

Build it Bright!

Crafting Your Solar Marketing Program

Presented by
Glenna Wiseman of



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THANK YOU!



PROGRAM TOPIC SCHEDULE

1. **January** - Taking Stock – [Recordings, tool, slides here](#)
2. **February** - Mapping Strategy – [Recordings, tool, slides here](#)
3. **March** - Presenting your Best: Marketing Campaigns and Creative Content – [Recordings, tool, slides here](#)
4. **April** - Efficient Activation: Tools and Strategies for Efficient Campaign Delivery – [Recordings, tool, slides here](#)
5. **May** - Tracking Results: Implementing Systematic ROI Reporting – [Recordings, tool, slides here](#)
6. **June** - Putting it all Together: Creating the Building Blocks of your Solar Marketing Program – Recording coming soon!

Find all the program elements:
Energytrust.org/BusinessDevelopment

Putting it all Together

From Assessment to
Tracking Results,
Create the Building
Blocks of Your Solar
Marketing Program



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SESSION CONTENT

Putting it all Together

From Assessment to Tracking Results,
Create the Building Blocks of Your Solar
Marketing Program



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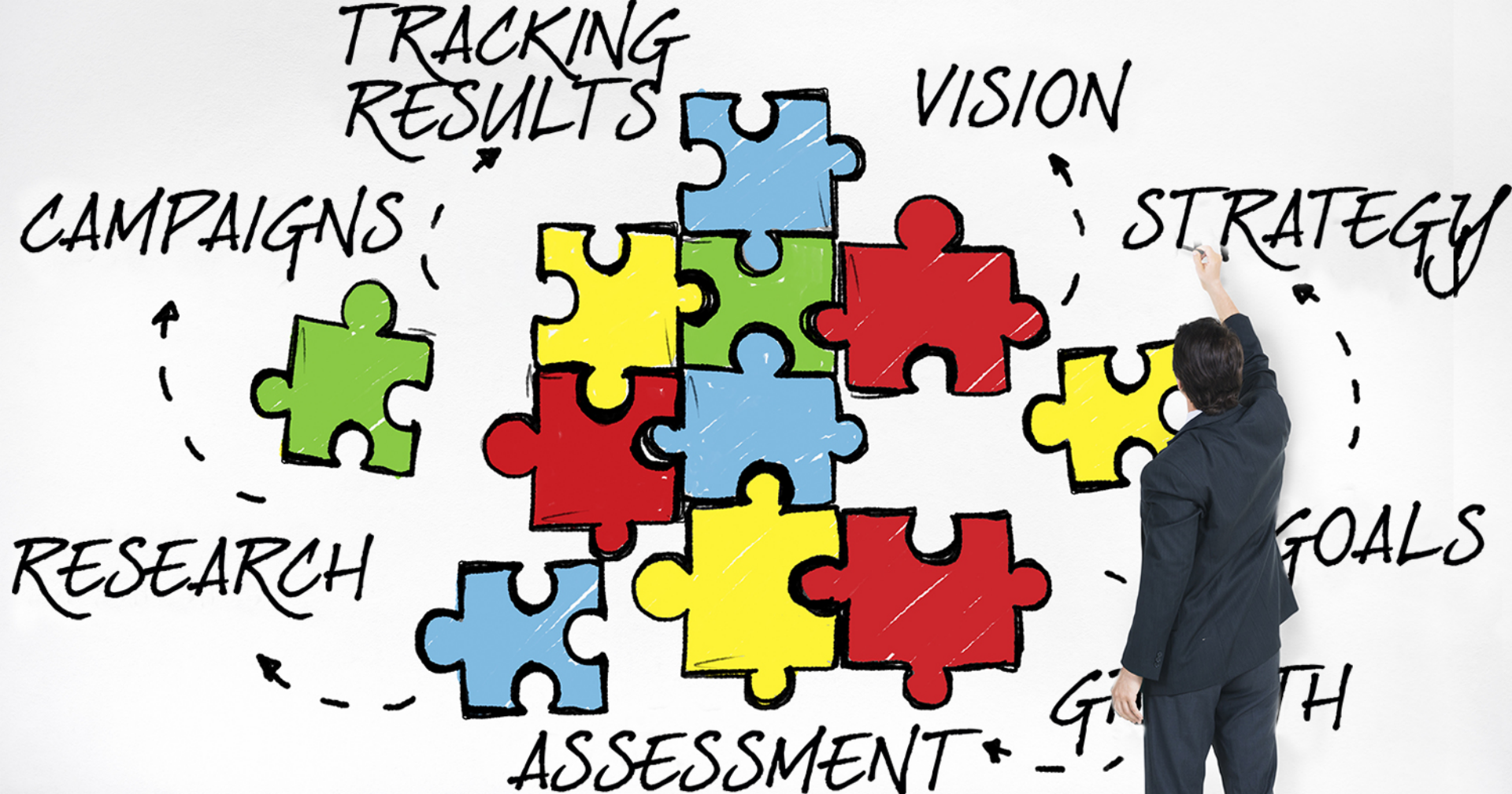


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Putting it all Together Webinar

- Quick Review of Program Tools and Benefits
- New! Solar Dedication Campaign Development Tool
- Putting it all Together – Sample Campaign
- Address Three Marketing Pain Points



PUTTING IT ALL TOGETHER

Build it Bright Solar Marketing Tools



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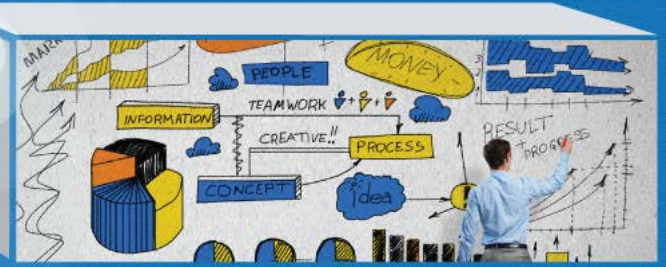


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MARKETING INVENTORY TOOL

Taking Stock

Assessing the Condition of
Your Marketing Foundation



- Evaluate past year's performance
- Set new goals
- Take inventory of current state of marketing assets and other marketing related business initiatives
- Set marketing asset priorities

STRATEGY MAPPING TOOL

Mapping Strategy

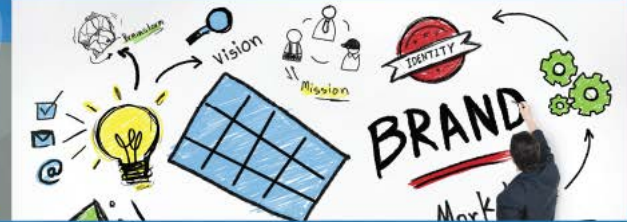
Engineering Your
Marketing Success



- Bring priorities information into strategy map
- Sharpen positioning
- Highlight need and steps to understand most critical customer base
- Identify resource needs
- Prioritize market sectors
- Map quarterly goals and budgets

CUSTOMER PROFILE DEVELOPMENT TOOL

**Presenting Your Best
Marketing Campaigns and
Creative Content**



- Outline most critical client personas
- Basis of marketing campaign creative development
- Focuses demographic and geo targeting data for campaign development
- Outlines most critical client base “pain points” for campaign messaging

CO-OP DEVELOPMENT TOOL

Efficient Activation Tools and Strategies for Efficient Campaign Delivery



- Tracking tool to secure more funding for your marketing budgets
- Maintain list of co-op sources for easy reference
- Identify campaign for which funds are being secured, campaign elements and key dates
- Ensure all parts of campaign are being tracked for submittal
- Track specifics of submittal process to ensure funding support is secured

MARKETING TRACKING TOOL

Tracking Results Implementing Systematic ROI Reporting



Drive up the
effectiveness
of your
marketing
and increase
sales

1. Track marketing spend by accounting chart of accounts

2. Establish tracking by lead source

3. Track quality and result of lead source types by cost of lead, cost of each opportunity and cost of sale



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SOLAR DEDICATION CAMPAIGN DEVELOPMENT TOOL

Putting it all Together

From Assessment to Tracking Results,
Create the Building Blocks of Your Solar
Marketing Program



Solar Dedication Campaign

Development Tool





PUTTING IT ALL TOGETHER

Solar Dedication Campaign Development



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WHY A TOOL ON RIBBON CUTTING EVENTS?

This tool will help you:

- Develop more business in nonresidential sectors like commercial, industrial and public sector by...
- Increasing the visibility of client projects you already have in those markets while...
- Promoting the good work your clients are doing going solar!



Tip:

Solar ribbon cuttings are powerful campaigns to celebrate existing client projects, generate PR and new business leads



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SOLAR DEDICATION DEVELOPMENT

Use this tool to:

- Develop the Solar Message / Event Theme
- Identify Promotional Opportunities
- Identify Stakeholder Groups
- List Stakeholder Groups
- Identify and Leverage Online Opportunities
- Identify and Leverage PR Opportunities



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TOOL SECTIONS

Client and Project Information

Campaign Marketing Partners

Campaign Overview

Stakeholder Groups

Program Element Budget and Scheduling



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CLIENT AND PROJECT INFORMATION

Client and Project Information

Client Information

Client Company Name:

Type of Client:

(Ex: C&I, Public Sector, Other)

Client Contact Name:

Email:

Phone:

Client has PR or other firm
involved with event?

YES or NO

If YES, list Firm Name:

Firm Email:

Firm Phone:

Project Team Information

Staff Member Completing Form:

Sales or Account Manager on our Team for this Client:

Construction Manager on our Team for this Project:

CLIENT AND PROJECT INFORMATION

Client and Project Information (continued)

Installation Information

Date of Installation Start:

Date of Projected Installation Finish:

Date of Projected Interconnection:

Type of Install:	Ground Mount		Rooftop		Community	
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Install Details

Size:

Location Address/City/State/Zip:

CLIENT AND PROJECT INFORMATION

What Aspects of This Solar Installation Are Unique?

	Yes	No	Explain
A First for Your Company	<input type="checkbox"/>	<input type="checkbox"/>	
A First in the Community	<input type="checkbox"/>	<input type="checkbox"/>	
Unique to Your Industry	<input type="checkbox"/>	<input type="checkbox"/>	
It Is Combined With Other Energy Efficiency Measures	<input type="checkbox"/>	<input type="checkbox"/>	
It Is the First in the Area to Use a Financing Program	<input type="checkbox"/>	<input type="checkbox"/>	

Client's Reasons to Go Solar

1

2

3



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CAMPAIGN MARKETING PARTNERS

Campaign Marketing Partners

Description: List of marketing partners who may be involved with the event.

Goal: Identify which partners could be involved with the campaign.

Campaign Marketing Partners

Module Manufacturer:

Contact Name:

Email:

Phone:

Involved in event?

Using Co-Op or other funds?

Notes:

Inverter Manufacturer:

Contact Name:

Email:

Phone:

Involved in event?

Using Co-Op or other funds?

Notes:

Yes No

Yes No



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CAMPAIGN OVERVIEW

Campaign Overview

Description: Develop goals and theme for the campaign.

Goal: Document the goals and work through ideas for the theme.

Solar Dedication Campaign Goals

Top Three Goals the Client Has for Doing the Solar Dedication Event

1

2

3

Top Three Goals for Our Participation

1

2

3



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CAMPAIGN OVERVIEW

Theme Development

Note: Why is it important? A theme **1)** adds excitement and relevancy to your event campaign, **2)** reinforces the client's solar story, **3)** creates a "rallying" call for everyone involved in the event, **4)** acts as a cohesive element for all activities, and **5)** guides the graphics and creative element development.

Solar Dedication Theme Ideas

Potential Theme Ideas:

1

2

3

How does the theme relate to client's business and sustainability client is working to fulfill?

Reviewed with client/ campaign team?

Final theme for the campaign/program

How will it be articulated in the graphics, program, etc.?



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HELP YOUR CLIENT TELL THEIR SOLAR STORY

Extend the reach of your client's solar investment with a clearly defined message campaign:

- Solar fulfills the emissions reduction and clean generation aspects of your sustainability mission.
- The metrics of solar today and the financing available for solar allow companies of all sizes to install solar.
- A solar installation acts as a pivot point around which you can create marketing communications and events to engage your stakeholder groups.



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DEVELOP A CAMPAIGN THEME

A campaign theme:

- 1) Adds excitement and relevancy to your event campaign
- 2) Reinforces the client's solar story
- 3) Creates a “rallying” call for everyone involved in the event
- 4) Acts as a cohesive element for all activities, and
- 5) Guides the graphics and creative element development.



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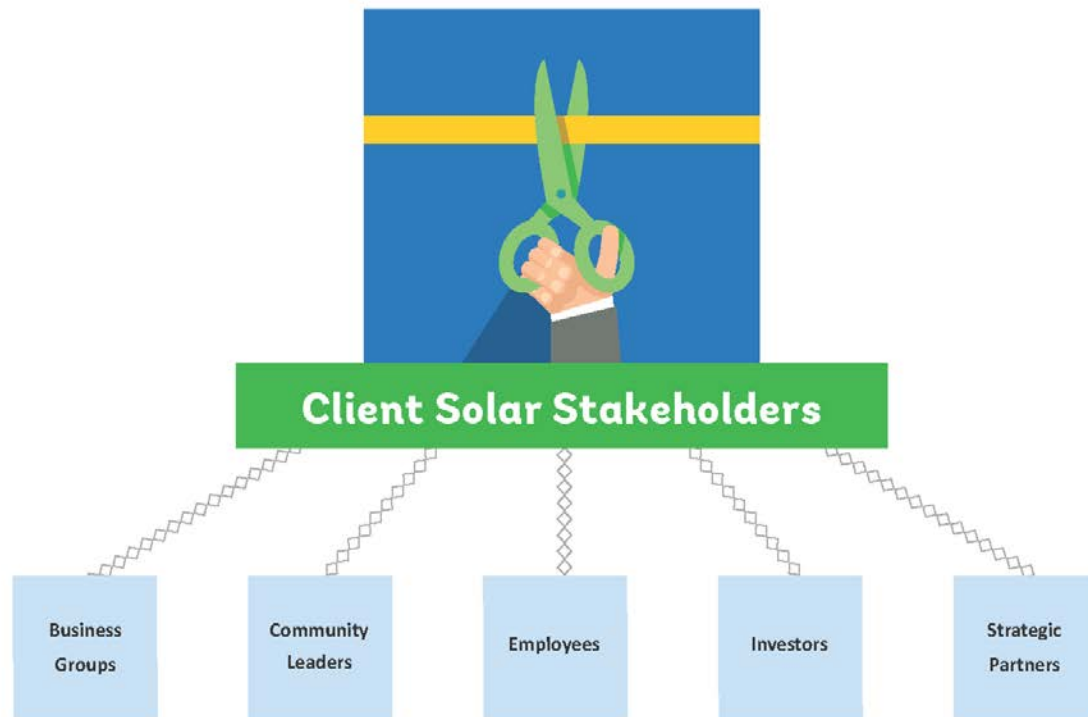
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STAKEHOLDER GROUPS

Identify Stakeholder Groups

Description: List of stakeholder groups involved in the campaign

Goal: Work with the client contact to identify as many stakeholder groups as possible to be involved with the event/campaign



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STAKEHOLDER GROUPS

List of Stakeholder Groups

Employees:

Our Key Advocates or Voices:

Client's Key Advocates or Voices:

Local Green Building:

Local City and Government Officials:

Local Business:

State Officials:

Other:

Other:

ENGAGE STAKEHOLDER GROUPS

- Communicate your solar story to each stakeholder group. Here are some ideas!
 - **Employees**
 - Internal kick off event
 - Employee discount | volume plan arranged with solar installer that has benefit to a cherished employee charity group
 - Progress reports on newsletter
 - Invite to solar dedication event
 - **Your Vendors**
 - Use solar as opportunity to invite vendors to go solar
 - **Strategic Partners**
 - Explore mutually beneficial ways to leverage solar story with your strategic partners
 - **Your Community**
 - Signage
 - Solar dedication event



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PROGRAM ELEMENT PLANNING

Program Element Budget and Scheduling

Description: List of program elements

Goal: Review and ensure all program elements are accounted for in the planning and outline schedule.

Element	Included in Program? YES/NO	Budget Needed? YES/NO	Projected Budget	Date Needed
Pre-Event				
Theme Development:				
Theme Developed				
Graphic Approach Developed (including incorporation of all participating logos)				
Employee Programs:				
Employee / Internal - Internal Kickoff Event				
Employee / Client- Internal Kickoff Event				
Client Employee Discount Volume Plan				
Newsletter – Other Content Posts				

PROGRAM ELEMENT PLANNING

Installation Related:				
Consumer Appropriate Description of the Install Provided to Client				
Project Fact Sheet Which Can Be Used at the Program as Well				
Time Lapse Video Production				
Project Installation Photos				
Install Groundbreaking / Start Press Release				



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PROGRAM ELEMENT PLANNING

Throughout:

Social Media Graphics and Campaign
Including During Event

Online Project Status Page

Real Time Build Camera Coverage

Blog Content Schedule, Images



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PROGRAM ELEMENT PLANNING

Event Related:

Speaker and Attendee List Development:

Invite List

Speaker List

Dignitaries List

Invitation

Program Outline

Signage:

In Front of Building

At Install

Point of Sale Signage

“Ribbon Cutting” Element

Photography

Videography

Catering

Dignitary Gifts

Client Plaque/ Acknowledgements



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PROGRAM ELEMENT PLANNING

Press Related:

Press List

Press Advisory

Press Release for Day of Program

Press Kit- Printed or Flash Drive

Project Fact Sheet



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PROGRAM ELEMENT PLANNING

Post Event:				
Thank You's – Email or Other				
Summary Online/ Blog Post				
Website Descriptions Including Live Monitoring Feed				
Photos of the Installation				
Case Study Including Saving Profile and Environmental Impact				
Photos and Content on Your Company Social Media Sites				

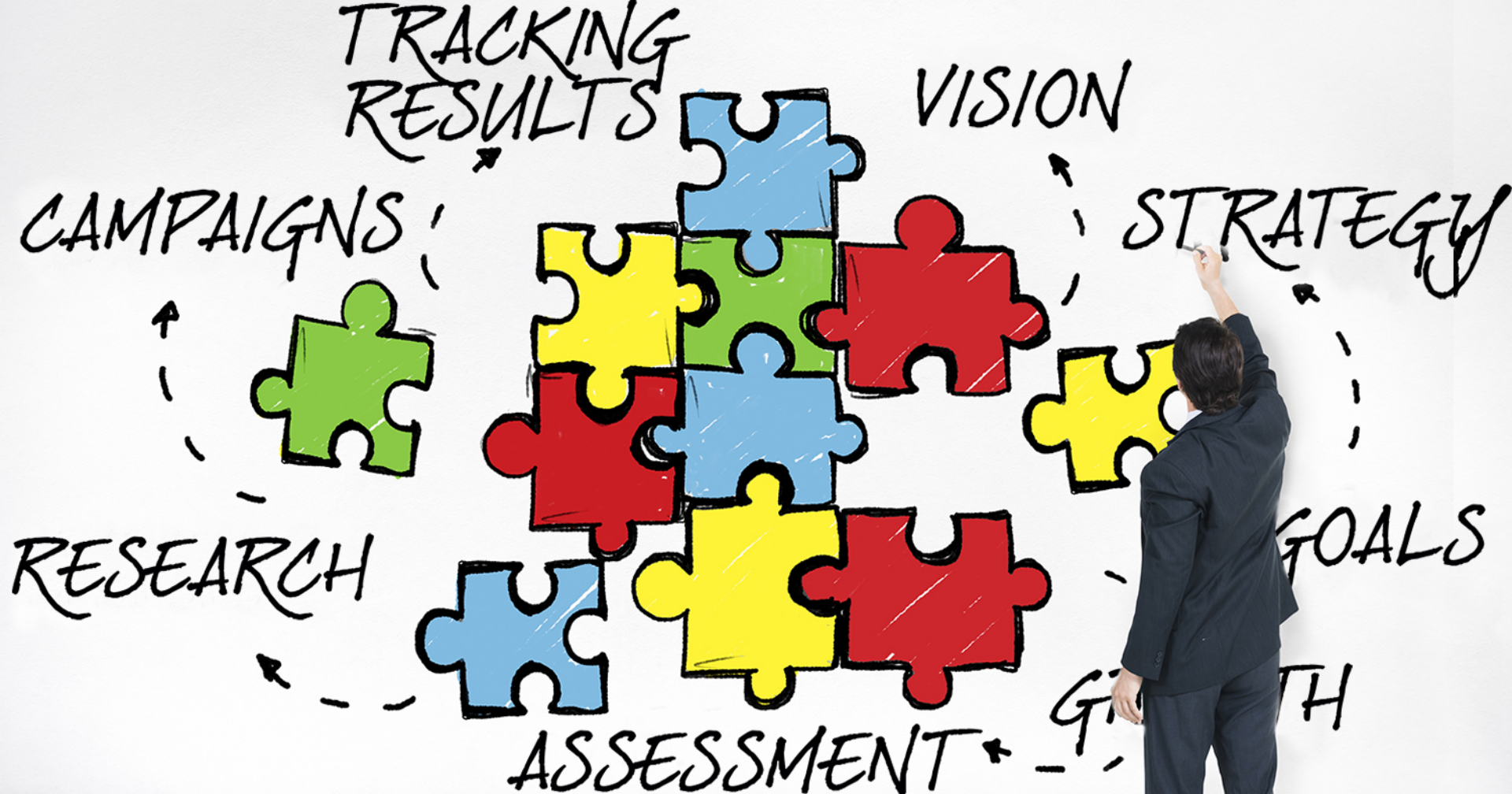


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PUTTING IT ALL TOGETHER

Putting it all Together – Sample Campaign



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THE SOLAR DEDICATION EVENT

- A solar dedication event is a pivot point to create PR and marketing coverage. It brings together:
 - **Client's Solar Story**
 - Why your client installed solar
 - How it relates to their sustainability initiatives
 - **Stakeholders**
 - Connected to the company
 - In the community
 - In the green building industry
 - **Your Marketing Message**
 - A theme will add excitement and relevancy to your event



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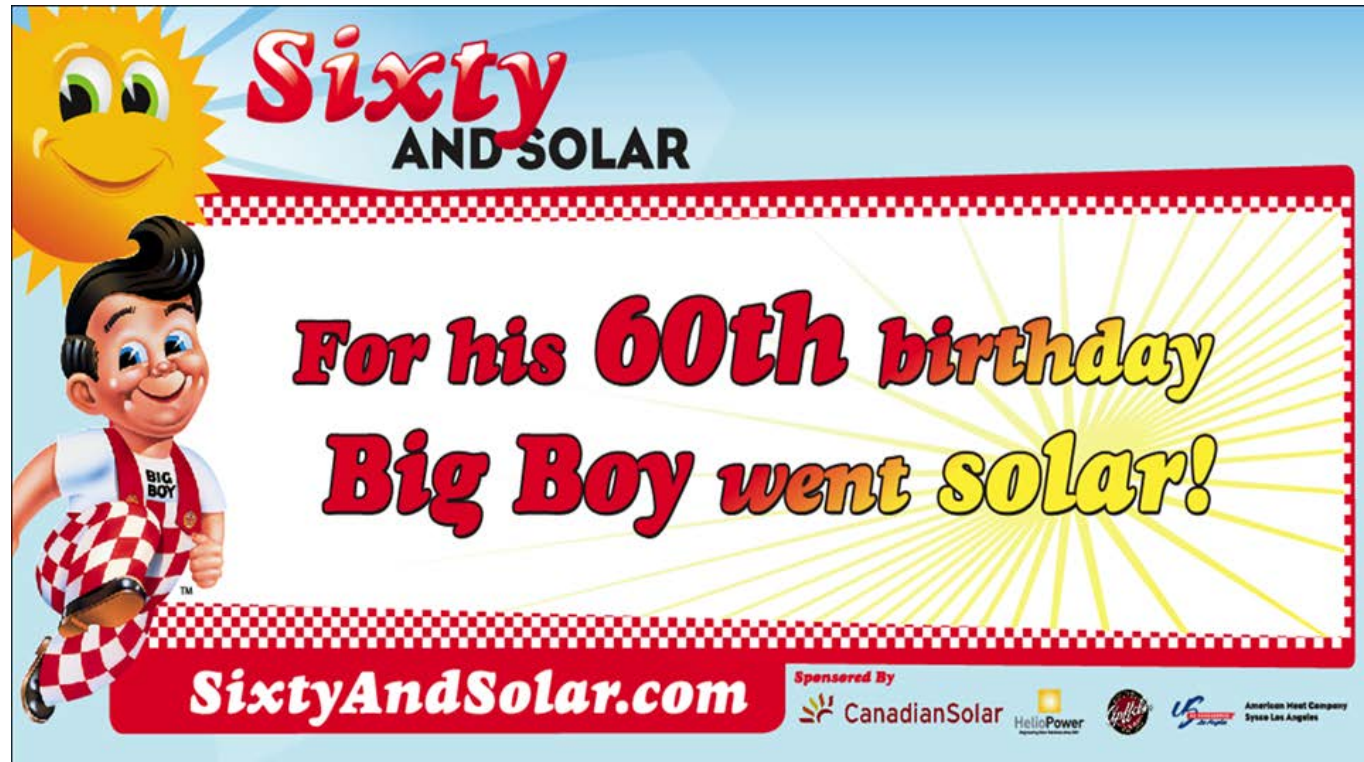


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BOB'S BIG BOY EVENT

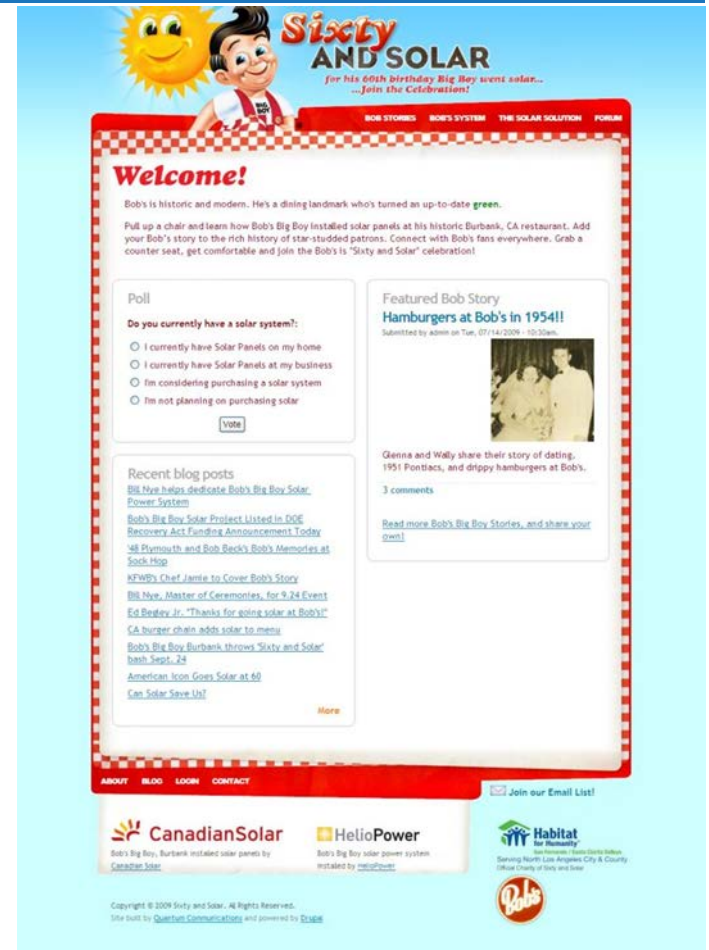
Theme Development:

- Iconic Bob's Big Boy in Burbank was celebrating its 60th anniversary by going solar



BOB'S BIG BOY EVENT

- Elements of the campaign included:
 - SixtyandSolar.com website
(pictured here, no longer online)
 - Fan Memories
 - Event Updates
 - Sponsor Visibility
 - Lead Capture
 - Content Program
 - Solar Dedication Event
 - 60th Dedication Party
 - Extensive Press Campaign
 - Video Marketing
 - Social Media



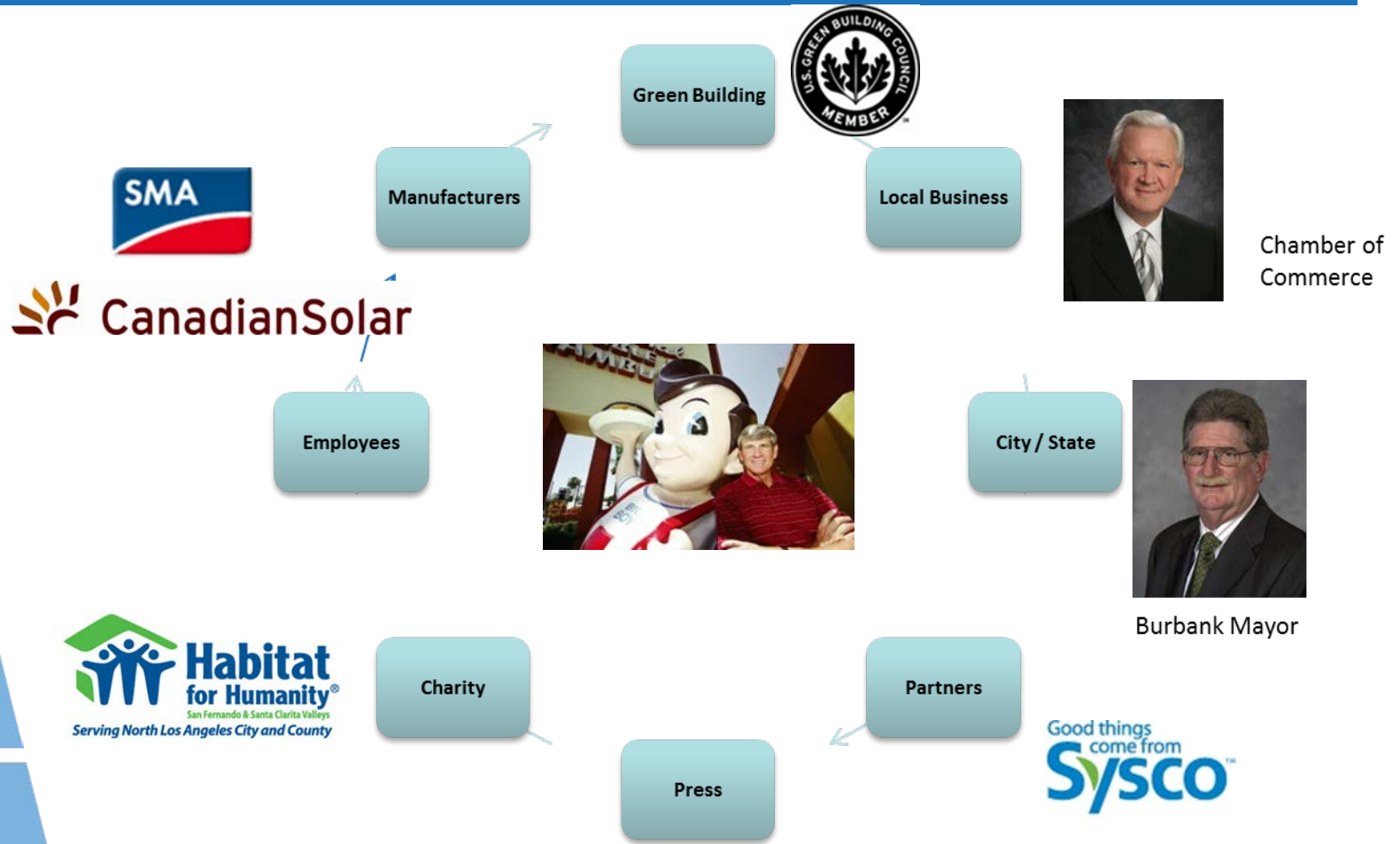
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BOB'S STAKEHOLDER GROUPS



AUTHENTIC SPOKESPERSON



BRANDED SIGNAGE & COLLATERAL



VIDEO MARKETING

- A video marketing piece developed for The Bob's Big Boy solar celebration was picked up during the press work by the Auto Channel, a major online enthusiast destination.
- By promoting to stakeholder groups of the client, in this case the automotive community that honors Bob's in Burbank as a travel destination, we were able to increase the pick up of the video message.
- Link to video: <http://identity3.com/portfolio-item/video-marketing/>



SUCCESSFUL RECOGNITION





PUTTING IT ALL TOGETHER

Addressing “Pain Points”



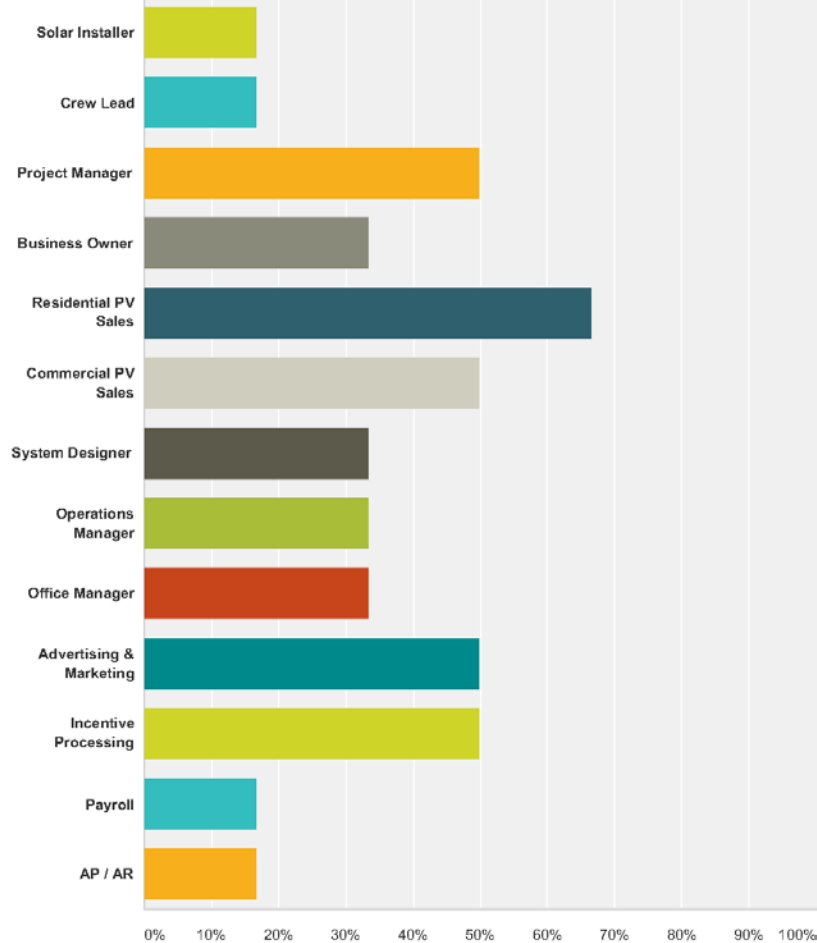
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THE MANY HATS YOU WEAR



Energy Trust 2015 survey
revealed contractors
“wear” as many as
5 hats on average
to run their businesses!



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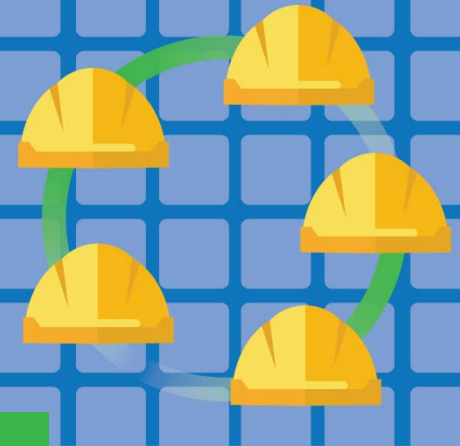
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MANAGING MARKETING IS TOUGH

Managing Marketing Function

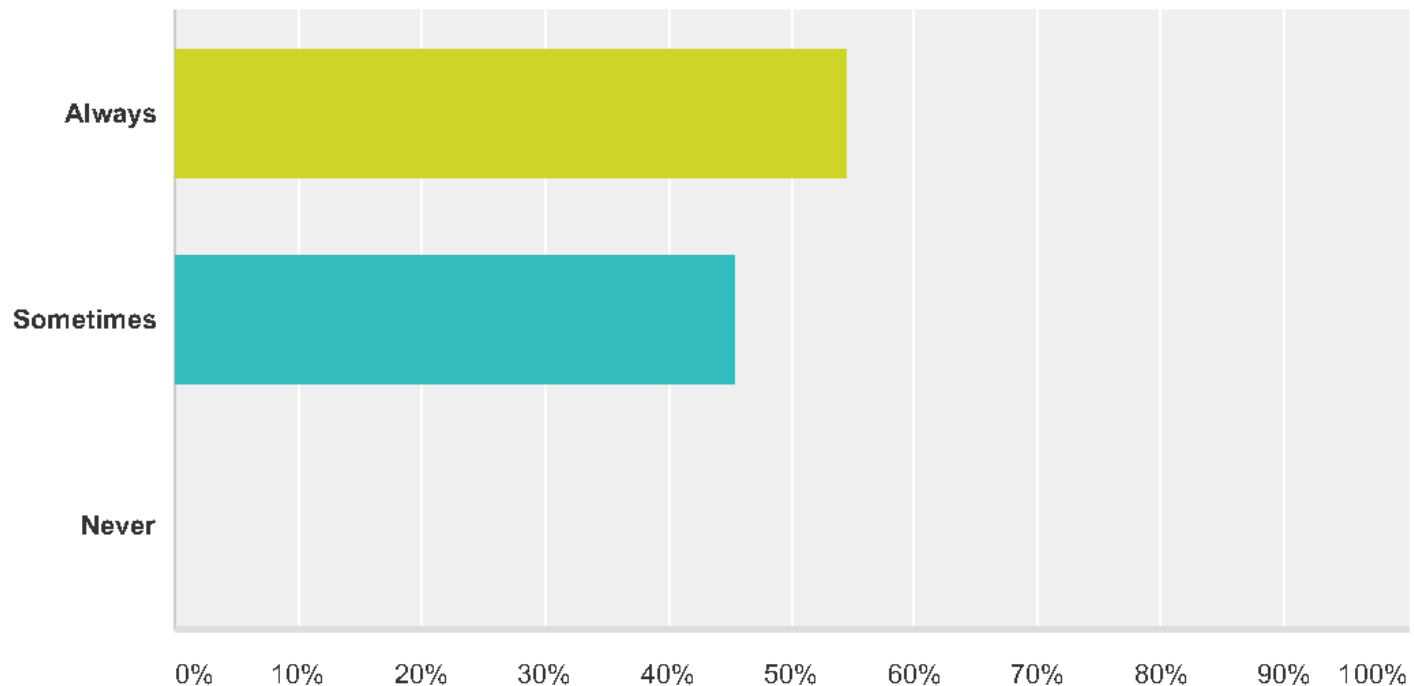
Given marketing is one of the “hats” it is not surprising in the Chaolysti 2016 survey Energy Trust of Oregon contractor allies ranked the following areas of their businesses as a combination of **“Very Difficult”** and **“Somewhat Difficult”** to manage:

1. Marketing: 62%
2. Sales Operations & Process: 55%
3. Tied for Third:
Cash flow & accounting, Component selection, System design



YOU ARE IN COMPETITIVE BID SITUATIONS

How often are you in a competitive bid situation?

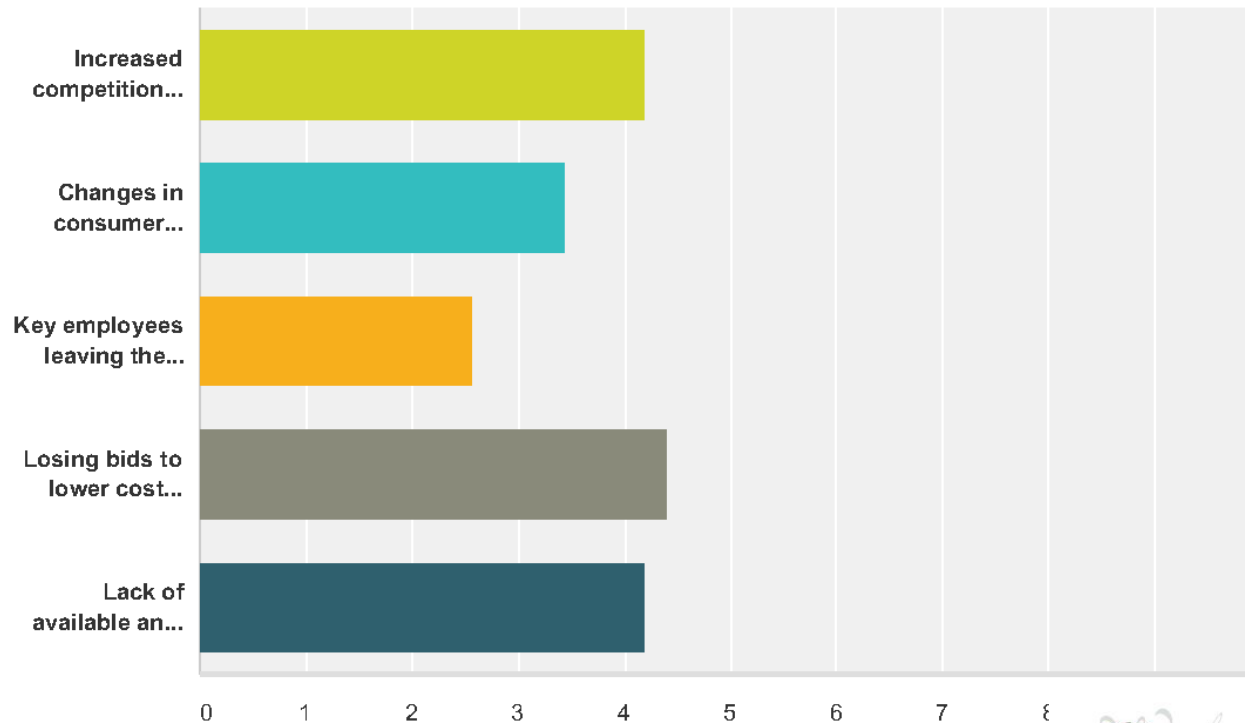


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INCREASED COMPETITION + PRICE PRESSURE

In Chaolysti and our program research allies cited increased competition and price pressure as business “pain points”



MARKETING MANAGEMENT

Three Tips to Effective Marketing Management

1. Create foundational pieces (Brand identity, brand guide, style guide, customer profiles) so you stay on target, save time and \$\$\$
2. Integrate “disparate” marketing software related platforms to one CRM
3. Secure more funds into programs through co-op resources so you can expand both help and scope of campaigns



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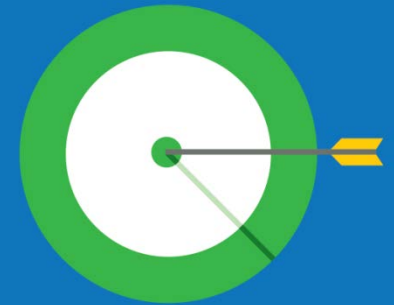


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COMPETITIVE BID SITUATIONS

Three Marketing Tips

1. Identify and consistently communicate your company's competitive strengths
2. Work to get referral marketing to "well oiled" machine
3. Reduce lost leads and response to lead time with CRM including "web to lead" forms, as close to instant response times as possible, clearly defined process steps and accountable sales attention



Tip:

Focus on your strengths versus your competition's weakness – places your message as a leader instead of "catching up"



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COMPETITION

Three Marketing Tips

1. Establish and consistently communicate your company's competitive strengths
2. Dedicate time and resources to marketing function for consistent program delivery and results tracking
3. Develop and leverage clear understanding (profile development) of key customer groups to more accurately use lead targeting tools and develop campaign creative content



Tip:

Consistency is key! Start small if necessary but keep a steady drumbeat of activity > tracking > adjustment cycle going!



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THE “BUILD IT BRIGHT” SERIES ONLINE

The Program Online

- **Energy Trust Website:**
Energytrust.org/BusinessDevelopment
- **Energy Trust [Insider's Blog](#)**
- **Energy Trust [Calendar](#)**
- **Identity³ Website:**
[#MarketingSolar Page](#) and [Blog](#)

CONTACT US

Questions?

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Watch for the Survey!