

Efficient Activation

Strategies for Efficient Campaign Delivery



Build it Bright!

Crafting Your Solar Marketing Program

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Working with
EnergyTrust
of Oregon

Solar Installer Co-Op Development Tool

Description: Component and/or other companies from which we purchase equipment or have business development funds available to us.

Goal: Maintain list of co-op sources for easy reference.



Marketplace Co-Op Partner

Revised Date:

Company/Organization Name:

Type of company and/or products

Ex: Solar panels, Inverters, incentives,
business development, etc.:

Program Name:

Company Contact Name:

Email:

Phone:

Type of Program

Yes No

Credit on invoice

Check back upon approval

"Store" Purchase Using Credits

Order co-branded materials from Company

Other: Describe:

Project Funding

Maximum funding annually:

% of Sales:

Other: Describe:

How are the co-op or
business development funds
calculated? Describe:

Funding Expires: YES or NO

Funding Expires as of:

Marketplace Co-op Partner

Revised Date:

Company/Organization Name:

Type of company and/or products
Ex: Solar panels, Inverters, incentives,
business development, etc.:

Program Name:

Company Contact Name:

Email:

Phone:

Type of Program

	Yes	No
Credit on invoice		
Check back upon approval		
"Store" Purchase Using Credits		
Order co-branded materials from Company		
Other: Describe:		

Project Funding

Maximum funding annually:

% of Sales:

Other: describe:

How are the co-op or
business development funds
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Project Funding

Maximum funding annually:

% of Sales:

Other: describe:

How are the co-op or
business development funds
calculated? Describe:

Funding Expires: yes or no

Funding Expires as of:

Campaign Information Page

Description: Identify campaign for which funds are being secured, campaign elements and key dates.

Goal: Ensure all parts of campaign are being tracked for submittal.

Company Information

Staff Member Completing Form: _____ Date: _____

Staff Contact in Accounting if applicable: _____

Campaign Name: _____

Campaign Start Date: _____ Campaign End Date: _____

Production Dates: _____

Geographic Region being targeted: _____

Persona(s)/client prospect

demographics being targeted: _____

Campaign Elements Review

	Yes	No
Print advertisements Examples: Yellow Pages, newspaper, magazine		
Direct mail Examples: post cards, letters		
Digital media Examples: online banner ads, pay-per-click ads		
Radio and television advertisements		
Outdoor Examples: door hangers, yard signs, billboards		
Apparel or other wearables Examples: t-shirts, hats, jackets		
Website Examples: Logo on website, landing page		
Events Examples: Home Shows, Community Events, Solar Parties, Webinars		
Collateral Examples: Brochures, folders, statement of qualifications		
Lead Generation Tools Examples: Faraday		
Content Marketing Examples: Blog posts, podcasts		
Other: _____		

List Specific Campaign Elements Here

1

2

3

Resources Being Used to Develop this Campaign

	Yes	No
Consultant:		
Agency:		
Internal:		
Other:		

Co-Op Partners for this Marketing Campaign

Description: Co-Op sources for this campaign.

Goal: Identify as many sources as possible for additional campaign funding.

List of Co-Op/Business Development Fund Partners We are Working with on this Campaign

1 Company:

2 Company:

3 Company:

4 Company:

1 Name:

Program Name:

Anticipated Funding
from this Source:

2 Name:

Program Name:

Anticipated Funding
from this Source:

3 Name:

Program Name:

Anticipated Funding
from this Source:

4 Name:

Program Name:

Anticipated Funding
from this Source:

Summary

Total Campaign costs:

Total Funding anticipated for this campaign:

Projected Net Cost of Campaign:

Tracking Page

Description: This page can be replicated for each affiliate marketing partner involved in the campaign.

Goal: Track specifics of submittal process to ensure funding support is secured.

Funding Source Company/Organization Name

Contact Name:

Contact Email:

Contact Phone:

	Yes	No
Materials about their program has been reviewed:		
Logo files received and to designer(s):		
Specific Forms required:		
Forms in-house:		

Pre-Approval Stage

What materials must be submitted to secure approval for funds?

1 Form Name:

2 Form Name:

3 Form Name:

4 Form Name:

5 Form Name:

How much time is needed for submission review (on average)?

Date materials submitted:

	Yes	No
Confirmation of receipt of materials received:		
Date approved:		
Submitted to our accounting department as needed:		

Tracking Page (continued)

Submit for Payment Stage

What materials must be submitted to receive payment or invoice credit?

1 Form Name: _____

2 Form Name: _____

3 Form Name: _____

4 Form Name: _____

5 Form Name: _____

How much time is needed for payment or credit (on average)? _____

Date materials submitted: _____

	Yes	No
Confirmation of receipt of materials received:		
Submitted to our accounting department as needed:		

Amount anticipated: _____

Actual amount received: _____

Date received: _____