

Brown Bag Webinar

Preview of Residential Marketing Materials for
Utility Feedback



Introduction

What are we doing?

- Working to support our customers' marketing and communications efforts either through ready made material and raw assets
- Reducing duplication of effort and cost by providing those materials utilities have indicated they would find valuable
- Creating pieces that leverage the regional investment in the RMCC toolkit and messaging
- Providing flexibility and customization options to avoid the “one size fits all” trap

Introduction

How did we get here?

- Rather than take a “we build it and they will come” approach, BPA requested the assistance of several of our customers
- This focus group was meant to guide our marketing efforts for the residential sector. Specifically:
 - In what measure categories would it be valuable to have centrally created marketing resources
 - What channels would you use in these measure categories
- This work also provided us an opportunity to leverage our regional investment in the RMCC Toolkit

Background: Top Utility Priorities

1	HVAC ductless heat pump	HVAC ductless heat pump	HVAC ductless heat pump	HVAC ductless heat pump	HVAC	HVAC ductless heat pump	Behavioral	HVAC ductless heat pump
2	Weatherization	Electric Water Heaters (HPWH)	Weatherization	Weatherization	Weatherization	Weatherization	Efficient and manufactured Homes	Electric Water Heaters (HPWH)
3	Simple Steps. Smart Savings.	Simple Steps. Smart Savings. w/ appliances	Regional savings where more rolls up	Simple Steps. Smart Savings. w/ appliances	Simple Steps. Smart Savings. w/ appliances	Electric Water Heaters (HPWH)	Multi-family	Appliance Rebates w/ Recycling

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Background: Top Utility Channels



Simple Steps,
Smart Savings



HVAC



Weatherization



Electric Water
Heaters

- Online Resources
- Retail Resources
- Direct Mail Resources
- Marcom Resources
- Raw Assets

- **Online Resources**
website content, email templates, social media content, educational PDFs, calculators, blog content, video
- **Retail Resources**
POS displays, shelf dangler, clings, brochures
- **Direct Mail Resources**
bill stuffer, newsletters, brochures, educational material, coupons
- **Marcom Resources**
PR content, event material, leave behinds, advertising
- **Raw Assets**
image library, copy library, templates, video

Why Regional Marketing?



- **Energy Efficiency is not competitive, your megawatt is not my megawatt**
- **Our lives are not bound by utility territories**
- **Consistency of message motivates action**
- **Cost savings could be significant**

The Challenges of a Regional Approach



- **Utilities serve a diverse set of end users**
- **They offer a variety of efficiency programs**
- **They have a wide variety of marketing competencies**
- **They have dramatically different resources to support marketing**
- **They have existing brands and campaigns**

Approach: RMCC Messaging Research

Methodology

- Included residents of Washington, Oregon, Montana & Idaho
- Data is representative of the region, geographically & demographically
- 50 online interviews conducted to get qualitative input
- 1,049 phone interviews conducted to get quantitative input, with 20 follow-up online chats

Key Learnings

- We do not need to build awareness of energy efficiency – residents across the region are already tuned in to this
- We do need to create a greater sense of urgency – at present, just 23% of households are highly likely to take more action
- Highlighting waste creates this sense of urgency and personalizes it - gets residents' attention that there's more they can do
- Getting rid of wasted energy delivers benefits that resonate – it not only lowers their bill, it makes them feel good that they are conserving more, wasting less, keeping costs down for everyone, and part of the solution

Approach: RMCC Messaging Hierarchy

On its own, saving money addresses a limited audience



Savings, waste reduction and conservation are critical combinations to driving action



Approach: RMCC Graphic Approach

“I TOOK STEPS TO STOP ENERGY WASTE AND IT FEELS GREAT.”

- Becca, 28

I was shocked to learn how much energy waste was seeping out through my attic. So with a few simple low-cost steps, I sealed it up, saved some money, and made my home comfortable again.

*It's a
Good
Place
TO BE*

Finished pieces

	Weatherization		Heating/Cooling				Electric Water Heating			
	Weatherization		DHP		PTCS		Heat Pumps		Storage Water	
	Customer	Partner	Customer	Partner	Customer	Partner	Customer	Partner	Customer	Partner
Copy Library	X	X	X	X	X	X	X	X	X	X
Info Sheet		X		X		X	X	X		
Email	X	X		X	X	X	X	X	X	
Full Page Ad	X				X		X		X	
Direct Mail	X				X		X		X	
Infographics			X							

Messaging and Copy Library

- Comprehensive source of customer- and partner-focused messaging and copy
- Messaging themes to develop custom copy
- Reflects findings of RMCC messaging hierarchy
- Ready-to-use or customizable long/medium/short blocks of copy
- Example – PTCS®

BPA – PTCS MESSAGING & COPY LIBRARY

Performance Tested Comfort System (PTCS) – Customer – Messaging

Definition

PTCS is a regional program that was designed to ensure that duct systems and ducted heat pumps in single family and manufactured homes will deliver the greatest energy savings possible, while reducing cold and drafty spots in the home.

Duct Sealing

Duct Sealing ensures that the air you have paid to heat or cool can travel through your home's ductwork with a minimal amount of leakage. When ducts are tight, conditioned air is getting to the rooms you occupy, rather than leaking into your crawlspace or attic. Duct sealing is important for new construction, existing homes, and especially manufactured homes. Duct sealing can also benefit homes with all kinds of heating systems.

Heat Pumps

Heat Pumps come in many different efficiency levels. PTCS provides step-by-step support to contractors to ensure that your new heat pump has been commissioned and configured to deliver conditioned air to its greatest potential.

Value Proposition

The PTCS program takes a holistic approach to increasing the efficiency of residential HVAC systems by combining highly efficient heat pump technology, good installation practices, and duct sealing to maximize comfort and indoor air quality while minimizing energy waste. PTCS combines rigorous training and prescriptive practices to ensure PTCS certified work delivers the highest quality and the greatest value.

Overall Message

When installing or upgrading your heating and cooling system your utility-approved PTCS certified technician can help you choose the right high efficiency heat pump, install and maintain it properly, and ensure it delivers heated or cooled air to your living spaces instead of leaking out of your ductwork. Your utility is here to help with more information on heating and cooling options and to find a PTCS certified technician.

Messaging Themes

1. Reduce energy waste

Duct Sealing

- Leaky ducts waste energy because the air you pay to heat and cool your home goes into places that don't need conditioned, like unconditioned basements, between walls and in attics and crawl spaces.
- Sealing ducts keeps your conditioned air where you want it to be, in your living space.
- Sealing ducts can reduce energy waste by as much as 20%.
- Even new homes can waste energy.

Heat Pumps

- The heat pump you choose and how it is installed matters.
- Choosing a low efficiency heat pump, choosing the wrong size for your house, or having it installed improperly can lead to a great deal of wasted energy, and unnecessarily high energy bills.
- A PTCS certified technician can ensure your equipment will function properly and have a long life.
- PTCS heat pump installations include testing and adjustments for optimal performance and comfort and can prevent the need for inefficient backup heat.

- 2. Increase your comfort and air quality**
 - Your heating and cooling system is essential in making sure you are comfortable regardless of the weather. Choosing the right system for your home, and making sure it functions properly will keep you comfortable year round.
 - Sealing and insulating ducts reduces problems like rooms that are too hot in the summer and too cold in the winter.
 - Duct sealing prevents dangerous household fumes like combustion gases and insulation particles from entering your duct system, and keeps these pollutants from circulating in your home.
 - A correctly tuned, high efficiency heat pump will provide year round comfort and cut down on wasted energy and money.

 - 3. PTCS provides quality you can rely on**
 - The PTCS program trains professional installers across the Pacific Northwest, to ensure PTCS certified installations provide the highest levels of quality and comfort.
 - PTCS certified technicians can ensure all facets of your HVAC system are delivering reliable comfort for many years:
 - i. PTCS technicians will ensure your heat pump is the right size for your home,
 - ii. Is installed properly to heat and cool your home as efficiently and effectively as possible.
 - iii. And delivers conditioned air where you want it, rather than escaping out of leaky ducts
 - Only PTCS-certified contractors can provide PTCS-qualified duct sealing or heat pump installations that allow you to qualify for utility incentives.

 - 4. Your utility is here for you**
 - Your utility can provide you with valuable information and guidance as you think about ways to reduce the energy waste in your heating and cooling systems.
 - Your utility can provide more information on heating and cooling options and direct you to a certified PTCS technician to make sure your investment in your home is as efficient and effective as possible.
 - You can find more information about the PTCS program at www.yourutility.com.
 - You might qualify for incentives from your utility to help offset the cost of duct sealing or heat pump installation.
-

Performance Tested Comfort System (PTCS) – Partner – Messaging

Definition

Performance Tested Comfort Systems certified contractors are trained to the highest standards for selection and installation of heat pump equipment and duct sealing service procedures. Contractors must be certified by a BPA-approved PTCS trainer; only certified technicians can provide PTCS services that are eligible for customer rebates.

Value Proposition

Only customers of PTCS-certified technicians are eligible for a utility incentive to reduce customer service and installation costs; by becoming PTCS certified you can offer these valuable benefits to your customers. In addition to promoting the benefits of PTCS projects to your customers, PTCS-Certified contractors will be listed on a central registry so that customers in their area who are actively seeking duct sealing and high efficiency heating equipment and who want to receive utility incentives. PTCS-qualified technicians have served 12,000 customers with PTCS services in the past year and a total of 54,700 since the beginning of the program. PTCS is supported by 103 utilities, which have provided incentives to their customers in Oregon, Washington, Idaho, Nevada, Montana and Wyoming.

Performance Tested Comfort Systems (PTCS) – Customer — LONG COPY

LOGO: It's a good place to be.

IMAGE: Guy drinking coffee from pot.

HEAD: Lower heating bills and a warmer home – now I can get really comfortable.

COPY: **Performance Tested Comfort Systems® minimize energy waste through duct sealing, efficient heat pump technology and good installation practices.**

SUBHEAD: **Seal Up The Savings**

COPY: Leaky ducts are a common cause of wasted energy in homes of all ages, making it more difficult, and more expensive to keep your house comfortable. When ducts are sealed, warm and cool air goes where you want it, rather than leaking into unused parts of your house like the attic or crawlspace. Performance Tested Comfort Systems (PTCS®) are designed to ensure that duct systems and ducted heat pumps deliver the greatest energy savings possible.

SUBHEAD: **The Benefits Of Certified Installation**

COPY: When installing or upgrading your heating system, PTCS certified technicians can help you throughout the entire process. They are trained to seal leaky ducts and install high efficiency heat pumps perfectly, tuned to each home's exact size and layout. Plus, (insert utility name here) offers incentives to help keep installation costs low.

Take control of energy waste and make your home *a good place to be*.

CTA: Contact us about a Performance Tested Comfort System at yourutility.com, or call (xxx) xxx-xxxx.

Performance Tested Comfort Systems (PTCS) – Customer — MEDIUM COPY

LOGO: It's a good place to be.

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COPY: **Performance Tested Comfort Systems® minimize energy waste through duct sealing, efficient heat pump technology and good installation practices.**

Leaky ducts are a common cause of wasted energy in homes of all ages, making it more difficult, and more expensive to keep a comfortable temperature. A Performance Tested Comfort System (PTCS®) certified technician is trained to seal leaky ducts and install high efficiency heat pumps perfectly tuned to each home's exact size and layout. And, with a certified PTCS installation, utility incentives can help keep installation costs low.

Take control of energy waste and make your home a *good place to be*.

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Performance Tested Comfort Systems (PTCS) – Customer — SHORT COPY

LOGO: It's a good place to be.

IMAGE: Guy drinking coffee from pot.

HEAD: **Lower heating bills and a warmer home – now I can get really comfortable.**

COPY: With Performance Tested Comfort Systems® a certified technician can seal your ducts and install an energy efficient heat pump that can qualify for valuable utility incentives. Take control of energy waste and make your home a *good place to be*.

CTA: Contact us about a Performance Tested Comfort System at youutility.com, or call (xxx) xxx-xxxx.

Performance Tested Comfort Systems (PTCS) – Partner — LONG COPY

HEADLINE: Become a Performance Tested Comfort System® certified technician and help more customers save on their energy bills.

SUBHEAD: Behind The Certification

COPY: A Performance Tested Comfort System (PTCS®) certified technician is trained to seal leaky ducts as well as select and install high efficiency heat pumps perfectly tuned to each home's exact size and layout. Plus, only a PTCS certified installation qualifies homeowners for the financial incentives available. By becoming certified you can offer these valuable services to your customers.

Benefits of a PTCS certified installation:

- Reduce energy waste
- Qualify for financial incentives
- Greater comfort and temperature control
- Improve indoor air quality

SUBHEAD: Your Utility Is Here To Help

COPY: By attending your utility's 3-day and 1-day training courses, you'll gain access to new customers who want to reduce waste, lower heating costs and qualify for valuable incentives. Your utility will also provide you with important news and information about the PTCS program.

CTA: Visit the PTCS page of the BPA site or, contact your utility to find out more about becoming a Performance Tested Comfort Systems (PTCS) certified installer at yourutility.com, or call (xxx) xxx-xxxx.

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Benefits Of A PTCS Certified Installation

- Reduce energy waste
- May qualify for financial incentives
- Greater comfort and temperature control
- Improve indoor air quality

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*It's a
Good
Place
TO BE*

**A warm bath that saves energy —
that's something we can all smile about.**

COMPANY  **LOGO**

PUBLIC UTILITIES

Heat Pump Water Heaters are the most efficient way to heat your water and can lower hot water costs by up to 50%. **Insert utility name here** offers incentives to help keep costs low. Take control of energy waste and make your home *A Good Place To Be.*

Contact us about installing a heat pump water heater at yourutility.com or call (xxx) xxx-xxxx.

*It's a
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TO BE



A warm bath that saves
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Heat Pump Water Heaters are the most efficient water heating option, reducing energy waste and hot water costs by up to 50%.

By installing a heat pump water heater, not only can you save a significant amount on your electric bill, but [insert utility name here](#) also offers incentives to help keep costs low.

A heat pump water heater is designed to work with your existing electric and plumbing systems, so installation is fast and easy when performed by a trained technician. They can also help you select the perfect system, depending on your home's hot water needs.

Take control of energy waste and make your home *A Good Place To Be.*

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PUBLIC UTILITIES

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The Most Efficient Way to Heat Water

By installing a heat pump water heater not only can you save a significant amount on your electric bills, but **insert utility name here** also offers incentives to help keep costs low. A heat pump water heater can save you up to 50% on your hot water costs and offers you the flexibility to meet all your hot water needs.

Advanced Technology That's Easy to Install

Working like a refrigerator in reverse, the heat pump water heater draws heat from the surrounding air and transfers it to the tank for the most efficient water heating technology possible. A heat pump water heater is also designed to work with your existing plumbing and electrical systems, so installation is fast and easy when performed by a trained technician.

Insert utility name here can recommend a heat pump water heater trained contractor who can assess your home's needs to help you select the perfect system.

Take control of energy waste and make your home *A Good Place To Be.*

COMPANY  **LOGO**
PUBLIC UTILITIES

Contact us about installing a heat pump water heater
at yourutility.com or call (xxx) xxx-xxxx.

Help customers dramatically lower their hot water costs with the most efficient water heating technology available.



Technology Designed to Save

Compatible with your customer's existing electric and plumbing systems, a Heat Pump Water Heater works like a refrigerator in reverse, drawing heat from the surrounding air and transferring it to water in the tank for maximum efficiency. And that efficiency pays off — not only can your customers save up to 50% of their hot water costs, **insert utility name here** also offers incentives to help keep installation costs low.

Customer Benefits of a Heat Pump Water Heater

- Most efficient water heater available
- Easy to install
- Lower hot water costs
- Easy to adjust efficiency settings
- Utility incentives available

Partnering With Your Utility

When you get manufacturer training your customers will be eligible for utility incentives and you will be able to recommend the ideal model for their needs. Go to www.dpa.gov/go/HPWH for more information on training and to your local utility for information on customer incentives.

**Help customers
dramatically lower
their hot water costs
with the most
efficient water
heating technology
available.**



Technology Designed to Save

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COMPANY  **LOGO**
PUBLIC UTILITIES

Learn more about heat pump water heaters,
and customer incentives at yourutility.com
or call (xxx) xxx-xxxx.



A new, more efficient water heater can reduce energy waste and save money on your electric bills.

Out With Old Water Heaters

Hot water accounts for 10-20% of your home's energy bills, and older water heaters, even from just ten years ago, can be inefficient and wasteful. By upgrading to a new energy efficient electric water heater, your savings over the next ten years will more than make up for the difference in price.

Your Utility is Here to Help

If you're shopping for a new water heater, or looking to reduce energy waste with a more efficient one, use the Energy Guide label to find those models with the lowest cost to operate. Before you buy, contact **Insert utility name** here to see which models qualify for incentives. A new water heater is easy to install and will work with all your current plumbing and electrical systems.

**Ductless Heat
Pumps are a proven
alternative to
outdated heating
systems** and can
lower your customers'
heating costs by
25-50%.

Installing the Savings



Replacing or supplementing inefficient heating systems like baseboard heaters, wall heaters and electric furnaces with Ductless Heat Pumps (DHP) has provided energy savings for approximately 17,000 homes across the Northwest. One DHP in the central living space of a home delivers warm air in the winter and cool air in the summer, to keep your customers comfortable year-round.

Efficient Heat

A DHP transfers heat, rather than using resistance elements, offering a much more even and efficient heat source. It's easy to install, leaving a small footprint and little disruption on your customer's home. Plus, utility incentives and tax credits can help offset installation costs.

DHP benefits

- Lower heating costs
- Consistent heat delivery to reduce hot and cold spots
- Both heating and cooling for year-round comfort
- Built-in filter to improve air quality
- Ultra quiet fan
- Remote control and programmable night-time setting



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PUBLIC UTILITIES

Learn more about ductless heat pump technology and the incentives available to your customers. Visit yourutility.com and the partner resources page at goingductless.com, or call (xxx) xxx-xxxx.



*It's a
Good
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TO BE*

Lower heating bill and a warmer home —
now I can get really comfortable.

Performance Tested Comfort Systems® minimize energy waste through duct sealing, efficient heat pump technology and good installation practices.

Seal Up the Savings

Leaky ducts are a common cause of wasted energy in homes of all ages, making it more difficult, and more expensive to keep your house comfortable. When ducts are sealed, warm and cool air goes where you want it, rather than leaking into unused parts of your house like the attic or crawlspace. Performance Tested Comfort Systems (PTCS®) are designed to ensure that duct systems and ducted heat pumps deliver the greatest energy savings possible.

The Benefits of Certified Installation

When installing or upgrading your heating system, PTCS certified technicians can help you throughout the entire process. They are trained to seal leaky ducts and install high efficiency heat pumps perfectly tuned to each home's exact size and layout. Plus, [\(insert utility name here\)](#) offers incentives to help keep installation costs low.

COMPANY LOGO
PUBLIC UTILITIES

Take control of energy waste and make your home *A Good Place To Be.*
Contact us about a Performance Tested Comfort System at [yourutility.com](#), or call **(xxx) xxx-xxxx**.

Become a Performance Tested Comfort System[®] certified technician and help more customers save on their energy bills.



Behind the Certification

A Performance Tested Comfort System (PTCS[®]) certified technician is trained to seal leaky ducts as well as select and install high efficiency heat pumps perfectly tuned to each home's exact size and layout. Plus, only a PTCS certified installation qualifies homeowners for the financial incentives available. By becoming certified you can offer these valuable services to your customers.

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Customizable Assets

- Encourage customization to own needs
- Supplying source files in Adobe InDesign
- Customizable elements



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COMPANY  **LOGO**
PUBLIC UTILITIES

Contact us about a Performance Tested Comfort System at YourUtility.com.
Or call (xxx) xxx-xxxx.

Future focus

- **Clearinghouse of materials, multi-sector**
- **“Finished” logo-ready pieces**
- **Source files for customization**
- **Copy libraries**
- **Infographics**
- **Existing marketing collateral, e.g. T8 lighting**

Your Thoughts:

- **Does this approach support your programmatic focus? Any programs you would add or remove?**

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- **Are there other communication channels we should address?**
- **Does this approach fit with your overall aesthetic / branding approach?**
- **What kind of customization do you anticipate?**
- **Do you have any further input?**