

# Brown Bag Webinar

## BPA Marketing Templates to Support Residential Efficiency Programs



# 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

# Background: Top Utility Channels



**Simple Steps,  
Smart Savings**



**HVAC**



**Weatherization**



**Electric Water  
Heaters**

- **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

# 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	
Billing Insert	X				X					

# Customizable assets

- **Clearinghouse of materials on BPA website**
- **Easy to download from the web**
- **Supply source files in Adobe InDesign**
- **Customizable elements**

# Download templates

[http://www.bpa.gov/energy/n/residential/Marketing\\_Toolkit/](http://www.bpa.gov/energy/n/residential/Marketing_Toolkit/)

The screenshot shows a web browser window displaying the Bonneville Power Administration's Residential Marketing Toolkit. The page features a navigation menu with options like 'Agency Topics', 'Finance & Rates', 'Jobs', 'Public Involvement', and 'Contact'. The main content area is titled 'Energy Efficiency Residential Marketing Toolkit' and includes a search bar and a list of navigation links. The page provides information about the toolkit's purpose, which is to help utilities and their trade allies reach out to customers. It also lists available materials such as bill inserts, one sheets, advertisements, and HTML email templates. A section titled 'Heating, Ventilation, Air Conditioning (HVAC) Ductless Heat Pumps (DHP)' is highlighted, featuring a list of download options: 'Copy Library', 'Partner Email', and 'Partner One Sheet'. Below this list is a promotional graphic for DHPs, stating they are a proven alternative to outdated heating systems and can lower heating costs by 25-50%. The graphic includes two images: one showing a person installing a DHP and another showing a room with a DHP. Text on the graphic describes the benefits of DHPs, such as being a small footprint and ductless, and providing lower heating costs.

BPA - Energy Efficiency | Residential Marketing Toolkit - Windows Internet Explorer

http://www.bpa.gov/energy/n/residential/Marketing\_Toolkit/

BONNEVILLE POWER ADMINISTRATION

Energy Efficiency

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BPA Home > EE Home > Residential Sector > Residential Marketing Toolkit

## Energy Efficiency Residential Marketing Toolkit

To help utilities and their trade allies reach out to customers, BPA has created a suite of marketing materials to promote residential energy efficiency upgrades. This leverages the Regional Marketing Toolkit created by NEEA in order to help BPA's customer utilities promote water heating, Heating, Ventilation, and Air Conditioning (HVAC), and weatherization measures.

Guided by customer input BPA has developed a number of materials including bill inserts, one sheets, advertisements, and HTML email templates Pieces labeled as partner directed at a partner audience, whereas those marked customer are directed at an end user audience, but can be customized to suit a variety of needs including trade ally marketing to end users.

These materials are being provided in their source format (Adobe InDesign) so that customers can customize these tools to fit their needs. Should you need assistance with this customization we have included a form that can be completed and returned to BPA to request assistance in modifying these materials. Please note the images included in these source files are only available to use in the formats provided and should not be incorporated into other materials.

### Heating, Ventilation, Air Conditioning (HVAC)

#### Ductless Heat Pumps (DHP)

- Copy Library
- Partner Email
- Partner One Sheet

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

**Install the Savings**

Replacing an outdated heating system with a ductless heat pump (DHP) can save money and reduce the energy use of your home. DHPs are a small footprint and ductless alternative to your customer's old furnace, boiler, and air conditioning system. Heat pumps (DHPs) use electricity to move heat from one room to another, or from the outdoors to the indoors. One DHP can heat and cool a room in the winter and cool it in the summer. It does not require venting to the outdoors.

**DHP Benefits**

- Lower heating costs
- Conditioned heat delivery to reduce fuel and costs costs
- Quiet heating and cooling for your residential customer

Source: DOE's National Energy Efficiency



# Target Audience: Consumers

- **Variety of assets allows greater flexibility to market individual utility programs**
- **Variety of assets allows multiple consumer touch points for programs**
- **Variety of assets can be scaled to budgets and offers many low-cost opportunities**

# Example: Customer HTML Email



**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](http://yourutility.com), or call (xxx) xxx-xxxx.

# Example: Customer Direct Mail



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

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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%.**

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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*.

**COMPANY  LOGO**  
PUBLIC UTILITIES

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

# Example: Customer Bill Insert



Fighting home energy waste —  
that's what heroes do.

Home weatherization  
can reduce energy  
waste and provide  
long-lasting comfort  
for your family.

Adding insulation, sealing around windows and doors or installing more efficient windows and doors helps reduce waste and keep you comfortable in your home all year long. **(Insert utility name here)** can recommend a contractor to identify where energy is being wasted and suggest the most cost effective solutions. With the right upgrades, you may also be eligible for incentives from **(Insert utility name here)**.

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

**COMPANY LOGO**  
PUBLIC UTILITIES

Find more information about our weatherization program at [yourutility.com](http://yourutility.com) or call us at XXX-XXX-XXXX.

# Example: Customer Full Page Ad



*It's a  
Good  
Place*  
TO BE

Paying less for a hot shower —  
that makes me wanna rock out.

**COMPANY LOGO**  
PUBLIC UTILITIES

A new, more efficient water heater can save you energy and money on your electric bill. [Insert utility name here](#) also offers financial incentives for qualified products and can help you choose the right water heater based on your family's needs. Take control of energy waste and make your home *A Good Place To Be*.

Contact us at [yourutility.com](#) or call [\(xxx\) xxx-xxxx](#) about upgrading to an energy efficient electric water heater.

# Example: Customer Full Page Ad



**COMPANY LOGO**  
PUBLIC UTILITIES

Air leaks and inadequate insulation waste a lot of the energy used to heat and cool your home. **(Insert utility name here)** can recommend a contractor to help you weatherize your home, keeping you more comfortable year round and saving you money on energy bills. With the right upgrades, you could also be eligible for incentives from **(Insert utility name here)**. Take control of energy waste and make your home *A Good Place To Be*.

Find more information about our weatherization program at [yourutility.com](http://yourutility.com) or call **(xxx) xxx-xxxx**.

# Example: Copy Library

- **Details definition, value proposition, and overall messaging and themes for PCTS, hot water heaters and ductless heat pumps**
- **Provides multiple combinations of marketing copy to customize to collateral pieces**

# Example: Copy Library

## Ductless Heat Pump (DHP) – Customer — SHORT COPY

**LOGO:** It's a good place to be.

**IMAGE:** TBD (SAMPLE HEADLINE BELOW)

**HEAD:** Lower heating costs and a warmer home – now that's something to sing about.

**COPY:** Inefficient baseboard or wall heaters waste a tremendous amount of energy. With a Ductless Heat Pump (DHP), you can keep your home more comfortable year-round, and lowers heating costs by as much as 25-50%. Utility incentives and tax credits can also offset initial costs. Take control of energy waste and make your home *a good place to be*.

**CTA:** Contact us about installing a ductless heat pump at [yourutility.com](http://yourutility.com), or call (xxx) xxx-xxxx.



# Example: Toolkit Tactics

## Integrate outreach multiple times



**It's a Good Place TO BE**

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

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

**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.




**It's a Good Place TO BE**

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



**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**.




**It's a Good Place TO BE**

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

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.

**COMPANY LOGO PUBLIC UTILITIES**

# Target Audience: Partners

- **Informative pieces inspire channel partners to look for new business opportunities in energy efficiency**
- **Simplicity allows for quick download of information**
- **Builds on message of partnership with utility**

# Example: Partner Info Sheet

**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.bpa.gov/go/HPWH](http://www.bpa.gov/go/HPWH) for more information on training and to your local utility for information on customer incentives.

**COMPANY LOGO**  
PUBLIC UTILITIES

Learn more about heat pump water heaters, and customer incentives at [yourutility.com](http://yourutility.com) or call (XXX) XXX-XXXX.

# Example: Partner HTML Email

**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.

#### **Benefits of a PTCS Certified Installation**

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

#### **Your Utility is Here to Help**

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.

**COMPANY LOGO**  
PUBLIC UTILITIES

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](http://yourutility.com), or call (xxx) xxx-xxxx.

# Example: Partner HTML Email

**Help make homes more comfortable and reduce energy waste** with weatherization solutions from your utility.



Photography courtesy of Owens Corning

#### **Season Proof Your Customers' Homes**

Many homeowners aren't aware of the gaps and air leaks around their homes, or that they may need more insulation. Basic weatherization can go a long way in reducing energy waste and making homes more comfortable.

By working with your customers to add insulation and eliminate air leaks, you can help them save money on their energy bills, and keep them comfortable year round.

#### **These Homes Need Your Help**

You have the expertise to identify areas in a home where energy is being wasted and suggest cost effective weatherization measures. **(Insert utility name here)** is here to support you with tools to educate homeowners, and incentives to reduce installation costs.

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**COMPANY LOGO**  
PUBLIC UTILITIES

Contact **(Insert utility name here)** about weatherization programs and the incentives available at [yourutility.com](http://yourutility.com) or call us at **(xxx) xxx-xxxx**.

# Need Help?

[http://www.bpa.gov/energy/n/residential/Marketing\\_Toolkit/marketing\\_toolkit\\_request.pdf](http://www.bpa.gov/energy/n/residential/Marketing_Toolkit/marketing_toolkit_request.pdf)

The screenshot shows a Windows Internet Explorer browser window displaying a PDF form. The address bar shows the URL: [http://www.bpa.gov/energy/n/residential/Marketing\\_Toolkit/marketing\\_toolkit\\_request.pdf](http://www.bpa.gov/energy/n/residential/Marketing_Toolkit/marketing_toolkit_request.pdf). The form is titled "Residential Toolkit Custom Marketing Print Materials Request Form" and contains the following sections:

**Individual submitting request**

Name:  Utility:

Email:  Tel:

**Materials (select one):**

HVAC	EWH	PTCS	Heat Pump Water Heater	Weatherization
<input type="checkbox"/> Partner One Sheet	<input type="checkbox"/> Customer Ad	<input type="checkbox"/> Partner One Sheet	<input type="checkbox"/> Partner One Sheet	<input type="checkbox"/> Partner One Sheet
	<input type="checkbox"/> Customer Direct Mail	<input type="checkbox"/> Customer Billing Insert	<input type="checkbox"/> Customer One Sheet	<input type="checkbox"/> Customer Bill Insert
		<input type="checkbox"/> Customer Ad	<input type="checkbox"/> Customer Ad	<input type="checkbox"/> Customer Ad
			<input type="checkbox"/> Customer Direct Mail	

**Customization Information**

The browser window also shows a status bar at the bottom with the text "Done" and "Unknown Zone". The taskbar at the bottom of the screen shows the Start button and several open applications, including "Cas...", "On B...", "QSSI...", "C:\D...", "EE10...", "Inbo...", "BPA...", "BPA...", and "http...". The system tray shows the time as 2:52 PM.

# Need Help?

- Request customization, fill out the customization form on the BPA residential website
- Attach your logo as a as a high-resolution image (.JPG, .TIF, .PNG)
- Email Carolyn VanWinkle [cbvanwinkle@bpa.gov](mailto:cbvanwinkle@bpa.gov)
- We will provide a print-ready PDF file of printed materials

# Share Your Success:

The screenshot shows the Consumers Power Inc. website in a Windows Internet Explorer browser window. The address bar displays `http://www.consumerspower.org/`. The website header includes the CPI logo and the text "CONSUMERS POWER INC." with a search bar and a "PAY YOUR BILL ONLINE" button. A navigation menu contains links for "MY ACCOUNT", "NEWS", "ENERGY-SAVING PRODUCTS", "ALL ABOUT ENERGY", "SAFETY", "REBATES", "CONTACT US", and "ABOUT CPI".

The main content area features a large banner with a photograph of a man smiling while holding a baby. The banner text reads "IT'S A GOOD PLACE TO BE" and "It's a Good Place TO BE". Below the banner is a "LEARN MORE" button and a small text snippet "A Lot More Than Water...".

An "ANNOUNCEMENTS" section contains two notices:

- CPI SCHEDULES SYSTEM UPGRADES**: Will Require Short Outage CPI members in the Siletz area to Kernville will have an outage on Monday June 24 from 8 am to 8:30 am. The outage is needed so CPI can begin system upgrades out of its Toledo... [READ MORE](#)
- All power restored in Lebanon. Cause was found in a CPI substation. Enjoy your weekend!** POSTED: JUNE 23, 2013
- Outage in Lebanon area on Sunday June 23. Cause unknown. Call 541.929.3124 to report your outage and for updates.** POSTED: JUNE 23, 2013
- Crews have finished repairs and power has been restored in the Lyons area. Thank you for your patience!** POSTED: JUNE 20, 2013

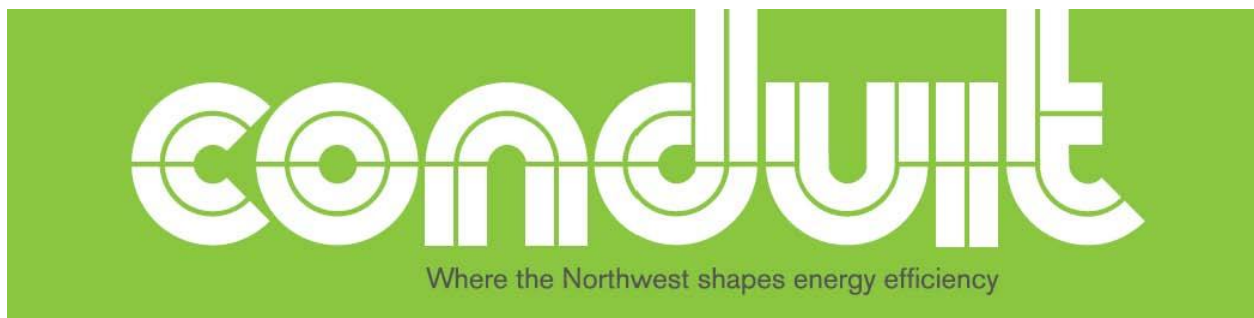
At the bottom of the page, there are two promotional boxes: "ENERGY EFFICIENCY AND REBATES LEARN HOW TO SAVE MORE" and "SIGN UP TO RECEIVE OUR EMAIL NEWSLETTER". The browser's taskbar at the bottom shows various open applications and the system clock at 9:28 AM.



# Share Your Success:

The screenshot shows a Windows Internet Explorer browser window displaying the Clark Public Utilities website. The browser's address bar shows the URL <http://www.clarkpublicutilities.com/index.cfm/your-home/energy-conservation/>. The website's navigation menu includes links for MY ACCOUNT, YOUR HOME, YOUR BUSINESS, PAYMENT OPTIONS, OUR ENVIRONMENT, COMMUNITY INVOLVEMENT, and B2B. The current page is titled "Energy conservation" and features a sidebar with a list of links including Appliances, Building and remodeling Calculators, Energy conservation (highlighted), Conserve space heat, Energy counselors, Energy saving tips, Heat pump incentives, Loans for conservation measures, On-site visit, Project Energy Savings, Rebates for 2013 Weatherization, While you're away, Free resources, Heating and cooling, Help with your bill, Lighting, Outages, Rates, Safety, and Start, stop or transfer service. The main content area has a heading "Energy conservation" and a featured image of a smiling couple with a red callout box that reads "OUR OLD HOUSE WAS OFF THE CHARTS, ENERGY WISE." Below the image, the text states: "Clark Public Utilities offers a range of conservation information and services. Loans are available to customers who own their electrically-heated home. Our residential energy counselors will be happy to provide you with conservation information and advice that's specific to your home. We offer speakers for your club or organization to provide you with personalized advice about a range of energy issues. To talk to an energy counselor you can [e-mail us](#) or call us at (360) 992-3355. We also have several conservation-related brochures and fact sheets you can [download or order online](#). Many of the energy conservation suggestions won't cost you anything. We have lots of energy-saving tips that are either low-cost or free! If you take a few minutes to learn how to [read your electric meter](#) you can keep track of your savings. Remember that pumping and heating water can be a big part of your electric bill. Check out our recommendations for [conserving water](#). Individualized advice is also available for our commercial and institutional customers. [E-mail us](#) and we'll call to set up an appointment." Below this text is a "Related links" section with a link to "Fact sheet summarizing conservation incentives". The Windows taskbar at the bottom shows the start button, several open applications, and the system tray with the time 9:33 AM.

# Share Your Success:

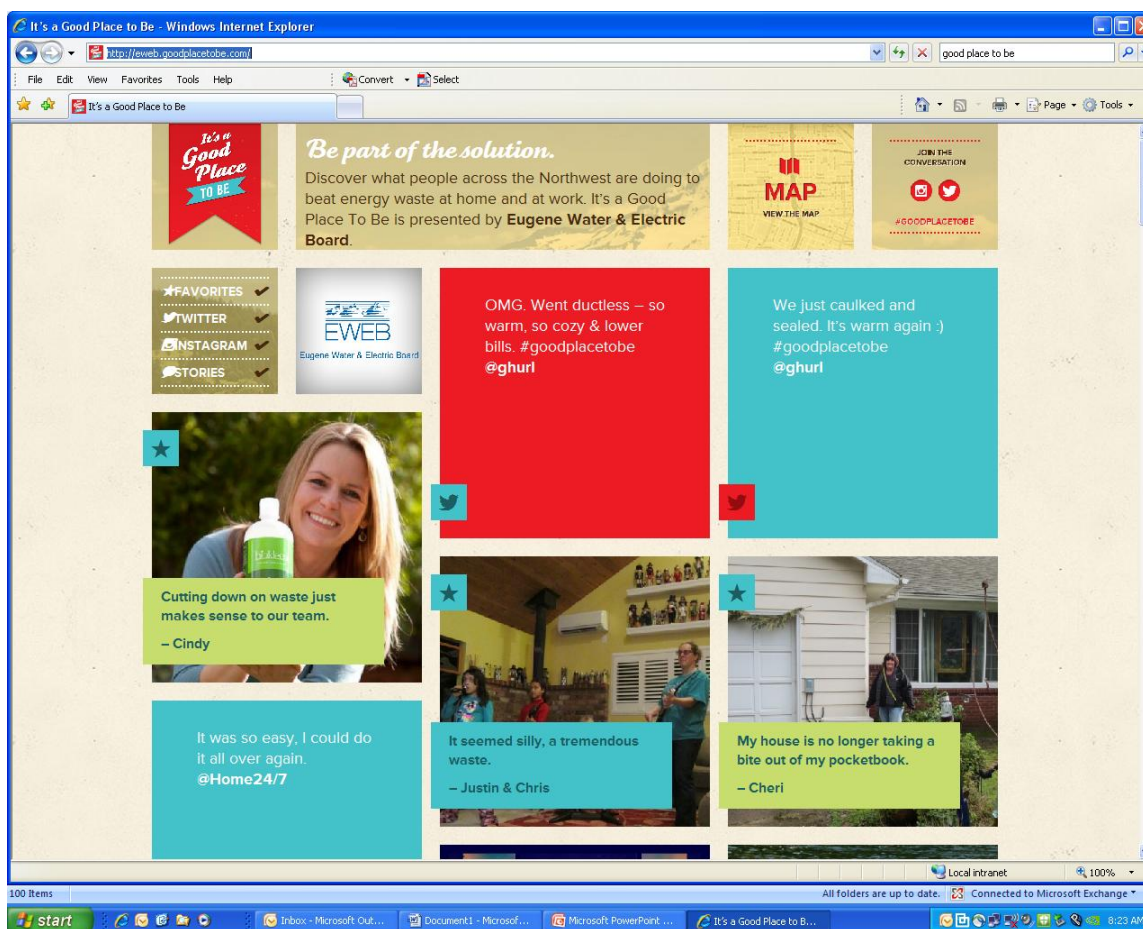


**Join the Regional Marketing Forum**

**<https://conduitnw.org/Pages/Group.aspx?rid=157>**

# Share Your Success

www.goodplacetobe.com



# BPA RMCC Toolkit Q&A

- **What do you think about the new marketing materials?**

# BPA RMCC Toolkit Q&A

- **Are there any barriers you might have to using these materials?**

## BPA RMCC Toolkit Q&A

- **What collateral pieces or marketing materials would you add to the toolkit?**

# BPA RMCC Toolkit Q&A

- **Would it be helpful to have us provide marketing plan examples for these materials?**

# For More Information

**Please direct additional comments or questions to your EER**