outreach | LPC; County ES staff for presentation | | |
| Outreach to Latino Community | X | X | Ongoing | grassroots communication to Latino residential and business communities | LPC and Latino Community contacts; County ES staff for necessary content | LPC will translate res and com brochures. (possibly in print too); have contacts in Latino business community to help promote. | LPC staff make connection |

| | Target Res | Target Com | Description | Staff Involved | Marketing Tools | Commitment to Include ES |
|--|------------|------------|--|---|-----------------|--|
| <i>Longmont Times-Call</i> | X | X | Local newspaper | LPC; County ES staff (to provide content) | 1/4 page ad | 1x / month |
| <i>Longmont Ledger</i> | X | X | Local newspaper | LPC; County ES staff (to provide content) | 1/4 page ad | 2-3 ads |
| <i>Chamber of Commerce Business Advocate</i> | | X | Local Chamber paper | LPC; County ES staff (to provide content) | 1/4 page ad | Inquire with Deborah Cameron |
| Sponsorship of County Award for businesses engaged in ES | | X | Co-sponsorship of annual recognition for business efficiency "leaders" | County ES staff | | 1x/ year; Inquire with Deborah Cameron |

| Date | Event | Location | Time | Audience |
|-------------|-------------------------|-------------------------------|-------------|--|
| 3/25/11 | BC Home and Garden Show | BC Fairgrounds | 12-6pm | Homeowners/Home Improvement |
| 3/26/11 | BC Home and Garden Show | BC Fairgrounds | 10-6pm | Homeowners/Home Improvement |
| 4/16/11 | Earth Day | Front Range Community College | | College Students/Environmental Focus/ Tenants |
| 5/7/11 | Cinco De Mayo | Roosevelt Park | 12-7:00pm | City -wide/Spanish Speaking |
| 7/9/11 | Rhythm on the River | Rogers Grove | all day | City wide - Note: Contact Ron Shaw |
| 8/26/11 | Festival On Main | Downtown Main Street | 6:00-9:00pm | City-wide |
| May-October | Longmont Farmers Market | Fairgrounds | | City-wide (Note: BCGB may be considering representing EnergySmart at this event) |

Appendix F. Community Mapping Tool

The key to effective grassroots outreach and marketing is a robust social networking strategy. Natural Capitalism Solutions (NCS) is developing a list of—and collecting information on—formal and informal social networks in Boulder County. Upon its completion, the enhanced list will be formally called the “Community Mapping Tool” and is referred to as such in this appendix. These networks consist of interest groups, professional associations, and other organizations that serve as the key entry points for distributing the EnergySmart message to homeowners and businesses.

Objective of the Community Mapping Tool

As a low-cost strategy, the outreach will emphasize peer-to-peer awareness of EnergySmart and influence to take action. These efforts create a messaging pipeline to large numbers of people who will further share this information within their own personal and professional networks. Individuals and leaders within these groups can also serve as EnergySmart message ambassadors to their constituents.

To reach these individuals and groups, implementation staff will utilize the tactics provided in the [Residential](#) and [Commercial](#) Grassroots and Community Outreach section of this report. The Community Mapping Tool is essential in these outreach efforts, as it provides the following information that staff will need:

- Key spokespersons within these groups; these spokespersons will be key contacts information whom staff will schedule presentations, coordinate newsletter and social media entries, etc.
- Information related to outreach opportunities with the group, including type of group, membership size, organizational mission, use of social media, messaging channels, etc.
- Information that implementation staff need to customize messages for outreach directly to the group, including group mission, membership characteristics, etc.

Information Collected

NCS is collecting the following information on groups:

- Key motivators or messages of the group;
- Number of businesses and/or community groups in the network and an estimate of the potential number of individuals in each group;
- Network or group demographics and potential number of participants for EnergySmart services;
- Whether the group has regular member interaction and/or meetings;
- Potential for presentations or other member interaction;
- Whether the network or group typically engages its members in service projects or individual action outside of its meeting times;

- Whether the group members feel a strong personal identification with the organization, its members, or its mission;
- Best approaches to engage the members (i.e., social media, newsletters, social events, contests, fundraisers, etc.);
- Key spokespersons within these groups; and
- Any additional criteria that would help facilitate outreach planning and prioritization via group segmentation.

Social Networks in the Community Mapping Tool

NCS will prioritize their research efforts on compiling information on organizations, networks, and leaders in the following categories:

- Civic and service groups, such as the Rotary Club, Lions Club, 4H Club, etc.
- Faith groups and congregations.
- Trade unions and business groups, such as municipal Chambers of Commerce, Boulder Area Realtor Association, and the Longmont Downtown Development Association.
- Organizations focused on youth and service, such as Parent Teacher's Associations, Boy and Girl Scout troops, etc.
- Lifestyle and activity groups, such as mountain biking clubs, environmental groups, and neighborhood associations and outdoor enthusiasts.

Within the above groups, special priority will be given to those that have the following attributes:

- Regular member interaction and/or meetings.
- Strong personal identification with the organization, its members, and/or its mission.
- Potential for attending presentations or having other member interaction.
- Missions that are aligned with sustainability.

Although Cadmus has been involved in the some aspects of the content of the Community Mapping Tool, the final Tool will be developed by NCS. All inquiries about product deliverables, final content, and usability should be direct to Jeff Hohensee of NCS (jhohensee@natcapsolutions.org).

Appendix G. EnergySmart Website Functions and Maintenance

Overview

The interactive and online plan strategy is a key element of the EnergySmart success path. The table below provides a quick overview of each element's function and indicate where and when staff action is necessary. Where appropriate, we have included links to other sections of the marketing implementation document. Instructions within those plan section will provide further detail for each element.

To ensure the best outcome, we recommend Boulder County assign specific staff and a frequency schedule to each task. Most of the tasks include a learning curve, so ongoing maintenance will benefit from individual staff expertise over time. While we recommend that one person or a team "own" a particular part of the interactive maintenance, we also suggest regular overview meetings of all involved. Such discussions will highlight areas of overlap and opportunity among tactics.

The characteristics of interactive/online tactics, listed below, should act as big picture guidelines for this overview meeting. Keep these items in mind while planning to maximize the effect of each marketing effort, either online, in print, or in person.

Flexibility/Nimbleness

Make sure content is updated and integrated with all other online and all offline efforts. Because the site content is Joomla-based and Boulder County-managed, all online text should always reflect the latest data and most current information.

Be creative with sponsors around special offers and related opportunities. It takes very little hard cost to post a jpg ad or coupon on EnergySmartYES.com, and the resulting sponsor investment can enable another big promotion to drive participation and exposure.

Test-ability/Measurability

Review Appendix X, Marketing Analytics and Tracking for guidance on tracking marketing efforts. As much as possible, include all access points on all marketing channels.

For example, drive all social media engagement and print marketing to EnergySmartYES.com, which in turn encourages visitors to "follow" and "like" EnergySmart on Facebook.

Scale-ability/"Share"-ability

When something is shown to work well and drive conversions, (see testing above) it becomes relatively easy to scale an online effort either via more intensive social network engagement or through other online outlets.

For example, if particular newsletter copy seems to be successful when sent via email, find another partner email list or blog with a similar psycho-demographic and re-send!

Low cost

While sometimes human resource-intensive, the cash outlay need for most interactive/online efforts is relatively low. In conjunction with the other benefits listed above, interactive market offers efficiency and positive return on investment.

EnergySmartYES.com Site Maintenance

Table G1. EnergySmartYES.com Task Table

| Site Function | Strategic Impact | Maintenance Task | Suggested Frequency |
|------------------------------|---|---|--|
| Program-Related Copy | Provides promotional and educational content for site visitors. Supports print marketing efforts. | Ensure integration and consistency with all marketing efforts. Update copy with any program changes. | Weekly reviews. Weekly and/or as needed updates. |
| FAQ | Presents answers to common questions; can be updated to include new common questions as they arise over the course of the grant. | Update to include new "common" questions as they arise over the course of the grant. Designate one point of contact at Populus and Franklin to provide new Q/A. Identify one point of contact within EnergySmart to collect Q/A via staff meetings. | Weekly emails to Populus/Franklin with corresponding site updates as needed. |
| Media/Press Links | Increases traffic and showcases media coverage of the service over time. | Monitor any and all mention of EnergySmart in the press, via Radian 6 and with the assistance of the office of Public Information. | Bi-monthly updates. Post in reverse time order. |
| ESYES in Schools Content | Integrates the Teach for Sustainability program with EnergySmart services; lends credibility to both. | Designate one ESYES and one TFS contact to connect monthly for a review of both programs. Ensure the site content matches the school program. | Monthly or as needed. |
| Case Studies/Success Stories | Provides "proof" to potential customers that the service works. Gives examples of EnergySmart benefits. Showcases the hard work and effort of Boulder County residents. | Collect online testimonial information, confirm, edit, and upload. | Add one case study and one success story at minimum per month. |
| Smart Regs Content | Links EnergySmart services to SmartRegs regulations. Promotes EnergySmart for landlords required to take energy efficiency action. | Designate a SmartRegs representative who can provide a Smart Regs update on a monthly basis. | Monthly or as Smart Regs and EnergySmart program details shift. |

| Site Function | Strategic Impact | Maintenance Task | Suggested Frequency |
|------------------------|---|--|--|
| Video (s) | Offers a "commercial" for the program. Gives potential customers a clear vision of what they can expect. Can include other content and educational material as appropriate. Increases traffic via linkages. | Use Radian 6 to identify appropriate videos for addition to the site. | Add one video at minimum per week to the video library. |
| Testimonials | Provides word-of-mouth recommendations from real customers and "neighbors." Helps "sell" the service. | Check the online testimonial "collection" form on a weekly basis. Use this content to update the testimonial page. | Encourage advisors to promote testimonial effort from customers. (Ongoing.) Add one testimonial for both business and residential per month. |
| Widget Data | Presents both EnergySmart's financial benefit via an aggregate rebate total and an "everybody's doing it" message. | Collect rebate totals and customer count weekly. Input manually. | Weekly. |
| Contractor Information | Enables trade allies with eligibility information, application forms, and marketing support. | Assign one website staff member to be on the "contractor beat." This staff member will review contractor site content on a regular basis and also be responsible for ad hoc updates. | Monthly. |

Appendix H. Social Media Best Practices

Measurement Best Practices

Measuring social media marketing activities will be part of a larger EnergySmart marketing tracking and analytics process. Social media platform outreach requires a greater human capital than monetary investment in order to see measurable ROI. Nevertheless, for EnergySmart, social media outreach is the likely key to goal achievement. The suggestions that follow are keys to successful measurement and, in conjunction with other data, will help focus efforts on those ideas that are most productive. Many overlap with the guidance in Appendix M. Measuring Effectiveness of Marketing Tactics, so these measures should be used in combination.

Most of the suggestions listed below will come fully baked into the Radian 6 analytics tool provided by Cadmus. We include them in this document, however, to serve as a guide should the analytics tool change and/or other programs be added to the EnergySmart topic list.

- **Set Goals up Front.** Ensure measurement is connected to a specific outcome, such as EnergySmartYES.com traffic, calls to Populus or Franklin, or views of the case study videos.
- **Track Click Through.** Measure click-through from all online efforts to EnergySmartYES.com or measure downloadable content like the video commercial.
- **Use Keyword Strategies.** Optimize how prospects find EnergySmart as much as possible. Natural search engine optimization will help this process for EnergySmartYES.com.
- **Track Re-Posts.** Online users will repost EnergySmart content and outreach messages. This can drive the viral effect.
- **Followers versus Followers.** On Twitter, measure followers that are interested in the content and messages you share and potentially gain access to their follower networks.
- **Measure User Replies.** Measure the one-to-one dialogue that customers have with EnergySmart or topic-related posts. Is volume growing? Are the conversations more positive or negative?
- **Don't ever stop listening-online or off!**

Engagement and Outreach Best Practice Overview

Boulder County residents don't hold back when it comes to speaking their mind. Comments posted about Boulder Daily Camera articles represent the potential inherent in engagement with online conversation. They also show the connection possibility with online personalities activated enough to be helpful in EnergySmart efforts.

Online engagement is not dissimilar to offline engagement. We connect and build relationships with others because it is mutually beneficial and fulfilling in some way. Best practices, therefore, follow common sense social etiquette in most ways. Inserting a promotional and reputation management aspect to the equation, however, does add another element to the mix, and this section addresses the wild card component via the guidelines below.

Everyone has a preferred method of communication, and many are turning to the social Web to share their thoughts and ideas about life. Social media is just another piece of the communications puzzle, and it's become a regular part of our existence.

Just as Websites changed from being unusual to ubiquitous, we've seen the same process with social media platforms and users. The important piece to remember is integrating and finding prospects "where they are." Social media outreach and engagement is not a magic bullet. It does, however, provide a new way to communicate with customers, often in a more interactive manner than ever before.

Gone are the days when a marketing message is pushed down from one of the big three networks via a 30-second news spot. Part of the excitement around social media marketing involves the possibility inherent in one-to-one relationships. Some marketers regard social media marketing as a no-cost method of constant promotion, unaware that the conversation is one-sided.

Many of the concepts are designed to provide a road map to function as checks and balances during the creative process which accompanies any social media marketing effort. As mentioned previously, part of the reason companies have been shy of using social media is fear of losing control of their brand.

Social media consultants like to say "*You never had control of your brand!*" or "*They're already talking about your brand. Don't you want to at least hear what's being said?*" What most consultants miss in their zeal to sell services is the fun and possibility arising from a new mode of communication—one that can support a larger marketing effort and also present some unexpected bumps and surprises.

By sticking with the guidelines below, EnergySmart staff will be well-prepared to leverage any social media-related opportunity or pitfall that may arise.

Rules of Engagement

Share Quality Information

Providing valuable and interesting content is the best way to attract attention and earn trust. Cultivate an authentic dialogue with customers, prospects, and other like-minded posters. Over time, all will become more receptive to comments, messages, or promotions. Remember that you wouldn't ask someone you just met to do you a big favor. Treat EnergySmart's online relationships with the same care.

Encourage Boulder County experts and political luminaries to share information about EnergySmart on a regular basis. Sharing valuable, useful information with your community via blog post, video, presentation, or podcast is a clear sign of engagement. The value of this content, providing it is useful and offered authentically, will provide a level of brand equity to serve EnergySmart in future promotional efforts.

Be Transparent

Honesty—as well as spin—is quickly apparent in the social media environment. Be open about being a Boulder County staffer and quickly reveal the resulting vested interest. Transparency is about your identity and relationship to EnergySmart.

Be Judicious

Make sure your efforts to be transparent don't violate Boulder County's privacy, confidentiality, and legal guidelines for external commercial speech. Ask permission to publish or report on conversations that are meant to be private or internal to EnergySmart. Never comment on anything related to legal matters. Also, protect yourself and your privacy. Published content online is widely accessible and will be around for a long time.

Write What you Know

Post content that tracks with your personal experience of EnergySmart. This will be more appropriate for the EnergySmart outreach effort, and is also more likely to include an interesting, unique perspective.

Perception is Reality

In online social networks, the lines between public and private, and personal and professional, are blurred. By associating yourself with EnergySmart, you represent Boulder County and all EnergySmart grant partners. Be certain that the content is consistent with the EnergySmart mission and values. Ensure you would be proud for anyone involved with the program to read your content.

It's a Conversation!

Talk to readers and other social media users like you would talk to real people in professional situations. Bring in your own personality and say what's on your mind. Encourage comments and offer open-ended topics. Give love to other bloggers, Tweeters, or posters writing about the same topic. Share their content and they will be more likely to share yours.

Are you Adding Value?

The best way to get your content read in an online social community is to offer some value for the reader. It is news? A helpful resource? A special offer? Thought-provoking? Community-building? Consider all these options before you post or contact another person online.

Create Excitement

EnergySmart is unique: the marketing and social mobilization tactics Boulder County is implementing with EnergySmart are ground-breaking. Keep this in mind during outreach to those in the county and across the U.S. EnergySmart in full effect has been a long time coming; celebrate it and get excited!

Be a Leader

There is no need to respond to every criticism with corresponding vitriol. Frame what you write to invite differing points of view without inflaming others. Some topics—like politics, government, and taxes—all within EnergySmart realm, can be more sensitive. Be careful and considerate. Once words are out there, they are hard to recall.

If it Gives you Pause, Pause

If you're about to publish something that makes you even the slightest bit uncomfortable, don't shrug it off. Take a minute to review these guidelines and discuss it with a colleague. In this case, better safe than sorry!

Blogger-Specific Outreach

Radian 6 data will provide access to lists of bloggers who would seem to be good EnergySmart outreach prospects. Before a standard blogger press release gets sent to the list wholesale, review the guidelines below. Take a few minutes to customize a message and prepare a personal approach.

#1 Read the Blog

Review enough posts to understand the style of writing, the topics, and whether there are any reasons to not contact the blogger. If the blogger is indexed on PostRank.com, the blogger's most popular articles are available for access. Typically, these are the blogger's favorite articles and give further insight into their point of view.

#2 Prepare an Outreach Template

An outreach campaign can include 20 to 30 bloggers, if not more. For efficiency's sake, develop an e-mail template that answers who, what, when, where, and why. Remember this template needs to be customized for each blogger.

A canned pitch is obvious to a blogger, who generally wants to have exclusive content. In this case, choose quality over quantity. A blogger wants a specific angle of EnergySmart, ideally one that corresponds with their own topic choices.

#3 Let the Blogger Opt In

Include basic EnergySmart information that can be easily scanned in your first e-mail to a blogger.

Let the blogger decide they want any part of EnergySmart. Let them know who you are and why you're contacting them. Close the e-mail by asking them if they want more information or are interested in reviewing the service.

This helps build a relationship with the blogger and keeps your opening e-mail short. Once the blogger is expecting your next e-mail, they are more likely to read a longer, more in-depth message.

Be open to connecting with the blogger in person or on the phone. Because EnergySmart is a local campaign, Boulder County staff has a potential communication choice advantage, useful for connecting offline.

#4 Share Important Information

Unlike press releases, blogger outreach campaigns need to be very targeted. Don't outreach about events unless they offer some kind of value to the blogger. Offering a complimentary home or business EnergySmart Assessment is a true value and their personal review will be exclusive content.

#5 Bonus: Give a Blogger Assets

If a blogger agrees to help EnergySmart, help them out. Re-Tweet and/or repost their content that EnergySmart prospects and customers might enjoy.

Provide videos, images, press releases, or even post ideas. When you make it as easy as possible to write about EnergySmart, the outcome is more positive.

6 The Payoff

Boulder County bloggers can be very influential and are careful when endorsing a product. Their reputation is their value, and they can be wary of pitches. Stay authentic and emphasize the community benefit of EnergySmart. This appeal, rather than a naked promo pitch, is more likely to meet with success.

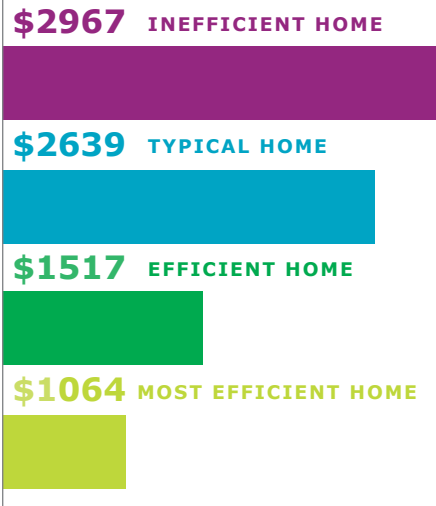
Appendix I. EnergySmart Marketing Collateral

Step 4 Start enjoying comfort & savings!

Your energy efficient home is now more comfortable and will save you money for many years to come.

SEE WHAT ENERGY EFFICIENCY CAN DO FOR YOU

The average costs for a 2000 square foot Boulder County home built in 1972.



ENERGY COSTS PER YEAR

Source: Department of Energy Home Energy Saver Calculator

Landlords and property owners

If you own rental property, EnergySmart provides expert guidance on cost-effective SmartRegs compliance and offers limited-time incentives. Visit EnergySmartYES.com for more information.



"I probably could have done this all on my own, but it would have taken a lot longer and might not have worked out as well! I will definitely refer my friends to EnergySmart."

— KATHY DENAULT, BOULDER

By acting now, you can take advantage of limited-time rebates up to \$250 and low-rate financing options only available to EnergySmart customers.

ENERGYSMART SERVICES ARE AVAILABLE TO ALL RESIDENTS OF BOULDER COUNTY

CALL

303-544-1000 for residential

EMAIL

signuphome@EnergySmartYES.com

LEARN MORE AT

www.EnergySmartYES.com

ENERGYSMART IS ALSO AVAILABLE FOR ALL BOULDER COUNTY BUSINESSES

CALL

877-505-6722



ENERGYSMART SERVICES ARE AVAILABLE FOR ALL BOULDER COUNTY RESIDENTS AND BUSINESSES

Interested in improving your home's comfort & cutting energy waste?



energysmart

Your Efficiency Solutions

With EnergySmart, there's never been a better time to say YES!



EnergySmart makes it easy & more affordable, every step of the way



Step 1

Call to schedule an EnergySmart Home Energy Assessment

When you call for a **Home Energy Assessment** you are assigned an **EnergySmart Advisor**. Your Advisor is your personal energy assistant who guides you through the steps of making your home as efficient as it can be.



Conducted by a certified Energy Specialist, your Assessment uncovers energy-savings opportunities in your home. The Assessment cost is \$120. Energy Advisor services listed in the table below are free. If you have had a home energy audit with audit report in the last 3 years, you do not need a new Assessment to receive the free Energy Advisor services.

Call 303-544-1000 to schedule your EnergySmart Home Energy Assessment now.

Step 2

Make a plan and find the resources

After the Assessment, your Advisor reviews your **EnergySmart Recommendations** with you and shows you which home improvements will cut energy waste and increase your home's comfort. Your Advisor will uncover all government and utility rebates, tax credits, and financing options to lower the cost of these improvements.



Boulder County's EnergySmart service removes the guesswork and hassle of cutting energy waste and energy costs

Step 3

Choose your home upgrades & select the right contractor

Your Advisor offers you a select list of pre-qualified contractors, helps you get bids, and makes sure the contractor knows what you want. **They even fill out your rebate and financing paperwork!**

By acting now, you can take advantage of limited-time rebates up to \$250 and low-rate financing options only available to EnergySmart customers.**



With EnergySmart Services, there's never been a better value for Boulder County Energy Efficiency

| | Other Providers | EnergySmart |
|--|-----------------|--------------|
| Home Energy Assessment & Recommendations | \$350 | \$120* |
| ENERGY ADVISOR SERVICES | | |
| Installation of Energy-Saving Lights, Showerheads, and Water Pipe Insulation | \$85 | FREE |
| Expert Help With Contractor Selection & Bid Evaluation | \$60 | FREE |
| Personalized Assistance With Rebates & Financing | \$60 | FREE |
| COMPARE THE VALUE! | \$555 | \$120 |

* EnergySmart is funded by the American Recovery and Reinvestment Act through the U.S. Department of Energy's BetterBuildings grant program, and is sponsored in partnership by Boulder County, the cities of Boulder and Longmont, and Xcel Energy.

**Funds are limited and are provided on a first-come, first-served basis. EnergySmart rebates apply to recommended measures only. This rebate is provided in addition to other government and utility rebates your Advisor will find for you.



energysMART

Your Efficiency Solutions

Q Are you interested in **improving your bottom line** with personalized service and limited-time energy-efficiency rebates?

A With **EnergySmart: Your Efficiency Solutions**, there's never been a better time to say YES! Available to all Boulder County businesses, new EnergySmart services **take the guesswork out of energy-efficiency decisions.**

CHOOSE YOUR PATH TO SAVING MONEY, ENERGY, AND TIME

START HERE...

LOOKING TO DISCOVER SAVINGS OPPORTUNITIES?

- > Schedule a **FREE** quick EnergySmart Assessment of your business' opportunities
- > Receive **FREE** installation of energy-saving lighting and water-saving devices
- > Prioritize potential upgrades with your personal EnergySmart Advisor

You're ready to save!

OR HERE...

READY TO START SAVING?

Call for your **FREE** personal EnergySmart Advisor services, which will:

- > Help identify participating installation and maintenance contractors
- > Find all cost-saving rebates
- > Assist with filling out forms

You're on your way to savings!

ACT NOW FOR ADDITIONAL SAVINGS!

Take advantage of additional EnergySmart lighting rebates. Funds are limited and provided on a first-come, first-served basis. **Your business may be eligible for 100% depreciation on capital investments** installed between September 8, 2010 and December 31, 2011.*

"We saw a 30% decrease in energy bills—this project has been saving us between \$1,000 - \$1,200/month in energy costs! The quality of the new lights is better than we had before—it is a cleaner light. Anne from the EnergySmart service was terrific and she filed all of our rebate forms for us!"

BEVERLY VERNON, OWNER
BUDGET HOME CENTER, LONGMONT

CALL 877-505-6722

EMAIL signupbiz@EnergySmartYES.com

VISIT www.EnergySmartYES.com



JOIN THOUSANDS OF COLORADO BUSINESSES ALREADY SAVING WITH IMPROVEMENTS TO:



LIGHTING

- > High Efficiency Lights
- > Lighting Controls
- > LED Exit Signs
- > High Bay Lights



HEATING & COOLING

- > High Efficiency Cooling
- > New Boilers & Furnaces
- > Improved Air Handling
- > HVAC Tune-Ups



OTHER SAVINGS

- > Refrigeration Tune Ups
- > Equipment Tune Ups
- > High Efficiency Motors
- > Energy Management

With EnergySmart Services, You Can:

DISCOVER> Schedule a **FREE EnergySmart Assessment** to learn ways you can eliminate energy waste. Your dedicated **EnergySmart Advisor** will help you develop a plan of action based on the best saving opportunities and the available rebates. You'll also receive free installation of efficient light bulbs, LED exit signs, and water saving devices.

OPTIMIZE> EnergySmart contractors can help you tune up your current equipment for optimized efficiency. You'll save money on heating, cooling, refrigeration, and even compressed air. **Your EnergySmart Advisor will identify and help you implement these projects.**

UPGRADE> There's never been a better time to upgrade your lighting and other equipment. **With EnergySmart and utility rebates, energy-efficiency upgrades have never been more cost-effective.** And since we know you're busy, your Advisor will help you identify contractors and file rebate paperwork.

START YOUR PATH TO A MORE EFFICIENT BUSINESS NOW!

CALL 877-505-6722

EMAIL signupbiz@EnergySmartYES.com

VISIT www.EnergySmartYES.com

EnergySmart services are offered to all Boulder County businesses, and are also available for Boulder County homes.

EnergySmart is funded by the Department of Energy's American Recovery and Reinvestment Act (ARRA) and is sponsored in partnership with Boulder County, the City of Boulder, the City of Longmont, and Xcel Energy.

EFFICIENT LIGHTING

Potential energy savings for a typical 2,000 square foot office space with 24 fixtures.

\$1380/YR OLDER T12 LIGHTS W/ MAGNETIC BALLASTS

\$1024/YR STANDARD T8 LIGHTS

Save 26%

\$794/YR HIGH PERFORMANCE T8 LIGHTS

Save 42%

\$398/YR ADD REFLECTORS / LENSES / DELAMP

Save

COST FOR LIGHTING PER YEAR

* Source: E Source Lighting Technology Atlas, Assume 24 fixtures, approx 2000 ft² of office space, average price of 9.19 c/kWh, 4,000 hrs/yr run time.

"We chose to take this step for both of our Colorado hotels because we wanted to reduce our impact on the environment. And the generous rebates made it that much easier. Mary Wiener, our EnergySmart Advisor, spent a great deal of time helping us identify energy savings opportunities. I just followed her lead and together we are making a difference."

**BERT LEWIS, OWNER
BOULDER QUALITY INN, BOULDER**

* The Tax Relief, Unemployment Insurance Reauthorization and Job Creation Act of 2010 provides a 100% depreciation bonus for capital investments in service after September 8, 2010 through December 31, 2011. The EnergySmart advisors are not tax professionals and cannot give tax advice, so we encourage you to talk to an attorney or qualified tax advisor about how these new federal tax law changes may help your business save energy and money in 2011 and beyond.





MONEY AND ENERGY SAVINGS MAKE LED LIGHTING UPGRADES A NO-BRAINER



"After having an energy audit done, the obvious choice as our first major upgrade was lighting. Not only did the relatively easy installation persuade us to follow through with the lighting upgrades, but also the incredible energy and money savings. The 144 locally manufactured LED bulbs will help us save almost 30% of our overall energy use. Not to mention, we'll save an estimated \$2,000/year on our energy bill! Those facts, plus the rebates offered by Xcel Energy and EnergySmart make this a no-brainer for our business."

— KATE HANSEN, STORE MANAGER

EnergySmart services are offered to all Boulder County businesses, and are also available for Boulder County homes.

RAGS CONSIGNMENTS

3128 28th Street, Boulder, CO

BUILDING USE: 1-story multi-tenant building in a strip mall on a busy four lane road

SQUARE FOOTAGE:

4,000

LIGHTING (BEFORE UPGRADE): 8' and 4', 2 lamp t-12 and 30 watt high intensity discharge (HID)

LED LIGHTING UPGRADES

| | |
|---|----------------|
| Project Cost..... | \$14,080 |
| Rebates..... | \$6,529 |
| Project Cost After Rebates | \$7,551 |
| Energy Cost Savings/Year | \$2,121 |



CALL 877-505-6722

EMAIL signupbiz@EnergySmartYES.com

VISIT www.EnergySmartYES.com



The 4-Lamp LED lighting that Rags installed has transformed the store by making the front desk area brighter and back of the store more inviting to shoppers.

>>> MAKING IT HAPPEN

Rags is a locally owned consignment store with over 19,000 consigners. The store opened in 1995, and since, sustainability has been a core business practice. Reuse as a lifestyle practice the reason Rags exists and the store incorporates green practices into its everyday business.

After receiving an energy audit, Rags decided to pursue lighting as their first major efficiency upgrade. With the help of an EnergySmart Advisor, Rags' contractor was able to make an informed decision about what products would save the most energy and receive the largest rebate.

After consulting with their EnergySmart Advisor, Rags decided to use locally manufactured LED light bulbs with an 11-year life span. Not only will the new bulbs last 8.3 years longer than the fluorescent T-12s that once lit the store, but each bulb will save 218 tons of CO₂ over its lifetime. In addition, the store will finally have bright lighting to showcase its consigners merchandise.

DISCOVER low and no-cost energy savings opportunities.

Schedule a FREE EnergySmart Assessment for your business, and you'll also receive FREE installation of efficient light bulbs, LED exit signs, and water-saving devices.

OPTIMIZE your building's existing equipment.

EnergySmart contractors can help you tune-up your equipment for optimized efficiency. You'll save money on heating, cooling, refrigeration, and compressed air.

UPGRADE your old or inefficient equipment. With EnergySmart advisors, incentives and utility rebates, energy-efficiency upgrades have never been more cost-effective.



SMART STATS

8' and 4', 2-Lamp T-12 lighting was replaced with 4-Lamp LED lighting throughout the store. 30W High Intensity Discharge (HID) canned lights were replaced with 12W LED can lights.

PRE-UPGRADE STATS

Annual KWH (from lighting): . 25,917
 Total Energy Use (KWH) 67,921
 Total Watts 7,120
 Annual Electricity Costs: \$2,851

NEW EQUIPMENT STATS

Annual KWH (from lighting): 6,639
 Total Energy Use (KWH): 48,644
 Total Watts: 1,824
 Annual Energy Costs: \$730
Total Energy Savings (KWH): 19,277
Total Energy Savings : 28%



EnergySmart is funded by the American Recovery and Reinvestment Act through the U.S. Department of Energy's BetterBuildings grant program, and is sponsored in partnership by Boulder County, the cities of Boulder and Longmont, and Xcel Energy.

CALL 877-505-6722

EMAIL signupbiz@EnergySmartYES.com

VISIT www.EnergySmartYES.com



energySMART

Your Efficiency Solutions

HOME 303-544-1000 | signuphome@EnergySmartYES.com

BUSINESS 877-505-6722 | signupbiz@EnergySmartYES.com

5.9.10

Dear Sirs:

Lorem ipsum dolor sit amet, consectetur adipiscing elit, sed diam nonummy nibh euismod tincidunt ut laoreet dolore magna aliquam erat volutpat. Ut wisi enim ad minim veniam, quis nostrud exerci tation ullamcorper suscipit lobortis nisl ut aliquip ex ea commodo consequat. Duis autem vel eum iriure dolor in hendrerit in vulputate velit esse molestie consequat, vel illum dolore eu feugiat nulla facilisis at vero eros et accumsan et iusto odio dignissim qui blandit praesent luptatum zzril delenit augue dui dolore te feugait nulla facilisi.

Phasellus nec erat nibh, id convallis orci, consectetur adipiscing elit. Maecenas sed diam nonummy nibh euismod tincidunt ut laoreet dolore magna aliquam erat.

Warm Regards,

Susie Strife

EnergySmartYES.com

EnergySmart is funded by the American Recovery and Reinvestment Act through the U.S. Department of Energy's BetterBuildings grant program, and is sponsored in partnership by Boulder County, the cities of Boulder and Longmont, and Xcel Energy.



Appendix J. Calendar of Key Boulder County Events

| Month | Event Date(s) | Event Name | Town | Location | Event Description | Attendance Hopes | Event Website | Vendor Costs |
|----------|----------------------------------|--|-----------|---|--|------------------|---|--|
| January | Jan. 8 | Lafayette Quaker Oatmeal Festival | Lafayette | Bob L. Burger Recreation Center | A popular family event focusing on healthy lifestyle. | N/A | http://www.lafayettecolorado.com/oatmealfestival.html | N/A |
| February | Feb. 26 | Special Olympics Colorado Polar Plunge | Boulder | Boulder Reservoir | A family event supporting Special Olympics Colorado athletes by taking a flying leap – a leap into the frigid waters of a Colorado lake. | 10,000+ | http://www.specialolympicsco.org/special_events/polar_plunge.html | N/A |
| March | Mar. 4-6 | Frozen Dead Guy Days | Nederland | Chipeta Park | Internationally famous wild and wacky winter festival celebrating all things dead, frozen, and frigidly fun. | 15,000 | http://nederlandchamber.org/events_fgdg-home.html | \$300 |
| | Mar. 12 | "Fun in the Sun" 4-H Carnival | Longmont | Boulder County Fairgrounds | An event for the entire family to enjoy a day of fun! | N/A | http://www.bouldercounty.org/pages/eventdetails.aspx?EventID=38 | N/A |
| | Mar. 25-27 | Boulder County Home & Garden Show | Longmont | Boulder County Fairgrounds | Fabulous annual home and garden show featuring vendors offering everything for your home improvement needs, inside and out! | N/A | http://www.bouldercounty.org/pages/eventdetails.aspx?EventID=245 | \$525-\$3750 + \$50 per 10 amp service |
| April | April 9 | Taste of Therapy Wellness Fair | Longmont | St. Vrain Memorial Building | Free annual event allows participants to meet with and learn about wellness practitioners. | N/A | http://www.ci.longmont.co.us/rec/fitness/tasteoftherapy.htm | N/A |
| | April 16-Oct. 31 (Sat. and Wed.) | Boulder County Farmer's Markets | Boulder | 13th Street between Arapahoe and Canyon | Established to provide an outlet for local agricultural producers to sell their products directly to the public. | N/A | http://www.boulderfarmers.org/home.html | Saturday-\$30; Wednesday-\$15 |
| | April 23 | Earth Day Green Fair & | Boulder | David Skaggs Research | A free family event where businesses and | N/A | http://www.boulder.doc.gov/events/earthday09/earthday09.html | Free |

| Month | Event Date(s) | Event Name | Town | Location | Event Description | Attendance Hopes | Event Website | Vendor Costs |
|------------------|-----------------------------------|---|----------|---|--|------------------|---|-------------------------------|
| April, continued | | Bring Your Child Down to Earth Day | | Center | organizations encourage environmental stewardship and sustainability to its visitors. | | | |
| | April 26 | Boulder County's Green Building Conference | Boulder | University of Colorado | Boulder Green Building Guild's Ideas to Action Conference. | N/A | http://bgbg.org/conference | N/A |
| May | April 16- Oct. 31 (Sat. and Wed.) | Boulder County Farmer's Markets | Boulder | 13th Street between Arapahoe and Canyon | Established to provide an outlet for local agricultural producers to sell their products directly to the public. | N/A | http://www.boulderfarmers.org/home.html | Saturday-\$30; Wednesday-\$15 |
| | May 1- Oct. 30 (Sat.) | Boulder County Farmer's Markets | Longmont | The Boulder County Fairgrounds | Established to provide an outlet for local agricultural producers to sell their products directly to the public. | N/A | http://www.boulderfarmers.org/home.html | \$30 |
| | May 1 | Taste of Pearl | Boulder | Pearl Street Mall | An afternoon event celebrating Colorado's wine and Boulder's culinary arts scene. | N/A | http://www.boulderdowntown.com/events/taste-of-pearl | N/A |
| | May 1 | Boulder Green Building Guild Product and Service Fair | Boulder | Boulder Central Park | A fair showcasing green building experts and businesses. | 1,500 | http://bgbg.org/fair | N/A |
| | May 5 | Cinco de Mayo | Longmont | Roosevelt Park | An fun family event that celebrates culture and honors the health of the Longmont community. | N/A | http://www.longmontcincodemayo.org/home.html | N/A |
| | May 14 (rain date May 21) | Boulder Home & Garden Fair | Boulder | Twenty Ninth Street Retail District | Offering your family an extensive array of ideas and innovation to | N/A | http://www.homeandgardenmag.com/?cat=69 | \$495-\$800 |

| Month | Event Date(s) | Event Name | Town | Location | Event Description | Attendance Hopes | Event Website | Vendor Costs |
|-------------------|----------------------------------|---------------------------------|---------|---|---|------------------|---|----------------------------------|
| May, continued | | | | | improve your living environment. | | | |
| | May 21 | 15th Erie Town Fair | Erie | Downtown Erie | Family event celebrating the annual hot air balloon launch festival. | 20,000 | http://www.eriechamber.org/index.php?option=com_content&view=article&id=65&Itemid=71 | \$130 |
| | May 28-30 | Boulder Creek Festival | Boulder | Central Park and the Municipal Building grounds | Widely considered Boulder County's favorite event, it represents the unofficial kickoff to summer for the Boulder community. | 450,000 | http://www.bceproductions.com/boulder-creek-festival/ | \$550 |
| | May 29-30 | Bolder Boulder (Sports Exhibit) | Boulder | Pearl Street Mall | Held in conjunction with race weekend packet pick-up and registration and the only place participants can pick-up a packet or register over the weekend. | 20,000 | http://www.bolderboulder.com/Hompage.htm | N/A |
| | May 31 | Bolder Boulder (Race Day Expt) | Boulder | Folsom Field | Open to race participants, family, friends and people in the community who are enjoying the events of race day. The Expo offers a great opportunity to interact with active families and individuals of all ages. | 60,000 | http://www.bolderboulder.com/Hompage.htm | N/A |
| June | April 16-Oct. 31 (Sat. and Wed.) | Boulder County Farmer's Markets | Boulder | 13th Street between Arapahoe and Canyon | Established to provide an outlet for local agricultural producers to sell their products directly to the public. | N/A | http://www.boulderfarmers.org/home.html | Saturday-\$30; Wednesday-\$15 |

| Month | Event Date(s) | Event Name | Town | Location | Event Description | Attendance Hopes | Event Website | Vendor Costs |
|-----------------|----------------------------------|----------------------------------|------------|---|--|------------------|---|---|
| June, continued | May 1-Oct. 30 (Sat.) | Boulder County Farmer's Markets | Longmont | The Boulder County Fairgrounds | Established to provide an outlet for local agricultural producers to sell their products directly to the public. | N/A | http://www.boulderfarmers.org/home.html | \$30 |
| | June 4-Oct. 15 (Sat.) | Louisville Farmer's Market | Louisville | Steinbaugh Pavilion | Established to provide an outlet for local agricultural producers to sell their products directly to the public. | N/A | http://www.farmersmarketlouis.com/ | N/A |
| | June 9-Sept. 8 (Thurs.) | Rhythm on the Rails | Niwot | The Niwot Bandstand | An award-winning summer concert series. | 15,000 | http://www.bceproductions.com/rhythm-on-the-rails/ | \$375 for 14 weeks |
| | June 10-Aug. 12 (Fri.) | Louisville Downtown Street Faire | Louisville | Steinbaugh Pavilion | Summertime evening event celebrating food, music, and community. | N/A | http://www.downtownlouisvilleco.com/street-faire/ | \$85 per week; \$300 for 5 weeks; \$450 for 9 weeks |
| | June 16-19 | Hanuman Festival | Boulder | Boulder Creek path | A community-oriented yoga and music festival. | 1,000+ | http://hanumanfestival.com/ | \$800 Friday-Sunday |
| | June 18-19 | Ironman Expo | Boulder | Boulder Reservoir | An Ironman Tri Series event open to race participants and spectators. | N/A | http://bouldertriseriess.com/expo.php | \$150 |
| July | April 16-Oct. 31 (Sat. and Wed.) | Boulder County Farmer's Markets | Boulder | 13th Street between Arapahoe and Canyon | Established to provide an outlet for local agricultural producers to sell their products directly to the public. | N/A | http://www.boulderfarmers.org/home.html | Saturday-\$30; Wednesday-\$15 |
| | May 1-Oct. 30 (Sat.) | Boulder County Farmer's Markets | Longmont | The Boulder County Fairgrounds | Established to provide an outlet for local agricultural producers to sell their products directly to the public. | N/A | http://www.boulderfarmers.org/home.html | \$30 |
| | June 4-Oct. 15 | Louisville Farmer's | Louisville | Steinbaugh Pavilion | Established to provide an outlet for local | N/A | http://www.farmersmarketlouis.com/ | N/A |

| Month | Event Date(s) | Event Name | Town | Location | Event Description | Attendance Hopes | Event Website | Vendor Costs |
|-----------------|----------------------------------|----------------------------------|------------|---|--|------------------|---|---|
| July, continued | (Sat.) | Market | | | agricultural producers to sell their products directly to the public. | | | |
| | June 9-Sept. 8 (Thurs.) | Rhythm on the Rails | Niwot | The Niwot Bandstand | An award-winning summer concert series. | 15,000 | http://www.bceproductions.com/rhythm-on-the-rails/ | \$375 for 14 weeks |
| | June 10-Aug. 12 (Fri.) | Louisville Downtown Street Faire | Louisville | Steinbaugh Pavilion | Summertime evening event celebrating food, music, and community. | N/A | http://www.downtownlouisvilleco.com/street-faire/ | \$85 per week; \$300 for 5 weeks; \$450 for 9 weeks |
| | July 8-9 | Rhythm on the River | Longmont | Rogers Grove | This festival celebrates the environment, the community, art, and music. | N/A | http://www.ci.longmont.co.us/rotr/index.htm | \$135 |
| August | April 16-Oct. 31 (Sat. and Wed.) | Boulder County Farmer's Markets | Boulder | 13th Street between Arapahoe and Canyon | Established to provide an outlet for local agricultural producers to sell their products directly to the public. | N/A | http://www.boulderfarmers.org/home.html | Saturday-\$30; Wednesday-\$15 |
| | May 1-Oct. 30 (Sat.) | Boulder County Farmer's Markets | Longmont | The Boulder County Fairgrounds | Established to provide an outlet for local agricultural producers to sell their products directly to the public. | N/A | http://www.boulderfarmers.org/home.html | \$30 |
| | June 4-Oct. 15 (Sat.) | Louisville Farmer's Market | Louisville | Steinbaugh Pavilion | Established to provide an outlet for local agricultural producers to sell their products directly to the public. | N/A | http://www.farmersmarketlouis.com/ | N/A |

| Month | Event Date(s) | Event Name | Town | Location | Event Description | Attendance Hopes | Event Website | Vendor Costs |
|-------------------|----------------------------------|--|------------|---|--|------------------|---|---|
| August, continued | June 9-Sept. 8 (Thurs.) | Rhythm on the Rails | Niwot | The Niwot Bandstand | An award-winning summer concert series. | 15,000 | http://www.bceproductions.com/rhythm-on-the-rails/ | \$375 for 14 weeks |
| | June 10-Aug. 12 (Fri.) | Louisville Downtown Street Faire | Louisville | Steinbaugh Pavilion | Summertime evening event celebrating food, music, and community. | N/A | http://www.downtownlouisvilleco.com/street-faire/ | \$85 per wk; \$300 for 5 wks; \$450 for 9 wks |
| | Aug. 3-7 | Boulder County Fair | Longmont | The Boulder County Fairgrounds | A family event offering a distinctive cowboy flair. | 85,000 | http://www.bouldercountyfair.org/ | \$272-\$400 |
| | Aug. 20 | 12 th Annual Lafayette Peach Festival | Lafayette | Old Town Lafayette | A family event celebrating Colorado's local agriculture, antiques, and art. | N/A | http://www.lafayettecolorado.com/peachfestival/2010peachfestival.html | N/A |
| | Aug. 26 | Festival on Main | Longmont | Downtown Main Street | A fun, family event celebrating August. | N/A | http://downtownlongmont.com/event/festival-main | N/A |
| September | April 16-Oct. 31 (Sat. and Wed.) | Boulder County Farmer's Markets | Boulder | 13th Street between Arapahoe and Canyon | Established to provide an outlet for local agricultural producers to sell their products directly to the public. | N/A | http://www.boulderfarmers.org/home.html | Saturday-\$30; Wednesday-\$15 |
| | May 1-Oct. 30 (Sat.) | Boulder County Farmer's Markets | Longmont | The Boulder County Fairgrounds | Established to provide an outlet for local agricultural producers to sell their products directly to the public. | N/A | http://www.boulderfarmers.org/home.html | \$30 |
| | June 4-Oct. 15 (Sat.) | Louisville Farmer's Market | Louisville | Steinbaugh Pavilion | Established to provide an outlet for local agricultural producers to sell their products directly to the public. | N/A | http://www.farmersmarketlouis.com/ | N/A |
| | June 9-Sept. 8 (Thurs.) | Rhythm on the Rails | Niwot | The Niwot Bandstand | An award-winning summer concert series. | 15,000 | http://www.bceproductions.com/rhythm-on-the-rails/ | \$375 for 14 weeks |
| | Sept. 3-5 | Boulder Creek | Boulder | Central Park and the | The perfect bookend to close out the summer | N/A | http://www.bceproductions.com/hometown-fair/about/ | \$450 |

| Month | Event Date(s) | Event Name | Town | Location | Event Description | Attendance Hopes | Event Website | Vendor Costs |
|----------------------|----------------------------------|---------------------------------|------------|---|--|------------------|---|-------------------------------|
| September, continued | | Hometown Fair | | Municipal Building grounds | event season with the community. | | | |
| | Sept. 10-12 | Longmont Oktoberfest | Longmont | Roosevelt Park | Family fun event celebrating live music, local breweries, and art. | N/A | http://www.bceproductions.com/longmont-oktoberfest/ | N/A |
| | Sept. 25 | Celebrate Lafayette | Lafayette | Old Town Lafayette | An annual community celebration for the people of Lafayette. | N/A | http://www.lafayettecolorado.com/celebratelafayette/celebratelafayette.html | \$100-\$180 |
| October | April 16-Oct. 31 (Sat. and Wed.) | Boulder County Farmer's Markets | Boulder | 13th Street between Arapahoe and Canyon | Established to provide an outlet for local agricultural producers to sell their products directly to the public. | N/A | http://www.boulderfarmers.org/home.html | Saturday-\$30; Wednesday-\$15 |
| | May 1-Oct. 30 (Sat.) | Boulder County Farmer's Markets | Longmont | The Boulder County Fairgrounds | Established to provide an outlet for local agricultural producers to sell their products directly to the public. | N/A | http://www.boulderfarmers.org/home.html | \$30 |
| | June 4-Oct. 15 (Sat.) | Louisville Farmer's Market | Louisville | Steinbaugh Pavilion | Established to provide an outlet for local agricultural producers to sell their products directly to the public. | N/A | http://www.farmersmarketlouis.com/ | N/A |
| | Oct. 1 | Erie Chamber Harvest Fest | Erie | Erie Community Park | A family fun event celebrating the fall and coming holiday season! | 4,000 | http://www.eriechamber.org/index.php?option=com_content&view=article&id=71&Itemid=72 | \$100- \$175 |
| November | Nov. 7 | Hotel Boulderado Bridal Show | Boulder | Hotel Boulderado | The most elegant wedding show in Colorado! | N/A | http://www.boulderado.com/bridalshow.html | N/A |

| Month | Event Date(s) | Event Name | Town | Location | Event Description | Attendance Hopes | Event Website | Vendor Costs |
|---------------------|---------------|--|----------|--------------------------------|--|------------------|---|--------------|
| November, continued | Nov. 18 | Boulder Business Trade Fair | Boulder | 1600 29 th Street | An event that gives local businesses a chance to showcase their products and services to the Boulder area community. | 450 | http://www.boulderbusinessstrade-fair.com/ | \$275-\$620 |
| December | Dec. 3-4 | Boulder County Winter Market & Holiday Gift Show | Longmont | The Boulder County Fairgrounds | One of Colorado's premier seasonal shows! Featuring arts, crafts, and foods from local artists and farmers! | 1,000s | http://www.boulderfarmers.org/artscrafts.html | \$150 |

Appendix K. Residential Social Mobilization Tactics: Full Descriptions

Energy Efficiency Barn-Raisings

Concept

An energy efficiency barn-raising is an event where the community gets together and spends the day working to weatherize a house, making it more energy-efficient. The day usually consists of several hours of learning and working and ends with a fun celebration of food and possibly music.

The term comes from the Amish tradition of the entire community coming together to help build a barn and then celebrating its accomplishment afterwards. The idea of "energy" or "weatherization barn-raising" came from Cambridge Home Energy Efficiency Team (HEET), which began doing barn-raising in the summer of 2008; taking direct action towards reducing energy consumption and cutting carbon in buildings of all types.

Every person comes to the barn-raising with a different set of knowledge, background, and skills, and they all can learn from each other. It can be a strong way of getting the community catalyzed around the idea of efficiency.

Benefits of this Endeavor

The ultimate goal of this approach is to give many neighbors the sense that making their own homes more efficient is not only possible but that it's something that many of their peers want to accomplish as well. It gives people a basic knowledge of efficiency, making it less overwhelming for them to take on in their own homes. In addition, the barn-raising of course leads to direct savings in the home being weatherized.

Target Audience

The neighborhoods should be carefully chosen, but the targets are the same as the overall EnergySmart service targets: single family homes that are primarily owner-occupied. The particular target for the barn-raising itself should be a home where the occupant needs assistance, either monetarily or because of limited capabilities to accomplish such an endeavor. This might be someone living alone, or a family that has had hard times and could use a hand from the neighbors.

Models

Worcester Energy Barn-Raisings, Home Energy Efficiency Team (Cambridge, Massachusetts), Environmental Justice League of Rhode Island.

How the Initiative Drives Savings

The barn-raising has primary effects and secondary marketing effects:

- Primary effects are that the barn-raising saves energy through weatherization;

- Secondary effects include neighborhood mobilization, which gives people 1) an intimate view of what can be done to save energy in a neighborhood home, 2) a sense of belonging to a larger cause, 3) access to information on the benefits of EnergySmart.
- Creates a fabulous opportunity for earned media, including TV.

Design Concept

Neighborhoods would be chosen for involvement, using the Community Mapping Tool. The neighborhood groups would suggest target homes and approach the homeowner with the offer for the energy barn-raising.

A date would be chosen for the event, probably on a Saturday or Sunday to maximize availability of volunteers. Door-to-door campaigns would solicit volunteers. The County or City would need to coordinate the materials and the training and supervise the work.

Level of Effort

There is substantial planning required upfront to get procedures in places, but once the first barn-raising is complete, subsequent ones should be much simpler. The community groups and neighborhoods should be able to do some heavy lifting on this.

Potential Impacts

The barn raisings are anticipated to create market buzz and earned media. They should also drive participation for EnergySmart on a neighborhood by neighborhood basis, and should create new social networks (and reinforce existing ones) that can be extensive.

Table K1. Barn-Raising Tasks and Activities

| Task | Staff | Hours |
|--|-------|-------|
| Select internal team for energy efficiency barn-raisings | | |
| Develop key parameters for what is possible to accomplish during barn-raising: Who can participate? What home alterations can be done? What disclosures are needed from the homeowner? What kind of training is necessary? | | |
| Develop how-to guide for the barn-raisings | | |
| Identify neighborhoods to work with. They should have high potential for "spillover" homes that might sign up for EnergySmart services | | |
| Find a "champion" (or 2) to drive the barn-raising in each target neighborhood | | |
| Solicit a small group of volunteers to help organize the barn-raising | | |
| Find a worthy home for the barn-raising | | |
| Engage the media in the event, write a press release | | |
| Create a small door-to-door campaign to recruit the team of volunteers for the actual work on the house | | |
| Conduct a pre-meeting with the volunteers. This is a preview of the actual event and also an opportunity to talk about EnergySmart and to generate buzz for the event, and to recruit more people if necessary. | | |
| Find a contractor who is willing to conduct the training and oversee the project onsite | | |
| Find a sponsor who is willing to donate materials | | |
| Schedule the barn-raising | | |
| Have a group organize the after-party | | |
| Find someone who will take pictures and videos of the event; get interviews with volunteers on video | | |
| Invite leaders from other neighborhoods to these events so they can learn before working in their own neighborhoods | | |

High School/Middle School Sporting Event Outreach

Concept

During school sporting event halftimes there would be a basketball shoot for a prize or another form of crowd interaction that ties in a surprising energy efficiency theme. For example, the average home has enough drafts and cracks to add up to a basketball-sized hole in the side of a house. But most people don't realize this. During the half-time event a staff person would have the opportunity to talk about how most people don't realize they are wasting energy through the basketball-sized hole in their homes; the benefits of sealing homes; and the availability of EnergySmart services.

If the person makes the shot, he or she would "win" an Energy Assessment and an efficiency quick install kit. If they don't make it, their consolation prize might be several CFLs or just the quick install kit. The County staff emcee for the event should also talk about these individual energy efficiency items in his or her speech.

Benefits of this Endeavor

The key benefits are targeted, personal advertising at a venue that already has community members who are also neighbors and friends, gathered together witnessing the same event. This increases the likelihood they may talk about it at a later time. This audience will also be largely captive to the message. Basketball season is also concurrent with heating season, so the message will be particularly relevant.

Target Audience

The target audience is parents of students in high schools and possibly middle schools. This is a prime audience for EnergySmart.

Models

No known models.

How the Initiative Drives Savings

This is a promotional event that educates and gets people to start being curious about unknown energy waste in their own homes. The event will generate leads for Energy Assessments.

Design Concept

This is an outreach and social mobilization approach, communicating a vivid and compelling message to a targeted and captive audience. The overall idea is to "go to the market" and find excellent venues to reach homeowners in a creative and entertaining way.

While this could conceivably be done for any sporting event, it would fit best with basketball games (although volleyball games will also draw the same target and should be considered). During a typical home basketball season, the home team hosts 12 games on average. Boys' games at the larger high schools are well-attended events, with hundreds of local citizens participating. For other games, the audience is made up primarily of the players' parents. Either of these situations will work, as the parents, not the students, are the target customers.

Specifically, there is likely to be a short period of time that an event like this could take place at a basketball game, and that is during halftime.

As the parents enter the gym, they would be asked to fill out a card which makes them eligible to be called for the contest and the prize. They will also receive EnergySmart literature. Note that this should be done for the Home team only if the visiting team is from outside the County. *If possible, EnergySmart should collect email and/or phone information on these cards.* These cards will also become lead generators for follow-up.

The contest we recommend is as follows:

1. The Boulder County staff person would serve as the emcee for this event. He or she would have a prop in the form of a basketball hoop. and would quickly explain that the typical house has a basketball hoop-sized hole if one adds up all the little leaks. “Would you stand for a hole this size in the side of your house? Of course not. So we’ve got a way to help you fix it, and lots of rebates are available.” Also, the emcee would announce that people can sign up for low cost Energy Assessments right after the game.
2. ALTERNATIVELY, staff could train someone from the school to conduct this activity.
3. One of the cards collected at the beginning of the game would be randomly selected by a neutral person like one of the cheerleaders. The winner of the drawing would be brought onto the court and told that making a basket will qualify him or her for a free Energy Assessment worth \$300+.
4. The contest we recommend gives 30 seconds to make a free throw, with the assistance of a rebounder so the contestant gets more shots in. Most people will be able to accomplish this, but it will allow for some excitement/tension as to whether they will actually succeed.
5. If permitted, after the game, County staff should set up at the exit with the banner and brochures and sign people up for Energy Assessments.

Activities and Outreach

In order to be allowed to participate during sports halftimes, staff would need to get approval. This is probably best gathered from the school districts (Boulder Valley and St. Vrain primarily), which could then prepare the individual schools for the arrival and accommodation of this event.

We envision doing this once or possibly twice per school, per season.

Level of Effort

The level of effort for this type of event would be fairly low per event, but there are potentially many events that could be attended. The best events are high school basketball games, and there are varsity, junior varsity, and sometimes freshmen games. In addition, there are both boys’ and girls’ games. There are about 20 high schools in Boulder County.

Potential Impacts

The impacts are based on qualified leads that are collected at the games, and word of mouth generated at the events. The EnergySmart team will need to track whether these events are driving demand.

Table K2. Sporting Events Tasks and Activities

| Task | Staff | Hours |
|---|-------|-------|
| Assemble team to develop plan for this initiative | | |
| Create an "offer letter" to the school districts that has the details of what we want to accomplish and what the community benefits are | | |
| Buy a basketball hoop (Sports Authority or Dicks will have these) | | |
| Get approval from school districts and then develop a plan to engage individual schools | | |
| Create the sign-up cards | | |
| Run a pilot at a fall event before basketball season, possibly at girls volleyball | | |
| Develop a method to track those who learn about EnergySmart from this endeavor | | |
| Have someone come to take pictures and videos at a couple of the events, post to website | | |
| Look at the full basketball schedule and map out who will be heading to which events | | |
| Track how well these events are driving business and make ongoing decisions whether to continue | | |
| If this works for basketball, decide how to expand to other sports or even music events | | |

Energy Savings Challenge

Concept

Contests have become a powerful social marketing approach for generating interest in energy conservation. Contests can be between communities, colleges, homes, neighborhoods, social groups, schools, classrooms, or any entities made up of multiple potential participants that can help drive interest and involvement.

The energy savings challenge would pit Boulder County cities/towns/communities against others of similar size. Participants would compete over the course of one year (or other time period) on who can save the most energy. Winners would get tangible prizes as well as bragging rights.

The County's other social marketing initiatives can feed participants and energy into contests. For example, neighborhood or community action initiatives can be catalysts for attracting participants. Barn-raising can drive awareness of the contest, as can Carrotmob initiatives (see below). Social media tools such as Facebook and Twitter can also be used to generate awareness and participation.

Benefits

Contests can reach a set of consumers that would never be motivated to address energy waste otherwise. People and businesses have inherent pride in their communities. By tapping into that pride, community contests can create interest and involvement where normal advertisements may fall short. A contest can also offer incentives that may be more appealing to some audiences than traditional program incentives. For example, where someone may not be particularly enthusiastic about energy savings or rebates, a game of chance that could net that person a new flat screen TV may provide the type of motivation that pushes him or her to act.

Contests can also create a sense of urgency, since they are held over a finite time period. They have the benefit of universality; that is, every resident and business belongs to a community, and therefore could be eligible to participate.

Finally, contests tend to generate interest from the media and can offer Boulder County multiple opportunities to create earned PR at times when it may be necessary to boost excitement or interest in the program. For example, local newspapers could have regular updates on which towns are winning. The Boulder County website would have ongoing updates of scores.

Target Audience

The energy savings challenge approach could be applied to both the residential and commercial sectors.

Models

There are several examples of successful energy and sustainability-focused contests from which to draw an example. A few of these include:

- Take Charge Challenge, Kansas
- Community Energy Challenge, Illinois
- America's Greenest Campus, nationwide
- Western Mass Saves

Additional town contests and initiatives are taking place in other Better Buildings grant areas, such as New York and Connecticut.

The contest will focus primarily on the number of retrofits completed and how much savings result from those retrofits.

Design Concept

All cities/towns/communities would be involved in the contest. Savings and involvement would be tracked on a per capita basis to level the playing field.

The contest would last one year, and savings could be measured (on a per capita basis) along several dimensions, such as:

- Combined energy savings achieved by individual participants as measured through retrofits and/or utility bills (as tracked by Symbiotic Engineering)
- Energy Sweeps and Energy Assessments completed
- Energy investment, including time

While it is important to award prizes to the winners, it is also beneficial to provide ongoing rewards as interim goals are met along the way, so that all participants are rewarded. (See section X on gaining prizes through sponsorships from local businesses.)

EnergySmart can increase excitement and media attention surrounding the contest by soliciting involvement from local celebrities and/or facilitating "good-natured wagers" among public figures (e.g., if Longmont loses to Boulder, the Longmont mayor has to dress like a hippie and sing songs on a bicycle one afternoon).

Potential Impacts

The Take Charge Challenge in Kansas saw reductions of 5 percent of energy use in the winning town compared to a control group. In six relatively small towns, 50,000 CFLs were purchased. These towns also counted at least 2,600 hours of volunteer time, and 65 events were held. So the potential for savings is very high. The impacts could be very high if towns are committed to reaching goals and they are able to mobilize their communities.

Implementation Needs

The level of effort for this contest would be high since several towns would be involved; however, it could also create a platform for conducting replicable outreach activities in each town. Many of these activities would be undertaken regardless of the contest as part of EnergySmart outreach; the contest simply would add a new dimension to the standard outreach approach and can give the initiative structure. High-level tasks for the contest include:

- 1) Recruit the towns and cities: EnergySmart staff members meet with leaders of each city/town to gain buy-in.
- 2) Each town creates its own energy leadership team (with a catchy name) which then organizes its own outreach efforts under the direction of Boulder County staff.
- 3) Information on measured results and each town's ranking is supplied to the teams on an ongoing basis.
- 4) Community action kits are supplied to the teams to aid them in organizing outreach and events.

The following task worksheet is intended to help County staff develop and implement an energy savings contest. **Table K3. Energy Challenge Tasks and Activities**

| Task | Staff | Hours |
|--|-------|-------|
| Create core team that will manage the contest | | |
| Hold team meetings to develop the structure of the contest: the parameters of the competition, number of retrofits, dollars spent, number of homes/business participating, prizes (including interim prizes for achieving milestones and grand prizes), and duration | | |
| Develop an "offer" for the towns and cities to get involved. This should be a well-formulated template outlining participation steps and milestones over the course of the contest. | | |
| Work with hand-selected champions in each town to pitch the contest to the mayor and city council members who would need to approve it. The County commissioners should also be involved. | | |
| Develop "sample action plans" that towns could use to develop ideas and a plan for achieving the contest goals. Activities might include town fairs, events at libraries, speaker series, door-to-door campaigns, CFL giveaways, music events, presentations, or even sporting events/races. | | |
| Solicit sponsors to donate prizes. | | |
| Help each town create an "energy leadership team". Boulder County staff should attend early meetings to get them off on the right foot. Teams should be tasked with developing a year-long strategy, creating events, conducting outreach, and using the tools available to them through | | |

| Task | Staff | Hours |
|---|-------|-------|
| EnergySmart. | | |
| Develop reporting requirements to track progress. | | |
| Work with mayors to create a "city challenge" that uses a friendly rivalry that is likely to get publicity. | | |
| Provide towns with information on their progress and ranking against other towns in the contest. | | |
| Provide ongoing assistance with events, outreach, and other activities the towns develop on their own. | | |
| Piggyback general EnergySmart outreach on scheduled town events. | | |
| Ensure pictures and videos are taken at major events. | | |
| Have meetings with teams throughout the contest to determine which tactics are working well and ensure that information is distributed. | | |
| Report contest progress on the EnergySmart website and through press releases. Try to get the newspapers to report regularly on the contest, or ask the Daily Camera to include results on its website. | | |

EnergySmart IgNite

Concept

IgNite is an existing, national form of social entertainment. The concept is simple. Regular people submit ideas that they want to talk about for 5 minutes at the bi-monthly IgNite event. People vote online for the ideas they like best, and those with the top votes get to talk. Boulder has a very active IgNite chapter.

Our twist on the concept is to hold an entire IgNite show about energy and sustainability.

Benefits of this Endeavor

This is an entertaining way to get real people to talk about their experience with energy and the environment. If we use the IgNite social group, we would have a ready-made list of active people who are potential ambassadors for the EnergySmart program.

Target Audience

Primary audience is the existing IgNite Boulder social group; that is, anyone who has signed up on the website for information or is a fan on Facebook.

Secondary audiences are any people highly interested in energy and the environment.

Models

IgNite national model with a specific focus on energy, sustainability, and environment. See <http://igniteboulder.com/> for local information.

How the Initiative Drives Savings

County staff would develop a presentation to raise awareness of the EnergySmart service; Boulder City staff could do the same for SmartRegs (targeting renters too). The other presentations focusing on sustainability could provide context and motivation for the audience to consider EnergySmart services and the SmartRegs program.

Design Concept

Ultimately, the greatest benefit would come from securing an entire night of IgNite with the theme of energy, sustainability, and the environment. County staff would use known environmental networks to ask people to submit ideas around that theme.

An alternate theme that could attract a potentially different target audience could focus on the current economy with EnergySmart-related presentations on “How I spent my part of the stimulus funds” or “How I helped create three jobs.”

About a dozen speakers would be chosen and they’d follow the same format as a normal IgNite presentation:

- 5 minute talk
- 20 slides
- Slides automatically advance in 15 second intervals
- Focus on teaching
- Be entertaining

Note that this event is established in Boulder, but not in other Boulder County cities.

Activities and Outreach

The IgNite platform and activities are fairly well established. In addition to IgNite’s advertising, EnergySmart staff would enhance outreach to all of our energy and environmental groups both for speakers and attendees. County staff would promote the event through the social networks developed with the community mapping tool.

Level of Effort

The level of effort is relatively low and would involve 10-12 hours if using the existing framework.

Potential Impacts

The IgNite evening would probably draw 300 participants, most of whom would be very receptive to the message of energy efficiency and climate impact reduction.

Considerations

- It is not certain that most of the IgNite attendees are homeowners. SmartRegs presentation focusing on renters should be given.

- Unless promoted widely throughout the County, this event would likely draw disproportionately from Boulder rather than other towns.
- Unless County staff is granted some control over the evening's presentations, there is no guarantee that EnergySmart or SmartRegs presentation would be selected through the vote.
- Note that the IgNite rules say that the speaker isn't allowed to "sell" anything. It needs to be an entertaining, informational presentation.

Table K4. IgNiteTasks and Activities

| Tasks | Staff | Hours |
|--|-------|-------|
| Contact IgNite Boulder leadership and set up a meeting to discuss options | | |
| Determine whether they can dedicate a night to sustainability topics, and give the donations for the night to a local environmental group, for example | | |
| If a sustainability theme is possible, do the following: | | |
| Develop a set of topical suggestions/rules for speaker submissions; put on the IgNite Boulder website. Link to the IgNite site from EnergySmart site | | |
| Using social networks identified in the Community Mapping Tool, encourage people to submit ideas for presentations | | |
| Assist in marketing the IgNite event through networking | | |
| At the event, take photos, videos, and put them on the EnergySmart website | | |
| If IgNite cannot do a sustainability theme night, then two options are available | | |
| 1. Submit a talk for the IgNite Boulder event | | |
| Get a group together to brainstorm topics | | |
| Get volunteers to submit them | | |
| Mobilize our network to vote to get them accepted | | |
| Coach the winning speaker | | |
| 2. Create a parallel IgNite Sustainability event | | |
| Work with a steering committee to develop the event | | |
| Find a venue | | |
| Conduct outreach for speakers | | |
| Conduct outreach for audience | | |
| Hold event and all the logistics involved (lots of work!) | | |

Community/Neighborhood Energy Kits + Rewards

Concept

While many people are influenced to invest in energy upgrades because of financial or environmental motivations, research has repeatedly shown that actions are strongly influenced by the actions and activities of peer groups, both in the residential and business sectors. Social and business norms can be leveraged through community-based social marketing, allowing a grassroots and person-to-person approach to getting people to invest in Energy Assessments and energy upgrades.

“Community energy kits” provide step-by-step actions to engage the individuals in their communities, whether that “community” is a neighborhood, civic club, interest group, or entity. To meet the needs of a variety of groups, the kits are flexible and include templates, sample flyers and ads, and recommendations on events and outreach. These kits enable these existing groups to gain knowledge about the benefits of energy upgrades, to engage their peer group with interesting energy information, to commit to doing something themselves to save energy, and to feel that they are working with others to accomplish a common goal.

Benefits of this Endeavor

The key benefit is increased interest in Energy Assessments and energy upgrades through the power of peer influence and word-of-mouth.

Target Audience

Several key groups could utilize these kits. These groups match closely with those identified by Natural Capitalism Solutions for its community mapping tool. In general, these will be neighborhood groups, civic groups, clubs, employees of larger businesses, churches, or any group of individuals who identify with other members of that group.

Models

There are not many mature programs in energy efficiency that have fully utilized this approach, so Boulder County will be breaking new ground in some respects.

Below is a list of initiatives:

- [Shanahan Neighbors for Climate Action](#), Boulder
- [Neighborhood Energy Action Partnership](#), Denver
- [Portland SE Uplift](#), Portland (see below for details)
- [Community Action Group](#), Oxford, England
- [Energize Bedford, Bedford](#), NY

An ARRA funded program, Energize Bedford parallels EnergySmart in many ways. It is the pilot town for programs that will be launched in 13 more towns.

How the Initiative Drives Savings

This initiative is a key method for mobilizing smaller groups in Boulder County. It drives savings by using the power of social norms, education, and knowledge to overcome barriers to adoption of energy upgrades. The members of these smaller groups can challenge and encourage one another to move forward on efficiency, and can develop their own customized messages to fit with their group. In the end, the kits will drive the activities towards home retrofits. In addition, rewards can keep the groups motivated towards specific goals.

Design Concept

Many groups, neighborhoods, and communities are looking for ways they can assist their membership in lower energy costs and helping the environment. However, they usually lack the tools and information to catalyze their group to action. In order to facilitate their movement on these issues, community energy kits include specific activities and templates that these groups can use to motivate their members to act and save energy.

These activities include get-togethers in the form of house parties or potlucks, or they can be appended to regular neighborhood meetings or social gatherings. Also, if a recipient of the EnergySmart services wants to have an open house to talk about the efficiency upgrades they've received, the additional activities below could be made available.

Kits might include some of the following:

- Activities
 - Discover which household appliances are wasting electricity
 - Use a watt-meter to find phantom electricity use
 - Go on a hunt for mysterious air leaks that are haunting your home
 - Energy 101 (CRC) or EnergySmart presentation
- EnergySmart flyers (residential and commercial) and door hangers
- How to create a regular, focused group
 - Creating goals for the group
 - Creating a speaker series
 - Developing discussion groups

An excellent resource for examples of neighborhood climate action is [Portland's SE Uplift](#), with its Climate Action Toolkit. PSEU education encompasses many sustainable behaviors beyond energy use, but it still provides a great framework for this neighborhood approach and has a host of links to additional useful information.

Rewards

To keep groups engaged, additional motivation should be considered. Groups could “earn” money or other rewards when they reach milestones, such as a certain number of people who have gotten Energy Assessments or upgrades. The rewards should be designed to keep the groups moving ahead over a period of time, and should be goal-driven. For example, rewards could be given at intervals of success, such as for every 10 people who sign up for an Energy Assessment, or for every \$25,000 in retrofit investment. Given DOE rules, the rewards may need to come from funding sources outside of ARRA. Donations from local businesses could be a source of rewards, for example.

Level of Effort

The level of effort for development of the kits will be moderate, and the outreach to get groups and communities to engage can be quite high. Level of effort to secure rewards is unknown.

Potential Impacts

The impacts of community action can be very high when targeted well. It will entirely depend on how many communities are reached, how committed they are, and whether County and city staff have time to dedicate to this effort.

Table K5. Energy Kits + Rewards Activities and Outreach

| Tasks for Creating Kits | Hours | Lead |
|--|-------|------|
| Create team to lead this social marketing initiative | | |
| Collect samples from various sources of what could be in a kit | | |
| Create broad list of kit contents/wish list | | |
| Hold brainstorming meeting on kit contents | | |
| Interview other people from around the U.S. etc. that have put neighborhood initiatives together | | |
| Hold meeting to discuss the pros and cons of each element of the kit, decide on what's in and what's out | | |
| Create outline of what will be in the kit, and do some market research with groups such as Shanahan Neighbors and CRC to make sure it plays with the marketplace | | |
| Finalize outline | | |
| Use existing information from other community programs to inform development of all the sections of the kit | | |
| Write the sections, develop the templates | | |
| Review, edit | | |
| Finalize, publish | | |

| Tasks for Pilot: Implementation Activities (can be done in parallel with kit development) | Hours | Lead |
|--|-------|------|
| Meet with project team to determine target opportunities; consider size of group, type of group, location, support, willingness of group to collect information and be an example, ensure it's part of the target market | | |
| Select several target groups for pilots: One should be a neighborhood (geographic) group, another should be a community group or club based on criteria above. Have a backup up group to work with in case the top picks fall through. | | |
| Go to group leaders, and gain commitment to be the pilot for execution of this program | | |
| Have the group create a leadership team | | |
| Meet with leadership team and determine the elements of the kit that they will implement; create timelines for execution | | |
| Work with the teams to implement the elements selected | | |
| Continue to collect data on success and failure, what's working and what's not | | |
| Capture photos and videos of activities. Discover success stories | | |
| Hold periodic meetings with leadership team to review and modify strategy | | |
| Analyze success after events, document | | |
| Create case studies for other groups | | |
| Modify Kit as necessary after pilot | | |
| If pilots are successful, roll out to more groups | | |

EnergySmart Video Contests

Concept

People can create powerful messages through their own experiences and creativity. Video contests can tap into the ideas and creativity of Boulder County residents. The videos will be shown on the EnergySmart website and, if possible County and cities' websites. To draw attention to the videos and their focus on energy efficiency, implementation staff should try to generate media interest.

Benefits to this Endeavor

As it will be user-generated content, the video contest provides a low-cost avenue to promote EnergySmart services through social media.

Target Audience

There is potential for several different video contests targeting various groups and/or types of videos. Examples include contests for primary and high-school students, CU students, and a contest of former EnergySmart service customers in the form of creatively-done testimonials.

Models

SmartPower, Avista, E Source.

How the Initiative Drives Savings

The contest will provide a number of benefits to drive savings and interest in the overall EnergySmart services as well as the City/Town Energy Challenge.

- Provides an entertaining medium to drive people to the website.
- Provides local, visual case studies for talks around the County to show people how others are saving.
- Creates an image of energy savings being a social norm in Boulder County.
- Promotion of the video contest will be a valuable method to get the word out about the other EnergySmart services and the energy challenge.

Design Concept

The contest is relatively straightforward. Several video contest ideas are below:

1. Create a one-minute video on why energy efficiency is important to the people and businesses of Boulder County:
 - a. 6-12th grade contest. (check to see if there are any legal issues with people under 18 years old).
 - b. College age contest
 - c. At large contest
2. For those who have gone through the EnergySmart services, create a 30-second video on how beneficial the service is and why others should do it.
 - a. Single family home
 - b. Multifamily home
 - c. Landlord/renter combination

All videos would be uploaded to the EnergySmart website after screening for appropriateness. They can be submitted through YouTube.

It would be beneficial to have a significant prize for winners.

Activities and Outreach

The main challenge for the video contest is getting the word out to the residents so they can participate.

Level of Effort

The amount of time for the video contest is modest overall.

Potential Impacts

The contest is anticipated to create market buzz as an event. It should drive participation in EnergySmart services in both sectors. It should also create a reason for people to return to the website.

Table K6. Video Contest Tasks and Activities

| Task | Staff | Hours |
|--|-------|-------|
| Create video contest team | | |
| Secure prizes for winners | | |
| Develop contest parameters, including length, topic, judging specifics, deadlines | | |
| Create "poster" that announces the contest and rules and deadlines | | |
| Create YouTube site for downloads | | |
| Use multiple methods to announce the contest | | |
| a. Schools announcements | | |
| b. College announcements | | |
| c. Newspapers, radio, social media | | |
| Select panel of judges to determine winners (it's also possible to have public voting for winners but there are many problems with this, primarily fairness and allowing only one vote per person) | | |
| Create parameters for judges: creativity, impact, quality, messaging, etc. | | |
| Announce winners, award prizes | | |
| Post winners on EnergySmart website | | |
| Integrate videos into presentations | | |

Appendix L. Soliciting Sponsorships

Because ARRA fund restrictions limited the cash and other prize purchases, we recommend staff pursue specific local sponsors in a focused and systematic way. The sponsor prospect list we recommend is based on business type and the value each can provide to promotional efforts listed elsewhere in the marketing plan.

Hardware stores, eco-home design services, and local retail/restaurants can provide gift cards and/or value-added offers from Boulder County businesses of interest to EnergySmart participant prospects. These sponsorship-associated benefits can reward referrals, act as contest prizes, and be used for lead generation bonuses. Cash sponsors benefit from exposure and impression opportunities in tandem with EnergySmart's mission-driven messages. In addition, the in-kind values we invite sponsors to provide in exchange for recognition also drives customers to the businesses themselves. This structure is congruent with ARRA's support of the local economy; with this model, local businesses become a part of EnergySmart.

The following (outlined in more detail below) will assist staff in sponsorship plan implementation:

- Sponsorship packet elements (cover letter, market data, and benefits)
- Proposed sponsorship structure
- Suggested categories and list of prospects
- Outreach guidance

An additional value of local sponsorship is longevity support for EnergySmart-related goals. Sponsors such as home stores, eco-design, and efficiency service organizations will connect with Boulder County residents during the course of the grant, and will thereby continue to promote efficiency action even after the grant period ends.

Sponsorship Packet

Copy and Layout Elements

Note: This "packet" should be designed for electronic communication and can also be provided as a .pdf on EnergySmartYES.com. The following pages are for suggestion only. Actual page flow and content may change as additional elements are added or removed.

Page 1. Title Page

Highlight the ESYES logo in the center and middle. Also include all partner logos with boilerplate copy. Include program contact information along the base of the page.

Page 2. Cover Letter Content

ESYES Header Logo

Contact Information

Date

Dear “X,”

Note: Prior to sending the packet, make sure you discover the name of the decision maker “X” for the organization. Send the letter and packet directly to this person and copy their assistant.

EnergySmart: Your Efficiency Solutions is delighted to invite “Company Name” to become a highlighted sponsor of Boulder County’s ground breaking energy efficiency service for home and business owners. Partially funded by the American Reinvestment and Recovery Act, EnergySmart is poised to serve 10,000 homeowners and 3,000 local businesses while reaching many thousands more thorough social mobilization marketing.

EnergySmart stakeholders include Boulder County, the cities of Boulder and Longmont, and local utilities. All these groups will promote the EnergySmart and sponsors’ brands via internal communication, internal media, and local events. Additionally, our marketing plan includes significant social media and interactive outreach.

We invite your support as an EnergySmart sponsor because “Company Name’s” local products and services are a perfect fit with the EnergySmart mission. (Note: Insert specific reason here, e.g., “McGuckin Hardware has long been a leader in providing ‘eco’ home products for Boulder County citizens.) Sponsorship of EnergySmart would raise the profile of “Company Name” throughout the two-year duration of the program. Sponsorship further gives “Company Name” the opportunity to promote any energy efficiency measures “Company Name” offers or promotes via special offers or specific message to prospects.

In the enclosed sponsorship packet, you’ll find the following information:

- EnergySmart Marketing Plan
- Sponsorship Benefits
- Quick Facts
- Testimonials

Feel free to contact me with any questions at info@energysmartyes.com or “Phone Number.” I look forward to working with you and will follow up shortly.

Yours sincerely,

Signature

BoCo Contact Name

Page 3. Market Information

EnergySmart Marketing Investment

Within two years, EnergySmart will invest hundreds of thousands of dollars and has already hired four full-time staffers to promote the EnergySmart service to every Boulder County resident. These investments add to an already robust communications platform in place via programs like ClimateSmart, EnergySmart@Work, 10 for Change, Partners in Action for a Clean Environment (PACE), and EcoCycle.

Strategic Partners

The American Reinvestment and Recovery Act funds limit paid media marketing of EnergySmart, so our marketing plan includes innovative and interactive partner elements for maximum exposure. We will leverage communication opportunities already in place at the local Chambers of Commerce, through earned local media and via internal and external governmental outreach efforts.

Additionally, our utility partners Xcel Energy and Longmont Power have committed to distributing the EnergySmart message in direct customer mailings. We will also be partnering with these utilities for presence at a wide variety of local events, garnering thousands more impressions. Our event education efforts will promote goodwill for EnergySmart and sponsor brands and will also drive EnergySmart service participation.

Interactive Strategy

As the hub of the EnergySmart brand, EnergySmartYES.com will provide the main entry point for information and service sign-up. Rich in functionality, the site will offer an uncluttered user interface and provide maximum share-ability. The EnergySmart social media plan includes engagement and outreach on Facebook, Twitter, topic-specific blogs, MicroTagging, and LinkedIn. All social media efforts will drive interested users back to EnergySmartYES.com. Sponsor logos and offers will appear run-of-site above the fold.

Psycho-Demographics

As a community-based and grant-funded service, EnergySmart is available to all Boulder County residents. We will, however, be targeting certain prospect categories based on both national and Boulder County-specific energy efficiency behavior research. Leveraging this research data, we anticipate targeting the following psycho-demographics via direct mail:

- More likely to have engaged in energy efficiency action in the past,
- Higher than average income,
- Higher than average education,
- Female, and
- Single family homeowners.

Page 4. Sponsorship

EnergyHEART EnergySmart Sponsorships

Current Inventory: 12 total, who will be highlighted monthly from May 2011-April 2012.

EnergySmart will highlight one sponsor monthly, but will also continue to feature past sponsors on an EnergySmartYES.com dedicated sponsor page. Therefore, early sponsors benefit from aggregate exposure over time. Monthly sponsors will also enjoy first right of refusal for sponsorships from May 2012 through March 2013.

In return for EnergyHEART sponsorship, “Company Name” will receive the following benefits:

- Social Media Platform Impressions: Facebook/Twitter/LinkedIn/Topic-specific blog outreach.
- Online Exposure: EnergySmartYES.com run-of-site for sponsor logo and promotional/coupon offer, and year-long promotional opportunity on dedicated sponsor page.
- Customer E-mail Outreach: Opt-in subscribers are active and interested homeowners.
- Advertising Logo Exposure: *Boulder Daily Camera, Longmont Times Call, and Boulder County Business Report.*
- Events: Opportunity to distribute sponsor materials.
- Partner E-mails: As available, EnergySmart will provide sponsor exposure via partner e-mail lists.

EnergyHEART Sponsorship Investment: \$TBD per month (or split into smaller chunks as appropriate).

In-Kind Sponsorship Opportunities

EnergySmart welcomes in-kind sponsorships, which consists of donating a certain product or service instead of direct financial contribution. For example, a news organization may provide print advertising, a hotel may provide rooms, a restaurant may provide food, etc., in exchange for being recognized as a sponsor. There are numerous possibilities.

The market value of the contribution must meet or exceed the specified amount listed in the sponsorship levels described above in order to qualify for sponsorship status. There can also be a combination of monetary and in-kind contributions. In-kind sponsor benefits will be based on the total market value of the donation, and will be matched with benefits at the sponsorship levels described.

Page 5. Quick Facts, Testimonials, Media, Staff Information

The elements below need to be added by implementation staff at the time of kit creation.

- FAQ from EnergySmartYES.com
- Selected testimonials
- Selected media

Suggested Sponsor Categories and Prospects**Media:**

- *Boulder Weekly*
- *Yellow Scene*
- *Lyons Recorder*
- *Louisville Times*
- *Superior Observer*

Home Stores:

- McGuckin Hardware
- Ace Hardware-Longmont
- Budget Home Center-Longmont
- Brownsboro Hardware
- Eco-Related Stores/Services:
 - McGuckin Design Center
 - Eco Ellies
 - Barrett Studio
 - DTJ Design

Health Clubs/Gyms:

- Colorado Athletic Club
- Rally Sport
- Core Power Yoga
- Yoga Pod
- The Spot

Retail:

- Pharmaca
- REI
- Whole Foods
- Silk/Hain
- Alfalfa's

Restaurants:

- Big Red F-Jax/West End/Zolo
- Noodles
- Chipotle
- Wahoos
- Mountain Sun

Outreach Guidance

Be Flexible

Negotiate with sponsors to determine what works best for both parties. In many cases, these may be in-kind donations. Ask for one large and many smaller values. This will allow EnergySmart promotions to also be more flexible.

Be Personal

Take the time to find the decision maker before reaching out with the sponsor offer.

Be Creative

Stay open to unique solutions. Remember, you are exchanging exposure for value. In some cases, that value will be exposure for EnergySmart in the form of e-mail lists, postings, etc. Any partnership that gives EnergySmart more visibility in Boulder County is worthwhile.

Be Exclusive

Tell potential sponsors that EnergySmart will limit the number of similar-type sponsor by geography to keep the value for each high. This will introduce a subtle competition for the inventory spots.

Be Persistent

Think of the sponsorship process as you would any sales job. You have a specific number of spots to fill and the best way to do that is to keep the pipeline full. Use any and all personal and professional connections to connect with prospective sponsors.

Appendix M. Measuring the Effectiveness of Marketing Tactics

Overview

Two important factors drive the importance of tracking marketing performance to assess return on investment (ROI):

- The EnergySmart Social Mobilization and Marketing Plan includes a variety of marketing channels to track direct mail, print and radio, social media marketing, and strategic partner marketing.
- The EnergySmart program includes limited resources of time, paid media, and staff.

Therefore, it becomes even more critical to track and analyze marketing performance as closely and as efficiently as possible. Marketing ROI measurement and associated knowledge allows resources to focus on the most valuable and productive marketing efforts. Over time, this increases total ROI for the entire program. The analytics plan provided below outlines some best practices for tracking marketing tailored specifically to the EnergySmart marketing plan and implementation realities.

The EnergySmart marketing and social mobilization plan helps deliver leads and increase the homes and businesses served by EnergySmart services. Any knowledge used to maximize the ROI of plan elements is a positive step of high value.

The Goal

Ideally, customer management systems fully integrate marketing with all sales and customer service processes. For instance, when an EnergySmart lead comes in via phone or e-mail, all the tracking and implementation functions will be auto-connected from start to finish. If the system is set up properly, marketing metrics and ROI will generate without much manual input. At this point, automated reminders about cross-selling, customer re-activation, and budget optimization become easier to execute.

The Reality

The EnergySmart business model includes two separate Salesforce CRMs and multiple entry points for prospects. EnergySmart implementers need to prioritize analytics efforts so the results can affect planning. In this case, simple is better, especially at the outset of full implementation.

Indeed, many businesses employ a full-time staffer to manage all data and analytics. However, digging into granular customer behavior is unlikely to return value for the invested time of EnergySmart staff. In addition, the marketing plan intentionally provides multiple entry pathways for Boulder County residents, so a combination of channels may drive participation. This design makes it more difficult to discern customer behavior triggers.

Setting a basic tracking plan is non-negotiable and deserves upfront time investment. It is also important to follow a lead through the CRM system as closely as possible, given any fixed

external limiters. Monitoring this path will provide additional data regarding ROI and customer service and process feedback.

Fortunately, this Social Mobilization and Marketing Plan offers intentionally nimble and flexible options, which will serve the optimization of efforts. To determine the performance of specific marketing efforts in order to fine tune the plan, we recommend testing the following variables:

- Media channel (print, radio, online, social media, e-mail)
- Creativity (where appropriate)
- Special offers

Key performance indicators (KPIs) become the data points used to test marketing effectiveness. EnergySmart KPIs include the following objectives:

- Calls/e-mails for more information
- EnergySmartYES.com traffic analysis (outlined in the Google Analytics paragraphs below)
- Contact information collected (at events or trainings)
- Conversions, such as:
 - Assessments/Sweeps scheduled
 - Efficiency action taken
 - Rebates collected
 - Tracking and analytics benefits

Ultimately, tracking provides information and learning which inform optimization of marketing efforts. By establishing evaluation criteria and consistent tracking methods, EnergySmart marketing can become more focused and drive better results.

Best Practices: Step by Step

Step 1: Establish and prioritize test elements, evaluation criteria, and metrics.

- Prioritize one or two key learning goals for testing to avoid information overload.
- Base these goals on the EnergySmart objectives listed above.
- Create a sample report and make sure external item codes can be captured via the internal CRM.
- Isolate testing variables as possible for best results. For example, to assess the “pull” effectiveness of a particular creative for direct mailing, test the creative change while maintaining the print specifications (size, color, paper stock), timing (same season and time of month), and send to a similar demographic mailing list.

Step 2: Construct appropriate tracking mechanisms.

In some cases, marketing channels offer unique phone numbers and URLs to automatically track responses. For EnergySmart, however, that level of specificity does not serve the current plan and may become more confusing. In the absence of automated tracking mechanisms, it becomes even more important that the drop down options available to call center staff and within the e-mail signup process closely match current marketing efforts.

In the case of multiple impressions of the EnergySmart message leading to customer outreach, it will be helpful to enable the drop down menu for multiple channels and to provide a method that highlights the most recent or conversion-driving method. In this way, the earlier channels get credit for driving behavior and do not appear incorrectly less valuable.

Further, EnergySmart staff should ensure that call center staff is very familiar with all external marketing. Consider posting current marketing materials in the Populus or Franklin offices so the customer experience is as seamless as possible.

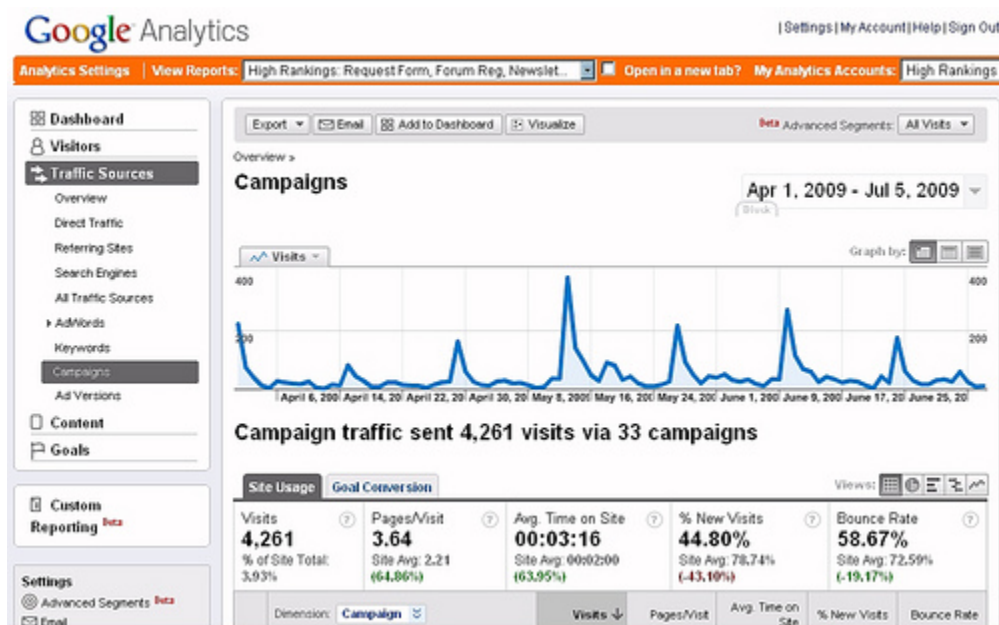
Step 3: Optimize campaigns based on learning. Think: continuous improvement.

If a channel is working, direct more energy and resources toward it. If an effort fails to register in terms of customer action, consider trying it once more in a different manner and/or discontinuing the effort.

EnergySmartYES.com and Google Analytics

Because the majority of the EnergySmart marketing plan drives prospects to EnergySmartYES.com, Google Analytics provides invaluable referral information. Such traffic referrals can include social media platform posts, e-mail links, and earned media mentions. The Boulder County Webmaster can set up Google Analytics on EnergySmartYES.com, which is architected in a manner to best support the data collection.

The screen shot below illustrates the data dashboard provided by Google Analytics.



E-mail and Social Media Marketing Tracking

E-mail services can provide information about how many recipients click and/or open an e-mail, but they do not provide any data after the click is recorded. Similarly, a link posted on Twitter will register as referring from Twitter, but many Twitter applications will not appear in Google Analytics as coming from Twitter. The workaround for this limitation involves tracking links in a special way.

Tracking URL Links: Two Methods

Google Analytics includes particular dimensions related to traffic statistics. Three of note for EnergySmart tracking purposes are campaign, source, and medium. For example, Website visitors arriving via an organic Google search will appear as:

- Source: Google
- Medium: Organic
- Campaign: (Not Set)

Two methods for tracking URL links are outlined below.

Method #1: Manual Entry

To ensure that all three dimensions appear in Google Analytics, the URL needs to include:

- utm_source
- utm_medium
- utm_campaign

For any EnergySmart link requiring tracking, such as a particular e-mail outreach effort, the following example link protocol can be followed:

http://www.example.com/myblogpost/?utm_source=Twitter&utm_medium=SocialMedia&utm_campaign=BlogPostName

In this case, the campaign is called "BlogPostName," the Medium is "SocialMedia" and the Source is "Twitter."

Be Consistent! There is no right or wrong way to name these fields; consistency is the most important practice.

Method #2: Google URL Builder

Google also offers a campaign URL builder tool which supplies appropriate fields and automates tracking URL creation. Campaign tracking URLs can be used for any content on EnergySmartYES.com marketed online or offline, but can become exceedingly long and difficult to share.

These URLs can be shortened for Twitter or within other presentations via a URL shortening application. The preferred solution is to create server redirects. This will require Boulder County IT and Webmaster support.

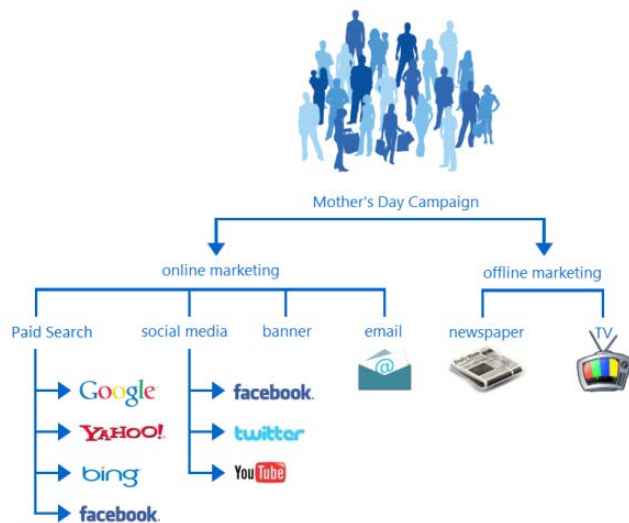
Campaign Tracking URL Applications

Use campaign tracking URLs for any site links posted to Twitter, Facebook, or any other social networking site. In addition, use them for any links to EnergySmartYES.com from any e-mail campaigns, newsletters, media mention, or blog comments. Such URLs can also serve within offline advertising, such as radio and print advertisements.

Tracking and Analytics in Action

The following example is outside of the EnergySmart subject domain, but we included it to illustrate a practical application of the best practices outlined above. The EnergySmart marketing plan will not approach the complexity of the Mother’s Day Campaign described. The tracking and analytics outputs, however, can be models for the kinds of data and information EnergySmart staff will gather.

More such practical information is condensed below and available in total via the link at the bottom of this section. Hubspot.com is a suggested resource for staff interested in digging deeper into the tracking and analytics process. For reference, the first two images below depict the full campaign. URL campaign tracking specifics follow with rationale.



| | | | | | | | | | | | |
|---------------|---------------------|---------------|-------------|---------------|-------|------|--------------|---------|---------|-------------|-----------|
| Campaign Name | Mother's Day 2010 | | | | | | | | | | |
| utm_campaign | Mother's Day 2010 | | | | | | | | | | |
| Platform | Online Ads | | | | | | | | | Offline Ads | |
| Channel | Email | | Banner | Pay Per Click | | | Social Media | | | TV | Newspaper |
| utm_medium | email | | banner | cpc | | | social media | | | tv | newspaper |
| Vehicle | Newsletter | Coupon | CNN | Google | Yahoo | Bing | FaceBook | Twitter | YouTube | Life Time | USA Today |
| utm_source | newsletter-april-07 | 15-per-coupon | www.cnn.com | google | yahoo | bing | facebook | twitter | youtube | life-time | usa-today |

E-mail Outreach URL Tracking

E-mail campaigns are one of the most effective ways of attracting site visitors. If e-mail URLs don't include proper campaign tags, visits to the Website from e-mail links will be attributed as referral or direct traffic.

How do we tag e-mail links? Enter the following variables into the URL builder:

- Website URL: <http://www.store.com/>
- Campaign Source: newsletter-april
- Campaign Medium: e-mail
- Campaign Name: Mother's Day 2010

Step 1: Enter the URL of your website.

Website URL: *
(e.g. <http://www.urchin.com/download>)

Step 2: Fill in the fields below. Campaign Source, Campaign Medium, Campaign Term, Campaign Content, Campaign Name*

Campaign Source: *

Campaign Medium: *

Campaign Term:

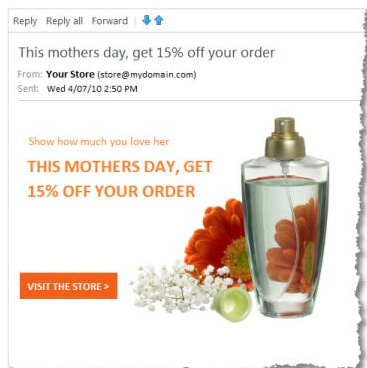
Campaign Content:

Campaign Name*:

Step 3

http://www.store.com/?utm_source=oprah.com&utm_medium=email

Use the generated link URL in your e-mail (e.g., a 'Visit the Store' button).



Banner Advertising Tracking

Follow the same tagging steps as with the e-mail campaign. Enter the following variables into the URL builder:

- Website URL: <http://www.store.com/>
- Campaign Source: oprah.com
- Campaign Medium: banner
- Campaign Name: Mother's Day 2010

Use the generated link URL in your banner (e.g., a 'Shop Now' button).



Social Media URL Tracking

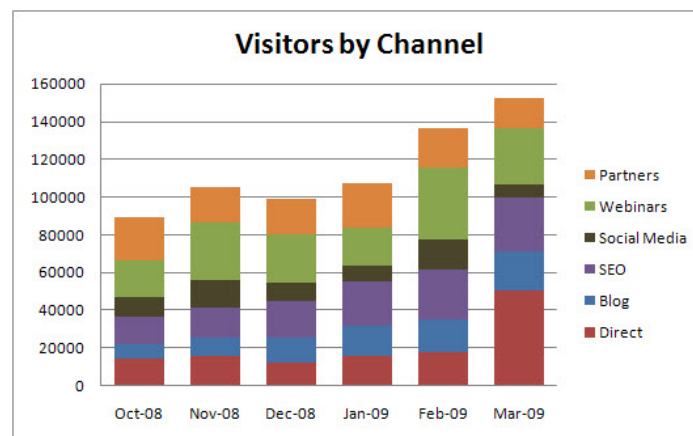
Social media has reshaped the online marketing landscape. A great deal of promotion and branding occurs within social network communication, and it's important to measure the success of these marketing efforts.

Using Twitter and the Mother's Day campaign example, tag all links to the EnergySmart Website with the proper campaign variables.

Measurement and Analytics Presentation

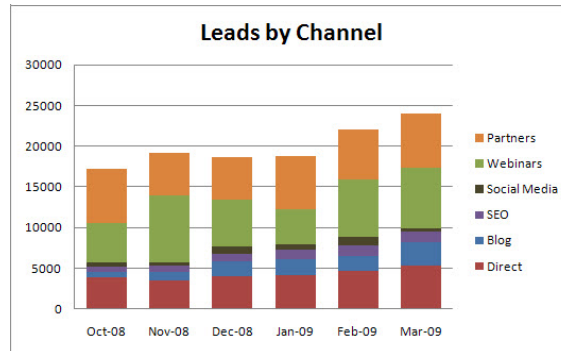
Granular Graphs

Your visitor graphs should look like the example below, including visitor volume from various marketing channels.

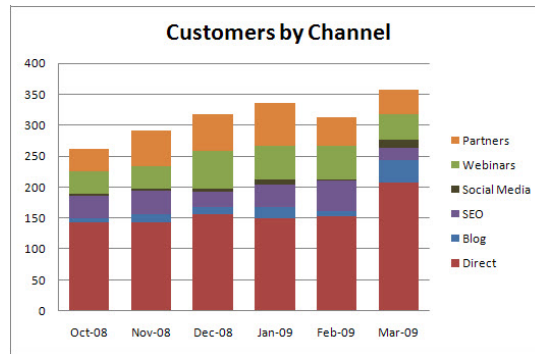


Prospect Funnel in Total

Using the data from [HubSpot Marketing Analytics](#), this granular analysis can be taken a step further with creation of similar graphs to understand what channels are delivering the most leads and, more importantly, what channels are delivering customers (see graphs below).

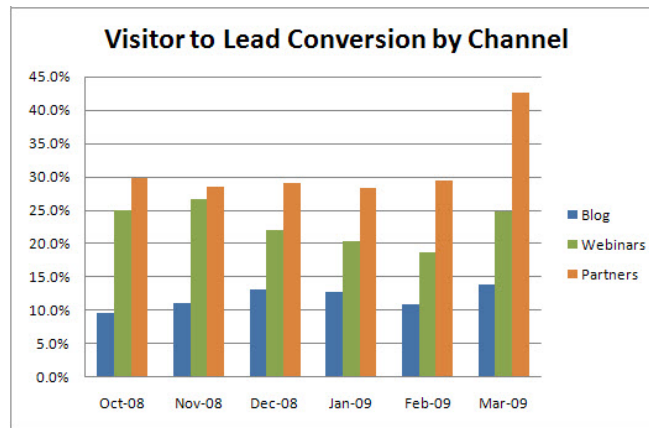


Channels driving leads, sales, and business are effective for determining where to invest limited marketing dollars.



Conversion Report

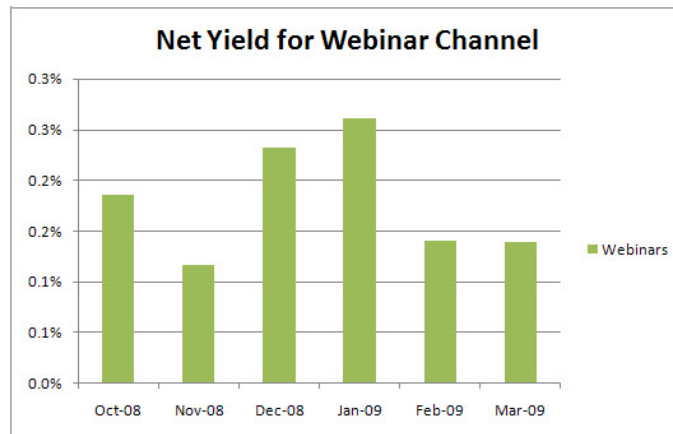
While marketing channels may be driving a healthy volume of visitors, leads, and customers, it is still important to track the conversion rate of each channel on a regular basis to check for consistent performance.



In the example above, the conversion rate for the Webinars channel (green) dropped for several months—from December through February—and the regained momentum in March. At the same time, the blog consistently delivered a reliable conversion rate month-over-month. These charts allow for fairly reliable estimates of leads for the upcoming months.

Business Results

Always finish with the net yield, or ROI of the channel or measure. This is what informs any shift in tactics or timing.



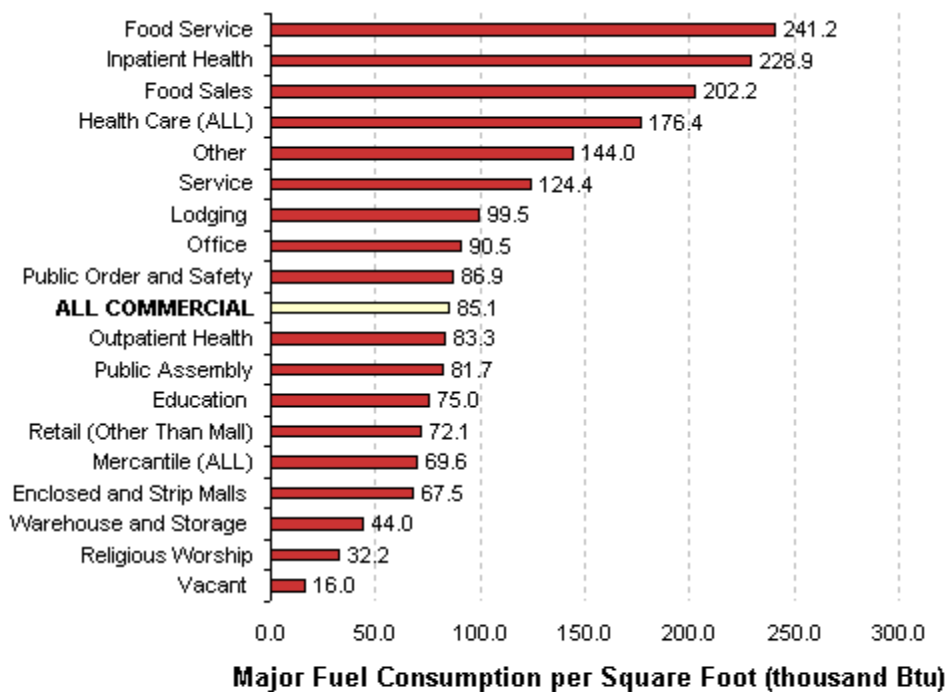
<http://blog.hubspot.com/blog/tabid/6307/bid/4712/Are-You-Tracking-Your-Marketing-Effectiveness-by-Channel.aspx#ixzz1FrNQtKW0>

Appendix N. Targeting Specific Commercial Market Sectors

This appendix provides additional background information on commercial sectors and their propensity to be good targets for energy-efficiency programs. There are many different perspectives from which one could determine the potential for energy efficiency: energy intensity, type of equipment, and decision-processes for investment, attitudes, and company size. The following sections provide data and insights that can help EnergySmart staff better target services and messages to various segments.

While the data in this appendix can provide insight into the potential for various commercial sectors, they also show that there are no perfect sectors for energy efficiency. EnergySmart staff should focus on sectors that have shown a propensity to want to participate in programs, as well as those that promise high potential energy savings when engaged. As more experienced is gained throughout the duration of the EnergySmart services, this document should be updated with the various business sector success factors.

Energy Intensity: On a square foot basis, commercial establishments vary greatly in their energy use. The chart below is based on data from the DOE Energy Information Agency, which combines both electricity and gas use intensity into one BTU number.



Note: "Mercantile (ALL)" includes both "Retail (Other Than Mall)" and "Enclosed and Strip Malls";

"Health Care (ALL)" includes both "Inpatient Health" and "Outpatient Health".

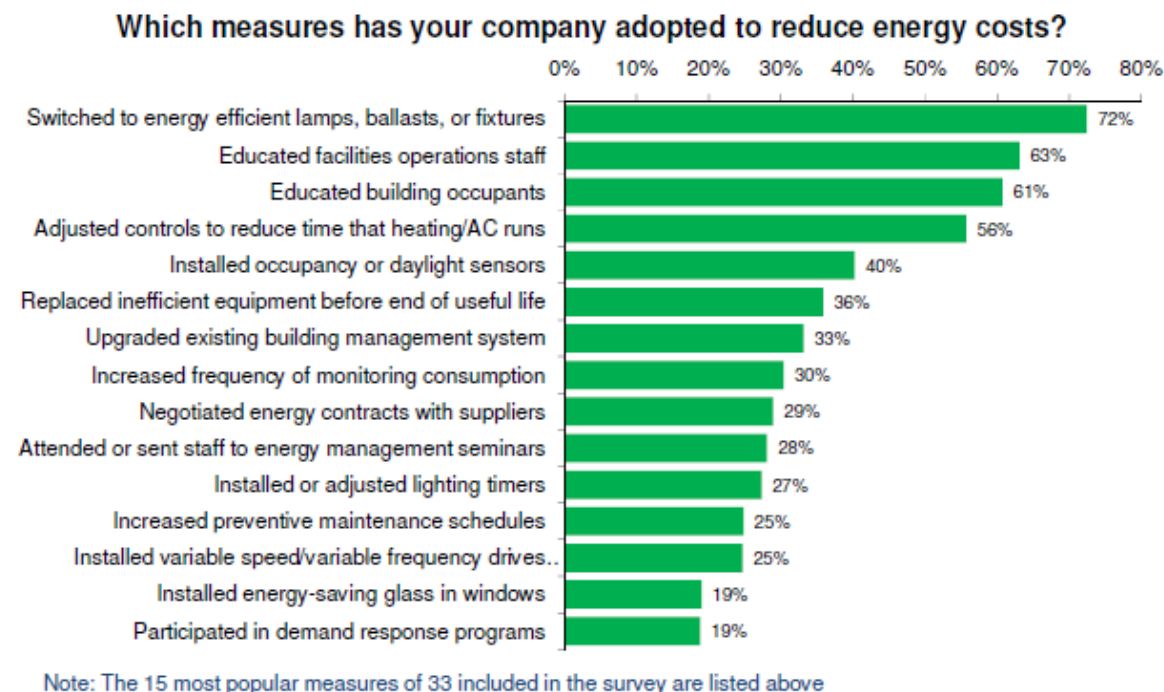
Source: Energy Information Administration, 1999 Commercial Buildings Energy Consumption Survey.

Source: <http://buildinginformationmanagement.wordpress.com/2010/02/12/energy-use-by-building-type/>

Energy Efficient Changes

Johnson Controls conducts an annual survey of businesses and their energy efficiency practices. The following graphic depicts the results of self-reported efficiency measures adopted by the surveyed companies. While lighting retrofits topped the list, it is noteworthy that the second and third measures were both behavioral changes.

Most popular efficiency measures are lighting retrofits and operational changes



Value of Various Efficiency Support Services by Sector

In a survey of end users,¹⁵ customers were asked about the value of a variety of service attributes that energy efficiency programs could possess. The following graphic shows that the value of services such as technical assistance, prequalification of vendors, and the offering of audits varies greatly depending on the market sector. When speaking with customers, EnergySmart staff should consider the relative value of these types of offers and emphasize those that are likely to resonate most.

¹⁵ *Estimating Markets for Energy Efficiency and Load Management Services*, E Source Multiclient Study, 2002.

Figure 31: Value of potential utility offerings—by secondary market sector.

The preferred offering varies dramatically by secondary market sector. Those in healthcare value prequalification of vendors most, while those in the office sector value below-market financing.



Note: Percentage responding 9 or 10 on a 10-point scale, where 10 = "extremely valuable."

Source: Question 43

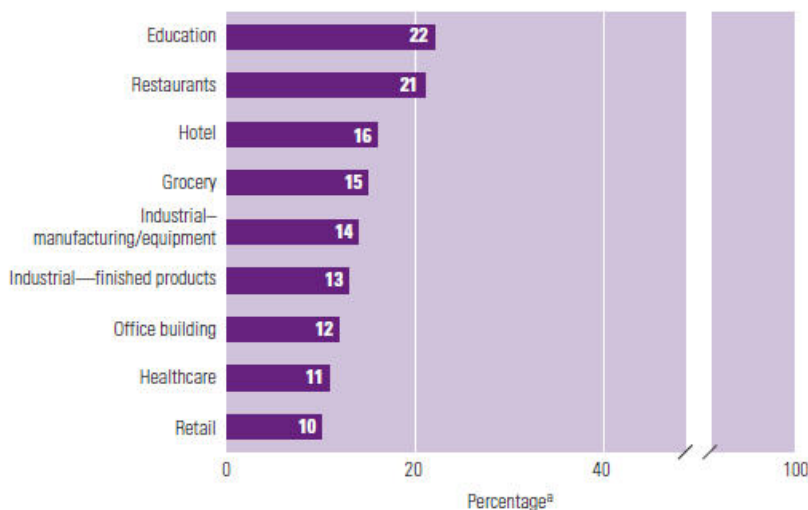
Source: E Source Estimating Markets for Energy Efficiency and Load Management Services.

Knowledge of Energy Efficiency Practices

The same E Source survey also looked at the energy efficiency knowledge level of energy decision-makers in various sectors. Those in education and restaurants tended to be more knowledgeable about energy efficiency measures, and those in retail and healthcare were on the low end of having energy efficiency knowledge. However, none of the sectors had a very high knowledge. EnergySmart staff will need to determine how to recognize the efficiency knowledge of their customers in order to provide the right information at the right level to allow them to make good business decisions.

Figure 22: Overall familiarity with energy efficiency practices—by secondary market sector

Survey respondents report low levels of familiarity with ways their organizations can use energy more efficiently to reduce their monthly energy bills.



Note: a. Rating is a 9 or 10 on a 10-point scale, where 10 = "extremely familiar"

Source: Question 26

Targeting Small and Mid-Sized Businesses for Lighting Retrofits

Given that the vast majority of energy savings from small business programs around the U.S. are from lighting upgrades, it is worthwhile to understand how targeting for lighting programs can work. Cadmus reviewed research from 2008 on utility lighting programs, which included an analysis of data on over 5,000 participants at two prominent utility and statewide efficiency programs. Cadmus also reviewed several market potential studies and program evaluations, as well as summaries of direct communication with 20 small business program managers.¹⁶

The research notes that program managers indicated that while energy savings are always important, *non-energy benefits* play a very large role in getting customers to engage. These non-energy benefits are listed by sector in the table below. Marketers should understand these key lighting concerns by market sector, and employ them during the Energy Assessment and follow-up processes.

Table N1. Top Target Sectors for Lighting Retrofits, at a Glance

| Sector | Average Energy Savings | Participation Level | Top Lighting Concerns* |
|-------------------------------|------------------------|---------------------|------------------------------------|
| Retail | Medium/High | High | Ambience, driving sales |
| Manufacturing | High | Medium | Reducing workplace errors |
| Offices | Medium | High | Workforce productivity and comfort |
| Lodging | Medium | Medium | Light quality, guest experience |
| Groceries, Convenience Stores | High | Low | Ambience, impact on food sales |
| Churches | Low | Medium | Community benefit |
| Warehouses | High | Low | Reducing workplace errors |

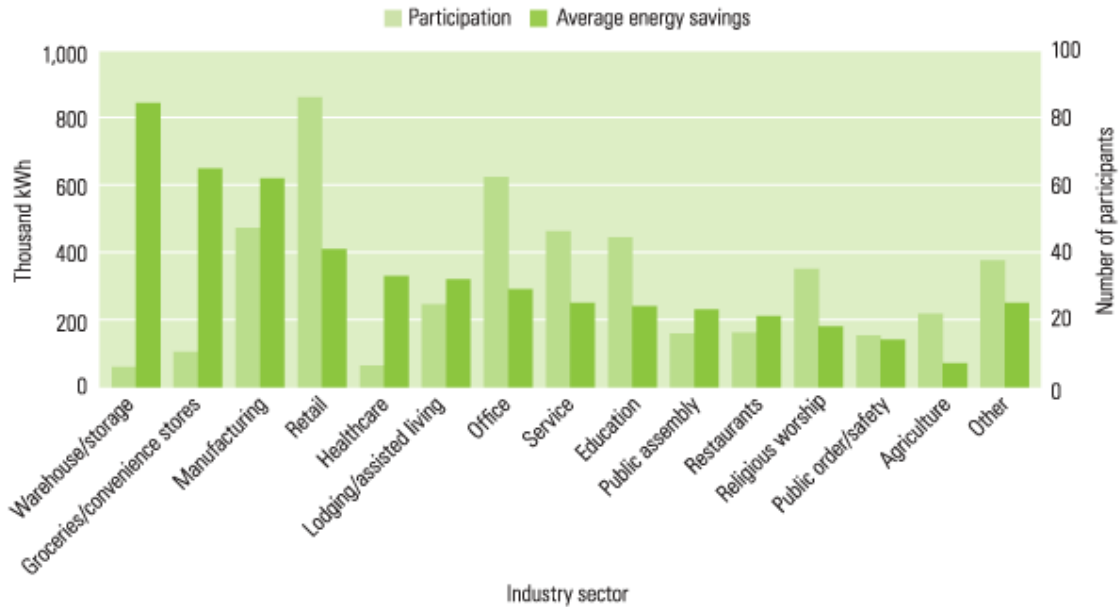
*In addition to cost savings.

Note that while churches may not have long run-hours for energy savings, they can be a conduit to congregations members that can save energy in their homes.

¹⁶ Small Businesses Go Retro: Achieving Greater Penetration for Lighting Retrofit Programs, E Source SMB-29, September 2008.

Sectors that Provide the Most Savings from Lighting Upgrades

Many sectors are attractive for energy-savings potential from lighting upgrades, depending primarily on the existing and desired lighting intensity and the total square footage of their space. Some sectors have higher participation rates while others have greater potential for savings. The following graphic shows the results of two robust small business lighting programs in the U.S. Manufacturing, retail, and office sectors have high participation. Warehouses and grocery/convenience stores, on the other hand, have the highest average savings.



Note: kWh = kilowatt-hours.

© E source; data from Efficiency Vermont and an anonymous midwestern utility

Source: Small Businesses Go Retro: Achieving Greater Penetration for Lighting Retrofit Programs, E Source SMB-29, September 2008.

Appendix O. Commercial Social Mobilization Tactics: Full Descriptions

Business Recognition Campaign

Concept

Many businesses love to receive public recognition that they are making efforts to be greener and more sustainable. While many businesses self-promote these attributes, there is greater value when a trusted third party entity does the promotion. This outreach campaign will provide a variety of methods for EnergySmart business customers to have their company promoted.

Benefits of this Endeavor

This ongoing campaign provides businesses with an added reason to engage the EnergySmart services and energy efficiency actions. Once one business in a sector has participated, other businesses in that sector are more likely to want to “keep up” and participate as well. It is a low-cost method to recognize the community leaders and to get additional earned media.

Target Audiences

The best targets for this type of recognition are businesses that cater to the local population, although all types of businesses may value this campaign. Businesses such as restaurants, retail shops, auto shops, groceries, and even banks are top prospects.

Models

Many utilities publish the names of businesses that participate in a variety of energy efficiency programs. Southern California Edison goes a step further, creating an awards ceremony each year that honors top green businesses for their actions in the prior year. We recommend EnergySmart follow the model set by the City of Boulder’s 10 for Change program in acknowledging businesses that have achieved a specific goal.

Design Concept

Boulder County would “recognize” participating EnergySmart businesses through a variety of methods. Some of these could include:

- Lists, or rolling banners on the web page
- Ads in the local newspapers
- Earned media (articles) in the local paper, business journals, and trade association newsletters or emails
- Case studies that get published and are online
- A yearly event to provide awards to the businesses that have excelled in energy reduction; there could be awards in a wide variety of sectors for larger and smaller businesses. This event could piggyback on an existing business event, such as the Boulder County Business Report, and could be sponsored or co-sponsored by Xcel Energy or LPC.

Activities and Outreach:

The primary activities would be developing the recognition collateral and getting it placed in papers, journals, and websites. Activities include:

- Determining which businesses to recognize. Examples include any business that spends \$1,000 or more on a retrofit or that experiences the greatest change in energy use after going through the EnergySmart service.
- Finding the best papers and journals from which to receive earned media or in which to place ads.
- Creating case studies through interviews.
- Determining the “best” performers for the highest awards/recognition (for example, Most Efficient Restaurant of the Year, Longmont). It is better to have more categories in which to have winners; the additional cost per winner is very low; more winners will generate greater press attention, create more role models in more sectors, and provide a large number of case studies.
- Request that Xcel and/or LPC sponsor these recognition activities to give them the opportunity to talk about their programs and rebates as well as link them to these efficiency upgrades in the press.

Level of Effort

The effort is relatively modest for this program, although it will require ongoing attention. Much of the foundation for this recognition is already underway in Boulder County and the cities of Boulder and Longmont.

Table O1. Business Recognition Tasks and Activities

| Task | Staff | Hours |
|---|-------|-------|
| Create business recognition team | | |
| As a group, look at the variety of options for recognition and decide which ones to pursue: | | |
| For each approach, determine what levels of activity will results in recognition: completing a Sweep? Spending a certain amount on an upgrade? Saving a certain amount of energy over time? | | |
| Determine award categories | | |
| Select the business journals and news outlets for buying ad space for recognition | | |
| Select businesses for case studies: Interview them, take photos, get "release" from them to be able to use pictures, data; write case studies, place in template and on the website. | | |
| Send press release out for each case study | | |
| Work with Xcel and LPC on integrating with any awards they may have. Work with them to cosponsor events and rewards. | | |

EnergySmart Carrotmobs

Concept

This social mobilization approach hits both businesses and residential customers at the same time. The idea is to create consumer demand during a very short period of time (a day or less) for one business that commits the most money to improving its energy efficiency. County or EnergySmart staff members would go to a number of competing businesses in the same sector in a community, such as restaurants, retailers, grocery, or liquor stores, and ask them to make a pledge to spend Carrotmob revenue on improving their energy efficiency. The business that commits the highest percentage of its revenue “wins.”

Benefits of this Endeavor

This approach has several benefits:

- The tangible benefit of the single business’s energy upgrades
- The other businesses are asked to think about energy efficiency
- Regular citizens get to contribute to a worthy cause, get some useful products, and have a “party” in the Carrotmob mode
- Potential earned media on such an innovative promotion
- Entertaining content for the EnergySmart website

Target Audience

The first target audience sector should be businesses that primarily serve local clients and that have flexible capacity for increased business during a given day. Locally owned retail shops, groceries, and liquor stores generally meet these requirements. Restaurants are also good but are less flexible as far as capacity.

The other target is the buyers, probably made up of people already interested in improving the environment.

Models

There is a Carrotmob website (Carrotmob.org) that has short articles on many Carrot mobs that have taken place around the world. The concept originated in San Francisco. Others include: Carrotmob Madison, Wisconsin (<http://madison.Carrotmob.org/>), Carrotmob Dallas (<http://dallas.Carrotmob.org/>). There were a number of Carrotmobs that were held in conjunction with 10/10/10’s 350.org get-togethers, including one in Boulder at the St. Julien (there was no competition but the hotel did donate some of its revenue) and Denver (http://denver.Carrotmob.org/campaigns/groundwork_in_denver).

How the Initiative Drives Savings

The money pledged by the business goes directly towards energy upgrades. In addition, other businesses in that category will be exposed to energy efficiency through the initial outreach on participating in the Carrotmob. EnergySmart Advisors should target these businesses simultaneously with sweeps.

Design Concept

As an example, County staff or EnergySmart Advisors would go to (15) restaurants in Longmont. Each would be asked to commit to a percent of revenues, generated on a designated day, that it would commit to setting aside for efficiency upgrades. This commitment would be in exchange for staff driving a LOT of business to the restaurant on that day. Once the highest bidder is determined (i.e., the restaurant that commits the highest percentage of revenue), staff would use its social networking tools to attract people to spend money at that restaurant. The more people and the more spending, the more money will be available to spend on efficiency improvements.

Key Activities and Outreach

The outreach and activities center around 1) businesses and 2) consumers.

- Develop a list of clusters of businesses to enlist for the Carrotmob approach.
 - By location
 - By type of business (fast food, casual, upscale restaurants; women's clothing stores; sporting goods; coffee shops; bookstores; bars;)
- Create market buzz through press releases and social mobilization. Emails through environmental groups, posts on Facebook, Twitter feeds, creation of a MeetUp page, and 4Square are all current methods that should be used for outreach.

Level of Effort

The organization time will depend on how many sectors and events are selected. Once the process is formulated, each additional sector will be fairly streamlined.

Potential Impacts

Investments for businesses would be modest, possibly in the several thousand dollar range per contest. Impacts would be multiplied by involvement of the consumers being encouraged to save at their own homes, and other businesses would be exposed to the overall concept.

Considerations

Press coverage may become sporadic or reduced as more of these events occur. It may be better to focus on generating mobs in several different towns over time.

Table O2. Carrotmob Tasks and Activities

| Task | Staff | Hours |
|---|-------|-------|
| Form internal Carrotmob team | | |
| Hold meeting to determine best business categories to target, and best targeted towns and cities. Decide on one or two targets for pilots. | | |
| Contact Carrotmob.org and have them post the event | | |
| Create a set of specific rules for the Carrotmob. Boulder doesn't have to copy exactly what others have done, but the Energy Upgrade model does fit well with the overall EnergySmart objectives. | | |
| Create a list of targeted businesses. This list should focus on one town or region of a town (such as North Boulder or downtown Longmont), and one category of businesses. It would be good if the business category had about 10 businesses in it in order to create competition as well as have decent reach into the sector. | | |
| Arrange to target Sweeps to these businesses as a way to engage them | | |
| Get bids from each participating business | | |
| Determine a winner, and notify all businesses of the final decision | | |
| Select a staff person to work with winning business on logistics: which day would work well, how long the "mob" will last, planning to meet added capacity, marketing efforts | | |
| Get agreements from business to do filming and pictures within the business, and to get quotes from the business for case studies | | |

Table O3. Carrotmob Outreach for the Event

| Task | Staff | Hours |
|---|-------|-------|
| Meet with team to determine the best audiences for the specific business that is being mobbed | | |
| Develop an appropriate advertising campaign that uses motivations for buyers | | |
| Put together social media tactics: Facebook, email campaigns, Twitter, MeetUp, 4Square | | |
| Discover partners for the outreach, such as local environmental groups, sports groups, etc. Go to their leadership and get commitment for them to advertise the events (particularly email). | | |
| Create press releases, at least one when the date is announced, one right before the event, and one after the event to show results | | |
| Get a group of volunteers to help on the day of the event: Bright signs, musicians, street walking (sandwich boards?) and any other element to drive business on the day of the event will be a plus. | | |
| Assign someone to take pictures, take videos, and interview people | | |

Table O4. Post Pilot Activities

| Task | Staff | Hours |
|--|-------|-------|
| Contact Carrotmob and update the event | | |
| Interview the business owner to get a debrief on how things went | | |
| Help the business follow through with its energy upgrade | | |
| Meet with Carrotmob team and determine next steps and other Carrotmob events | | |

Appendix P. EnergySmart Brand and Logo Usage Guidelines



energySMART

Your Efficiency Solutions

**Graphic Standards &
Brand Name Usage Manual**



energysMART
Your Efficiency Solutions

Your logo is the cornerstone of your identity. It is essential that it be used consistently to ensure brand recognition, loyalty, and trust. Here are a few guidelines:

- > The EnergySmart logo should always include the icon, logotype, and tagline.
- > The EnergySmart logo may be used in horizontal or vertical formats. Please use the official arrangements.
- > The EnergySmart logo may be printed in CMYK, PMS (2-color), or B&W.
- > The EnergySmart logo should only be printed on a white background.



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4-COLOR CMYK VERTICAL FORMAT



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4-COLOR CMYK HORIZONTAL FORMAT



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2 PMS COLORS



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BLACK & WHITE



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The EnergySmart icon and the HOME and BUSINESS building icons may be used separately when doing so would enhance communication. Here are a few guidelines:

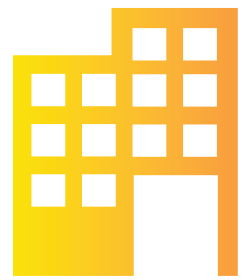
- > The EnergySmart icon may be used without the logotype and tagline, and may be printed on backgrounds other than white, as long as the white border/interior and appropriate spacing are preserved.
- > The EnergySmart HOME and BUSINESS icons may also be used independently of the logo and tagline.
- > The EnergySmart HOME and BUSINESS icons may be used in color or in white against a colored background.



ICON



HOME ICON



BUSINESS ICON



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Building height



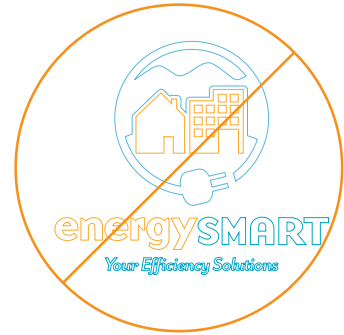
Ample space should be given around the EnergySmart logo—at least a space equal to the height of the commercial building in the icon.



energySMART
Your Efficiency Solutions

WHAT NOT TO DO

- A. Do NOT stretch
- B. Do NOT outline
- C. Do NOT crop
- D. Do NOT change the logo colors
- E. Do NOT re-proportion elements
- F. Do NOT change the orientation
- G. Do NOT crowd
- H. Do NOT add effects



B



C



D



E



F



G



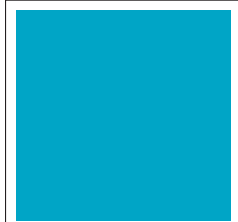
H



energySMART
Your Efficiency Solutions

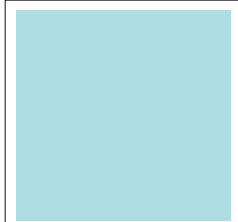
Color is another powerful component of your brand, and should be used consistently without fail. The guide below designates color for consistent application between mediums (PMS and CMYK for print; Hexadecimal and RGB

TEAL



PMS 3135C
CMYK 100/1/20/3
RGB 0/164/196
HEX 00a4c4

SKY BLUE

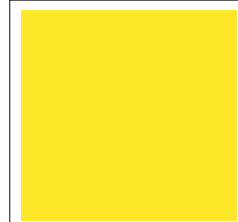


PMS 290C
CMYK 30/0/10/0
RGB 175/223/229
HEX afdfe5

ORANGE

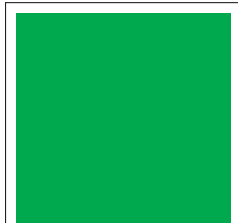


PMS 137C
CMYK 0/38/95/0
RGB 251/170/39
HEX fbaa27



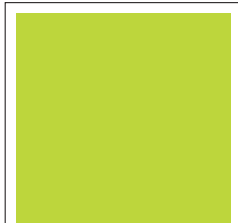
PMS 107C
CMYK 0/5/90/0
RGB 255/231/46
HEX ff72e

BRIGHT



PMS 355C
CMYK 93/0/100/0
RGB 0/170/39
HEX 00aa4f

LICHEN



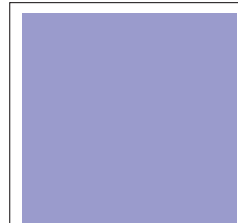
PMS 583C
CMYK 30/0/95/0
RGB 191/215/59
HEX bfd73b

PLUM



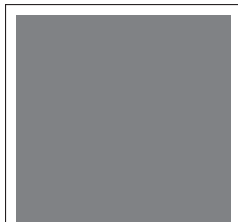
PMS 2415C
CMYK 50/100/15/0
RGB 147/39/128
HEX 932780

LAVENDER



PMS 270C
CMYK 40/36/0/0
RGB 154/155/205
HEX 9a9bcd

GRAY



PMS 423C
CMYK 0/0/0/60
RGB 128/130/133
HEX 808285

Teal and orange are the main colors.
 The other shades should be used as accents.
 Gradients of like colors are also recommended.

GRADIENTS





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Your Efficiency Solutions

Verdana is the typeface for both print and web use. Regular for body copy, and bold for headlines and subheads. Italic for callouts and testimonials.

Verdana Regular

ABCDEFGHIJKLMNOPQRSTUVWXYZ
abcdefghijklmnopqrstuvwxyz
1234567890-=[],./

Verdana Bold

ABCDEFGHIJKLMNOPQRSTUVWXYZ
abcdefghijklmnopqrstuvwxyz
1234567890-=[],./

Verdana Italic

ABCDEFGHIJKLMNOPQRSTUVWXYZ
abcdefghijklmnopqrstuvwxyz
1234567890-=[],./


energysMART
Your Efficiency Solutions

Headline in Verdana Bold

Ample leading and white space around the text allows for ease of reading.

Verdana Roman is used for body copy. Bold face calls out key phrases.

**Step
1**
Call to schedule an EnergySmart Home Energy Assessment

When you call for a **Home Energy Assessment** you are assigned an **EnergySmart Advisor**. Your Advisor is your personal energy assistant who guides you through the steps of making your home as efficient as it can be.



Conducted by a certified Energy Specialist, your Assessment uncovers energy-savings opportunities in your home. The Assessment cost is \$120. Energy Advisor services listed in the table below are free. If you have had a home energy audit with audit report in the last 3 years, you do not need a new Assessment to receive the free Energy Advisor services.

Call 303-544-1000 to schedule your EnergySmart Home Energy Assessment now.

Callouts in Verdana Italic conveys ease and friendliness.



energySMART
Your Efficiency Solutions

Photography can also be used to bring EnergySmart brand to life. Images of everyday people interacting with friendly advisors and contractors will underscore the personal assistance the program offers. Close-ups of key energy-efficiency objects and devices also illustrate the offerings. Consider using a round-cornered box to communicate ease of use and friendliness.



These HOME and BUSINESS illustrations may also be used to communicate key program offerings: energy-efficiency, sustainability, and cost-savings for both home and business.



HOME



BUSINESS



energysMART
Your Efficiency Solutions

The following are examples of how to bring the elements of the EnergySmart brand together. Consider using gradient backgrounds to anchor a header or graphic. These examples are by no means exhaustive or restrictive — just a sampling of how the brand language can begin to take form. Have fun!

We're Here to Help!

Step 3

Choose your home upgrades & select the right contractor

Your Advisor offers you a select list of pre-qualified contractors, helps you get bids, and makes sure the contractor knows what you want. **They even fill out your rebate and financing paperwork!**

By acting now, you can take advantage of limited-time rebates up to \$250 and low-rate financing options only available to EnergySmart customers.**



**Funds are limited and are provided on a first-come, first-served basis. EnergySmart rebates apply to recommended measures only. This rebate is provided in addition to other government and utility rebates your Advisor will find for you.



EFFICIENT LIGHTING

Potential energy savings for a typical 2,000 square foot office space with 24 fixtures.

| | |
|------------------|---------------------------------------|
| \$1380/YR | OLDER T12 LIGHTS W/ MAGNETIC BALLASTS |
| \$1024/YR | STANDARD T8 LIGHTS |
| Save 26% | |
| \$794/YR | HIGH PERFORMANCE T8 LIGHTS |
| Save 42% | |
| \$398/YR | ADD REFLECTORS / LENSES / DELAMP |
| Save | |

COST FOR LIGHTING PER YEAR

* Source: E Source Lighting Technology Atlas, Assume 24 fixtures, approx 2000 ft² of office space, average price of 9.19 c/kWh, 4,000 hrs/yr run time.

"We saw a 30% decrease in energy bills—this project has been saving us between \$1,000 - \$1,200/month in energy costs! The quality of the new lights is better than we had before—it is a cleaner light."

**BEVERLY VERNON, OWNER
BUDGET HOME CENTER, LONGMONT**



energySMART
Your Efficiency Solutions

Usage guidelines for brand name and tagline

EnergySmart: Your Efficiency Solutions

DO

- > The tagline should only accompany the brand in the logo and when it can be used as a stand-alone phrase, as below:

"EnergySmart: Your Efficiency Solutions. Now in pre-launch phase, these pilot services are available to all Boulder County citizens."

DON'T

- > For text, try NOT TO USE the following format. This will keep the text from becoming cumbersome:

"Boulder County's new program EnergySmart: Your Energy Solutions is a service that makes it easier for you to improve your bottom-line."

Using EnergySmart in text

- > Only when used in the logo, is "EnergySmart" presented with "energy" in lower case and "SMART" in upper case as in the logo below.
- > When used in text (articles, brochures, emails, websites, etc.), each of the two words should be capitalized and the words should be combined without a space: EnergySmart.

Example:

"By acting now, you can take advantage of limited-time rebates available only to EnergySmart customers."

- > EnergySmart is a set of services provided to make it easier for customers to engage in and follow-through with efficiency implementation. In written text, it can be referred to as a stand-alone name or as a descriptor included with the word "services".

Examples:

"With EnergySmart, it's never been easier to improve your bottom line by improving the efficiency of your business."

"With EnergySmart services, it's never been easier to make your home more comfortable."

**energySMART***Your Efficiency Solutions*

Using EnergySmart with service terms

- > EnergySmart, as the service brand name is part of the official service terms, such as "Advisor" or "Home Energy Assessment" but does not always accompany the term in written text.
- > The first time a service term/name is used in a continuous piece of text, it should include the brand name ("EnergySmart") and the service title or item (e.g. "Energy Advisor", "Recommendations Report", etc).
- > When the service term is used later in the same written piece use your judgment, based on the context, for whether to use EnergySmart with the term again.
- > Service terms can also be used without other parts of the term (such as "Home" or "Energy" for the "Home Energy Assessment").
- > The shortened term or title should always be capitalized.

Example:

"When you call for an EnergySmart Home Energy Assessment you are assigned an EnergySmart Advisor. Your Advisor is your personal energy assistant who guides you through the steps of making your home as efficient as you want it to be. Your EnergySmart Assessment uncovers energy-saving opportunities unique to your home. During this visit your Advisor also installs FREE energy-saving light bulbs, showerheads, and water heater pipe insulation.

Using EnergySmart in URL

EnergySmartYES.com

- > The website address should always be presented with the upper and lower case letters as it is above. You may also use "www" (in lower case) to start the url.
- > Do not forget to include the "YES" after "EnergySmart".



Cooperative Advertising & Cobranding Guidelines

- > Contractor promotional efforts may include EnergySmart logos and materials provided by Boulder County. Files can be downloaded from the EnergySmartYES.com contractor web portal or may be available on request.
- > In all advertising creative, contractors must adhere to the branding guidelines outlined above.
- > Trade allies may use the EnergySmart logo in promotional materials. In all cases, the EnergySmart logo must appear no smaller than the following minimum sizes:

| Material | Material Size | Required minimum logo size |
|------------------|--------------------------|--|
| Printed | 8 ½" X 11" or larger | 2.75" W (horizontal logo) 1.5" W (vertical logo) |
| Printed/tri-fold | 8 ½" X 3.6" | 1.75" W (horizontal logo) 1" W (vertical logo) |
| Printed ½ page | 8 ½" X 5 ½" or larger | 2.75" W (horizontal logo) 1.5" W (vertical logo) |
| Newspaper ad | Smaller than 8.5" x 5.5" | 1.75" W (horizontal logo) 1" W (vertical logo) |
| Web page | any | 230px W (horizontal logo) 150px W (vertical logo) |

- > Please ensure white space around the EnergySmart logo equal to the size of the commercial building in the icon.
- > Use of the EnergySmart logo must always include the tagline "Your Efficiency Solutions."
- > Trade allies may use the following language in their own promotional materials:
 - [Contractor] is a proud participant in the EnergySmart approved contractor network.
 - Ask me about the Boulder County EnergySmart program.
 - Products and services provided by [Contractor] may be eligible for rebates or incentives under EnergySmart programs.
- > Restrictions: No modifications to EnergySmart materials or to contractors' own materials promoting Boulder County's EnergySmart programs are permitted without the explicit permission of Boulder County. This includes the use of the EnergySmart logo and other variations of EnergySmart materials.
- > Failure to comply with any of these rules, regulations or guidelines herein may result in removal from the EnergySmart contractor network.

Appendix Q. Staff Communications Social Marketing Reference

The following are basic communication concepts for Energy Advisors and outreach staff **to use during in-person or e-mail communications with existing or prospective EnergySmart customers**. Detailed examples of specific messages are provided in the labeled tables accompanying this section. Energy Advisors and outreach staff should become very familiar with the concepts below and the content in these tables so that conversations with potential or existing customers are fluid and natural. The topics below cover communications for either:

- 1) Outreach staff motivating prospective customers to engage with EnergySmart, or
- 2) Advisors motivating existing customers to install the recommended measures.

Basic Customer Interaction Framing

Be customer-focused. Stay focused on the customers' needs and understanding of the service. From the customers' perspective, EnergySmart is not about the County hitting goals for energy efficiency or emissions reductions (for the most part). They are interested primarily in the benefits they will receive from the service.

- **Service and outreach staff are salespeople.** Although you may feel like a government employee or technical expert, when communicating with prospective customers you are a salesperson. From initial contact with a prospective customer when you can build trust to post-installation follow up when your actions can stimulate customer referrals, you can influence customer decisions.
- **Know who you're talking to.** Different customers will be motivated by different benefits and values, so you need to understand the perspective of the person you're interacting with specifically. Ask questions to learn the customer's barriers and what would motivate them to engage the EnergySmart service. More on the barriers is provided below in the Addressing Barriers with Communication portion of this appendix.

Following are several key points from our research that staff should remember: examples of messaging supporting these points is included in the table "Addressing Barriers with Messages" in their respective [residential](#) and [commercial](#) sections.

- **People overestimate how efficient their homes are.** People may not see the need for EnergySmart if they think their home is already pretty efficient. To overcome this barrier, outreach staff should emphasize that energy can be wasted in parts of the home they can't see and might not be aware of, like ducts, attics, and so on. An Energy Assessment would find these hidden areas. After an Assessment, people may be surprised to learn their homes are not as efficient as they thought, and may be unprepared for the costs needed to make them efficient. Advisors should emphasize rebates and the long-term energy savings customers will receive.
- **People want to be comfortable and show a preference for measures that decrease discomfort.** If prospective customers talk about cold spots or drafts, let them know this indicates that energy is likely being wasted and that EnergySmart can help. If the

Assessment uncovers the need for air sealing or insulation, emphasize that they will reduce the cold spots in their homes as well as cut the energy they're wasting.

- **Cost can inhibit, BUT rebates can enable.** People are attracted to the perceived value of the Assessments and the Energy Advisor service. But the costs of *upgrades* can be inhibiting to customers following through on recommendations. Outreach staff should tell prospective customers about the range of limited-time rebates. Advisors should lead conversations with the rebate funds that are available, using the total value of combined rebates to make the value seem larger. Customers need to be reminded that these rebates are only available for a short time.
- **Personal assistance is valued.** Even if not part of the initial appeal of the service, customers value the Energy Advisor's expertise and the help they receive making decisions throughout the process. Outreach staff should talk about the value Advisors bring to customers. Customers want their service people to be responsive, honest, and organized; these qualities will build trust and credibility with existing customers.

Addressing Barriers with Communication

Outreach staff and Energy Advisors should become extremely familiar with common customer barriers to energy efficiency and be able to speak knowledgeably about the EnergySmart benefits and features that offer *value* to the customer to overcome those barriers. The table "Addressing Barriers with Messages", in their respective [residential](#) and [commercial](#) sections, lists the most common barriers and key messages to address them.

Below are several suggested questions that will encourage customers to reveal their barrier(s) and possible responses about EnergySmart benefits that staff can use to keep the customer interested:

Staff: *"Have you ever hired a professional to understand where your home could be wasting energy?"*

Customer: *"No. The service is too expensive."*

Staff: *"EnergySmart services provide up to \$555 in value at a cost to you of only \$120"* (show brochure with breakdown of cost/value).

Staff: *"What has kept you from doing something about your drafty home/high energy bills/desire to reduce your carbon footprint?"*

Customer: *"I just don't think I have the time to deal with contractors."*

Staff: *"That's one of the great things about EnergySmart. You get a personal Energy Advisor who will get bids from contractors for you, as well as handle rebate paperwork."*

Staff: *"Did you know your home could be leaking heated air in places you can't see? An Energy Assessment would help find those hidden leaks so they can be fixed."*

Customer: *"Maybe. But I'm not sure I could trust the auditor. They might just be trying to sell me something I don't need by saying my house is leaky."*

Staff: *"I understand that concern. The auditors with EnergySmart only conduct the audits—not the efficiency upgrade work. And your personal Energy Advisor is an independent, third-party expert with no incentive to steer you the wrong way. In fact, they are working for you."*

Staff: “What is keeping you from signing up right now for an assessment to see if you might be wasting energy without knowing it?”

Customer: “I’m not sure I want to know, because I can’t afford to make any upgrades right now.”

Staff: [note, there are several possible responses. Several potential responses to the cost barrier are listed here]. “EnergySmart is subsidized through a short-term federal grant, and the Assessment value is more than \$500, but you get it for \$120. And for that \$120, you get free efficiency items (like CFLs) worth up to \$85, not counting the energy dollars these will save. In addition, EnergySmart rebates of up to \$250 are available right now, for a limited time. These rebates are in addition to other rebates you may be eligible for. Boulder County also has a microloan program...”

Normative Messaging

It is possible to influence a person’s behavior by sharing information about the behavior of others. People tend to do what they think other people in their peer groups do, even at a subconscious level. EnergySmart staff and Advisors should use normative messaging as much as possible when interacting with potential and existing customers. Some approaches might include:

- Explaining how homes, particularly in their neighborhood, are already engaged in EnergySmart and efficiency practices.

“The homeowner on the corner has already completed a retrofit, blown insulation into the walls, and changed out an old furnace. Our calculations showed that this will save him 15 percent on his heating bill.”
- Mentioning that lots of people are getting on board with EnergySmart Assessments.

“EnergySmart has already completed Assessments on over 40 homes just in this part of Longmont. They are all on their way to making their homes more comfortable and lowering their energy bills.”
- Focusing on a “don’t be left behind” message.

“There are good rebates from the County, utility, and state, but funds are limited and lots of people are already taking advantage of them.”

Targeted/Values-based Messages

Consumers can also be steered towards energy-efficiency services through motives based on values and emotions. The table “Target Group Values Messages”, in the respective [residential](#) and [commercial](#) sections, links specific groups and customer attributes with corresponding EnergySmart messages that resonate with each group. These messages do not necessarily substitute for the key message platform, but are meant to bolster it with specific reasons for the consumer to take action. To learn of an individual’s motivation for EnergySmart services, ask a direct question such as: “What are some of the reasons you would want to reduce energy use in your home?” Try to understand if there any personal values beyond saving money that might motivate their initial interest, and talk about the benefits of EnergySmart that reflect those values. These values can be inferred with a frank question, such as: “Besides saving money, are there other reasons you want to reduce energy use?”

Pledges and Commitments

Pledges have been shown to be a powerful social driver; research shows that once a person makes a commitment to another person, especially publicly, they are much more likely to follow through than if they had not made a formal agreement.

In Groups: People make commitments when authority figures (EnergySmart staff) or their peers are present, and when information is fresh in their minds. EnergySmart staff should get pledges of action during meetings and presentations. This can be completed by:

- Collecting participants' contact information via pledge cards or attendance sheets.
- Asking for a show of hands of those in the group who think EnergySmart sounds like a valuable service *OR* who will call to schedule an Assessment.

During EnergySmart Assessments/follow-up meetings: Commitments don't need to be large gestures; they can be small steps towards implementing some or all of the recommended measures. Examples of questions to solicit commitments might include:

- *“Can I get a date by which you will choose a contractor to make these upgrades?”*
- *“Which specific upgrades are you going to follow through on?”*
- *“When is a good time for me to return and sit down to talk with you about the Assessment findings?”*
- *“Do you need to talk to your spouse before making a commitment? I'd be happy to come back to go over the options with both of you.”*

Recognition

For a customer who has had a generally good experience with EnergySmart services, recognition of his or her contribution to the overall program and community goal can be a key motivating factor in getting that customer to share their experience with others. Like commitments, recognition statements do not have to be grandiose; simple encouragement or reinforcement works just as well and is more genuine. Energy Advisors should give recognition to customers who have followed through on recommendations. Examples might include:

- *“Congratulations. With this Assessment, you've taken your first step towards a more efficient home. Now let's see what we can find for rebates.”*
- *“Come next heating season, you'll thank yourself for sealing up your home.”*
- *“Not only will you now be saving money, but you've reduced your impact on the environment as well, and I know that's important to you” (based on prior conversations).*

Case Studies and Testimonials

Testimonials and case studies are especially powerful in creating new social norms. They tell success stories that come from a more credible source (another customer) than County staff. Outreach staff and Advisors should memorize specific facts and figures from their experience or from prepared case studies to share with customers as the topics arise in conversations.

- *“Jim Brown invested in a new high-efficiency furnace even though his wasn’t broken yet. He figured that he’d start saving energy right away and take advantage of the rebates that are available now.”*
- *“I was an Advisor to a couple who said they’d been thinking about improving their energy efficiency on their own, but knew it would take them a long time and might not work out as well. That’s why they decided to call EnergySmart.”*

Addressing Barriers with Messages

County employees, contractors, volunteers, and partners representing the EnergySmart programs may encounter barriers when talking to consumers and potential customers about energy-efficiency investments.

EnergySmart representatives should become extremely familiar with the common barriers below, and be able to speak knowledgeably about the EnergySmart benefits and features that offer *value* to the customer and help overcome those barriers. The table “Addressing Barriers with Messages”, in their respective [residential](#) and [commercial](#) sections, lists the most common barriers and key messages to address them.

The barriers and responses below can be used when speaking with potential customers at events, during presentations, or in written communications when specific barriers can be anticipated.

Target Individual Value Messages

In the table “Target Group Values Messages”, in the respective [residential](#) and [commercial](#) sections, we provided suggestions for message points linked to specific groups and individual attributes for which particular messages resonate. These messages do not necessarily substitute for the key message platform, but are meant to bolster it with target-specific reasons for the consumer to take action.

These messages should be used when EnergySmart staff is communicating with one of the specific groups identified, through presentations, direct communications, and other contact with the group, such as group newsletters and Websites. When providing a group with written content for a newsletter or Website, these values-based messages should be appended to the EnergySmart message segments supplied in [Appendix C. Message Segments Describing EnergySmart Services and Benefits](#), in a stand-alone Word document. The message segments below are intended to be suggestive of the values-based theme for the group; the specific language and content can be modified or adapted for different applications.

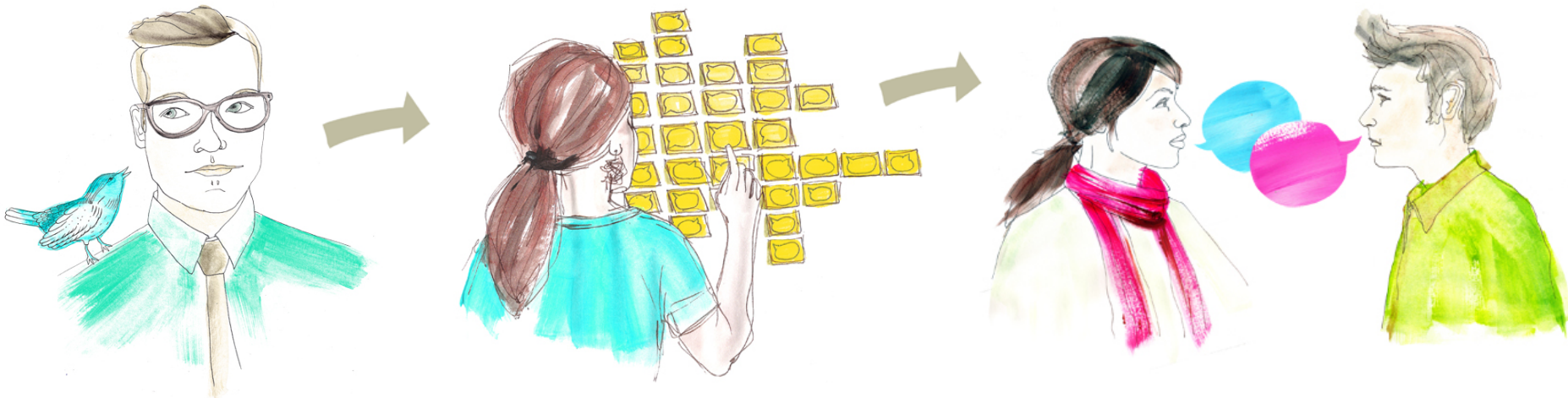
Appendix R. Social Media Staff Training



| SOCIAL MEDIA TRAINING

Items Include

1. Training Meeting Outline
2. Training Meeting PowerPoint Overview
3. Social Media (SM) Proposal Appendix Review
4. In Process: SM Training Meeting Follow Up-SM staff team
5. In Process: Radian 6 Workshop Training-Beth, Jamie, Intern TBD





| SOCIAL MEDIA TRAINING OUTLINE

Friday April 22, 2011

Attendees: Beth Beckel, Dave Hatchimonji, Lea Yancey, Megan Cuzzolino

Social Media Quick Overview

- Account platforms (Facebook, Twitter, Linked In)
- Usage for each
- Best practice examples

Time Savers

- Ping and/or account linking
- Tweetdeck
- Wefollow.com
- Radian 6
- SocialOomph

Radian 6 Social Media Analytics Overview

- Set up and contract review
- Dashboard exploration
- River of News
- Influencers
- Tutorials

Day-to-day work flow

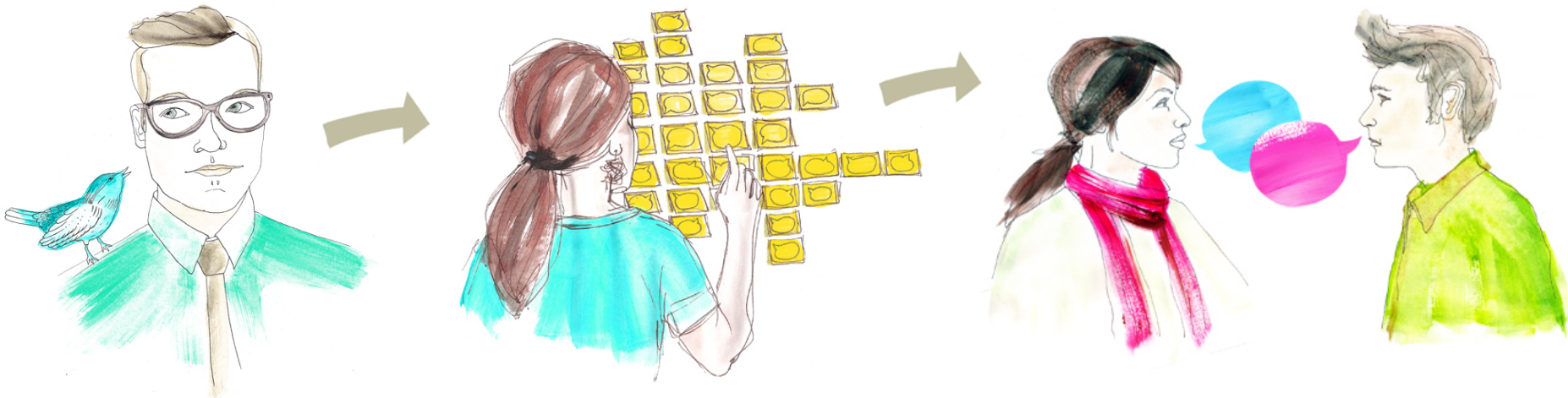
- Priorities (divide and conquer by day or platform)
- Targeted outreach/comments
- Marketing plan messaging use

Questions/Concerns/Follow Ups



| SOCIAL MEDIA OPPORTUNITIES

1. **Listening:** Discovering real-time, relevant, impactful conversations.
2. **Measuring:** Monitoring, analyzing and tracking those conversations.
3. **Engaging:** Active dialogue with customers/ambassadors and tracking, tagging, archiving comments for further use.





| SOCIAL MEDIA USE CASES

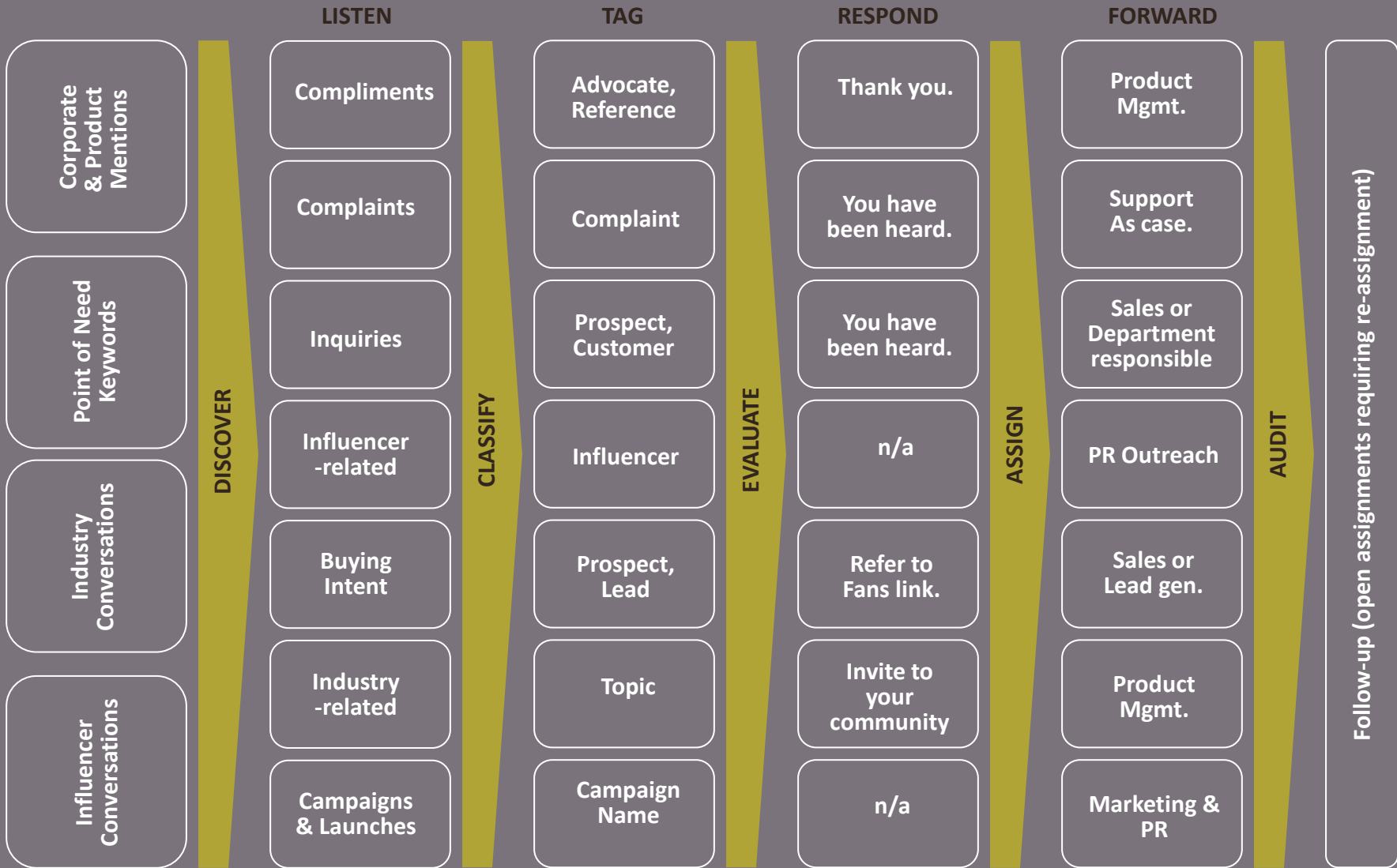
social media
monitoring +
engagement

- Crisis Management
- The Lifecycle of Buzz
- Uncovering Influencers
- Benchmark the Competition
- 360 Degrees of Your Brand
- Capture Industry Trends
- Social Meets Web Analytics
- Sales and Lead Generation
- Create a Listening Grid
- Measure Community Engagement
- Customer Service Outreach
- Make a Case for Social Media
- Find your Brand Evangelists
- Listen When No One's Talking



| SOCIAL PLAYBOOK

social media monitoring + engagement



End-to-end Engagement Reporting



| ORGANIC PROCESS/WHO WILL HELP US?

social media
monitoring +
engagement

- **Strategic Partners-** GEO, Utilities, Pop/Franklin, PACE Partners, Trade Allies, Contractor Lists, New Era, etc.
- **Interests-** Eco/green, thrift, renovators, community building,
- **Known Influencers-** List searches
- **Online/Offline Opps-** Training sessions, public talks, media appearances,
- **County/City Activity-** Leverage all government social networks
- **Media outlets-** Public Access, local/community papers, dedicated blogs,



| GETTING GOING/QUICK TOURS

- Favorites
- Ms. Energy Smart and consolidating logins
(socialmedia@energysmartyes.com)
- **Facebook**- Admins, use as page, marketing plan ideas, paid options
- **Twitter**- using lists, RT, hashtags, #FF, give to get
- **LinkedIn**- MW tour, research use, discussion about group
- **TweetDeck**- Searching beyond Radian 6 topics
- **Ping FM**- multi-network updates
- **Radian 6**- high level overview/potential
- **Social Oomph**- possibility (\$)

Discussion: Next steps and needs, workflow, prioritization