



Better Buildings Residential Network Peer Exchange Call Series: *Who's Got Game?* *Interactive Customer Engagement Strategies*

March 9, 2017

Call Slides and Discussion Summary

Agenda

- Agenda Review and Ground Rules
- Opening Polls
- Brief Residential Network Overview and Upcoming Call Schedule
- Featured Speakers
 - **Laura Orfanedes**, Director of Strategy and Marketing, Fiveworx
 - **Kevin Duffy**, Program Manager, ICF International
 - **Kathy Kuntz**, Executive Director, Cool Choices (*Network Member*)
- Discussion
 - What are key challenges and opportunities to deploy interactive engagement strategies?
 - What benefits do these strategies offer on top of usual marketing campaigns?
 - What are keys to developing and implementing successful interactive strategies?
 - What interactive engagement strategies have worked well for your program? Have these campaigns resulted in increased program demand?
- 2 ■ Closing Poll

Better Buildings Residential Network

Better Buildings Residential Network: Connects energy efficiency programs and partners to share best practices and learn from one another to increase the number of homes that are energy efficient.

Membership: Open to organizations committed to accelerating the pace of home energy upgrades.

Benefits:

- Peer Exchange Calls 4x/month
- Tools, templates, & resources
- Recognition in media, materials
- Speaking opportunities
- Updates on latest trends
- Voluntary member initiatives
- Residential Program Solution Center guided tours

Commitment: Provide DOE with annual number of residential upgrades, and information about associated benefits.

For more information or to join, email bbresidentialnetwork@ee.doe.gov, or go to energy.gov/eere/bbrn and click Join

Peer Exchange Call Series

We hold one Peer Exchange call the first four Thursdays of each month from 1:00-2:30 pm ET

Calls cover a range of topics, including financing & revenue, data & evaluation, business partners, multifamily housing, and marketing & outreach for all stages of program development and implementation

Upcoming calls:

- April 6: [Master Key: Unlocking Innovative Approaches to Program Design](#)
- April 13: [Ultimate Retrofit: Zero Energy Ready Homes](#)
- April 20: [Two Is More Than One: Leveraging Strategic Partners](#)
- April 27: [Just What the Doctor Ordered: Integrating Health Benefits into Energy-Efficiency Programs](#)

Send call topic ideas to peerexchange@rossstrategic.com

See the Better Buildings Residential Network Program [website](#) to register

Best Practices: Fiveworx



3/8/17

Stacking Behavior In Our Favor

Laura Orfanedes, Fiveworx

DOE Peer Exchange

"Who's Got Game?"

Interactive Customer Engagement Strategies



The Challenge



80%

of Americans
think they use
less energy
than they did
5 years ago

49%

think their
homes are
already
energy
efficient

50%

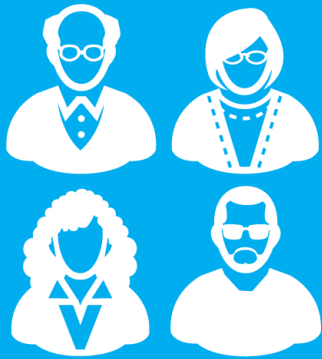
claim to have
made 1-3
efficiency
improvements
to their homes

67%

are unaware
or unfamiliar
with utility
rebate
programs

Source: Energy Pulse 2013

Pilot Goals



Increase
Program
Participation



Improve
Customer
Satisfaction



Assess ability to
capture
behavioral
savings

A Stacked Behavioral Strategy

Commitment

+

Feedback

+

Follow-through

+

Framing

+

Rewards & Gifts = *Behavior change!*



Cautious Conservatives



Working Class Realists



Concerned Parents



True Believers



fiveworx

Approach

- 1 Identify segments and propensities.
- 2 Develop customer journeys.
- 3 Track and analyze online user behavior.
- 4 Adjust messaging based on activity and rules.
- 5 Nudge customers over time to drive engagement and action.



AWARD-WINNING PROGRAM RESULTS



OPENS

33% Above
Industry Average



CLICK-
THROUGHS

84% Above
Industry Average



CLICK-TO-
OPENS

145% Above
Industry Average



PROGRAM
AWARENESS

33% Increase



WEBSITE
VISITS

141% Increase



150% Increase
PROGRAM PARTICIPATION



5% Increase
CUSTOMER SATISFACTION

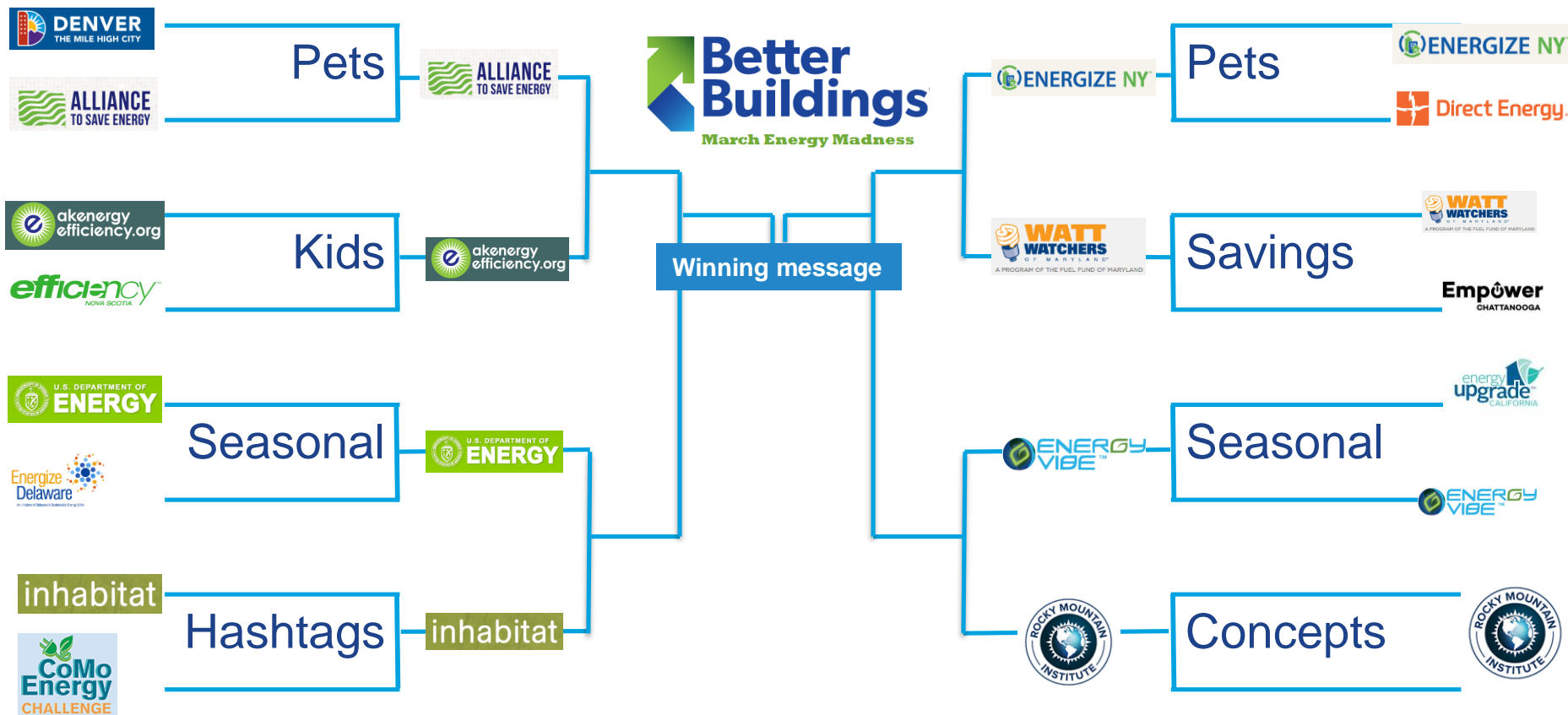


Verified Savings
kWh AND THERMS

Presentation Highlights: Fiveworx

- **Persona segmentation** helps identify the key underlying drivers of the target audience and tailor custom messages:
 - **True believers:** early adopters of technology. Respond to non-energy benefits like home performance and comfort.
 - **Concerned parents:** family-oriented. Comfort and non-waste drive their decisions.
- **These segment-based models are a great way to:**
 - identify the energy upgrades customers are most likely to participate in.
 - tailor communications and customer journeys based on each target persona.
- **Machine learning & marketing automation** analyze in real time the customers' behavior and help increase relevance and personalization of messages.

March Energy Madness: Round 2



The winning message will be selected on the March 23 call!

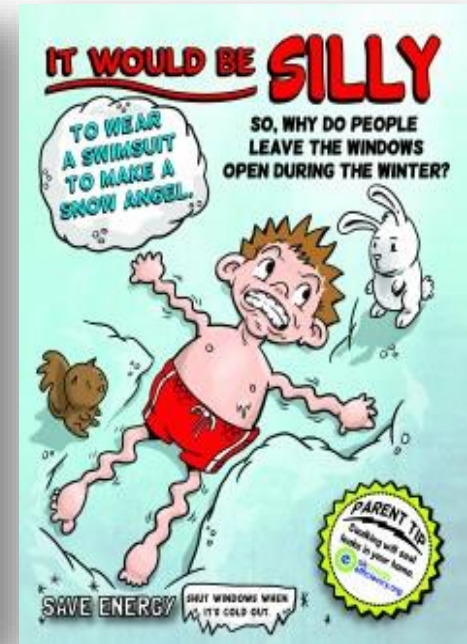
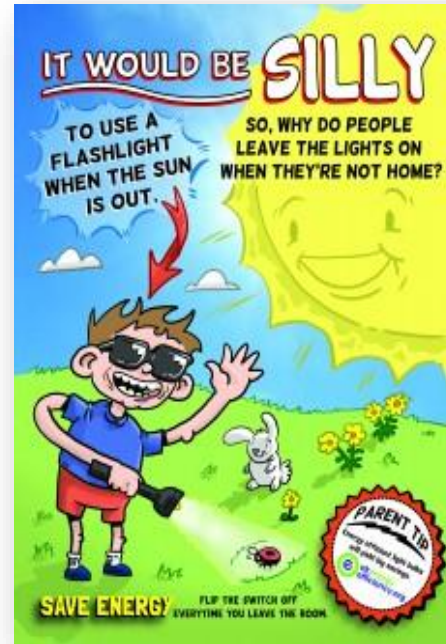
Round 2: Bracket 1

Alliance to Save Energy



[Video](#)

Alaska Energy Efficiency



Posters

Round 2: Bracket 2

Department of Energy*



[Video](#)

Inhabitat



Website Post

Round 2: Bracket 3

Energize New York*



Energize New York with Justin Cole Frawley.

November 11, 2014 ·

For this week's installment of Testimonial Tuesday we are featuring members of the family that know all about the warm and cold spots in their house. Energized pets Buddy and Mr. Bojangles said "Ruff Ruff Bark Bark" about their warmer spaces.

Our translator quotes Buddy saying "I spend more time in our house than any other family member and am most pleased that my favorite spot on the tile floor in the kitchen is no longer drafty and ice cold during snowy winter days. Now I don't even need my slippers!"



Facebook Post

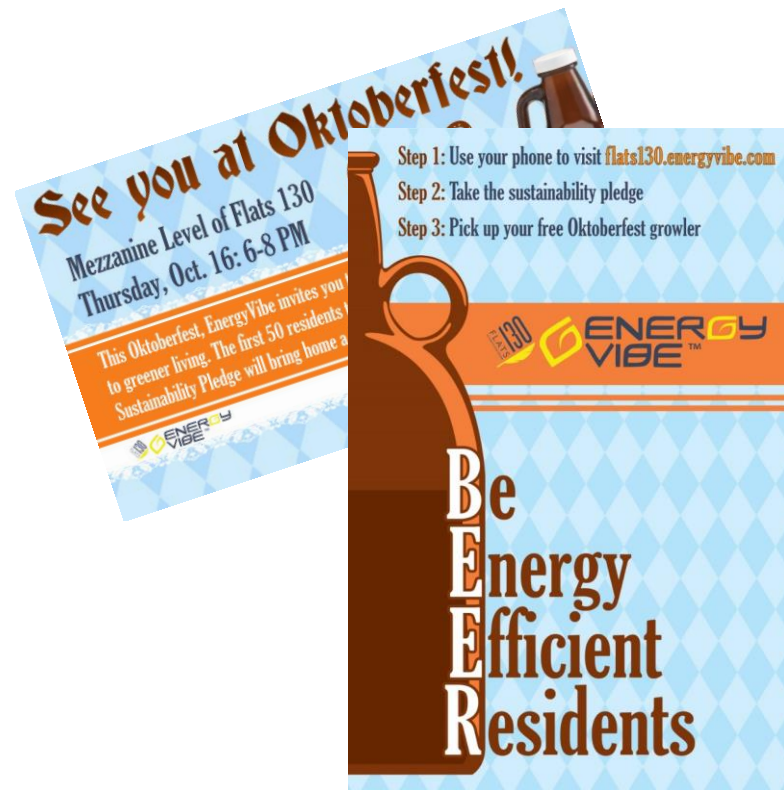
Fuel Fund of Maryland* The Watt Watchers program



Posters

Round 2: Bracket 4

Energy Vibe



Posters

Rocky Mountain Institute*

Your house can work harder for you



We're a hard working country. We don't like laziness or wastefulness. We each work hard for ourselves, our families, our friends, and our communities. But too often our houses don't work hard enough for us; they're lazy and wasteful, even though solutions are available today. We deserve better, high performance houses that work as hard as we do. Ask a qualified professional today about how getting an energy upgrade and how your house can work harder for you.

Best Practices: ICF International



The Why and How of Loyalty and Rewards in the Energy Efficiency World

Energy Efficiency and Engagement Better Buildings Peer Exchange

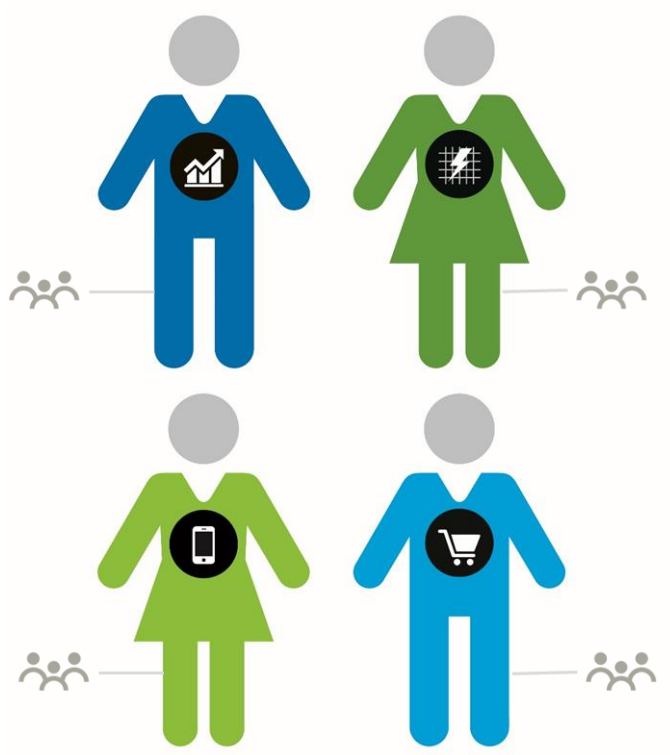


Kevin Duffy
Program Manager
ICF
March 9, 2017

Loyalty and Rewards Programs

A Primer

Loyalty and Rewards Programs

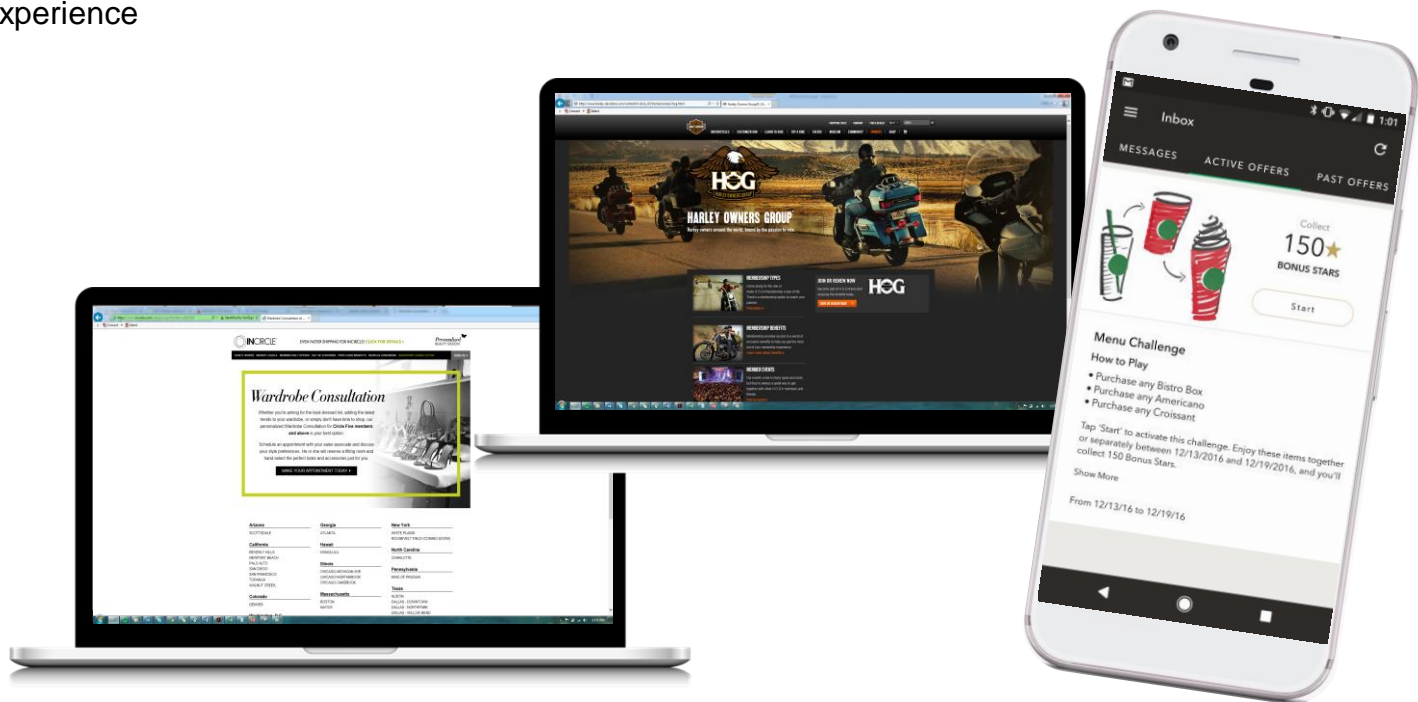


- Customers expect added value
- Mutual benefit with proactive customer relationship management
- U.S. enrolled in 21.9 per household



Loyalty Programs

- **Successful programs develop an emotional attachment through:**
 - Personal recognition
 - Preferential treatment
 - Exploration experience



Value of Loyalty Programs



76% of customers think that loyalty programs are part of their relationships with brands.

75% of U.S. companies with loyalty programs generate a return on investment.

83% of customers agree that loyalty programs make them more likely to continue doing business with certain companies.

The probability of converting a new customer is **5-20%** whereas the probability of converting an existing customer is **60-70%**.

25% of consumers are frustrated when a company fails to recognize them as a past or current customer.

67% of U.S. adults would be willing to give companies access to basic personal information in exchange for better service or products.

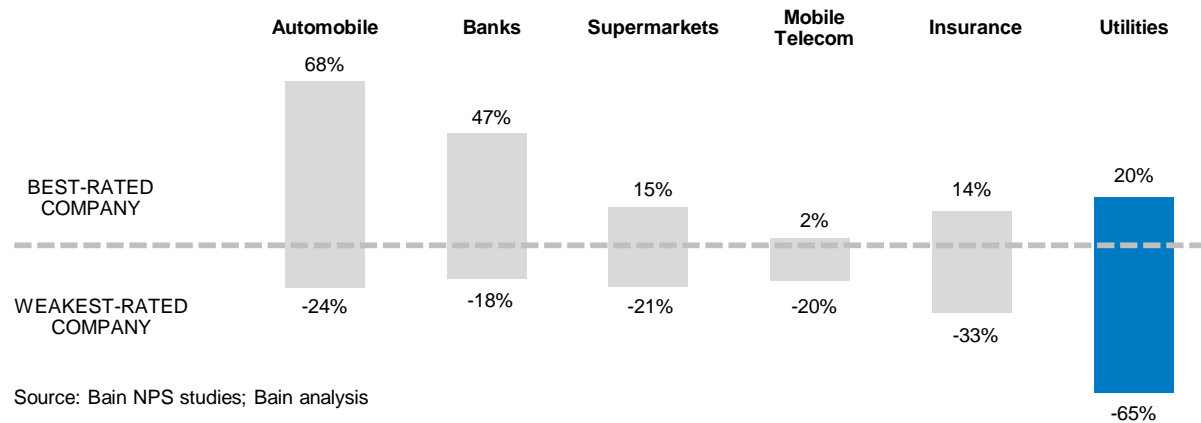
It is **6-7 times** more expensive to acquire a new customer than it is to keep a current one.

Existing customers spend **67%** more than new customers.

Utility-Customer Relationship Evolution



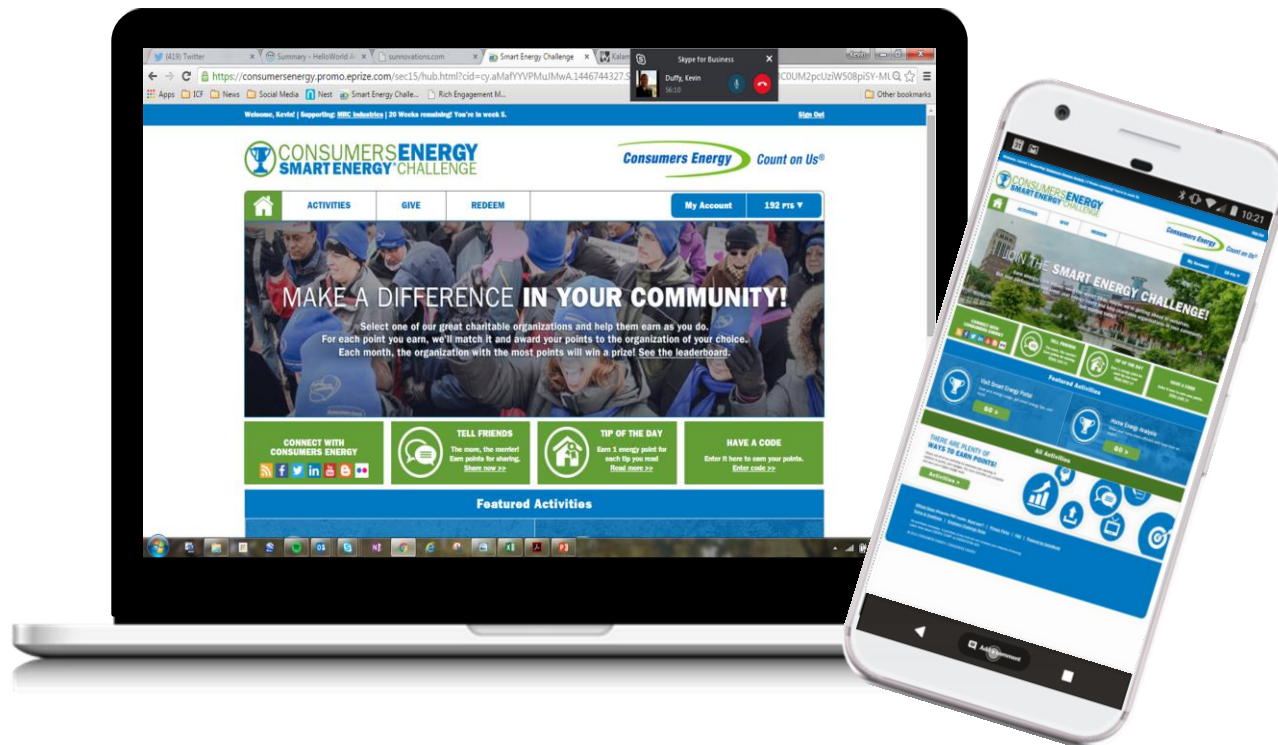
Customer retention and loyalty are new dimensions of “satisfaction”



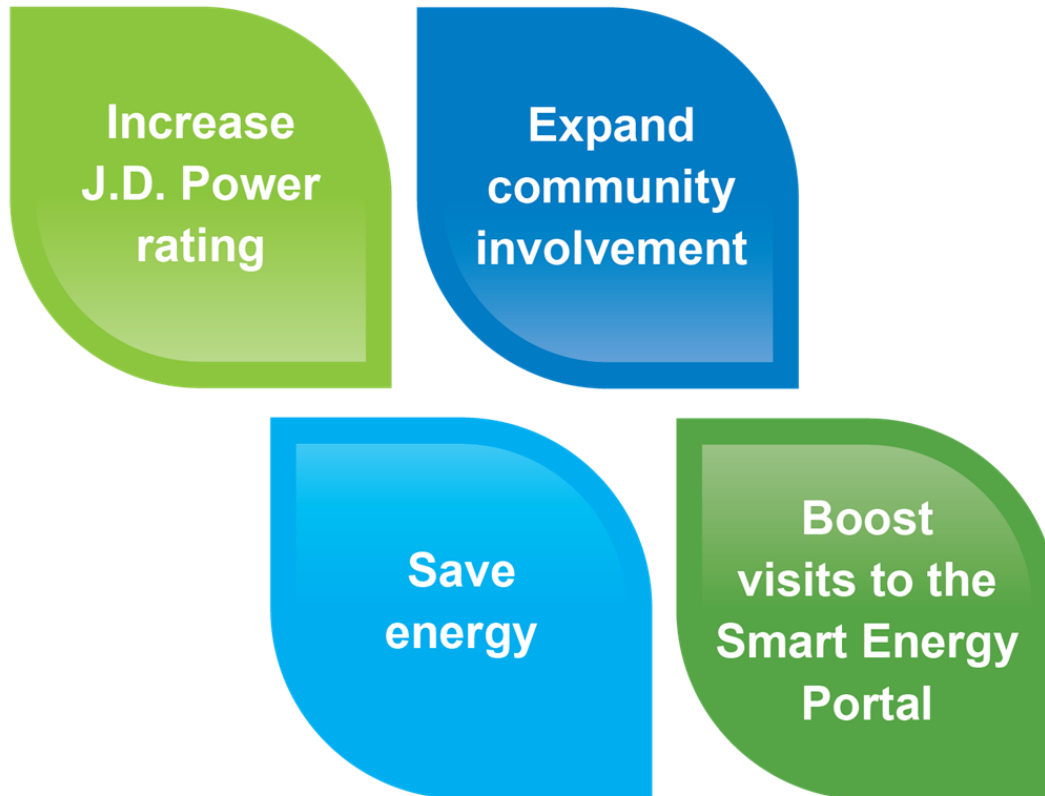


Case Study - Consumers Energy Smart Energy® Challenge

Smart Energy Challenge



Program Goals

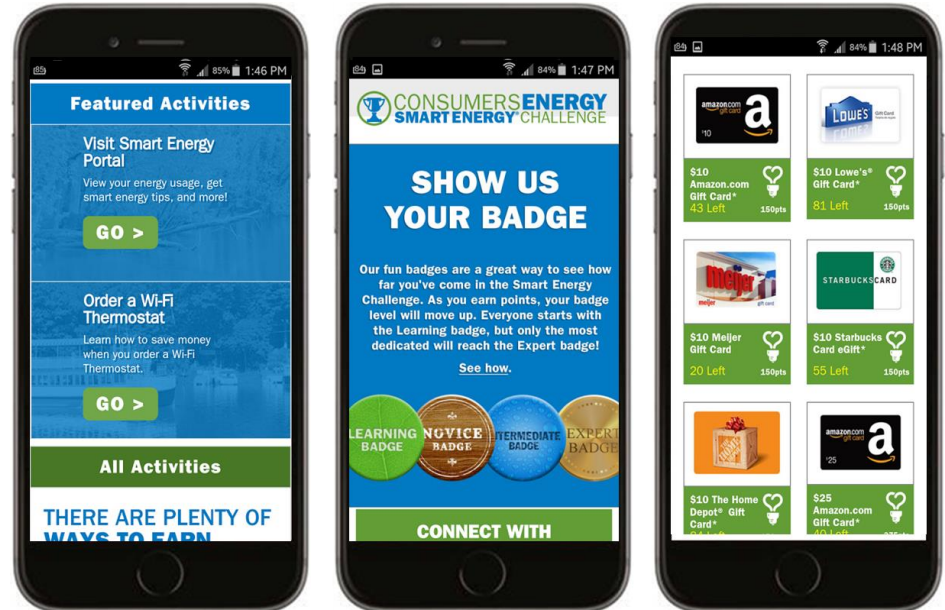


Nonprofit Organization Challenge

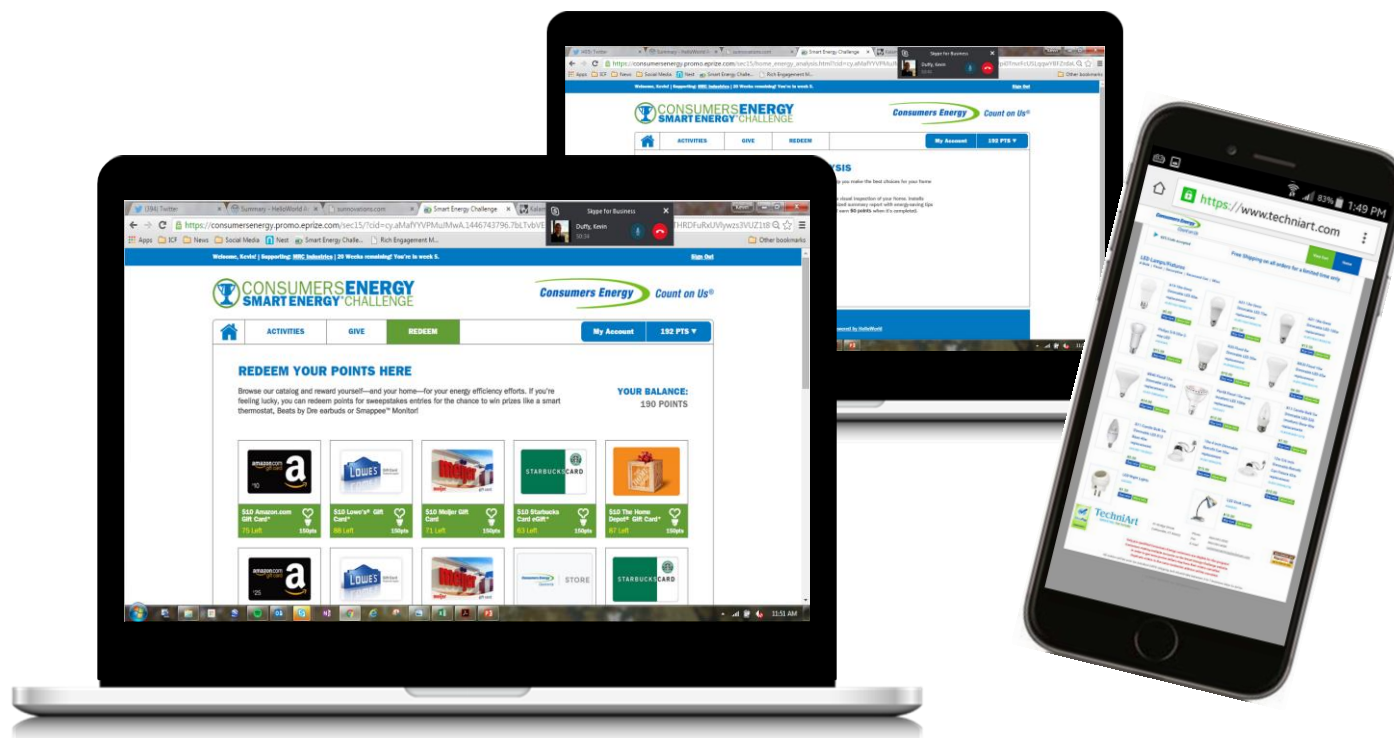


Insights Sought

- Effectiveness of loyalty component
- Virality
- Grassroots impact
- Impact of local organizations
- Gamification



Activities and Rewards



Website Analytics



3 min 36 sec

Average time
spent per login



7.82

Logins per
registrant



50.41%

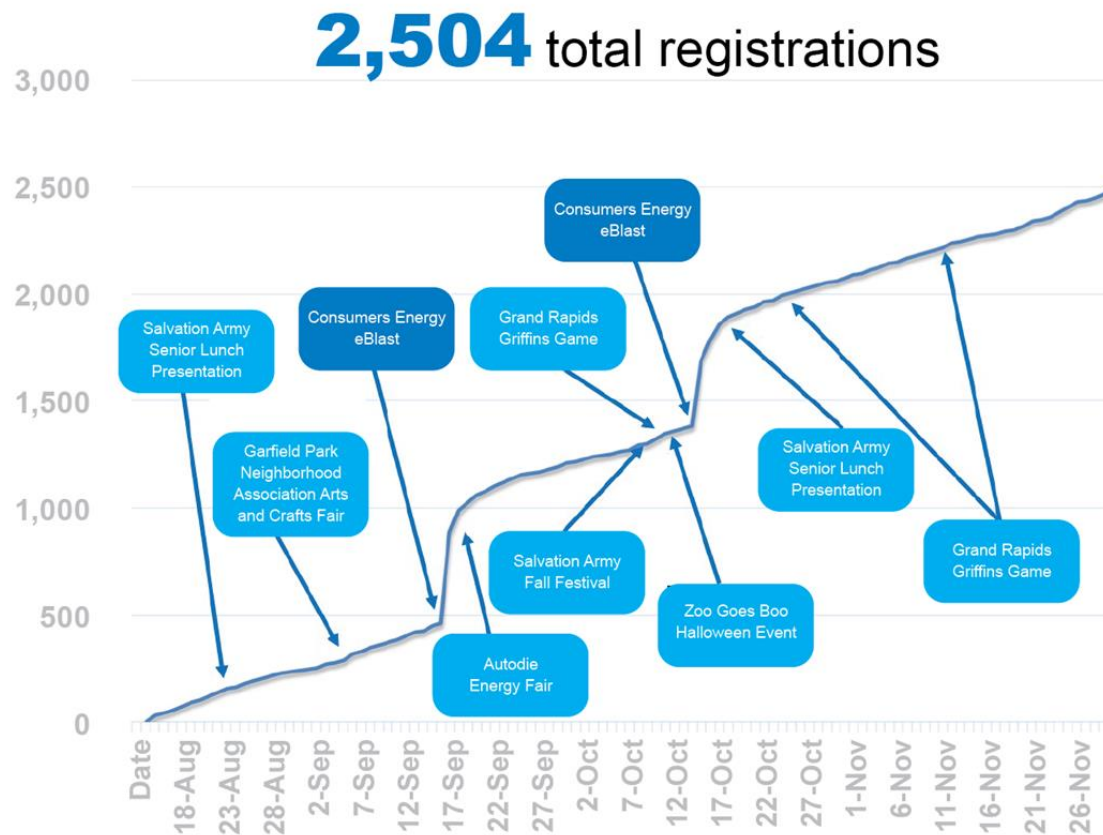
Email opt-in
rate



749

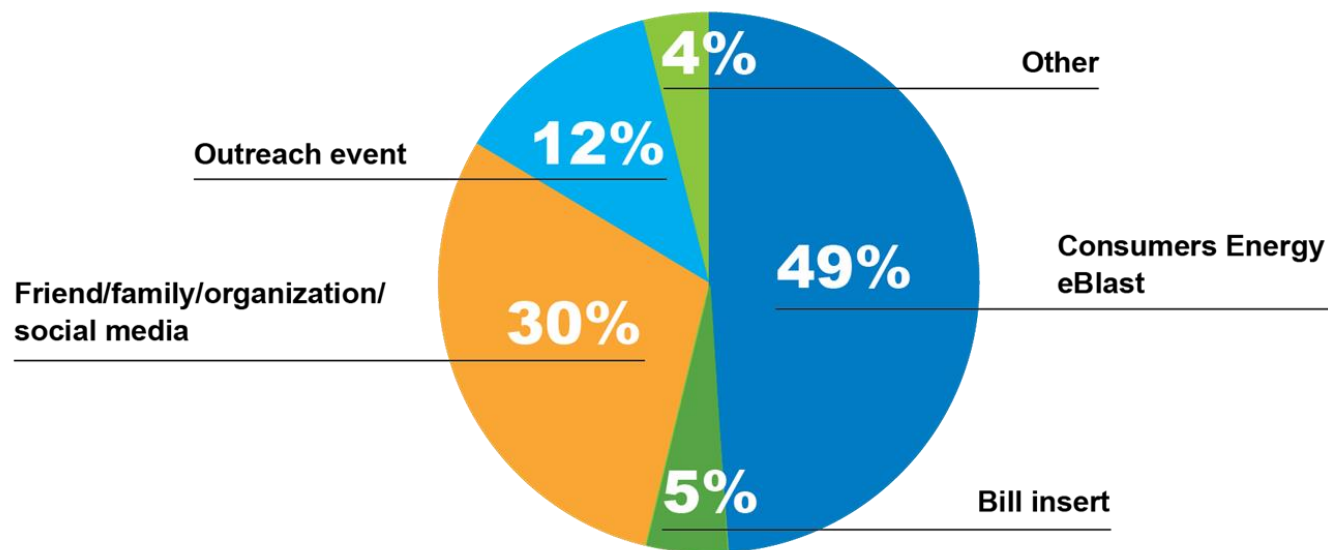
Refer-a-friend
emails

Cumulative Registrations



Website Analytics

How did participants find out?



Impacts: AMI Portal

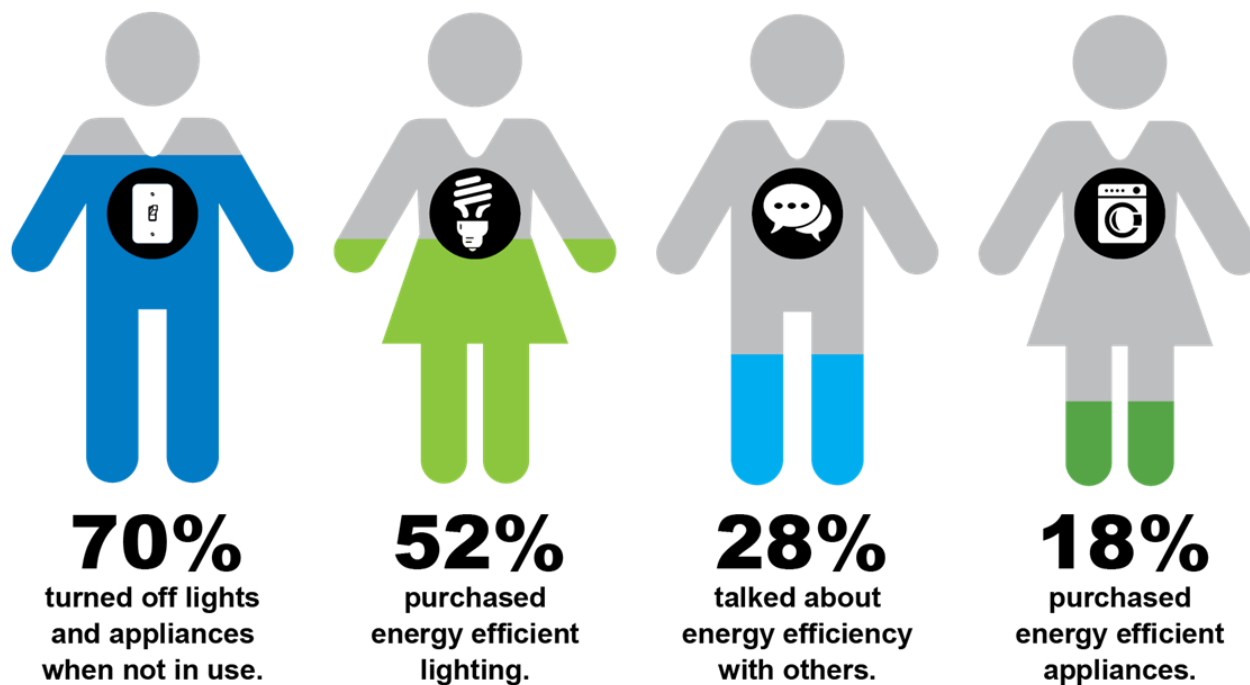
83% of participants
logged on to the portal
for the **first time**.



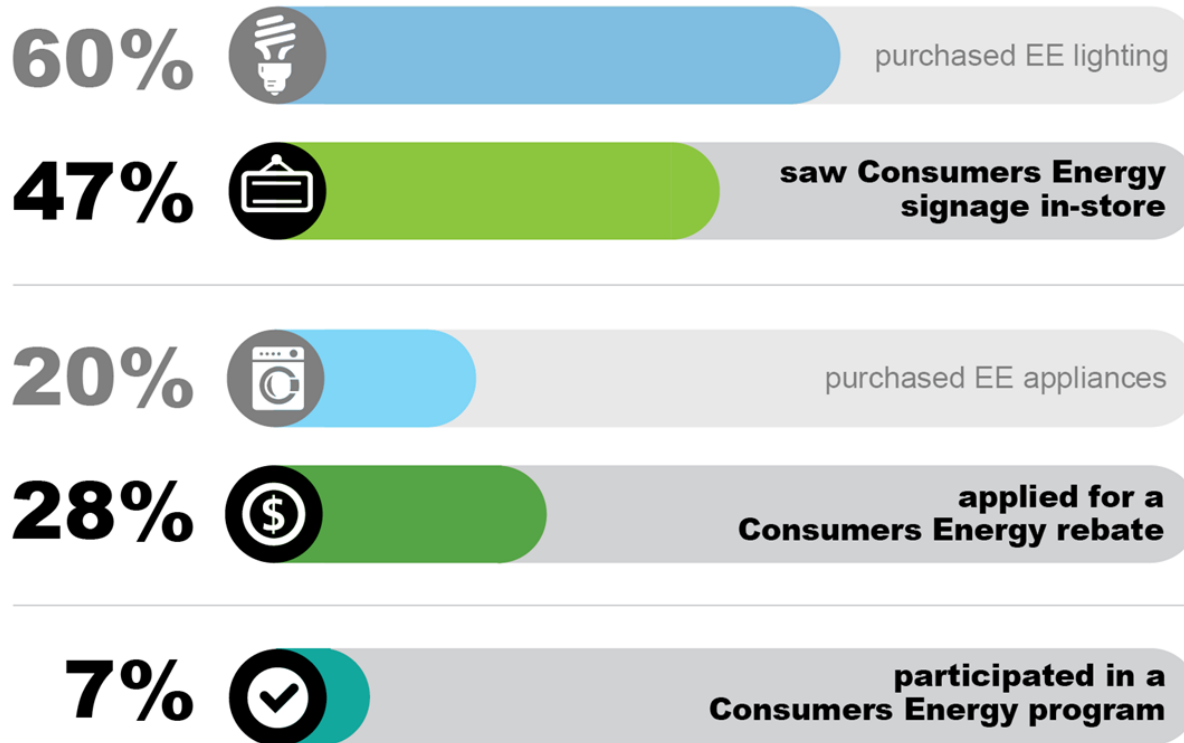
85% logged on
more than once.



Impacts: Behavior Change

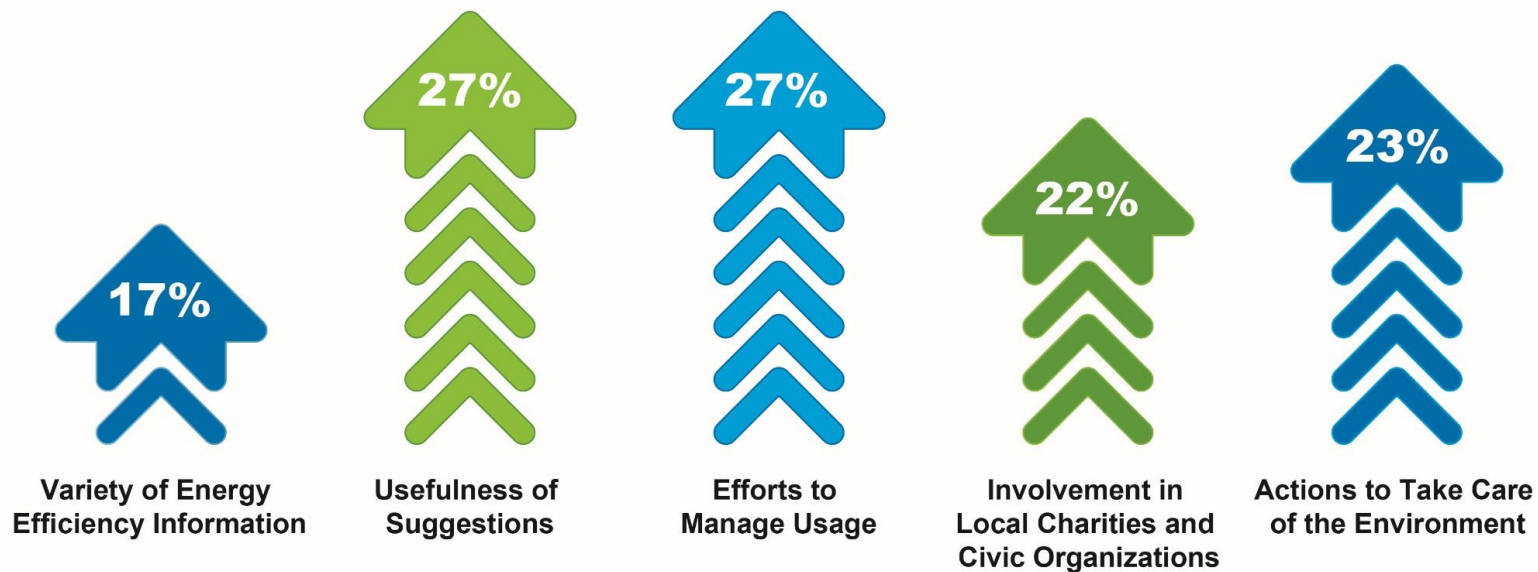


Impacts: Energy Efficiency Program Participation



J.D. Power Ratings

Percentage Increase Over Last Wave



Win, Win, Win!



What Does it Mean?

- **Same goal**

- Increased sales
- Customer retention
- Customer satisfaction

- **SLIGHTLY different approach**

- ENGAGE with sticky content
- REWARD for action
- Community
- Cohesive program offering



Thank you



Presentation Highlights: ICF International (1 of 2)

- **Pay attention to the customer's buying journey and their retail experience:**
 - Customers are more than customers, they're brand advocates.
 - Designing positive customer experiences will result in higher retention.
- **Create sticky content to engage customers** and ensure they come back.
- **Use games like loyalty and rewards programs** to connect with large communities:
 - The Consumers Energy Smart Energy Challenge (SEC) launched a rewards website where customers could learn about energy efficiency and earn points from games, such as energy-related trivia.

Presentation Highlights: ICF International (2 of 2)

- SEC offered multiple benefits to increase participation and create a win-win for both parties.
 - **Customers** earned points they could donate to local NGOs or redeem for energy efficiency products to local retailers.
 - **Utilities** benefited from increased program participation and energy efficiency awareness.
 - **Local NGOs** received cash rewards from points donated by customers.
 - **The local economy** benefited from a greater uptake of energy efficient products.
- **SEC coupled traditional communication strategies with community-based social-marketing.**
- **Make participation fun and meet your target audience where they are:**
 - SEC's event "Zoo Goes Boo" made participation fun and allowed on the spot registration.

Best Practices: Cool Choices

Leveraging Games for Program Results

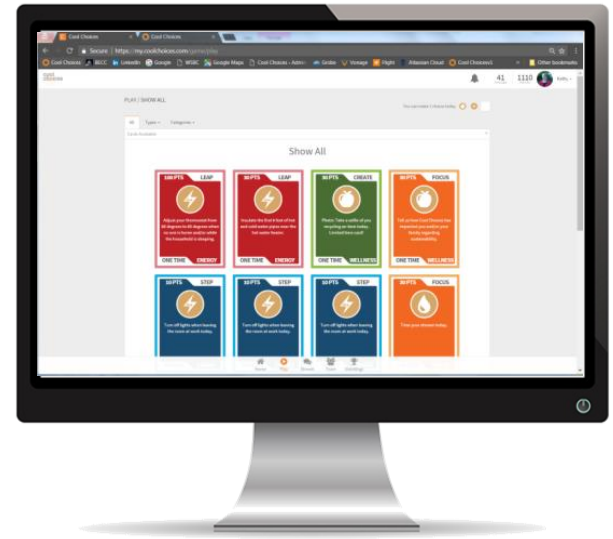
Who's Got Game, Better Buildings Webinar

Kathy Kuntz, Cool Choices

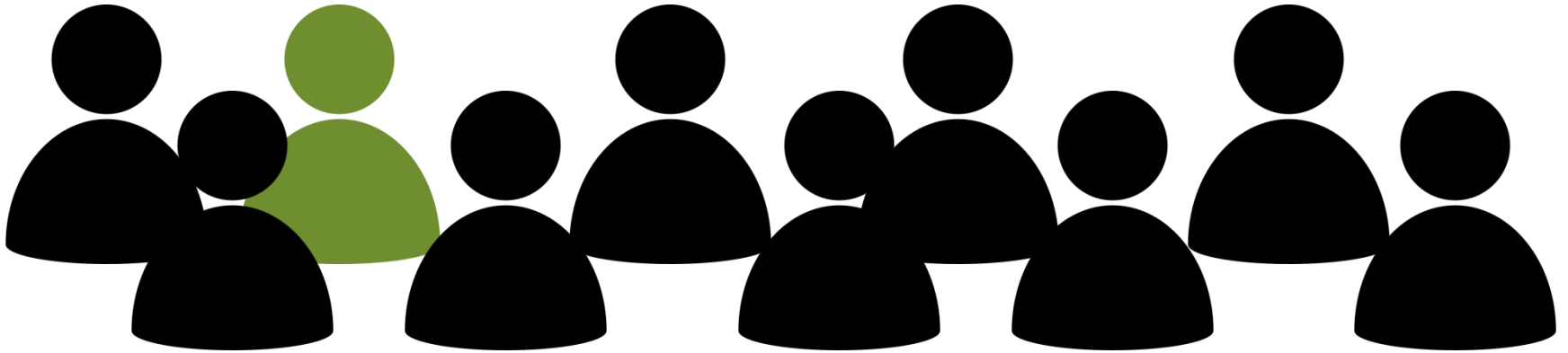


Our Online Game

- Leverage Workplaces
 - Form Teams with Peers
 - Compete to Earn Points
- Simple, Holistic On-line Approach
 - Points – Not Geek Speak – for Actions Taken
 - Earn Badges, Bragging Rights
- Transparent – *Sustainable Actions Are Visible*
- Aggregate Outcomes – *What I Do Matters*



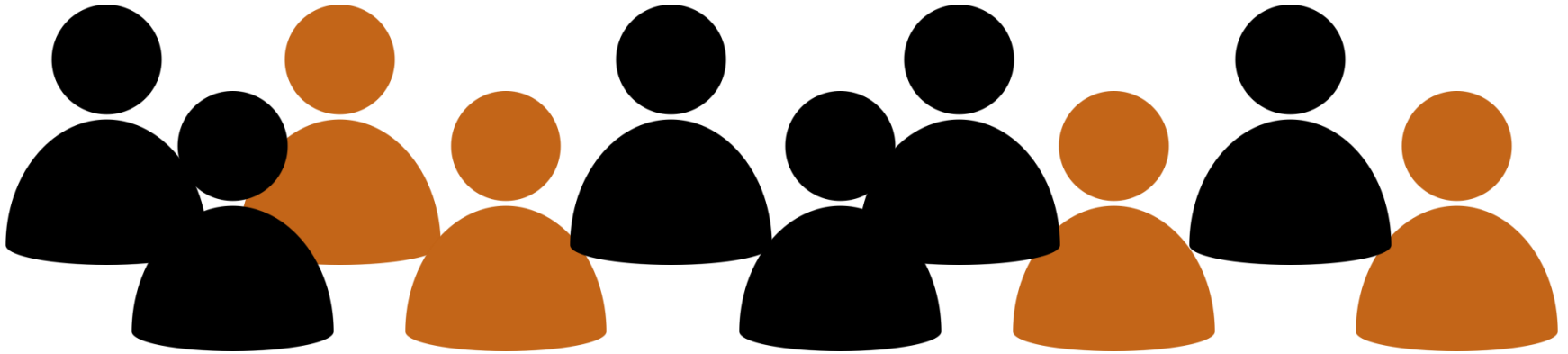
Typical EE Program Participation



Competing against coworkers: local and immediate



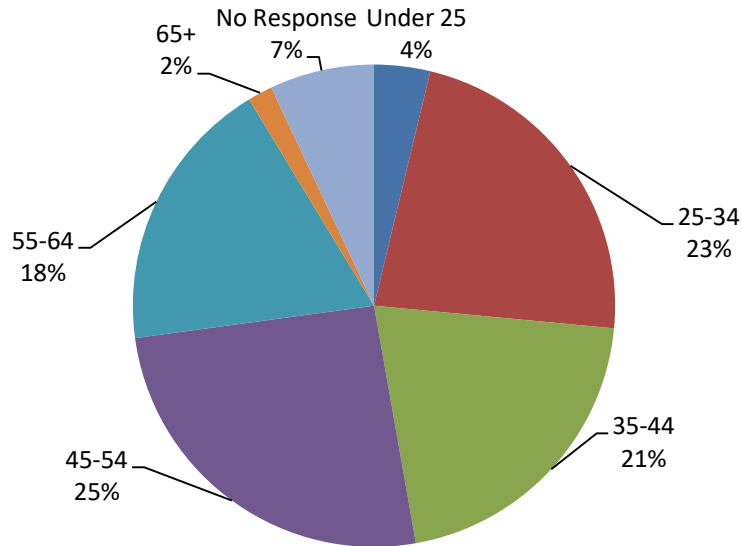
Games Deliver Broader Participation



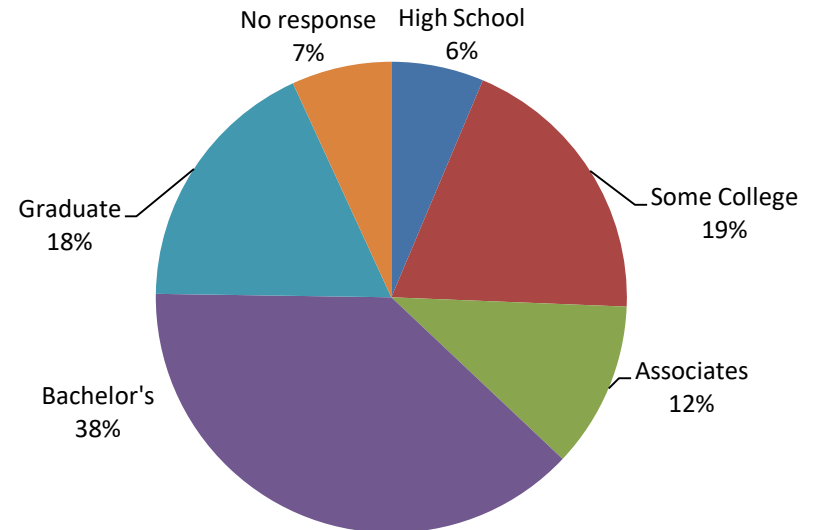
Imagine engaging 3X-4X as many households!

Games Deliver Diverse Audiences

2016 Participant Age (Baseline Surveys)



2016 Education Levels (Baseline Surveys)



Points Motivate!

John Riddle and 352 other players played the card "Time your shower today."

How many minutes was your shower?

brian knoll : 3.15

Moirra Johnson : 9

Gina LaVarier : 15

Dora Pineda : 15

Michelle Caldea : 16

Jeff Clark : 10

Melody Phonsnasinh : 10

Gary Madole : 5

John Stary : 12.5

JoAnna Hubbard : 10

Cool

 **Share**

 **Tweet**

 **Share**



Nudging Players to Efficiency Programs

- Pilot with Wisconsin's Focus on Energy
 - Appliance Turn In
 - Energy Check Up
 - Home Retrofits
- Cool Choices did prompt new participation
 - “I didn't know...”
 - “This was the nudge I needed to...”
- Some tracking challenges



Games Can Prompt Word of Mouth



Joyce | _____

Nov 02, 2014 at 9:27am



We had our Focus on Energy home visit--it was fabulous! Nick installed lots of light bulbs, water savers in the kitchen and bathrooms faucets, new low use water shower heads, checked the temperature of the water heater and was a wealth of information, all for free. It was an hour well spent!

Cool

 Share

 Tweet

 Share





Mike Calabrese
Oct 27, 2016 at 9:21am



Cool

f Share

🐦 Tweet

in Share

Karalyn Falatovich, Stephanie Chennell, Danika @ Cool Choices, and 1 other think this is cool.



Stephanie Chennell Oct 27, 2016 at 10:20am
You're even crushing ComEd competition!



Jon Tarullo Oct 27, 2016 at 11:25am
Awesome! You are more efficient than the efficient neighbors!. I say you deserve a bonus 100 points for that one!



Games as a forum where players can brag...about their home energy reports!



Games Make Actions Visible And Visible Actions Stick



Games Work

- Broaden Participation
- Prompt Information Sharing
- Create Buzz
- Deliver Persistent Savings

Use games to accelerate efficiency efforts!



Presentation Highlights: Cool Choices (1 of 2)

- **Games are a great way to make energy efficiency fun, social, and easy** while gathering useful data information.
- **Workplaces provide a forum to engage people in energy efficient behaviors** due to peer-to-peer influence.
- **Use clear, accessible language and avoid technical jargon to effectively communicate your message:**
 - Use points to convey game results and avoid confusing metrics such as BTUs or kilowatt-hours.
- **Make individual game progress visible** to allow people see how they compare with others and ramp up their efforts.
- **Aggregates are more compelling than individual data:** the big picture builds momentum and drives participation.
 - For example, communicating that the team has saved 4 Olympic pools full of water is more compelling than an individual's efforts.

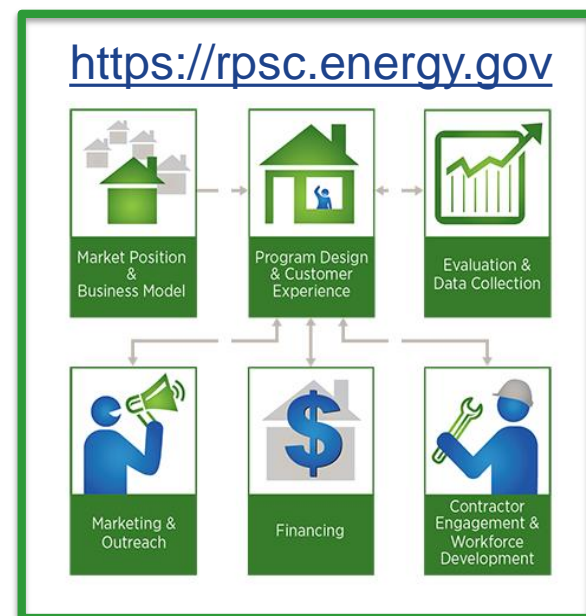
Presentation Highlights: Cool Choices (2 of 2)

- **Local competitions are more immediate and visceral** and have a positive impact on participation rates.
- **Collecting data** directly from game participants can help identify other engagement opportunities, including data on:
 - **Behaviors:** can be used to promote greater residential savings, such as reducing water consumption by encouraging shorter showers.
 - **Home appliances:** useful to direct people towards specific programs, such as the refrigerator program or energy audits, based on various upgrade needs.
- **Word of mouth and information sharing among participants** creates positive reinforcement and a sense of shared values.
- **Participants that share pictures demonstrating their commitment to energy efficiency** are more likely to continue that behavior due to a sense of commitment and visibility.

Related Resources in the Residential Program Solution Center

Explore resources related to interactive customer engagement strategies:

- Read about Salt Lake City's stakeholder engagement process and the creation of a customer energy data access portal in this [Better Buildings case study](#).
- Learn about the “peer diffusion” strategy as an opportunity to engage customers through social interaction and comparison of home energy upgrades in this [RMI report](#).
- Explore strategies for engaging customers through the communication of your program's impacts in the [Program Design & Customer Experience – Communicate Impacts handbook](#).



- Check out the latest [Proven Practices](#) post on [Recognizing Good Contractor Performance](#).
- The Solution Center is continually updated to support residential energy efficiency programs—[member ideas are wanted!](#)

2017 Better Buildings Summit

Registration is now open!



Be sure to [register today](#) for the 2017 [Better Buildings Summit!](#)



Spread the word:

[#BBSummit17](#) registration is right around the corner. Get ready to learn about expert [#EnergyEfficiency](#) enhancements <http://bit.ly/2iZCMsB>

HPC National Home Performance 2017



Join us!
March 19-22
Nashville, TN

Don't Miss Our Sessions:

- Monday, March 20 (10:30-12:00pm): *What Do We Really Know About the Health Benefits of Energy Upgrades?*
- Wednesday, March 22 (10:30am-12:00pm): *The Amazing Race for \$Millions: The Georgetown University Energy Prize*

GET SOCIAL WITH US



Stay engaged and connected with the Better Buildings Residential Network and our partners from the residential and multifamily sectors!

Follow us to plug into the latest Better Buildings news and updates!

Share with us your top stories on how your organization is accelerating energy savings through efficiency upgrades, strategies, and investment!



[Better Buildings Twitter](#) with [#BBResNet](#)



[Better Buildings LinkedIn](#)

We can't wait to hear from you!

Addenda: Attendee Information and Poll Results

Call Attendee Locations



Call Attendees: Network Members

- AppleBlossom Energy Inc.
- Fort Collins Utilities
- CLEAResult
- Cool Choices
- Davis Energy Group
- Ecolighten Energy Solutions Ltd.
- Energize New York
- Honeywell International, Inc.
- Housing Authority of the City of San Buenaventura
- International Center for Appropriate and Sustainable Technology (ICAST)
- NeighborWorks of Western Vermont
- Rocky Mountain Institute
- Vermont Energy Investment Corporation (VEIC)
- Wisconsin Energy Conservation Corporation (WECC)

Call Attendees: Non-Members (1 of 2)

- 1000 Home Challenge
- Apogee Interactive
- Bank of Montreal
- Bay City Electric Light & Power
- Carolina Smart Homes
- Center for Energy and Environment
- City of Milwaukee
- Emerson Electric Company
- Energetics Incorporated
- Energy Efficiency Specialists, LLC
- EnergyWize
- Environmental Design / Build
- FCI Management
- Fiveworx
- Green Compass Sustainability
- ICF International
- Imaasa De CV

Call Attendees: Non-Members (2 of 2)

- Johnson Home Performance
- Local Government Commission
- *Mercy Housing*
- Montana Department of Public Health and Human Services
- Montana Department of Environmental Quality
- NANA Regional Corporation, Inc.
- New Jersey Natural Gas
- New Mexico State Energy Office
- Clallam County (WA)
- Sanfilippo Solutions Inc.
- Schreiner Design
- Snohomish County (WA)
- Sustainable South Bronx
- University of Illinois
- Ygrene Energy Fund

Opening Poll #1

- Which of the following best describes your organization's experience with interactive customer engagement strategies?
 - Limited experience/familiarity – **59%**
 - Some experience/familiarity – **30%**
 - No experience/familiarity – **11%**
 - Very experienced/familiar - **0%**
 - Not applicable – **0%**

Closing Poll

- After today's call, what will you do?
 - Seek out additional information on one or more of the ideas – **61%**
 - Consider implementing one or more of the ideas discussed – **31%**
 - Make no changes to your current approach – **8%**
 - Other (please explain) – **0%**