

Appendix E: Outreach and Interim Marketing Plan

On July 13, 2016, the TRC Team initiated outreach deployment as described in *Enhanced Outreach Plan for Program Administration and Management Services, New Jersey's Clean Energy Program™*. The FY18 outreach plan will update and replace the original plan based on experiences in FY17 and feedback from BPU staff and stakeholders.

The TRC Team is developing comprehensive Outreach and Interim Marketing Plan for FY 18 that will be submitted for BPU review and approval in the first quarter of FY 18. The Plan will describe activities for deploying marketing efforts essential to supporting NJCEP participation.

Enhanced Outreach Plan Summary

The Enhanced Outreach Plan (Plan) will continue efforts deployed in FY17 and will support NJCEP participation throughout the State. The Plan will continue to incorporate best practices from the Team's experience nationwide while making adjustments based on Plan implementation experience and growth. As stated in the original Plan, the Team will continue to "implement a reasonable and solid structure that provides flexibility as individual programs evolve". The following Plan description identifies high-level details to be included into the complete Plan.

Program-wide Outreach Themes

The Outreach Team supports the entire NJCEP offering. While some outreach themes are unique to particular markets, there are multiple themes that resonate across all sectors. These include:

- Account Management Outreach
- Establish outreach goals corresponding to methods of measurement from Customer Relationship Management (CRM) tool and program implementation data
- Refine tailored education for sectors such as architectural, and realtor through web based training via the Clean Energy Learning Center (CELC) and speaking engagements
- Refine event outreach strategy and prioritize events that provide maximum benefit to residential and /or C&I sectors.
- Coordinate outreach efforts with BPU Ombudsman's Office, and grantees
- Coordinate outreach with all New Jersey Utilities

The FY18 Plan will combine elements of the FY17 Plan adjusted for outreach experience in FY17 with input from BPU staff. Account Management remains the cornerstone to supporting the Plan. Based on continuous feedback since Team deployment, we know potential applicants and trade allies benefit from Account Manager assistance to guide them toward the appropriate NJCEP pathway and help them align project plans with potential incentives. Account Managers tailor engagement to participant knowledge and expertise by providing positive customer service and sharing techniques and equipment knowledge best suited for each unique project. In FY18, we will continue to focus our outreach efforts on one-on-one meetings with potential program participants while also leveraging trade allies and others who can help deliver information about the programs to their customers.

The FY18 Plan will include goals derived from key performance indicators (KPI) such as Account Management activities, company contact information, track communications, event and presentation details, and follow project leads tracked in FY17 coordinated with revised program goals for energy savings and applications. Coupled with manual project matching from implementation databases, we can identify completed project leads. Some examples of goals are as follows:

- Outreach meetings with participants and trade allies
- Presentations to trade allies and key stakeholders
- Trained trade allies and key stakeholders
- Applications received
- Utility/NJCEP joint customer meetings

The Plan will include monthly and annual targets for each goal. In addition, the Plan will include continuous collaboration, monitoring and coordination both within the Team and with the BPU (NJCEP staff, Ombudsman, Communications Office and Office of State Energy Services), Investor Owned Utilities (IOUs) and grantees to ensure the best possible measurable outcome. We will build off of existing relationships with various organizations, large and small customers and trade allies to enhance outreach.

Residential Programs

During FY18, the residential outreach efforts will continue to focus on maintaining and expanding where possible, the relationships with HVAC equipment manufacturers and distributors, to identify those potential contractors that have the aptitude and capability to expand their business scope and participate in NJCEP programs. In addition, the Account managers will seek new builders that can build above IECC 2015, ENERGY STAR Homes or Zero Energy Ready Homes. The Account Managers will continue to promote the programs at events prioritized by the BPU and the Outreach Team and those that can result in most leads and energy savings contributions. We will also look at opportunities to raise overall brand awareness when working with these industry professionals.

FY18 primary strategies

Some residential outreach strategies that will be developed further in the complete Plan include:

- Maintain and expand Manufacturer/Distributor relationships
- Establish Builder Connections
- Educate Homeowners
- Promote the Customer Journey
- Explore outreach Efforts to the Remodeling Industry

C&I and Renewable Programs

The C&I outreach effort will focus on those sectors and customers that present the highest potential for program participation and significant energy savings. We will also look at opportunities to raise overall brand awareness when working with these sectors and customers.

FY18 primary strategies

Some C&I outreach strategies that will be developed further in the complete Plan include:

- Leveraging top performing contractors and partners to promote programs.
- Distributor/Supply House Engagement
- Developing strategies to promote Customer Tailored Pilot (once launched)
- Continue and improve LEUP Market Segment Focus
- Continue and improve LGEA Post Audit Account Management Follow-up

Interim Marketing Plan

This Interim Marketing Plan provides an overview of the marketing efforts that would be implemented if an Interim Marketing budget is approved for FY 18.

These efforts would be limited to the most critical marketing needs to continue to support the programs.

Website Redesign and Hosting

The NJCEP web site has not been updated in over ten years. A redesign of the site is critical to ensure proper website security as well as provide enhanced navigation for customers and partners. An improved design will better reflect how customer and partners use the site, making it easier for them to find the most frequently used documents, submit applications and identify new content.

This Plan will also support the hosting of the existing website as well as the new site once it is completed.

Marketing for Underperforming and New Programs

This plan would allow for some marketing tactics for those underperforming programs, as well as any new pilots or programs that may launch during the year, to help increase program participation while also helping raise overall brand awareness within specific sectors.

Under this plan, low cost marketing strategies will be utilized and tracked. Examples of these strategies may include:

- Development of digital advertising strategies
- Updating or developing program literature for use by staff as well as program partners and trade allies.
- E-Mail marketing campaign of specific program information to key lists of partners, contractors or members of trade/business organizations.
- Social media advertising to promote specific programs.
- Direct mail

Evaluations of program participation will inform which programs will benefit most from marketing and which strategies will be used.