

Me² Marketing Plan

August 31, 2010 Planning Document for Common Council Review

The [Recovery through Retrofit](#) document issued by the White House and Council on Environmental Quality outlined existing barriers to energy efficiency markets and options for overcoming these barriers. This report formed the basis for the Better Buildings grant that makes Me² possible. Per the report, the three primary barriers inhibit a self-sustaining energy efficiency market: 1) access to information; 2) access to financing; and 3) access to skilled workers.

The Me² program seeks to overcome each of the three barriers. This marketing plan addresses the information barrier. The Recovery through Retrofit report describes the “Access to Information” barrier this way: “Consumers do not have access to straightforward and reliable information on home energy retrofits that they need to make informed decisions.”

I. Marketing Plan Objectives

- 1) Increase customer demand for energy efficiency by demonstrating why it is a **smart investment**
- 2) Raise awareness of the Me² program
- 3) Help the real estate market value energy efficiency by branding homes that have been improved through Me²

II. Marketing Plan Development

After consultation with members of the Milwaukee Common Council, the Wisconsin Energy Conservation Corporation (WECC) and the Office of Environmental Sustainability determined that the City of Milwaukee (City) and WECC have sufficient staff resources to design and implement a marketing plan for Me². Neither WECC nor the City plan to contract with third party marketing firm to develop a large scale marketing plan as had been originally proposed. Third party vendors may be used to implement advertising activity within the marketing plan, such as billboard operators.

The Office of the City Clerk’s marketing staff and WECC marketing staff met and established a marketing plan strategy.

A communications team made up of City of Milwaukee Common Council—City Clerk’s Public Information Division marketing staff, Office of Environmental Sustainability staff, and WECC staff—has been established. The team will meet regularly to review proposed communication and education approaches, upcoming events, materials, etc. The City will take the lead on the front-end communications (branding, messaging, etc.) and WECC/Focus on Energy will take the lead on the program-specific communications and activities (promoting Energy Advocate use, home energy

assessments, incentives, etc.). Crossover activities will be addressed on an ongoing basis by the communications team.

III. Marketing Strategy

- 1) Branding
- 2) Educational tools
- 3) Public Awareness Campaign
- 4) Energy Advocates
- 5) Neighborhood targeting for residential
 - a. Housing demographics
 - b. Neighborhood group activity
- 6) Standardized consultant reports
- 7) Commercial sector marketing
- 8) Industrial sector marketing

Branding

A name and tagline will be established for the Me² program and used in communications with customers and stakeholders across the City of Milwaukee. The brand will be used for the duration of the program on the website, program materials, and throughout the various elements of the public awareness campaign. A key element will be to co-brand Me² with other recognizable existing brands without creating confusion. Me² will be co-branded with Focus on Energy and the Me² financial provider.

- 1) Me² program brand. The team has developed a brand surrounding the Me² concept—which accommodates “Milwaukee Energy Efficiency” as well as our brand identity, “Energy Einstein.” Leveraging the current research on marketing, motivation and sustainability practices, the team is focusing on the idea of a “smart” consumer and will wrap all projects around the “smart,” “energy-wise” ideas that tether to the Einstein character. The main logo for the project will incorporate the basic, consistent tag line that “Smart Energy Pays” and this is consistent with research that argues many in this income bracket will be motivated by the ego identity “smart” and that the competition to be more efficient than one’s neighbor and make wise, forward-thinking choices for the community are priorities.
- 2) Apply an Energy Performance label to homes that have had a whole house energy upgrade. A national effort led by DOE and EPA is underway to develop this label. Homeowners who participate in the Me² program may receive this national label once it is finalized. Focus on

Energy partnering consultants already have expertise in rating homes, and this experience will tie in with the national labeling framework.

Educational tools

To aid homeowners in understanding their energy consumption, customers will be encouraged to create a user profile on the We Energies website, where they can obtain access to their historical billing information. Additionally, Focus on Energy's website provides a link to an Online Energy Audit tool. Online tools can help homeowners evaluate their home's energy performance and estimate their potential for improvement. Based on a home's total annual energy use, the tools compare one home to other homes after adjusting for size, age, location, and the number of people living in the home. The online educational tools will hope homeowners assess whether they would benefit from a full energy assessment from a partnering Focus on Energy consultant.

Public Awareness Campaign

- a. Website
 - i. The website will be designed to accommodate the basic navigation of residents, contractors, government, and Energy Advocates. From this basic navigation tree, each page will provide information on the program relevant to the selected audience.
 - ii. Energy Advocate links will predominate as they are a linchpin in the process; so from anywhere within the site, Energy Advocate access is at the ready. The site will also have a flash media function for constantly updated news streams and images to promote the success of the program.
 - iii. The site will also track community goals and offer a link to the software that assesses personal energy goals.
 - iv. A calendar function will be incorporated so that all upcoming events, application dates, training sessions, and more are available .
 - v. The site will also be a hub for keeping Energy Advocates informed and give them access to all print materials for print-on-demand options; serving as a workstation for the Energy Advocates, complete with uniform email addresses for the Energy Advocates*.

b. Media Events

- i. Staging publicity to coincide with media events will be a key means of leveraging both audiences and dollars, utilizing our brand and Energy Advocates at local home shows and Realtor events will help create a presence among crowds already invested in their homes.
- ii. Other events can be seasonally staged as the natural change of weather in the Milwaukee area prompts a number of regular events in our community (parking rules and enforcement, Halloween neighborhood events, spring pot-hole filling), thus capitalizing on the regular changes in weather and systems to promote the program's purpose.
- iii. Staging news events related to any goal numbers, first houses completed, "famous" homes or businesses completed is a potential use of our internal press resources to promote the program as ongoing.

c. Home shows

- i. Piggybacking on pre-staged home shows captures audiences already inclined toward the program.
- ii. Using Realtors to share the information to home owners, buyers and sellers also capitalizes on pre-made audiences.

d. Collateral Print

- i. Basic print collateral will include brochures, single-sheet white pages with basic facts, promotional post-card mailings, banners, printable signage and all products made accessible via PDF so that Energy Advocates may also print on demand.
- ii. Other print needs will include training materials for Energy Advocates—worksheets, templates, forms, etc.
- iii. Collateral print needs could extend to uniform embroidered polo shirts to help advocates brand while they're interacting with residents, badges/buttons, bags for advocates to carry materials in, business cards for advocates, magnetic signage for advocates' vehicles and more.

e. Billboards

- i. Lamar can provide a long term contract for digital signage at a reduced rate and simply uses our graphics and images.

- ii. Clear Channel provides bus advertising and other digital billboards, but bus shelter advertising may not specifically reach those residents whose homes are excellent candidates for the program. Bus advertising is not recommended for Me².
- f. Other advertising
- i. Other unique advertising venues can include information cards at home improvement stores near energy-saving items.
 - ii. Post cards or mailers as responses to information queries.
 - iii. Survey cards for gathering post-assessment data from homeowners.
 - iv. Media buys in radio or print:
 - 1. primarily print buys in leading publications as our target audience is a homeowner, not renter, with at least a \$50,000 household worth
 - 2. *Milwaukee Magazine* and the *Milwaukee Journal Sentinel* are clear targets and other print buys should be in less conventional media outlets like local event programs—advertising in the symphony or the Milwaukee Rep programs, for example
 - 3. print media buys can also include local church bulletins, etc.
- g. Facebook, Twitter, and other emerging web communication:
- i. creation of the Energy Einstein identity allows for successful use of emerging social media categories
 - ii. website can interact with RSS feeds to a Twitter account, allowing for dual real-time updates of announcements, facts, info, and programs
 - iii. using social media allows for constant feedback and measure of our target audience and offers the ability to flex the campaign to continue to meet the needs of the audience

Energy Advocates

A key component to the Me² program will be the no-cost assistance for homeowners provided by an Energy Advocate. Utilizing an Energy Advocate is an opportunity for residents to learn more about their current energy usage and to find out if other initiatives are a good fit for them. While in the home, the Energy Advocate will focus on not only equipment, appliances, and electronics in the home, but also on how simple behavioral changes might help reduce the resident's energy costs.

The Energy Advocate will provide services such as walking the homeowner through the application and energy assessment process, reviewing financing options, selecting and scheduling of service contractors, setting home electronics and control equipment to optimal energy efficiency settings, and educating the homeowner on sustainable energy practices/behaviors.

One of the key objectives of the Energy Advocate will be to help move homeowners through Focus on Energy's Home Performance with ENERGY STAR Program, which can often be a cumbersome process for homeowners. Once homeowners have completed the energy assessment, the Energy Advocate will explain additional opportunities available to the resident through Me², the assessment recommendations, and a review of the homeowner's energy usage (from utility data). Key functions of the Energy Advocates include:

- a. Provide homeowner assistance
 - Improve customer knowledge, information, tools, and energy efficiency initiatives to reduce energy consumption
 - Create awareness of current energy usage
 - Provide customers useful comparisons of their current usage to be used as a benchmark for energy use reduction
 - Reduce residential energy usage through behavioral changes
 - Provide information to assist customers in making finance decisions
 - Help understand which energy program is best for their situation (Focus on Energy's Home Performance with ENERGY or Targeted Home Performance, or the State of Wisconsin's Low Income Weatherization program)
 - Assist with interpreting consultant list of recommendations
 - Organize contractor bids
 - Provide customer service for the homeowner throughout project
- b. Mobilizing and speaking to local community groups
 - Leveraging a community-based approach for the purpose of increasing energy efficiency investments by homeowners (and local businesses)
 - Working in cooperation with community leaders, neighborhood members, and local businesses
 - Providing robust communication, delivery, and implementation plan, and by capitalizing on the group dynamic.

Neighborhood targeting for residential

Me² is a citywide program. However, Me² will target its marketing to particular neighborhoods throughout the project. The Me² marketing team will work with Milwaukee Common Council members to help select neighborhoods that will likely have high rates of participation.

- a. Housing demographics: The best candidates for energy retrofits are homes built between 1920 and 1970. Homes built before 1920 may have knob and tube wiring that can create a fire hazard for weatherization projects. Homes built after 1970 likely have a

higher baseline level of energy efficiency due to higher home construction standards that became law in the 1970s. Early candidates for residential neighborhoods between North Avenue and Silver Spring west of 35th St. Bayview also appears to be a good candidate.

- b. Neighborhood group activity: Active neighborhood groups can play a critical role in marketing Me². Neighborhoods where homeowners value the opinions of the neighbors can lead to a snowballing effect on Me² participation.

Standardized consultant reports

WECC will be contracting with a vendor to implement software that will support the in-home energy assessment and will have the capability to generate a customer report directly in the home. Delivering timely and consistent results that meet the needs of the home owner and the residential service providers is a key goal of the Me² program, and software is critical to streamlining this process. The customer report includes predicted energy savings for the recommended improvements. Information collected can be customized and typically includes:

- a. Basic house data
- b. Test-in/test-out
- c. Quality Assurance inspection data
- d. Improvement descriptions
- e. Notes to the customer for inclusion in the audit reports and notes to the crews for inclusion in workscope reports

Reports include customer energy audit reports and programmatic documents such as contracts and rebate forms. Output from the system can include dynamically generated PDF reports and MS Word files which include data fields from Surveyor (the name of the energy assessment software tool). Data can also be processed to obtain in home calculations of utility demand impacts and cost effectiveness calculations. Surveyor data collection can vary based on the selection of audit type or program. For example additional information required for a rebate can be collected if in a particular utility service territory.

The energy assessment software tool also allows consultants to present a scope of work to various contractors specifying information related to work recommended. The software tool collects and reports workscope information including testing information and workscope descriptions as well as custom notes to the installing crew and/or contractor on individual improvements.

Commercial sector marketing

The City of Milwaukee has various programs in place that target commercial investment in neighborhoods. These existing programs can be utilized to play a critical role in marketing Me². For example, Business Improvement Districts (BIDs) are made up of property owners in designated geographic areas that voluntarily collect annual assessments that are spent on projects that enhance the local business environments, such as streetscaping, marketing, business recruitment, and security. There are currently 33 active BIDs in the city.

Another marketing opportunity exists in the Main Street Milwaukee program. This is a comprehensive, citywide approach to neighborhood economic development that utilizes a proven method to increase investment in urban neighborhoods, create new businesses, create jobs and create wealth in urban communities. This program includes the work of many volunteers, representing both business and residences that work to improve the neighborhood.

Both of these existing programs are made up of highly motivated participants who are working to improve their neighborhoods and could be used as a catalyst to promote Me² within their areas.

Industrial sector marketing

The City approach to industrial energy efficiency upgrades will be augmented by the federal government partnership program—E3: Economy, Energy and Environment. E3 is a coordinated federal and local technical assistance initiative that is helping manufacturers across the nation adapt and thrive in a new business era focused on sustainability. In the process, E3 is boosting local economies and benefiting the communities with creation of “green jobs” and reduced environmental impacts.

Joining forces with the local community, E3 provides manufacturers with customized, hands-on assessments of production processes and assists with the implementation of energy-saving projects. As a result, E3 is: increasing manufacturers’ productivity, while making them more competitive; driving innovation and encouraging global leadership; helping foster a green workforce; improving the regional economy by retaining jobs in companies; and reducing environmental impacts.

In order to build off the Me² theme, the City proposes that the industrial portion of this program be referred to as Me³. This satisfies our federal partners that the “E3” brand is appropriately introduced citywide while thematically tying into the branding efforts of Me².

Because the City and its eventual E3 partners will choose the manufacturers that participate in Me³, the marketing strategy will differ slightly from that of residential and commercial. The City and its local partners will establish a set of participation criteria for potential manufacturers to possibly include energy usage, waste tipping fees, water usage, and impervious area. The City and its partners will identify a potential pool of Me³ candidates based on some combination of these factors in order to attain the greatest increase in overall sustainability as possible.

The City and its partners will focus on small and medium sized manufacturers that have been reluctant to implement sustainable business practices whether because the funding stream has not been in place

or because there is a basic unfamiliarity with sustainable business practices. Also, in order to achieve the greatest reduction in aggregate environmental impact as possible, the City and its partners will focus on the largest energy users, waste producers and water users within the small and medium sized manufacturing community in the City of Milwaukee.

Advertisement for this program will consist primarily of targeted outreach by the City, its partners, and the local E3 technical assistance providers.