

Build it Bright!

Crafting Your Solar Marketing Program

Presented by
Glenna Wiseman of



Working with
EnergyTrust
of Oregon



#MARKETINGSOLAR



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to contribute
on Twitter.



PROGRAM TOPIC SCHEDULE

1. **January - Taking Stock** – [Recordings, tool, slides here](#)
2. **February - Mapping Strategy** – NEW podcast: [*Building an Online and Social Media Strategy with Limited Resources with Kent Lewis of Anvil Media*](#)
3. **March - Presenting your Best: Marketing Campaigns and Creative Content**, [RSVP for webinar](#)
4. **April - Efficient Activation: Tools and Strategies for Efficient Campaign Delivery** – [RSVP for webinar](#)
5. **May - Tracking Results: Implementing Systematic ROI Reporting** – [RSVP for webinar](#)
6. **June - Putting it all Together: Creating the Building Blocks of your Solar Marketing Program** – [RSVP for webinar](#)

Find all the program elements: Energytrust.org/BusinessDevelopment

Mapping Strategy

Engineering
Your Marketing
Success



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MAPPING STRATEGY OBJECTIVES

Our objectives today:

- Hear from our special guest, Jeni Hall of Energy Trust of Oregon
- Support Mapping Strategy Development via our interactive tool
 - Priorities
 - Positioning
 - Market Sectors
 - Customers
 - Resources
 - Quarterly Goals and Budget

WELCOME JENI!



Jeni Hall
Solar Project Manager
Energy Trust of Oregon

Solar Strategy Insights

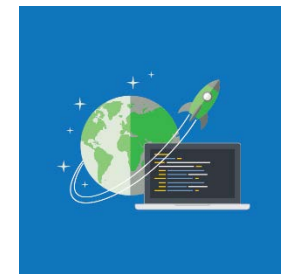
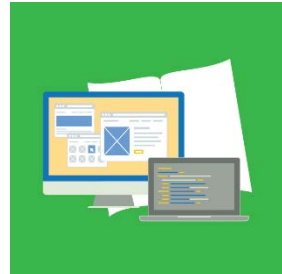
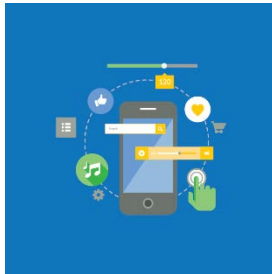
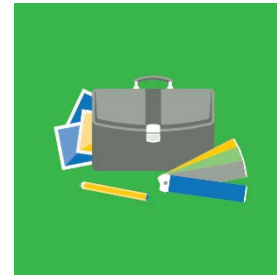
- Energy Trust strategy for this solar marketing series
- Insights from her role at Energy Trust
- Insights as a former solar contractor owner

Reach Jeni Hall

- Jeni.Hall@energytrust.org
- Twitter: [@SolarJeni](https://twitter.com/SolarJeni)

PRIORITIES

Document priorities identified in [“Taking Stock” webinar](#) to strategy tool.





MAPPING STRATEGY

Positioning

POSITIONING PREP WORK – COMPETITIVE LANDSCAPE REVIEW

1. Competitors – What Customers See

To understand your top 3 competitive strengths, or the “core DNA / Identity” of your company, start with a competitive landscape review. Who are the **5-6 competitors** you encounter in your bids?

Create spreadsheet and analyze these companies:

- Marketing:
 - Website
 - SEO
 - Social media sites
- Customer Messaging:
 - What customer benefits do they communicate?
- Sectors:
 - The services they provide that compare with yours
-and up to 30 competitive points to get a clear picture of how they compare with you and what opportunities exist.



POSITIONING PREP WORK – BRAND DEVELOPMENT

2. Internal – Company Voices

This process is to gather the perspectives of those in the company. Recommendation is to record one on one talks and then transcribe them.

Talk with founders and team members:

- What is the core strengths of the company?
- Why was the firm created?
- What is the joy or passion the company “lives” to accomplish?
- What do others on the team, other than the founders or owners, think are the reasons customers contract with the firm?



POSITIONING PREP WORK – CUSTOMER INTERVIEWS

3. Customer Voices – What Customers Say

Interview customers to understand how they see your strengths (and weaknesses) Create a set of questions to use in phone interviews that are open ended.



Use this process to discover:

- Why they went with your firm (it is also very valuable to find out why they did not go with your firm if you can talk with “lost business” contacts”
- Get specific insights into what is unique about your firm over the others they considered
- Why do they tell their friends and family members to use your firm?

TIP: This is a great time to gather testimonials! Simply ask the customer if you can write up a short testimonial based on their words and have them approve it!

POSITIONING PREP WORK

When you put all of this input together...

1. Competitor review
2. Team interviews
3. Client interviews

...You will see patterns!

The strengths that are really unique to your firm

The goal is to synthesize down to your firm's most competitive strengths. These should be clearly communicated on your website, online sites and all your collateral.





MAPPING STRATEGY

Customers

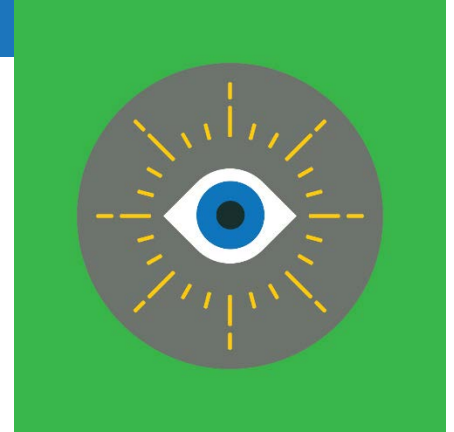
UNDERSTANDING CUSTOMERS PREP WORK – DATA REVIEW

In this section our goal is to identify our most important customers, understand them better and move toward creating customer personas.

In this process you are at an advantage if you have data. This data could be from your CRM.

You want to identify (among other data points):

- The customer types (specific demographics) who are most important to your business
 - What are the age groups?
 - Who is initiating the research?
 - Who is making the decision?
- Is it a residential sale or PPA? In what geos?
- Is it a commercial sale? What types of properties?



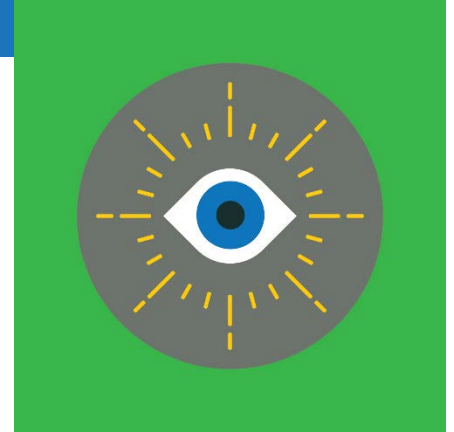
UNDERSTANDING CUSTOMERS PREP WORK – CUSTOMER INTERVIEWS

Getting to know your key customers! That is the goal.

Once you have identified the 3-4 types of customers most important to your business growth, select up to 10 customer contacts within each group.

Starting with one type of customer group, personally interview (or have a third party, impartial group do this for you – but have them record the interviews so you can listen to a few of them as they proceed):

Your goal is to understand the buying / research questions they had along with process of contracting for solar, what were their concerns about solar and at each buying stage, how did they answer them, where did they find answers...you want to get a clear picture of each customer type so you can build the persona or profile!



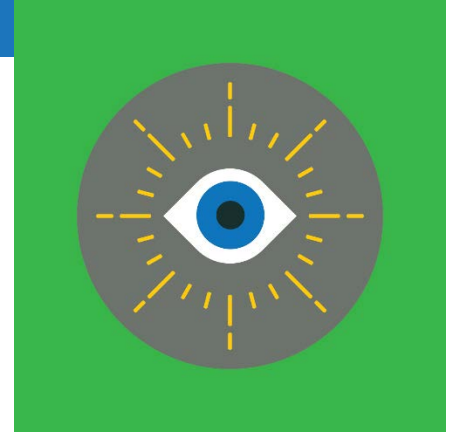
UNDERSTANDING CUSTOMERS PREP WORK – SALES TEAM INTERVIEWS

You are building a treasure trove of customer information and your **sales team** knows them well!

Before you talk to your sales team, map out a series of data points related to your customers to gather. Be sure you confirm the process and the questions with the sales manager.

Typical questions for your sales team:

- What are your key customer types?
- If it is a couple, who do you talk with at which stage?
- Who is present at the “kitchen table” selling environment and what are their concerns and questions?
- In a commercial sale process, what are the roles in the company you are working with and what are their considerations/ questions at each stage?



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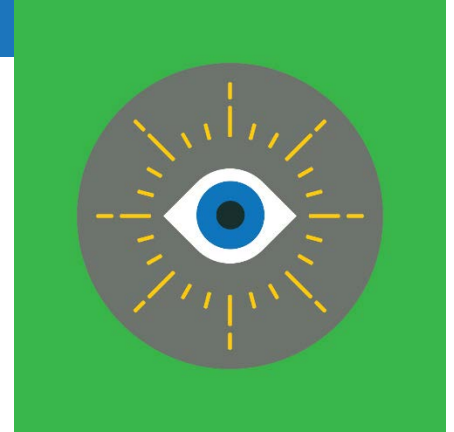
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UNDERSTANDING CUSTOMERS PREP WORK – CONSUMER DATA

Match internally gathered information to consumer data!

TIP: The Faraday platform will help you duplicate the customer types you have in your “database” and qualifies for Energy Trust of Oregon business development funds

Once you have organized all this internal and customer input and have the 3-4 key customer types you want to focus on, now you can access consumer data sources online to build out your customer profile / persona.





MAPPING STRATEGY

Market Sectors

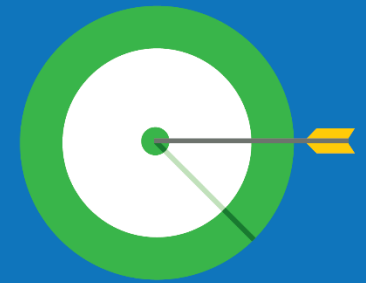
MARKET SECTORS PREP WORK – PRIOR SALES REVIEW

Mapping Strategy requires the identification of best performing market sectors and the priorities for the year.

Again data is your friend.

From your past year's sales and operations data, identify:

- Installed margins for each type of business
- Types, size and geo locations of top margin business
- Cost of acquisition for each sector – marketing
- Average sales commission for each type of business – commission stack



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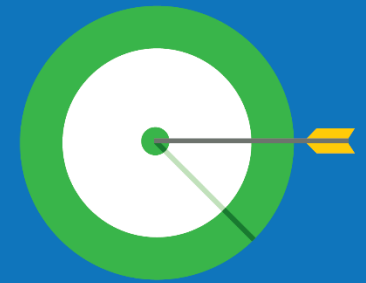


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MARKET SECTORS PREP WORK – FOCUS

Once you have the list of top performing business sectors for your business, determine the priorities for this year.

By identifying what you will focus on this year you can align marketing activities, resources and sales against the sectors you want to grow this year.



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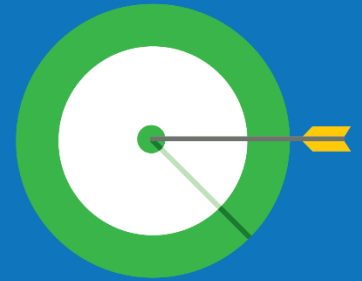
MARKET SECTORS PREP WORK – NEW MARKETS

Will you pursue new markets this year?

If so, which ones and why?

What customers or projects have you done that can act as a baseline, “foot in the door”?

Use these to model your new activities.





MAPPING STRATEGY

Quarterly Goals & Budget

QUARTERLY GOALS AND BUDGETS

Now the goal of the process is to map those goals – to a quarterly timeframe!

The opportunity is to identify which priorities affect others. Map out the completion of fundamental marketing building blocks as early as possible in the year.

These fundamentals include:

- Brand development and competitive strengths – because this messaging needs to be on all marketing and is fundamental to a new website, for example,
- Graphics and a style guide –because you can use these tools to save time and money throughout the year
- Customer profiling outlined here – because this information focuses your marketing campaigns and efforts



QUARTERLY GOALS AND BUDGETS

Once you have identified the activities key to each quarter, you can tackle projected budgets.

Budgets:

- Research pricing for the deliverables you need
- Take an average of perhaps three sources
- Work a quarter in advance

Now you have a financial “marketing plan” as well!





MAPPING STRATEGY

Resources

RESOURCES PREP WORK – TYPES REVIEW

You've identified your priorities for the year, your key customers, important markets, goals and rough budgets...

...now do you have the resources internal or external to deliver on your vision?

Review:

- Types of resources you need to develop your highest priority projects
- Can a resource handle more than one priority?
- What are the pros/ cons for hiring staff versus outside?
- How do you look at the metrics involved? [Social Media Podcast with Kent Lewis of Anvil Media](#)



UP NEXT FOR THE “BUILD IT BRIGHT” SERIES

Up Next...

[Presenting Your Best, March 24th 11 am PST](#)

Podcasts:

- [The Effective Use of Graphics in Marketing Solar](#)
- [Building a Social Media Strategy with Limited Resources](#)

Webinar Recordings:

- [Taking Stock Webinar Recording](#)

The graphic features a central illustration of a person pointing at a whiteboard filled with marketing-related icons and text. The whiteboard includes a lightbulb, a magnifying glass, a grid, a person icon, a gear, and the word 'BRAND'. The background is a mix of green and blue with abstract shapes.

Presenting Your Best
Marketing Campaigns and Creative Content

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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!