



**Neighbor to Neighbor**

**ENERGY CHALLENGE**

Small Changes. **BIG RESULTS.**

## **Analyzing Outreach Effectiveness to Improve Program Design**

What's Working in Residential Energy Efficiency Upgrade Programs,  
Panel on Collecting and Using Data to Improve the Program

May 20, 2011



### Join Your Neighbors



"Neighbor to Neighbor" has helped me understand the importance of energy efficiency in my home. I have learned a lot from the experts and am now taking steps to reduce my energy consumption. This program is a great resource for anyone looking to save money and protect the environment.

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# Neighbor to Neighbor

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# Commitment to Action

## Road from Start to Finish

Commit to the Energy Challenge

Neighborhood Energy Workshops

Neighbor to Neighbor Lighting Program

Home Energy Solutions

Home Energy Upgrade Insulation

Home Energy Upgrade Heating and Cooling Equip.

Home Energy Upgrade Solar Hot Water

Clean Energy Sign-Up



**CTCleanEnergy Options<sup>SM</sup>**

START

FINISH

# CONGRATULATIONS!!!





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# Program Innovations

- Clean Energy Corps
- Campaign Management
- Enabling Technology
- Measurement & Verification
- Performance-Based Rewards





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# Campaign Management Tools

## Support Community-Based Acquisition Marketing

- Program Facing
  - Consistent organizing tools in all 14 towns, outreach staff
  - Integrated application/data platform based on Salesforce.com
  - Management reports used to track progress
- Customer Facing
  - Branded town visibility kits
  - Workshops: Home Energy Basics & Deeper Energy Savings
  - Customer follow-up process, Refer-a-friend
  - Online / Social Media: [www.CTEnergyChallenge.com](http://www.CTEnergyChallenge.com) , videos, testimonials, Facebook pages, monthly newsletter & action alerts



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# Hybrid Approach to Analysis

## Qualitative *and* Quantitative Approach:

- Qualitative
  - Listening to the voice of the consumer, Event debriefs
  - Surveys and feedback (online, phone, in person)
- Quantitative Analysis
  - Baseline data on energy usage and ratepayer fund program participation
  - Deep dive on data to evaluate effectiveness of particular strategies
- “A/B” Testing to Refine Messages
  - Email Subject Lines, web/collateral wording
- Social network analysis to:
  - Determine influencers, influenced, and spread of norms and program

### Research Partners:





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# Data Collection

## Example: Outreach Event

Neighbor to Neighbor Energy Challenge   Kat Donnelly ▾ Help & Training Neighbor to Neighbor Ener... ▾

Home Web Leads Contacts Households & Organizations Projects **Outreach Activities** Reports Dashboards Utility Records +

Outreach Activity Edit Help for this Page ?

**New Outreach Activity**

**Outreach Activity Edit**

**Outreach Activity Information** ! = Required Information

Outreach Activity Name <input type="text"/>	Host Organization <input type="text"/>
Active <input type="checkbox"/>	Parent Outreach Activity <input type="text"/>
Event Type <input type="text" value="--None--"/>	Outreach Activity Owner <b>Kat Donnelly</b>
Event Start Date/Time <input type="text" value="[ 5/17/2011 3:40 PM ]"/>	Meeting Location: Name <input type="text"/>
Event End Date/Time <input type="text" value="[ 5/17/2011 3:40 PM ]"/>	Meeting Location: Address <input type="text"/>
TOWN <input type="text" value="--None--"/>	Parnter Meeting Topic(s) <input type="text"/>
DOE Outreach Strategy <input type="text" value="--None--"/>	Meeting Cost <input type="text"/>
Outreach Strategy, if Other <input type="text"/>	

**Materials Used Information**

Standard Event Materials <input type="checkbox"/>	<table border="1"> <thead> <tr> <th>Available</th> <th></th> <th>Chosen</th> </tr> </thead> <tbody> <tr><td>Table</td><td></td><td></td></tr> <tr><td>Chairs</td><td></td><td></td></tr> <tr><td>Pens</td><td></td><td></td></tr> <tr><td>Tape</td><td></td><td></td></tr> <tr><td>Scissors</td><td></td><td></td></tr> <tr><td>Notepad</td><td></td><td></td></tr> <tr><td>Nametags</td><td></td><td></td></tr> <tr><td>N2N Shirts</td><td></td><td></td></tr> <tr><td>Clipboards</td><td></td><td></td></tr> </tbody> </table>	Available		Chosen	Table			Chairs			Pens			Tape			Scissors			Notepad			Nametags			N2N Shirts			Clipboards			Surveys <input type="text"/>
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**Neighbor**  
**ENERGY**  
Small Change

Description Information

Town and Social Characteristics

Available	Chosen
Town Name	
1 of Only 14 Towns	
Facebook	
Town Rewards	
Volunteer Opportunities	

Notes about Basic Pitch

Credibility

Available	Chosen
Grassroots	
DOE Grant	
Stakeholder Name Drop	

Notes about Credibility

N2N Program Benefits

Available	Chosen
20% Energy Reduction	
Call You	
Email You	
Follow-on	

Roadmap

Available	Chosen
No Cost (Web/Lighting/Workshop)	
Low Cost (HES/CEO)	
High Cost (Retrofit/Renewables)	

HES Benefits

Available	Chosen
\$25 Town Rebate	
\$75 co-pay for \$750 value	
1st step need for solar	
Blower door/scaling	

Lighting Benefits

Available	Chosen
Free program	
Team of lighting experts	
Target high use rooms	
15 to 20 bulbs	

Other Motivators

Available	Chosen
Energy tips	
Money savings	
Campaign length	
First in line to receive info	

Other Pitch Motivators





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# Approach in Action

## Problem: Assessment close rate too low only 26%!

- How problem was identified:
  - Heads up through informal contractor feedback (Jan/Feb), confirmed in pipeline reports (launched Jan) and dashboards (launched Feb)
- Tools used to analyze problem
  - Listening to the Voice of the Participant exercises with outreach team (Dec and Apr) and contractors (Mar)
  - Deep dive on data to analyze leads from various outreach activities (Mar)
    - How was customer was acquired (workshop, online, tabling event)
    - How long before lead sent to contractor, contractor followed up, etc.
  - Comprehensive process review from initial customer touch to completion of assessment (Mar)



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# Approach in Action

## What we found – Qualitative Analysis:

- People might not want to say “no” to our young, enthusiastic Corps
- Some people wanted more info, but we put them in the scheduling queue and they were non-responsive
- People didn’t understand what they were signing up for
- We didn’t fully understand what we were pitching and how to pitch it
- We weren’t setting appropriate expectations as to the next steps in the process

**Result: we weren’t sourcing enough qualified leads!  
And even some that were qualified were surprised by  
the next steps, so were scared off.**



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# Approach in Action

## What we found – Quantitative Analysis:

- Initial homeowner workshops weren't pulling through any better than tabling at community events – hmmm...
- Contractor getting the most leads (majority of leads in 7 communities) wasn't reporting complete data (over 50% of customer records looked up were missing) – aha!
- Utility program administrator “lost” many leads in Jan and took 14-20 days to distribute leads in periods in Feb and early Mar – whoops!

**Result: even if we were sourcing qualified leads, there was a high degree of probability they were falling through the cracks or going cold. Arrgghh!**



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# Approach in Action

## Solution:

- Take over distribution of leads to contractors – turnaround in 1-2 days
- Get contractors on a Salesforce portal for reporting
- Get the outreach team more education on what happens during the visit
- Refine the “pitch”/collateral used in outreach - developed with outreach team
- Create a “receipt” for customers who sign up, outlining next steps
- Change confirmation email to include contractors name, reminder of where customer signed up
- Next up: N2N to call non-responsive leads after 2 weeks

**Result: 35% increase in Assessment close rate in April (changes began implementing in mid-Apr)**



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## Contact Information:

Kerry E. O'Neill

Program Manager, Neighbor to Neighbor Energy Challenge

President, Earth Markets

[kerry@earthmarkets.com](mailto:kerry@earthmarkets.com)

203-956-0813





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# Program Partners



CONNECTICUT  
CLEAN ENERGY FUND



CONNECTICUT  
ENERGY EFFICIENCY FUND



**Earth Markets**

Save Money — Save the Planet!  
One Community at a Time



**SmartPower**

Let's Get Energy Smart.



sca



**CLEAN WATER  
FUND**



Energy efficiency for greater savings and comfort



**Massachusetts  
Institute of  
Technology**



**EMPOWER DEVICES  
AND ASSOCIATES**



**MOBILE GENIUS**



**Celtic Energy**