

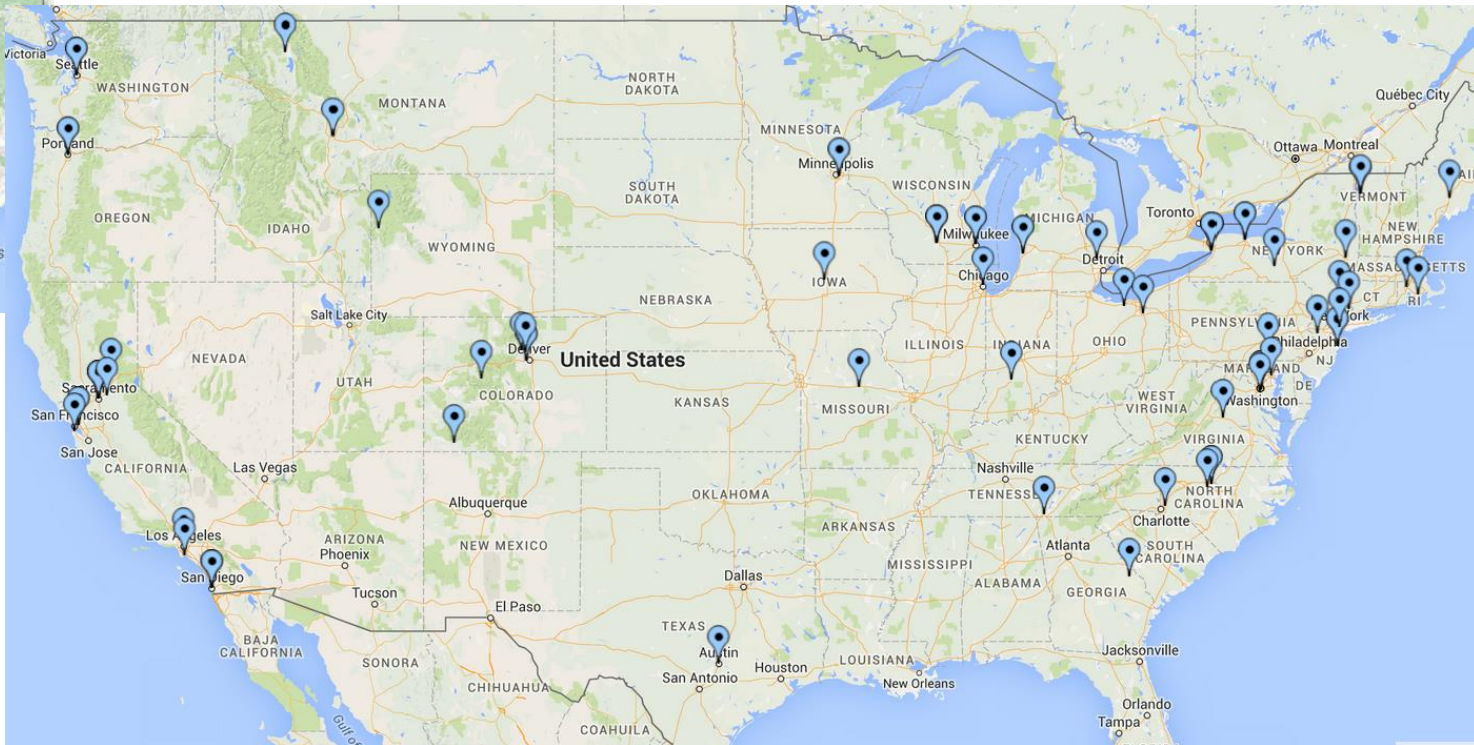
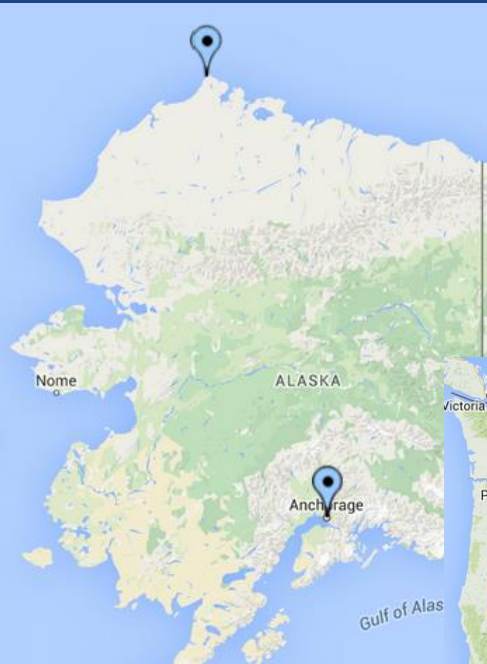


# **Better Buildings Residential Network Peer Exchange Call Series: *He Said, She Said: The Power of Messaging (101)***

February 11, 2016

*Call Slides and Discussion Summary*

# Call Attendee Locations



# Call Participants – Network Members

- ACEEE
- Alaska Housing Finance Corporation
- Build It Green
- Building Performance Center Inc.
- California Energy Commission
- Center of Sustainable Energy
- City of Chula Vista, California
- City of Holland, Michigan
- Civic Works
- CLEAResult
- Columbia Water & Light
- Efficiency Maine
- Efficiency Nova Scotia
- Elevate Energy
- Energize NY
- Energy Conservation Works
- Energy Efficiency Specialists, LLC
- greenspaces
- Honeywell
- ICAST
- LEAP
- Metropolitan Washington Council of Governments
- OmStout Consulting
- PUSH Buffalo
- Rhode Island Office of Energy Resources
- South Burlington Energy Committee
- The Oberlin Project
- Wisconsin Energy Conservation Corporation

# Call Participants – Non-Members

- 3M
- AJO
- AppleBlossom Energy Inc.
- Ballarat Consulting
- BKi
- BlueGreen Alliance
- BPA
- Brand Cool
- BritePlug
- CB&I
- City of Akron, Ohio
- City of Bloomington, Indiana
- City of Milwaukee, Wisconsin
- Cooperative Extension of Tompkins County
- Duke University
- Enbridge Gas Distribution
- Energy Commission
- Flathead Electric Coop
- Fruitfull Energy
- Groundswell
- GUEP Local Team
- Impact Marketing
- Local Government Commission
- MN Dept of Commerce
- New Jersey Natural Gas
- Newland Communities
- Nexant
- North Slope Borough
- NorthWestern Energy
- NYSERDA
- Oakland Livingston Human Service Agency
- Plant Vogtle
- PUSH Green
- Rocky Mountain Institute
- Salcido Solutions
- Seattle City Light
- StopWaste
- TRC Energy Services
- V3
- Volunteers of America

# Agenda

- Agenda Review, Ground Rules, and Opening Poll
- Brief Residential Network Overview
- Featured Speakers
  - Sabrina Cowden, Senior Project Manager, [Milepost Consulting](#)
  - Amy Frykman, Vice President, [Resource Media](#)
  - Julie O'Brien, Manager of Behavioral Research, [Opower](#)
- Discussion
  - What stories can you tell to capture the benefits of home upgrades?
  - How can you frame your messaging to attract new customers to home performance?
  - What messaging strategies have worked well for your program to improve conversion rates?
  - Has anything not worked well? Please share your lessons learned.
- Closing Poll and Upcoming Call Schedule

# Better Buildings Residential Network

**Better Buildings Residential Network:** Connects energy efficiency programs and partners to share best practices and learn from one another to increase the number of homes that are energy efficient.

**Membership:** Open to organizations committed to accelerating the pace of home energy upgrades.

## **Benefits:**

- Peer Exchange Calls 4x/month
- Tools, templates, & resources
- Recognition in media, materials
- Speaking opportunities
- Updates on latest trends
- Voluntary member initiatives
- Residential Program Solution Center guided tours

**Commitment:** Provide DOE with annual number of residential upgrades, and information about associated benefits.

*For more information or to join, email [bbresidentialnetwork@ee.doe.gov](mailto:bbresidentialnetwork@ee.doe.gov)*

# Related Resources in the Residential Program Solution Center

## Explore messaging resources:

- Learn how to frame your marketing and outreach efforts by understanding your local market in the [Marketing & Outreach – Assess the Market](#) handbook.
- Tip: [Adapt messages to your primary target audience's needs](#)
- [Messaging Quick Link](#) provides 40 curated resources.



While you're there, see the latest Proven Practices post on [Energy Advisors](#).

The Solution Center is continually updated to support residential energy efficiency programs—  
[member ideas are wanted!](#)

# Residential Program Solution Center Navigational Example

## Better Buildings Residential Program Solution Center

EERE » BTO » Better Buildings Neighborhood Program » Solution Center Home » Handbook Index

Solution Center Home

About

Handbook Index

Quick Links

Proven Practices

Energy Data Facts

Glossary

BROWSE BY:

Program Components

Program Design Phases

Content Types

## Marketing & Outreach – Assess the Market

[Where Am I?](#)

[PDF of handbook](#) [Print this page](#)

Description

Step-by-Step

Tips for Success

Examples

Toolbox

Topical Resources

### Step-by-Step

By researching who comprises your program's target audiences, what their needs are, what motivates them to change their behavior, and what prevents them from undertaking home energy upgrades, you will be able to [craft relevant messages](#) and delivery approaches that will inspire them to take action.

The following steps can help your program assess the market for home energy upgrades.

[Expand All](#)

- ▶ **Develop a market research plan based on available resources and research techniques**
- ▶ **Conduct audience research to determine who should be the focus of your marketing and outreach**
- ▶ **Categorize your target audiences to narrow the focus of your marketing and outreach efforts**

<p>Strategy Development</p>	4. <a href="#">Develop a Business Model</a>	4. <a href="#">Make Design Decisions</a>		4. <a href="#">Make Design Decisions</a>	4. <a href="#">Make Design Decisions</a>	4. <a href="#">Make Design Decisions</a>
	5. <a href="#">Create a Business Plan</a>	5. <a href="#">Develop Implementation Plans</a>	1. <a href="#">Develop Evaluation Plans</a>	5. <a href="#">Develop Implementation Plans</a>	5. <a href="#">Develop Implementation Plans</a>	5. <a href="#">Develop Implementation Plans</a>



# Opening Poll #1

- Which of the following best describes your organization's experience with the call topic?
  - Some experience/familiarity – **41%**
  - Very experienced/familiar – **31%**
  - Limited experience/familiarity – **25%**
  - No experience/familiarity – **0%**
  - Not applicable – **2%**

# Opening Poll #2

- What do you think is the most effective focus of messaging for residential energy efficiency?
  - Cost savings (energy bills) – **56%**
  - Comfort in the home – **29%**
  - Improving resale value – **4%**
  - Environmental benefits – **4%**
  - Other (please chat in your response) – **8%**

# Storytelling: Milepost Consulting



efficiency engagement environment

# The Art and Science of Storytelling

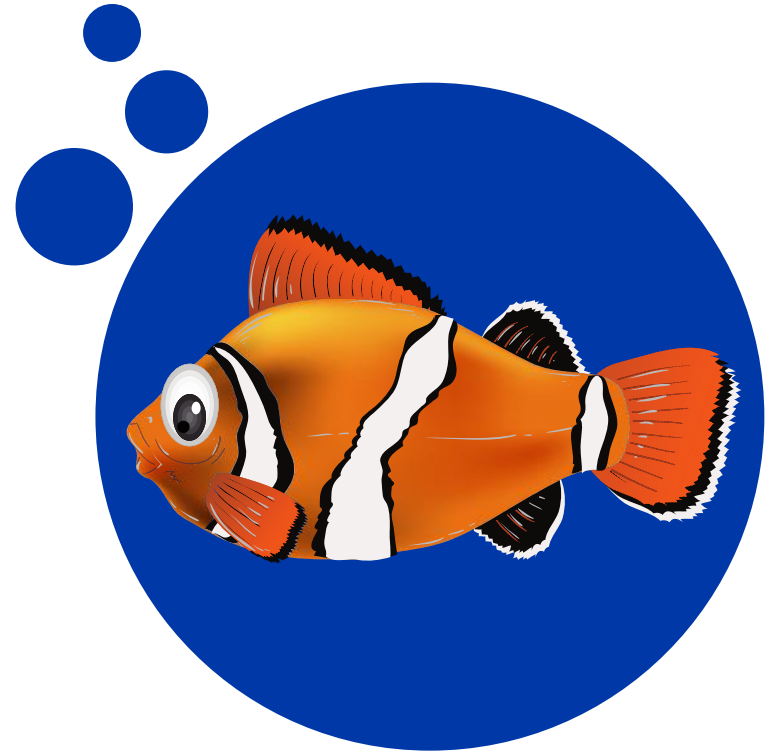
EE can learn from David, Goliath and Finding Nemo



## A Quick Quiz



**David & Goliath**



**Finding Nemo**

## Energy Efficiency has a Challenge



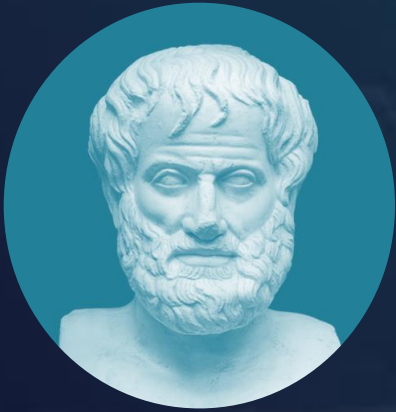
# The Original Flat Screen TV







**Tension Makes a Story Stick**



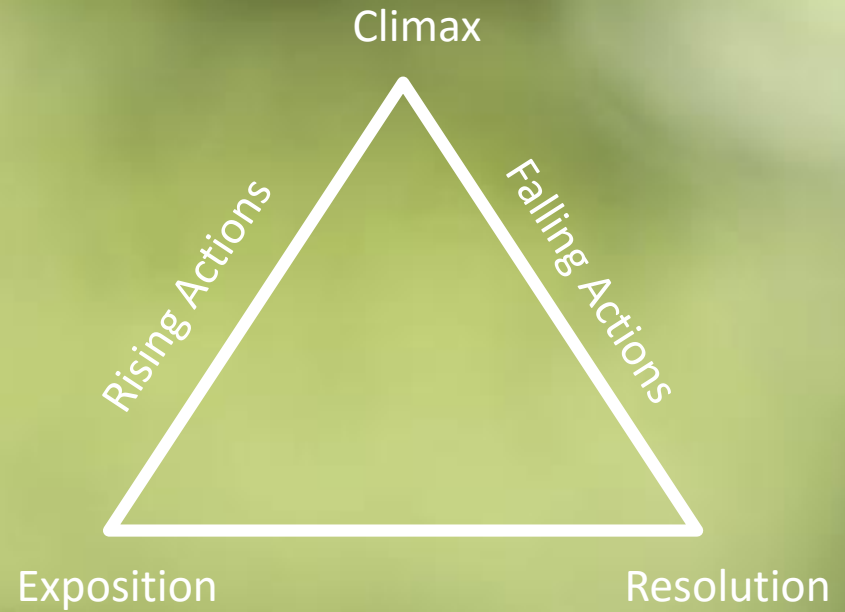
Aristotle, 384-322 B.C.



**A logical path from beginning to end**

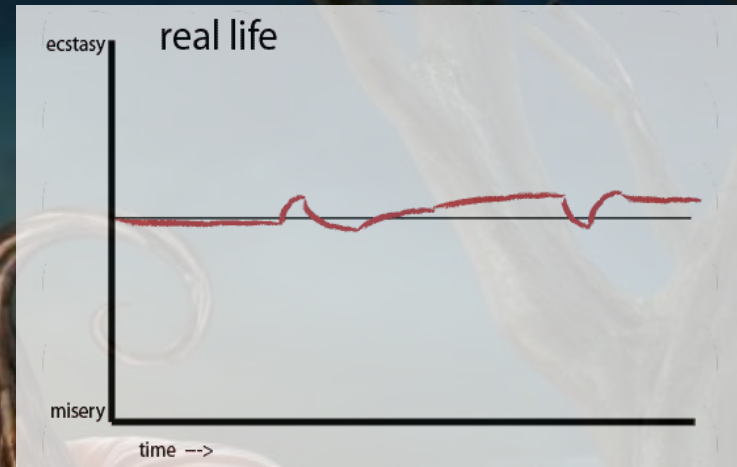


Gustav Freytag, 1863



**And said another way...**





Maps by Kurt Vonnegut

**We like the drama**





- Giant is fighting the tribe; tribe is losing
- No one in the tribe is willing to face the giant
- David, an unlikely candidate – a shepherd, not a soldier, agrees to face Goliath
- David kills Goliath and is the hero to the entire tribe



- Nemo, who has a foreshortened fin, is captured by a diver
- Dad sets out to find and rescue Nemo
- Dad meets Dory, and has lots of close encounters – sharks, jellyfish – during his rescue attempt
- Meanwhile, Nemo is hatching his own escape plans
- Dad and Nemo are reunited

# We have lost touch with our inner story teller



**Be strategic  
and creative  
about telling  
your story**



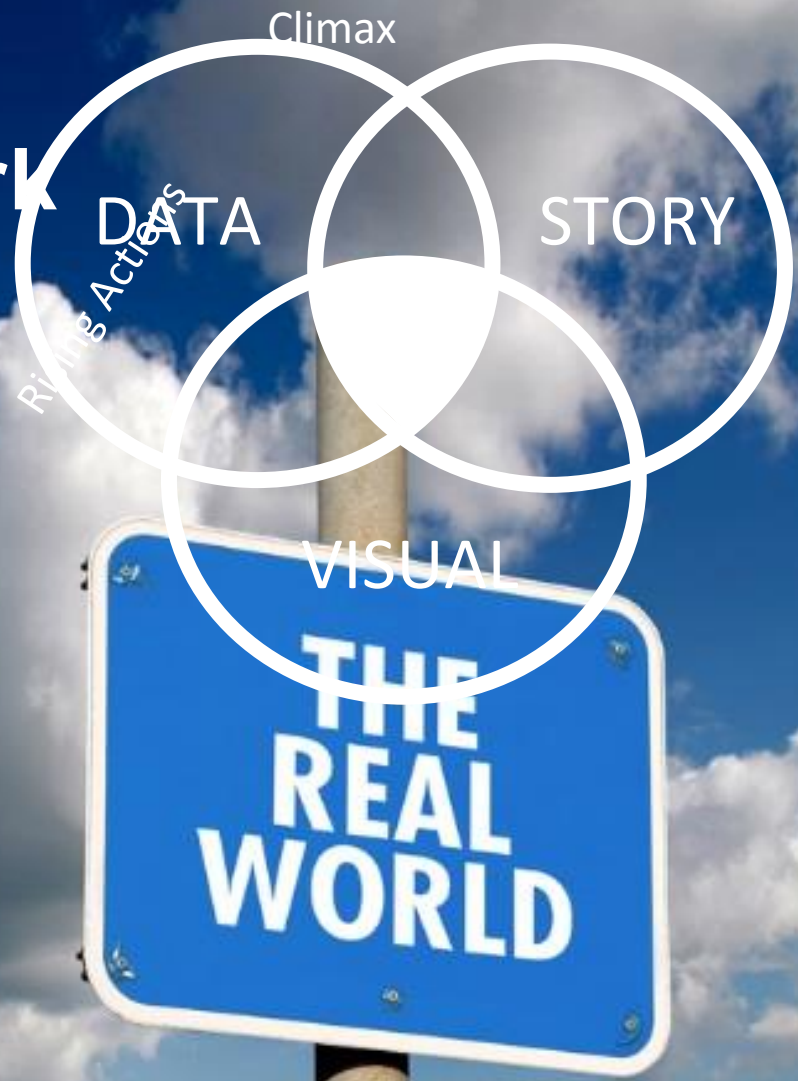
Climax

*Rising Action*  
DATA

STORY

VISUAL

Be strategic  
But how does that work  
in the creative world?  
about telling  
your story





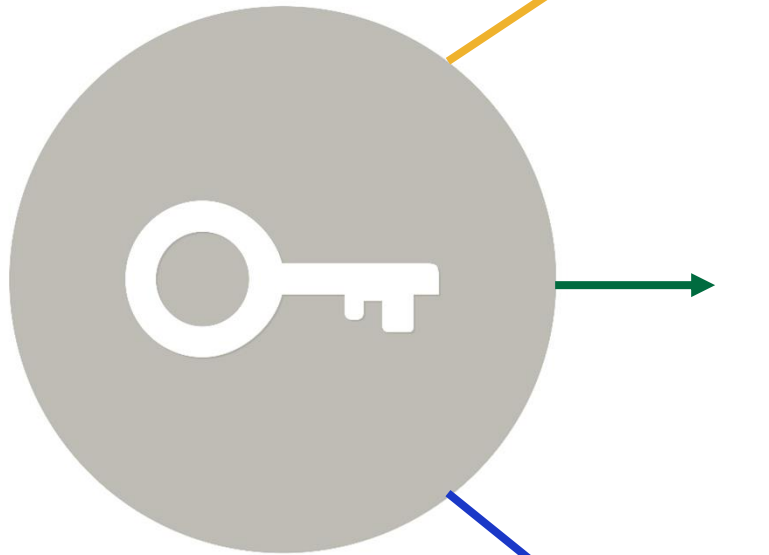




**EE is a leader in successful project delivery.**



**EE is a connector across multiple stakeholder groups.**



**Building overarching memes  
around our desired outcomes.**

**Writing supporting features  
with stories embedded.**

**Writing supporting features  
that personalize the subject.**

# My Utility Residential Energy Efficiency Internal Communications Plan - Spring/Summer

Desired Outcomes:

- EE is seen as a leader in successful project delivery.
- EE is seen as a connector across multiple stakeholder groups.

Meme	Key Messages	Story Arc	Placement Desired	Audience						Preparer	Deliverer	Frequency/ Dates of Delivery
				EE team outside of reg events	Internal Communi- cat ions	Other Depts	Local Power Companies	Trade Allies				
<b>A New Approach to Project Management</b>	Set a target but be flexible in how you get there.	Developed a project plan and set a date. As we worked, issues developed, stuck to our date and made it	Internal Publication/Upper Management Meeting Callouts	X	X					Joe Smith, EE residential team	Sally Smith, Senior Manager for EE residential team	4 weeks prior to desired publish date of April 1. Submit by March 1.
	Define your team	Clearly defined roles and responsibilities for every team member and a clear, regular schedule for checkins. Team members changed. Redefined r&r as needed and kept moving.	Internal Publication/Upper Management Meeting Callouts	X	X					Tammy Jones, EE residential team	Sally Smith, Senior Manager for EE residential team	4 weeks prior to desired publish date of May 1. Submit by April 1.
	Maintaining momentum by celebrating the small stuff	Excited at the outset - a new challenge. Soon roadblocks and distractions arose - as we dealt with these, we learned to celebrate even our small successes to keep our enthusiasm and momentum going	Internal Publication/Upper Management Meeting Callouts	X	X					Mary Smith, EE residential team	Sally Smith, Senior Manager for EE residential team	4 weeks prior to desired publish date of June 1. Submit by May 1.
<b>Meaningful Collaborations</b>	Pilot Partners	LPC came to utility with a challenge, looking for a solution. Utility invited LPC to be an integral part in looking for that solution. Worked in partnership thru design and pilot phases.	Customer Communications and Community Meetings			X				Harry Jones, EE residential team	Sally Smith, Senior Manager for EE residential team	4 weeks prior to desired publish date of April 1. Submit by March 1.
	Talking with Trade Allies	Designed a program and launched a pilot. Not as successful as we hoped - identified trade allies as missing link. Went out and actively sought out trade ally input - drama. Improved the program by listening to their opinions.	Customer Communications and Community Meetings				X			Manny Smith, communication coordinator for EE residential team	Sally Smith, Senior Manager for EE residential team	4 weeks prior to desired publish date of May 1. Submit by April 1.
	Creating Collaboration with Local Power Companies	Scheduled a series of face to face training sessions to introduce new program. Met with some excitement and many reservations. Continued to meet them where they were and work to understand their POV.	Customer Communications and Community Meetings			X				Suzy Jones, communication coordinator for EE residential team	Sally Smith, Senior Manager for EE residential team	4 weeks prior to desired publish date of June 1. Submit by May 1.

# Our BIG Story

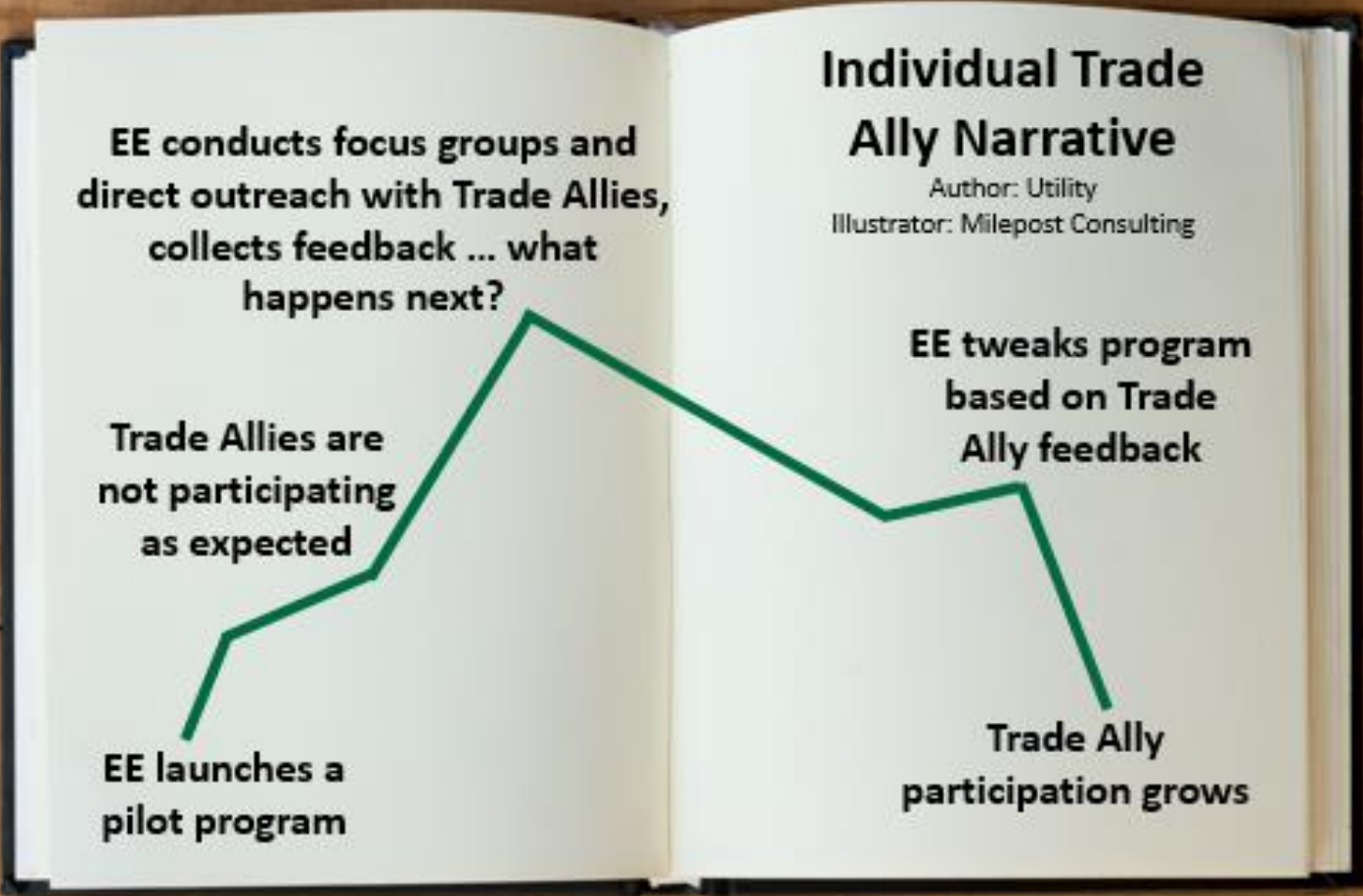
Author: Utility  
Illustrator: Milepost Consulting

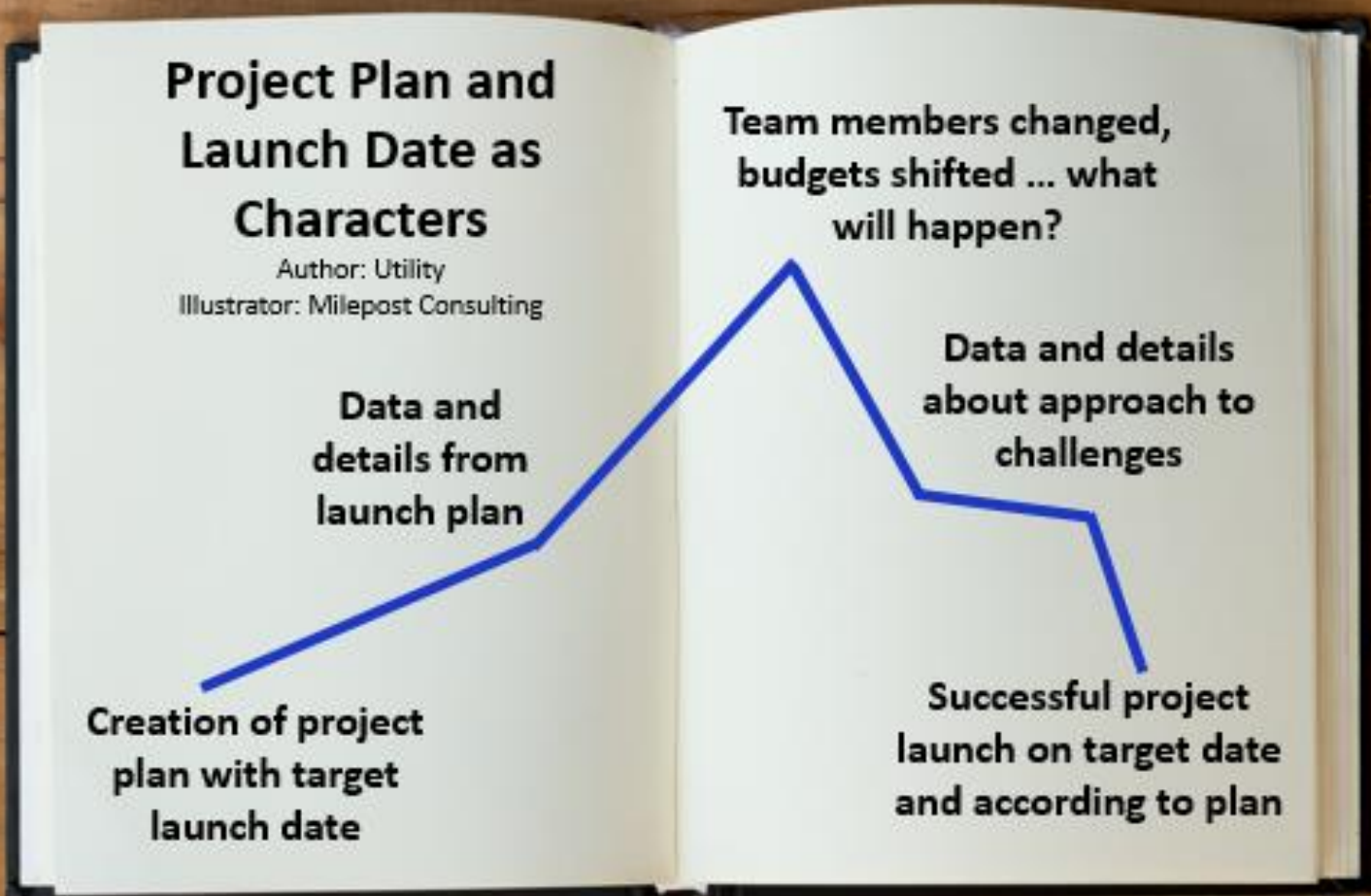
Let's try something different ... will it work?

EE wants a new reputation

Successful new program launches









**Do you  
remember  
mine?**





efficiency engagement environment

# Sabrina Cowden, Senior Project Manager

# Presentation Highlights: Milepost

- **Storytelling is natural** in personal communication, but many of us don't do it in business communications.
- **Basic elements** of storytelling – a beginning, middle, and end – are the same whether you are developing mass outreach materials or having one-on-one conversations.
- **To promote energy efficiency**, leverage storytelling. Ensure that data are accompanied by the narrative you want people to absorb.
- **Peer pressure** is good marketing: use stories to show homeowners that their neighbors are doing home efficiency upgrades.

# Best Practices: Resource Media

# A Better Way To Build

## Audience-Driven Communications *Telling the Energy Efficiency Story*





# About Resource Media

- Communications Strategy
- Execution + Outreach
- Digital + Social Media
- Environmental + Health + Justice Focus

# Agenda

- What the research tells us:  
polling, focus groups and  
image testing
- Recommendations

# Audience Research

- 8 focus groups, 2-each in the Midwest, South, Northeast and West. By FM3 and POS, summer 2014
- 1000-person poll conducted by FM3 and POS in April 2015.
- Online focus groups in the Midwest & PNW in fall 2014 to test images

# Focus Groups & Polling

- Very positive associations with EE
- EE a much lower priority than other energy sources.
- EE not seen as a “resource,” or as something that replaces power plants and solves big picture energy needs.
- Poor conception of the bigger picture—i.e. commercial energy use & the huge gains that could be made.
- Best framing = being smart and in control, and optimizing energy use.



# Positive feelings about energy efficiency

**“Responsible”**

**“Fulfilling”**

**“Right thing to do”**

**“Smart”**

**“Conscientious”**

# Messengers: Homeowners/small business owners who have saved energy and money

Messenger	Total Trust
Home owners who have made their homes more energy efficient and saved money on their electricity bills	83%
Small businesses which have made their operations more energy efficient and saved money on their electricity bills	81%
The American Lung Association	72%
University researchers who study ways to use energy smarter	71%

*Next, here is a list of people and organizations that take positions on issues relating to energy efficiency. Please tell me if you would generally trust each person or organization's opinion, or if you would be suspicious of it.*

# Less credible: environmental organizations, EE biz, utilities

Messenger	Total Trust
Businesses which manufacture or sell energy efficient products such as windows, heat pumps, appliances and smart thermostats	<b>67%</b>
Entrepreneurs who have created innovative, energy-saving technology	<b>58%</b>
Your electric utility	<b>51%</b>
Environmental organizations	<b>49%</b>

*Next, here is a list of people and organizations that take positions on issues relating to energy efficiency. Please tell me if you would generally trust each person or organization's opinion, or if you would be suspicious of it.*

“Require” provokes a strong response for some, particularly more conservative.

***“Don’t force me to do it.  
That makes me mad.”***  
- Birmingham AL woman



# Core Challenge

How do we bridge from the positive associations people have with energy efficiency personally to the bigger picture policy initiatives needed to advance energy efficiency at the scale required?



# Online focus groups: Day 1



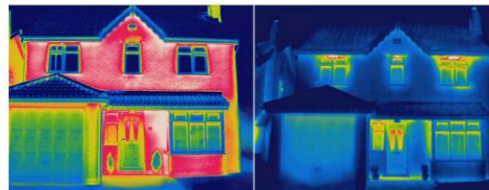
# Online focus groups: Day 2



You could be saving a lot of money.  
Find out how with a Home Energy Evaluation.

Get a free home Energy Evaluation online at [EnergyRight.com](http://EnergyRight.com) and you'll receive a free energy saving kit worth over forty dollars. Then start hanging on to your money. [EnergyRight.com](http://EnergyRight.com)

**energyright** SOLUTIONS  and your local power company

An advertisement featuring a man in a trench coat and hat looking at a stack of money. In the background, a brick chimney is shown with a large amount of money falling out of it into the sky. The text promotes a free home energy evaluation and a money-saving kit.

**EFFICIENT SMART**  
with Energy Solutions

May 20, 2014

Mitchell's HomeMade 182,200 kWh  
One Hundred Eighty Two Thousand Two Hundred <sup>0000</sup> Annual Savings

A group of four people (three men and one woman) are gathered around a table, looking at a document. The document is a certificate or report from EnergyRight, dated May 20, 2014, showing energy savings for 'Mitchell's HomeMade'.



# Online focus groups: Day 3



# Observations

- Mostly non-politicized
- People draw on personal experiences
- People get excited when talking about things they have done/could do to their homes to save energy

# Perceptions of energy efficiency

- Positive and personal
- Why? Save money, stop waste & do the right thing
- People see it as a question of personal responsibility, not government mandates or utility programs

*Energy efficiency is great, but don't tell me what to do, and I won't tell you what to do either.*

# People easily relate and engage



# Top Findings

- The role of government/utilities is our vulnerability
- EE = virtuous self-interest: save money while stopping waste and doing the right thing
- Images make EE personal for people
- We don't use imagery enough; what is out there is abstract and technical
- Images help normalize EE as something everyone is doing and should do

# Core Recommendation



Lead with real people and businesses embracing energy efficiency as a way to introduce programs and policies that drive energy efficiency improvements.

# Building the Message

Point to real money savings and tangible benefits from existing EE programs.

Pivot to the opportunity to expand the program or programs like it.

Finish with a call to action.

# Sample Message: Part 1

Kansans save hundreds of dollars a year on average thanks to energy efficiency programs. One such program enabled Topeka resident Jane Smith and her family to install a programmable thermostat and add more insulation in the attic. Today, just a couple months later, the Smith's monthly utility bills are lower, and their home is warmer in the winter, and cooler in the summer. They rarely needs to turn on the heater or air-conditioner.



# Sample Message: Part 2

Kansas now has an opportunity to expand programs like these, helping more families save money and energy, by making energy efficiency a core strategy of the Kansas Clean Power Plan. By prioritizing energy efficiency, the State of Kansas can help residents save an average of XX dollars annually on energy bills, while significantly lowering energy use, resulting in cleaner air and water for everyone.

# Sample Message: Part 3

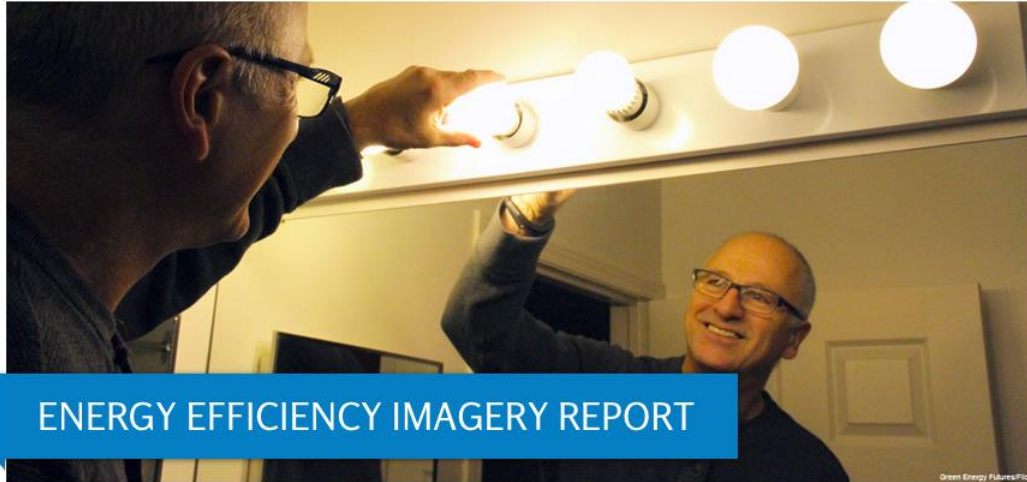


Please contact [insert decision-maker] and tell them to make energy efficiency the #1 priority in the Kansas Clean Power Plan

# Go to our website for:

VisualStoryLab A project of resourcemedia

REPORTS RESOURCES BLOG BEST OF ABOUT DONATE



- Report
- Research summary
- Tip-sheet
- New research

Which images work best to get people excited about energy efficiency? More importantly, what kind of images inspire people to *take action* to save energy and support policies that drive energy savings? Resource Media's research into energy efficiency visuals suggests several strategies to make energy efficiency imagery more appealing, inspiring and engaging.

The research demonstrates that:

- Visuals are a powerful way to motivate people to take action in support of energy efficiency—whether through improvements in their own home, or through support for policies.
- The best images are those that show real people doing tangible things to save energy in their homes and businesses.

Learn more in our report "[Beyond the CFL: Winning Images for Energy Efficiency](#)." Want the Cliff's Notes? Download our [research summary](#). Or, check our tip sheet: [Ten Steps to Improving Energy Efficiency Imagery](#).

This research is just the first step. There is so much more to learn. Resource Media is continuing to test and refine our understanding of ways imagery can help inspire energy-saving action and support for policies and share what we learn with you. We also invite you to share your own success stories, best practices and questions. Drop us a line at [efficiency@resource-media.org](mailto:efficiency@resource-media.org).

## Get the Report

Beyond the CFL: Winning Images for Energy Efficiency provides new insight into the types of images that get people excited about energy efficiency and supporting energy-saving practices and policies, and those that turn people off.

[GET THE REPORT >](#)



[www.resource-media.org/visual-story-lab/energy-efficiency-imagery](http://www.resource-media.org/visual-story-lab/energy-efficiency-imagery)



Thank you!

@Afrykman on Twitter

# Low-Income Messaging: Opower

# Don't Show Me the Money: Why *Not* To Choose Financial Messaging to Influence Your Low-Income Customers



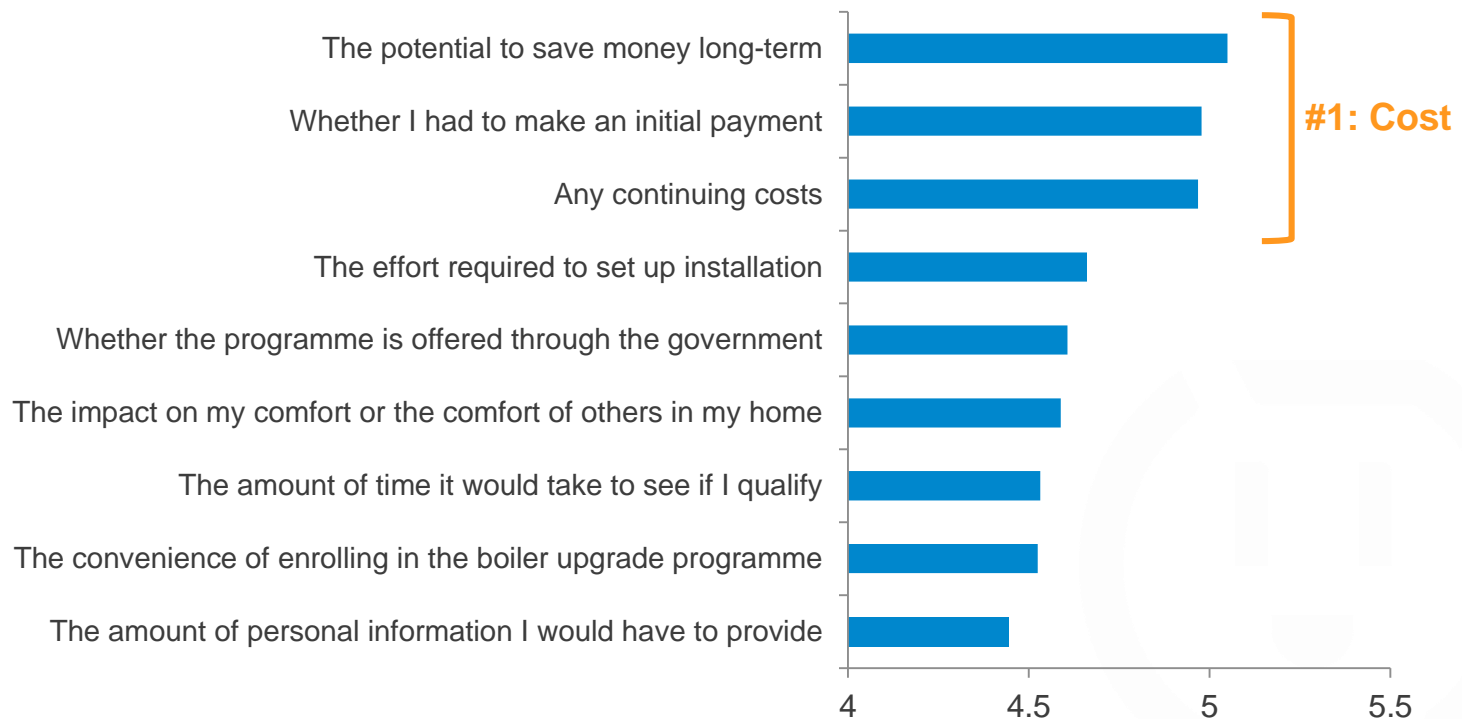
# For low-income households, money talks



# If you ask, people will tell you money is a key motivator

## Client Survey

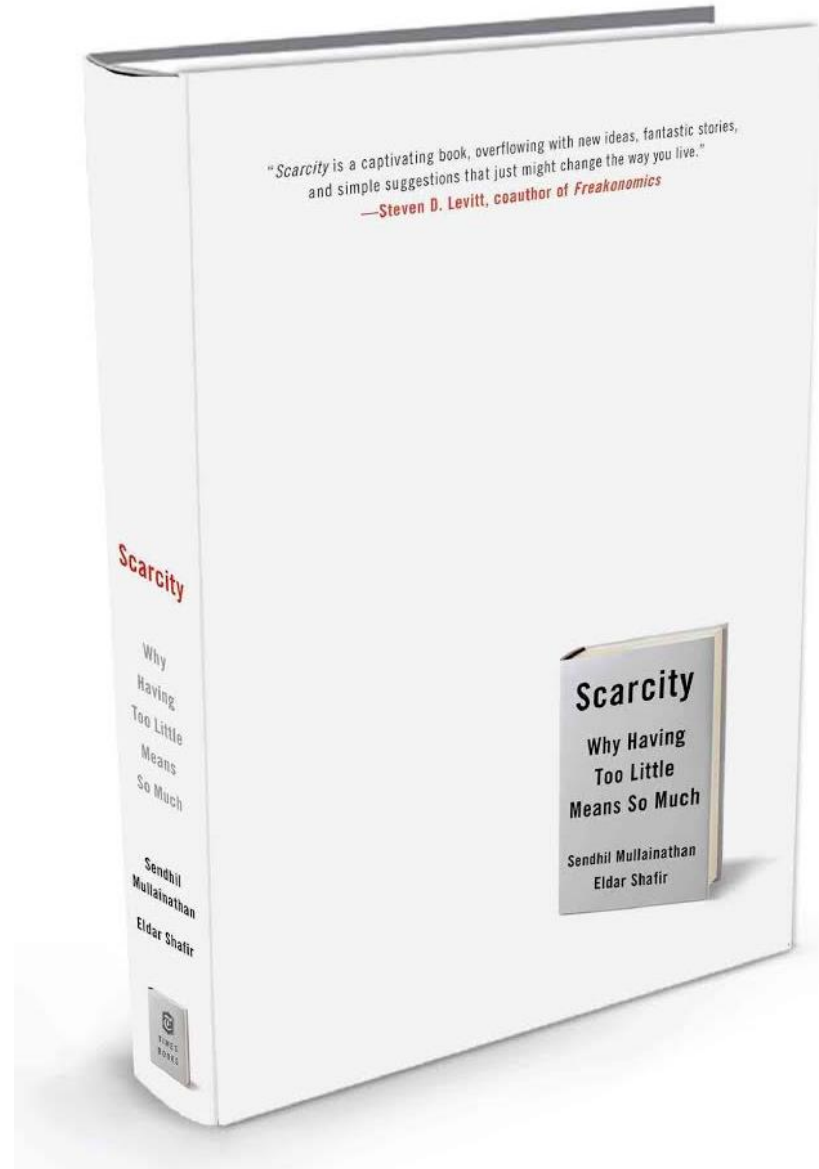
### Self-Reported Importance of Factors Determining Participation Decision





Scarcity  
brings  
focus . . .

sometimes  
to a fault



# We tested the influence of financial vs. non-financial calls to action on cognitive resources

## Online experiment

### Financial condition:

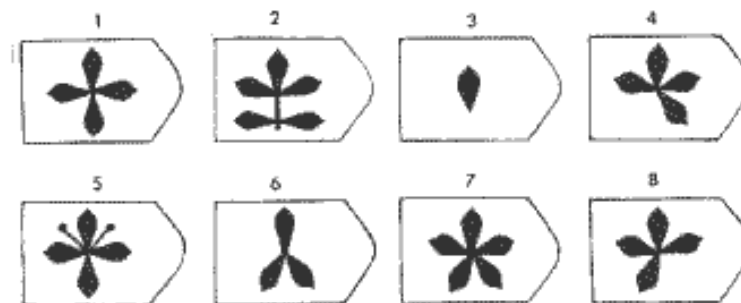
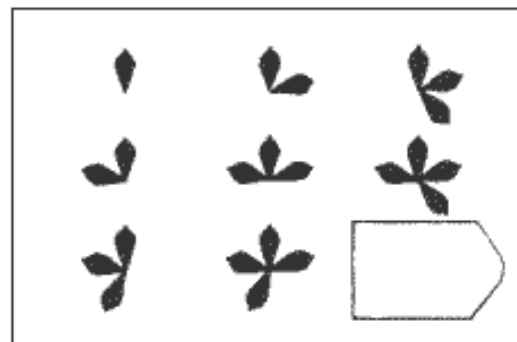
Weatherize your home.

**Minimize your bills.**

### Non-financial condition:

Weatherize your home.

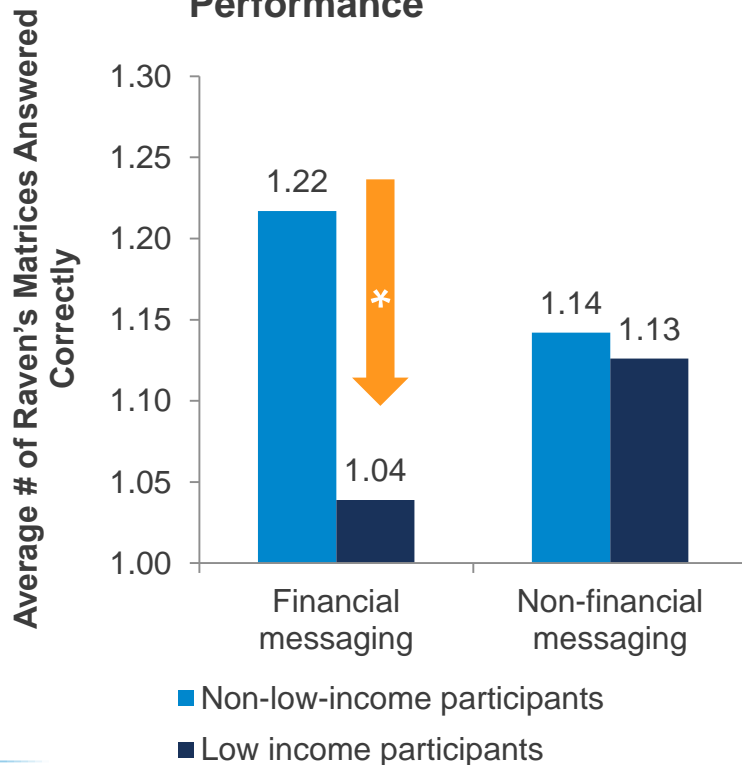
**Maximize your comfort.**



# Financial messaging seizes cognitive resources, but only from low-income participants

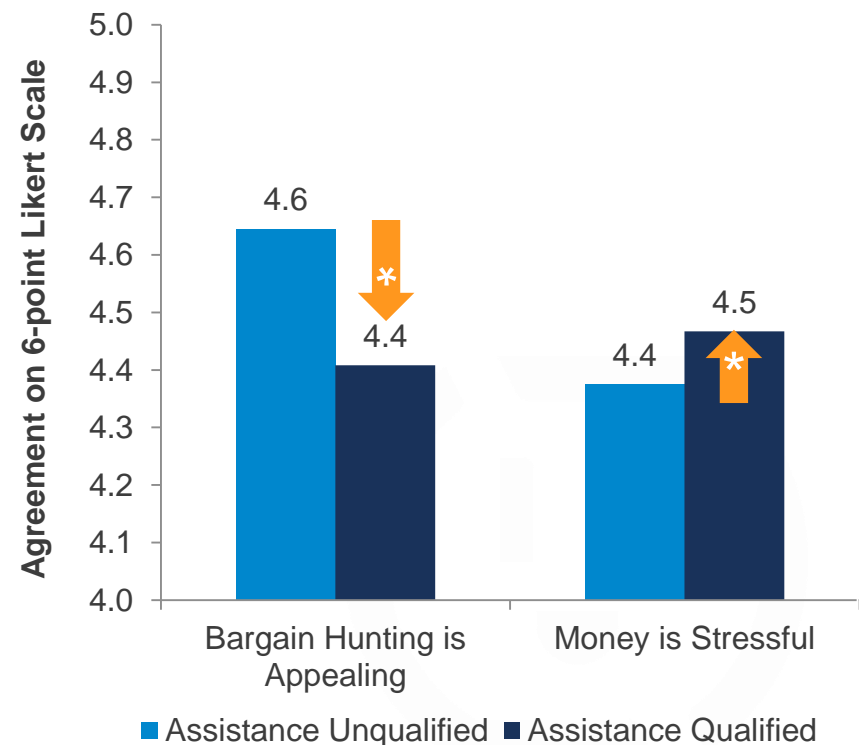
## Product Study

### Fluid Intelligence Task Performance



## Client Survey

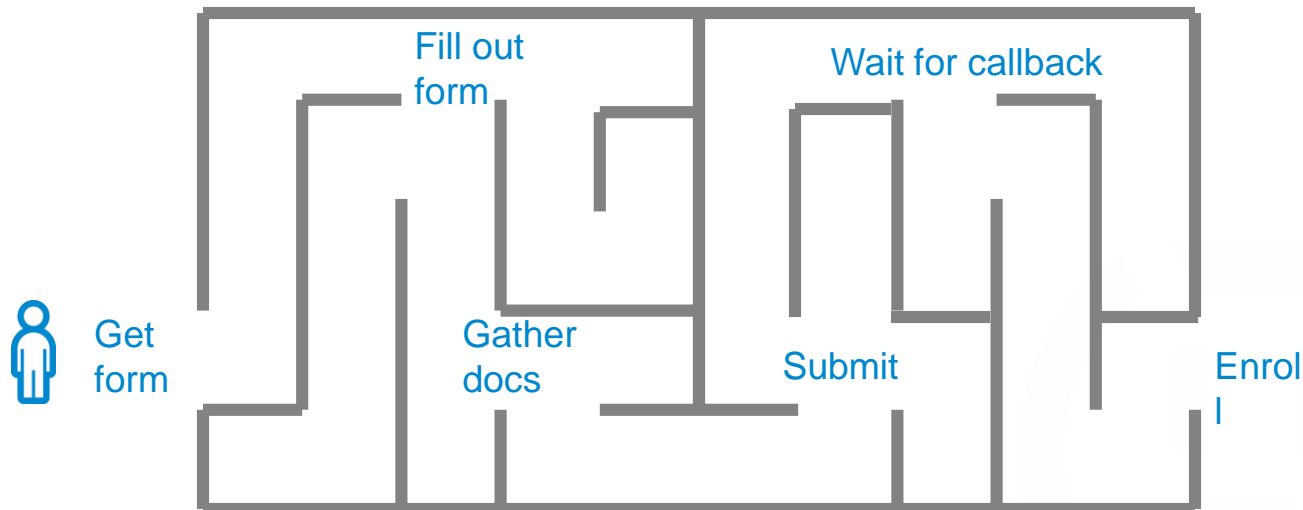
### Financial Stress Items



Sometimes, **urgent focus may spur immediate action** in a low-income household.



But **scarcity effects may impede planning, navigating, and completion** of multi-step processes.



# Presentation Highlights: Opower Low-Income Messaging

- **Be direct** in messaging to customers, asking “What really matters to you?”
- **Most important things** to understand about your audience are income group and geographic location.
- **Money=stress** for low-income customers. Bargain-hunting is a negative experience.
- **Simplicity is key** for money-based messaging. Complicated processes cause people to drop off, but a simple click-through message works.
- **Program design changes** may be warranted if customers are stymied by the complexity of enrollment.
- **Multifamily building owners** respond to messaging about their peers in similar buildings.

# Discussion Questions

- What stories can you tell to capture the benefits of home upgrades?
- How can you frame your messaging to attract new customers to home performance?
- What messaging strategies have worked well for your program to improve conversion rates?
- Has anything not worked well? Please share your lessons learned.

# Discussion Highlights

- **Programs don't need to hide** in the background in their messaging, but do lead with stories about homeowners' neighbors and peers.
- **Messaging can help people identify with energy efficiency** by encouraging a broader understanding of EE as encompassing simple actions like turning off lights.
- **Gather feedback in low-cost ways** through crowdsourcing websites like [CrowdFlower](#) and Amazon [Mechanical Turk](#).
- **Tap into natural competitiveness** of your audience using social media to get people to lower energy use.
- **Emotion**, not just direct information, should be a part of any effective messaging.



# Closing Poll

- After today's call, what will you do?
  - Consider implementing one or more of the ideas discussed – **49%**
  - Seek out additional information on one or more of the ideas – **47%**
  - Make no changes to your current approach – **3%**
  - Other (please explain) – **3%**

# Peer Exchange Call Series

*We hold one Peer Exchange call [almost] every  
Thursday from 1:00-2:30 pm ET*

Calls cover a range of topics, including financing & revenue, data & evaluation, business partners, multifamily housing, and marketing & outreach for all stages of program development and implementation

## Upcoming calls:

- **March 10:** Addressing Barriers to Upgrade Projects at Affordable Multifamily Properties (201)
- **March 17:** Rainbows and Leprechauns: Finding Gold in Partnerships (101)
- **March 24:** Home Improvement Catalyst: Sequencing Upgrades and Engaging Homeowners over Time (201)
- **April 14:** Training: How to get Results - What Matters, What Doesn't (201)
- **April 21:** Advances in Integrating Energy Efficiency into the Real Estate Market (301)
- **April 28:** Driving Change in Residential Energy Efficiency: Electric Vehicles (301)

# Join us @ ACI National Home Performance 2016

## Kick-off with DOE on Monday, April 4!

Home Performance with ENERGY STAR Partner Meeting, 8:30 am - 5:00 pm

including special breakout sessions:

- Home Energy Score, 1:30 - 2:50 PM
- Home Energy Information Accelerator, 3:00 - 4:20 PM
- Trade-Based Approach – DOE Home Improvement Catalyst, 3:00 - 4:20 PM

Getting Started with HPXML workshop – *Monday afternoon*

Meet us at many more  
sessions, April 5-7!

Early registration deadline: March 3.

# Meet us at sessions, April 5-7!

- T, 4/5**
- Home Upgrade Program Models for Acquiring Savings in Multiple Climate Zones
  - Residential Energy Labels, Why Should You Care & What Do You Do About It?

- W, 4/6**
- Showcasing Home Performance with ENERGY STAR Contractors
  - Transforming the Market with HPXML: Strategies and Lessons Learned
  - What Building America Learned in 4 Years About Retrofits & Staged Upgrades
  - Realizing the Market Value for High Performance Homes: Reports from the Field
  - Health & Home Performance: Unlocking New Funding, Marketing, & Data Value
  - The Quest for Smarter Performance Measurement
  - The Home Energy Data Huddle: Getting together to Build an Information Pipeline

- R, 4/7**
- Home Performance Financing Update & Options to Help Close More Jobs
  - Insights from the Better Buildings Neighborhood Program Evaluation
  - America's Building Blocks to High Performance Housing

Download the full [ACI National Home Performance Conference Agenda](#) for more details.

# ***LET'S ALL MEET IN MAY!***

## **REGISTER TODAY for the BETTER BUILDINGS SUMMIT**

Washington, DC · May 9-11, 2016

**SAVE YOUR SPOT NOW:**

**[HTTPS://WW2.EVENTREBELS.COM/ER/REGISTRATION/STEPREGINFO.JSP?ACTIVITYID=14611&STEPNUMBER=1](https://ww2.eventrebels.com/er/registration/stepreginfo.jsp?activityid=14611&stepnumber=1)**

This Summit will bring together Better Buildings partners and stakeholders to exchange best practices and discuss future opportunities for greater energy efficiency in America's homes and buildings.

***There will be time set aside for a specific Residential Network discussion and meet-up!***

# Thank you!

Please send any follow-up questions or future call topic ideas to:  
[peerexchange@rossstrategic.com](mailto:peerexchange@rossstrategic.com)