Build it Bright!
Crafting Your Solar Marketing Program

Presented by Glenna Wiseman of Identity³
Working with EnergyTrust of Oregon
#MARKETINGSOLAR

Use hashtag #MarketingSolar to contribute on Twitter.
HERE’S WHAT’S NEW...

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]
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]
Efficient Activation
Tools and Strategies for Efficient Campaign Delivery

Build it Bright!
Crafting Your Solar Marketing Program

Presented by Glenna Wiseman of Identity³
WEBINAR OBJECTIVES

Three core objectives today!

1. **Gain insights into installer marketing**
   - Access new research to understand commonly used marketing tools and their perceived effectiveness

2. **Secure more $$$ into your campaigns**
   - Solar installer co-op development tool

3. **Use the $$$ you have to deliver campaigns more effectively**
   - Tips and tools
EFFICIENT ACTIVATION

Installer Marketing Insights
WELCOME PAMELA!

From the “Chaos Analyst”
- Trade Ally Survey Results
- Tips for Evaluating Software Tools
- Marketing Activation / Commentary
- Questions

Reach Pamela Cargill
- pcargill@chaolysti.com
- Twitter: @chaolyst

Pamela Cargill
Principal
Chaolysti
Oregon Solar Ally Trade Survey

- **Size, # of Employees**
  - 1-10 – 58%
  - 11-20 – 16%
  - 50+ - 16%

- **Top three market sectors**
  - Residential PV – 100%
  - Commercial PV – 83%
  - Gov/Municipal – 50%
  - Non-Profit – 58%

- **Top three “products”**
  - Solar PV, On Grid – 100%
  - Solar PV, Off Grid – 66%
  - Energy Storage – 41%
Managing Marketing Function

When asked about their confidence in managing areas of their business, installers ranked the following as a combination of “Very Difficult” and “Somewhat Difficult”

1. Marketing – 62%
2. Sales Operations & Process – 55%
3. Tied for third:
   - Cash flow / accounting
   - Component selection
   - System design
Most Commonly Used Marketing Activation

Installers using combination of activation channels

1. Referral / Word of Mouth – 100%

2. Graphics – Yard signs/ track magnets – 90%

3. Affinity Marketing – 55%

4. Paid Media Online – 54%
ACTIVATION CHANNEL EFFECTIVENESS

Rating Effectiveness of Campaign Activation Channels

*Installers using combination of activation channels*

Combining “Extremely Effective” with “Somewhat Effective”...

1. Referral / word of mouth
2. Yard Signs/ truck magnets
3. Affinity Marketing
4. Workshops, speaking engagements
Interviews as preparation for the “Build it Bright” solar marketing series revealed...

Referral marketing is #1 source of high quality leads for installers

Yet...

Most installers don’t have “organized” systematic, measurable processes to conduct, measure and deliver incentives for referral marketing.
Multi-Page Tool Co-Op Development Tool

- Use the new co-op funds tracking tool to secure more funding for your marketing budgets.
- Track component and/or other companies from which you purchase equipment or have business development funds available to you.
- 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.

Efficient Activation
Strategies for Efficient Campaign Delivery

Build it Bright!
Crafting Your Solar Marketing Program

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

<table>
<thead>
<tr>
<th>Name</th>
<th>Email</th>
<th>Phone</th>
</tr>
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</table>

<table>
<thead>
<tr>
<th>Type of Program</th>
<th>Year</th>
<th>Project Funding</th>
</tr>
</thead>
<tbody>
<tr>
<td>Check size &amp; space</td>
<td>Yes</td>
<td>Maximum funding allocation</td>
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<tr>
<td>Check back on approval</td>
<td>Yes</td>
<td>% of Sales</td>
</tr>
<tr>
<td>&quot;Share&quot; Purchase Using Credits</td>
<td>Yes</td>
<td>Other Details</td>
</tr>
<tr>
<td>Order environmentally friendly materials from Company</td>
<td>Yes</td>
<td>How are the proceeds used?</td>
</tr>
<tr>
<td>Other Details</td>
<td>Yes</td>
<td>Subsidy Development Funds</td>
</tr>
</tbody>
</table>

Funding Sources:
- Energy Trust of Oregon
- Other Sources

Efficient Activation: Tools and Strategies for Efficient Campaign Delivery
Presented by: Glenn Winesen of Identity3
Working with Energy Trust of Oregon
## Identify Co-op Partners

### 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:** 

<table>
<thead>
<tr>
<th>Type of Program</th>
<th>Yes</th>
<th>No</th>
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<tbody>
<tr>
<td>Credit on invoice</td>
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<tr>
<td>Check back upon approval</td>
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<tr>
<td>“Store” Purchase Using Credits</td>
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<tr>
<td>Order co-branded materials from Company</td>
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<tr>
<td>Other: Describe:</td>
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### Project Funding

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<tbody>
<tr>
<td>Maximum funding annually:</td>
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<tr>
<td>% of Sales:</td>
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<tr>
<td>Other: Describe:</td>
<td></td>
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<tr>
<td>How are the co-op or business development funds calculated? Describe:</td>
<td></td>
</tr>
<tr>
<td>Funding Expires: YES or NO</td>
<td></td>
</tr>
<tr>
<td>Funding Expires as of:</td>
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</tbody>
</table>
Business Development Funds

- Available to Energy Trust Contractor Allies
- Available for cooperative marketing and training
- Quarterly funds capped at $1500

Steps to add Energy Trust Business development funds to your campaign:
1. Request pre-approval (show use of logo)
2. Produce marketing materials
3. Submit for payment

More information and forms at www.EnergyTrust.org/BusinessDevelopment
Describle Campaign

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**

<table>
<thead>
<tr>
<th>Staff Member Completing Form:</th>
<th>Date:</th>
</tr>
</thead>
<tbody>
<tr>
<td>Staff Contact in Accounting if applicable:</td>
<td></td>
</tr>
<tr>
<td>Campaign Name:</td>
<td></td>
</tr>
<tr>
<td>Campaign Start Date:</td>
<td>Campaign End Date:</td>
</tr>
<tr>
<td>Production Dates:</td>
<td></td>
</tr>
<tr>
<td>Geographic Region being targeted:</td>
<td></td>
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<tr>
<td>Persona(s)/client prospect demographics being targeted:</td>
<td></td>
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</tbody>
</table>
## IDENTIFY CAMPAIGN ELEMENTS

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

List Specific Campaign Elements Here

1
2
3

Resources Being Used to Develop this Campaign

<table>
<thead>
<tr>
<th></th>
<th>Yes</th>
<th>No</th>
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<tbody>
<tr>
<td>Consultant:</td>
<td></td>
<td></td>
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<tr>
<td>Agency:</td>
<td></td>
<td></td>
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<tr>
<td>Internal:</td>
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<tr>
<td>Other:</td>
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</table>

in association with
## 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

<table>
<thead>
<tr>
<th></th>
<th>Company:</th>
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<tr>
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<td>3</td>
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- **Program Name:**
- **Anticipated Funding from this Source:**

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<th></th>
<th>Name:</th>
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<td>2</td>
<td></td>
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<td>3</td>
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- **Program Name:**
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<tbody>
<tr>
<td>3</td>
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</tbody>
</table>

- **Program Name:**
- **Anticipated Funding from this Source:**
SUMMARIZE FUNDING SUPPORT

Summary

Total Campaign costs:

Total Funding anticipated for this campaign:

Projected Net Cost of Campaign:
TRACK FUND SUBMISSION PROCESS

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:

Materials about their program has been reviewed:

Logo files received and to designer(s):

Specific Forms required:

Forms in-house:
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:

Confirmation of receipt of materials received:

Submitted to our accounting department as needed:

Amount anticipated:

Actual amount received:

Date received:
EFFICIENT ACTIVATION
Software
Most Commonly Used Marketing Software Types (of those using software)

1. Email marketing – 62%

2. Customer relationship manager (CRM) – 57%

3. Lead targeting – 33%

Marketing software use was at the bottom of the list of tools used way behind accounting and proposal generation.
Tips For Evaluating Software Adoption

1. Develop realistic expectations for what software can and cannot do
2. Streamline your current process as much as possible
3. Make sure you have the right people in the right roles
4. Evaluate remaining employee and customer pain points
5. Evaluate the cost vs. benefits of adopting software
6. Create an implementation plan
7. Set goals
Choosing the right business software platform—based on company business model and strengths—could help smaller residential solar installers remain competitive.

Solar installers who use software tools effectively:
• Manage customer acquisition process more cost effectively
• Convert data into actionable information to inform marketing campaign planning
• Pivot / amend marketing campaigns to increase lead generation and return on investment
EFFICIENT ACTIVATION

Marketing Campaign Tools
MARKETING CAMPAIGN ACTIVATION TOOLS

Tips and Tools

1. Referral / Word of Mouth
2. Graphics – Yard signs/ track magnets
3. Email Marketing
4. Lead Targeting
**EXAMPLE SOFTWARE - CRM**

**SolarPro Magazine Review**

**Difference between “Contact Tracking” vs. “CRM”**

**Examples of simple CRM’s**
- Method:CRM (BONUS! can integrate with QuickBooks)
- Insightly (very simple QuickBooks features can integrate)

**CRM tips...**
- CRM use can simplify, track and delivery on marketing campaigns depending on the platform and modules in use
- CRM can move prospect from lead generation including right from the website (web to lead forms) into the system and be tracked through close and installation
- Use CRM software to effectively deliver on Referral Marketing Programs
Tools for Delivering Effective Graphics

Podcast Mention: Graphics for Marketing Solar

- Take inventory of graphic representation of your company to ensure lawn signs, truck signage and all digital and offline places your logo appears are consistent.
- Create a style guide for your solar business to save you time and money.
- Having your business represented consistently from the brochures to contracts to employee email signatures conveys a professional image of your business to customers.
Tools for Effective Email Marketing

- Use platforms that integrate with your CRM.
  - For example, Constant Contact integrates with Microsoft Dynamics; Mail Chimp integrates with Method:CRM
  - This allows you to track engagement from email to prospect within the CRM
- Sales follow up can be gauged to prospect interest, i.e. click throughs and opens
- Lead nurturing via the email marketing can be “automated” by work flows to tailor messages depending on the prospects interest and action
LEAD TARGETING

Lead Targeting Tools

Podcast Mention: Tips for Using Faraday to Reach More Solar Prospects

Faraday Qualifies for Energy Trust Business Development Funds

- Platform is best leveraged if you have customer personas, profile information
- Geo target to reach customers around Lawn sign / neighborhood presence
- Target by energy use indicators
LEAD TARGETING

Lead Targeting Tools

- **SolView** - You can order neighborhood level site and customer suitability studies. Available almost anywhere.

- **SunNumber** - Provides a 1-100 score for a customer’s solar access and theoretical production capabilities. Available in Portland.

- **Mapdwell – solarsystem™ rooftop assessment tool. Available in Portland**
UP NEXT FOR THE
“BUILD IT BRIGHT” SERIES

Solar Trade Ally
Contractors Summit
May 3, 2016

Solar Trade Ally
CONTRACTOR SUMMIT

Part of the Oregon Solar
Energy Conference,
May 4-5, 2016
Portland, Oregon
UP NEXT FOR THE “BUILD IT BRIGHT” SERIES

Tracking Results: Implementing Systematic ROI Reporting

May 26 11 am PST
THE “BUILD IT BRIGHT” SERIES ONLINE

The Program Online

- Energy Trust Website: [Energytrust.org/BusinessDevelopment](http://Energytrust.org/BusinessDevelopment)
- Energy Trust Insider’s Blog
- Energy Trust Calendar
- Identity³ Website: [#MarketingSolar Page](#MarketingSolar Page) and [Blog](#Blog)
Help us shape the program to meet your needs...
Fill out the Survey!