

### Analyzing Outreach Effectiveness to Improve Program Design

What's Working in Residential Energy Efficiency Upgrade Programs, Panel on Collecting and Using Data to Improve the Program

May 20, 2011





### Commitment to Action

#### **Road from Start to Finish**



**CONGRATULATIONS!!!** 



### Program Innovations

- Clean Energy Corps
- Campaign Management
- Enabling Technology
- Measurement & Verification
- Performance-Based Rewards









### Campaign Management Tools

#### **Support Community-Based Acquisition Marketing**

- Program Facing
  - Consistent organizing tools in all 14 towns, outreach staff
  - Integrated application/data platform based on Salesforce.com
  - Management reports used to track progress
- Customer Facing
  - Branded town visibility kits
  - Workshops: Home Energy Basics & Deeper Energy Savings
  - Customer follow-up process, Refer-a-friend
  - Online / Social Media: <a href="www.CTEnergyChallenge.com">www.CTEnergyChallenge.com</a>, videos, testimonials, Facebook pages, monthly newsletter & action alerts
     © Copyright Earth Markets, LLC 2011



# Hybrid Approach to Analysis

#### **Qualitative and Quantitative Approach:**

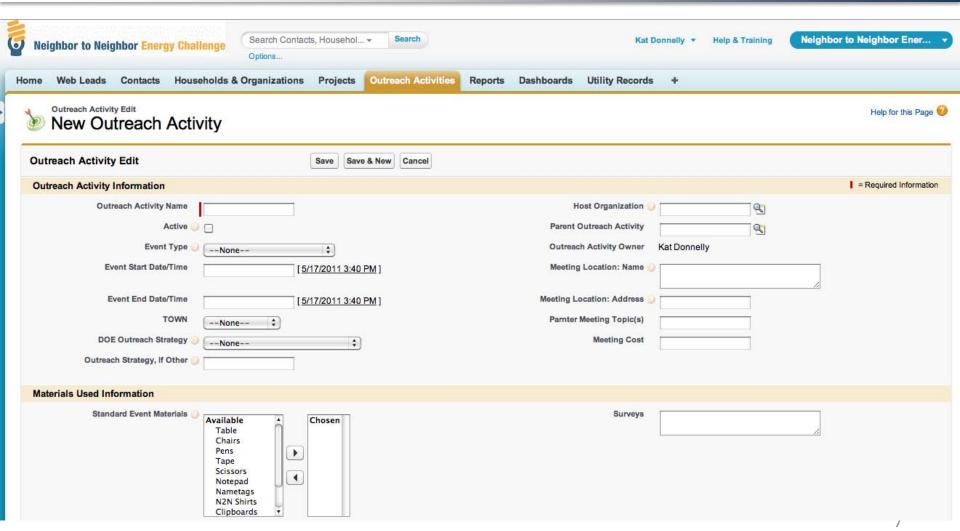
- Qualitative
  - Listening to the voice of the consumer, Event debriefs
  - Surveys and feedback (online, phone, in person)
- Quantitative Analysis
  - Baseline data on energy usage and ratepayer fund program participation
  - Deep dive on data to evaluate effectiveness of particular strategies
- "A/B" Testing to Refine Messages
  - Email Subject Lines, web/collateral wording
- Social network analysis to:
  - Determine influencers, influenced, and spread of norms and program



**Research Partners:** 



# Data Collection Example: Outreach Event





Description Information	
Town and Social Characteristics	Available Town Name 1 of Only 14 Towns Facebook Town Rewards Volunteer Opportunities
Notes about Basic Pitch	
Credibility	Available Grassroots DOE Grant Stakeholder Name Drop
Notes about Credibility	
N2N Program Benefits	Available 20% Energy Reduction Call You Email You Follow-on
Roadmap	Available No Cost (Web/Lighting/Workshop) Low Cost (HES/CEO) High Cost (Retrofit/Renewables)
HES Benefits	Available \$25 Town Rebate \$75 co-pay for \$750 value 1st step need for solar Blower door/scaling
Lighting Benefits	Available Free program Team of lighting experts Target high use rooms 15 to 20 bulbs
Other Motivators	Available Energy tips Money savings Campaign length

First in line to receive info

Other Pitch Motivators



#### Problem: Assessment close rate too low only 26%!

- How problem was identified:
  - Heads up through informal contractor feedback (Jan/Feb), confirmed in pipeline reports (launched Jan) and dashboards (launched Feb)
- Tools used to analyze problem
  - Listening to the Voice of the Participant exercises with outreach team
     (Dec and Apr) and contractors (Mar)
  - Deep dive on data to analyze leads from various outreach activities (Mar)
    - How was customer was acquired (workshop, online, tabling event)
    - How long before lead sent to contractor, contractor followed up, etc.
  - Comprehensive process review from initial customer touch to completion of assessment (Mar)



#### What we found – Qualitative Analysis:

- People might not want to say "no" to our young, enthusiastic Corps
- Some people wanted more info, but we put them in the scheduling queue and they were non-responsive
- People didn't understand what they were signing up for
- We didn't fully understand what we were pitching and how to pitch it
- We weren't setting appropriate expectations as to the next steps in the process

Result: we weren't sourcing enough qualified leads! And even some that were qualified were surprised by the next steps, so were scared off.



#### What we found – Quantitative Analysis:

- Initial homeowner workshops weren't pulling through any better than tabling at community events <u>- hmmm...</u>
- Contractor getting the most leads (majority of leads in 7 communities)
  wasn't reporting complete data (over 50% of customer records looked up
  were missing) <u>aha!</u>
- Utility program administrator "lost" many leads in Jan and took 14-20 days to distribute leads in periods in Feb and early Mar – <u>whoops!</u>

Result: even if we were sourcing qualified leads, there was a high degree of probability they were falling through the cracks or going cold. Arrgghh!



#### **Solution:**

- Take over distribution of leads to contractors turnaround in 1-2 days
- Get contractors on a Salesforce portal for reporting
- Get the outreach team more education on what happens during the visit
- Refine the "pitch"/collateral used in outreach developed with outreach team
- Create a "receipt" for customers who sign up, outlining next steps
- Change confirmation email to include contractors name, reminder of where customer signed up
- Next up: N2N to call non-responsive leads after 2 weeks

### Result: 35% increase in Assessment close rate in April (changes began implementing in mid-Apr)



#### **Contact Information:**

Kerry E. O'Neill Program Manager, Neighbor to Neighbor Energy Challenge President, Earth Markets kerry@earthmarkets.com

203-956-0813



### **Program Partners**

















Massachusetts Institute of Technology





