Build it Bright!
Crafting Your Solar Marketing Program

Presented by Glenna Wiseman of Identity³ Vibrant Marketing
Working with Energy Trust of Oregon
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

Build it Bright!
Crafting Your Solar Marketing Program

Presented by Glenna Wiseman of Identity³
SESSION CONTENT

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
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

- 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
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

Identity³
Working with EnergyTrust of Oregon

in association with
PUTTING IT ALL TOGETHER

Solar Dedication Campaign Development
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.
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
TOOL SECTIONS

- Client and Project Information
- Campaign Marketing Partners
- Campaign Overview
- Stakeholder Groups
- Program Element Budget and Scheduling
# Client and Project Information

## Client Information

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Client Company Name</td>
<td></td>
</tr>
<tr>
<td>Type of Client</td>
<td>(Ex: C&amp;I, Public Sector, Other)</td>
</tr>
<tr>
<td>Client Contact Name</td>
<td></td>
</tr>
<tr>
<td>Email</td>
<td></td>
</tr>
<tr>
<td>Phone</td>
<td></td>
</tr>
<tr>
<td>Client has PR or other firm involved with event?</td>
<td>YES or NO</td>
</tr>
<tr>
<td>If YES, list Firm Name</td>
<td></td>
</tr>
<tr>
<td>Firm Email</td>
<td></td>
</tr>
<tr>
<td>Firm Phone</td>
<td></td>
</tr>
</tbody>
</table>

## Project Team Information

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Staff Member Completing Form</td>
<td></td>
</tr>
<tr>
<td>Sales or Account Manager on our Team for this Client</td>
<td></td>
</tr>
<tr>
<td>Construction Manager on our Team for this Project</td>
<td></td>
</tr>
</tbody>
</table>
### Installation Information

| Date of Installation Start:         |
| Date of Projected Installation Finish: |
| Date of Projected Interconnection: |

<table>
<thead>
<tr>
<th>Type of Install:</th>
<th>Ground Mount</th>
<th>Rooftop</th>
<th>Community</th>
</tr>
</thead>
</table>

### Install Details

| Size:            |
| Location Address/City/State/Zip: |

---
## CLIENT AND PROJECT INFORMATION

**What Aspects of This Solar Installation Are Unique?**  

<table>
<thead>
<tr>
<th></th>
<th>Yes</th>
<th>No</th>
<th>Explain</th>
</tr>
</thead>
<tbody>
<tr>
<td>A First for Your Company</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>A First in the Community</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Unique to Your Industry</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>It Is Combined With Other Energy Efficiency Measures</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>It Is the First in the Area to Use a Financing Program</td>
<td></td>
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<td></td>
</tr>
</tbody>
</table>

### Client’s Reasons to Go Solar

1.
2.
3.
**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.

<table>
<thead>
<tr>
<th>Campaign Marketing Partners</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Module Manufacturer:</td>
<td>Contact Name:</td>
</tr>
<tr>
<td>Email:</td>
<td>Phone:</td>
</tr>
<tr>
<td>Yes</td>
<td>No</td>
</tr>
<tr>
<td>Involved in event?</td>
<td></td>
</tr>
<tr>
<td>Using Co-Op or other funds?</td>
<td></td>
</tr>
<tr>
<td>Notes:</td>
<td></td>
</tr>
</tbody>
</table>

| Inverter Manufacturer:     | Contact Name: |
| Email:                     | Phone: |
| Yes | No |
| Involved in event?         |   |
| Using Co-Op or other funds? |   |
| Notes:                     |   |
### 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.
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.?
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.
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.
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

Client Solar Stakeholders

- Business Groups
- Community Leaders
- Employees
- Investors
- Strategic Partners
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
### 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.

<table>
<thead>
<tr>
<th>Element</th>
<th>Included in Program?</th>
<th>Budget Needed?</th>
<th>Projected Budget</th>
<th>Date Needed</th>
</tr>
</thead>
<tbody>
<tr>
<td>Pre-Event</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Theme Development:</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Theme Developed</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Graphic Approach Developed</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Employee Programs:</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Employee / Internal - Internal Kickoff Event</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Employee / Client - Internal Kickoff Event</td>
<td></td>
<td></td>
<td></td>
<td></td>
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<tr>
<td>Client Employee Discount</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Newsletter – Other Content Posts</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

*Note: The table represents a planning matrix for various program elements, including budget and scheduling details.*
## Program Element Planning

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

In association with
# PROGRAM ELEMENT PLANNING

<table>
<thead>
<tr>
<th>Throughout:</th>
</tr>
</thead>
<tbody>
<tr>
<td>Social Media Graphics and Campaign</td>
</tr>
<tr>
<td>Including During Event</td>
</tr>
<tr>
<td>Online Project Status Page</td>
</tr>
<tr>
<td>Real Time Build Camera Coverage</td>
</tr>
<tr>
<td>Blog Content Schedule, Images</td>
</tr>
</tbody>
</table>
# Program Element Planning

<table>
<thead>
<tr>
<th>Event Related:</th>
</tr>
</thead>
<tbody>
<tr>
<td>Speaker and Attendee List Development:</td>
</tr>
<tr>
<td>Invite List</td>
</tr>
<tr>
<td>Speaker List</td>
</tr>
<tr>
<td>Dignitaries List</td>
</tr>
<tr>
<td>Invitation</td>
</tr>
<tr>
<td>Program Outline</td>
</tr>
<tr>
<td>Signage:</td>
</tr>
<tr>
<td>In Front of Building</td>
</tr>
<tr>
<td>At Install</td>
</tr>
<tr>
<td>Point of Sale Signage</td>
</tr>
<tr>
<td>“Ribbon Cutting” Element</td>
</tr>
<tr>
<td>Photography</td>
</tr>
<tr>
<td>Videography</td>
</tr>
<tr>
<td>Catering</td>
</tr>
<tr>
<td>Dignitary Gifts</td>
</tr>
<tr>
<td>Client Plaque/ Acknowledgements</td>
</tr>
</tbody>
</table>
## Program Element Planning

### Press Related:

<table>
<thead>
<tr>
<th>Press List</th>
</tr>
</thead>
<tbody>
<tr>
<td>Press Advisory</td>
</tr>
<tr>
<td>Press Release for Day of Program</td>
</tr>
<tr>
<td>Press Kit - Printed or Flash Drive</td>
</tr>
<tr>
<td>Project Fact Sheet</td>
</tr>
</tbody>
</table>
## PROGRAM ELEMENT PLANNING

<table>
<thead>
<tr>
<th>Post Event:</th>
<th></th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Thank You’s – Email or Other</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Summary Online/ Blog Post</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Website Descriptions Including Live Monitoring Feed</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Photos of the Installation</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Case Study Including Saving Profile and Environmental Impact</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Photos and Content on Your Company Social Media Sites</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
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
Theme Development:

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

![Image of Sixty And Solar advertisement](image-url)
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
BOB'S STAKEHOLDER GROUPS

- Manufacturers
- Local Business
- Green Building
- City / State
- Partners
- Press
- Charity
- Employees
- Chamber of Commerce
- Burbank Mayor

in association with

Identity³

Working with EnergyTrust of Oregon
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/
PUTTING IT ALL TOGETHER

Addressing “Pain Points”
THE MANY HATS YOU WEAR

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

- Always
- Sometimes
- Never
In Chaolysti and our program research allies cited increased competition and price pressure as business “pain points”
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
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”
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!
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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LinkedIn: Glenna Wiseman
Web: www.Identity3.com

Watch for the Survey!