

# ASSESSING THE EFFECTIVENESS OF CUSTOMER ENGAGEMENT STRATEGIES

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# How do we know if customer engagement strategies are working?

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- Utilities and Program Administrators (PAs) throughout the country are experimenting with different customer engagement strategies
  - Understanding their effectiveness is critical to figuring out return on investment. Sponsors look at the value of customer engagement from many perspectives:
    - Customer relationship development
    - Participation lift
    - Energy savings

# How do we know if customer engagement strategies are working?

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- There are multiple ways to assess effectiveness



What do the results tell us?

## Examples

- **Community Based Outreach** to increase participation and energy savings
- **Umbrella Marketing** to change attitudes and behaviors



# Case Studies



# Community Based Outreach

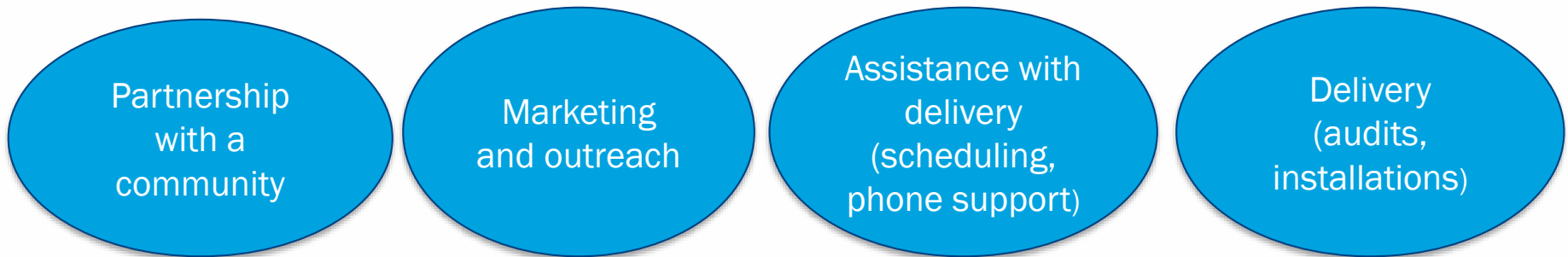


# Defining Community-Based Initiatives

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- Community-based energy efficiency initiatives are efforts that target a specific community (audience or geography) through engagement strategies designed for that specific community (marketing and outreach, program design and delivery, etc.). These efforts might or might not engage local community leaders or stakeholders in any part of the engagement process.

## Level of community engagement



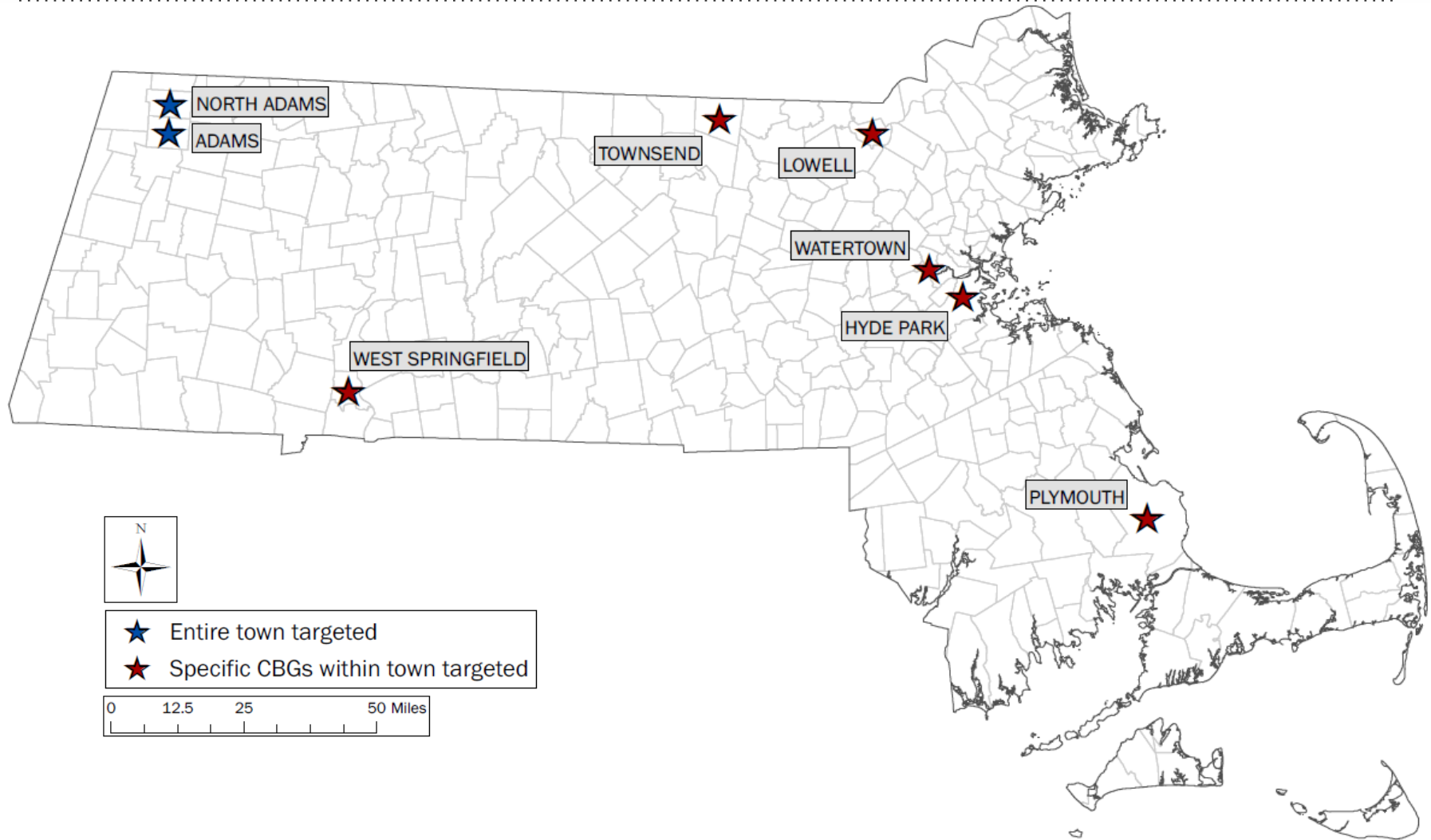
# Efficient Neighborhoods Plus (EN+<sup>SM</sup>) Core Initiative

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- A largely statewide initiative that is community-focused
- Open to nearly all residents of target community, but goal is to increase participation among a harder-to-reach population
- Featured enhanced incentive structures and a wide variety of marketing and outreach tactics



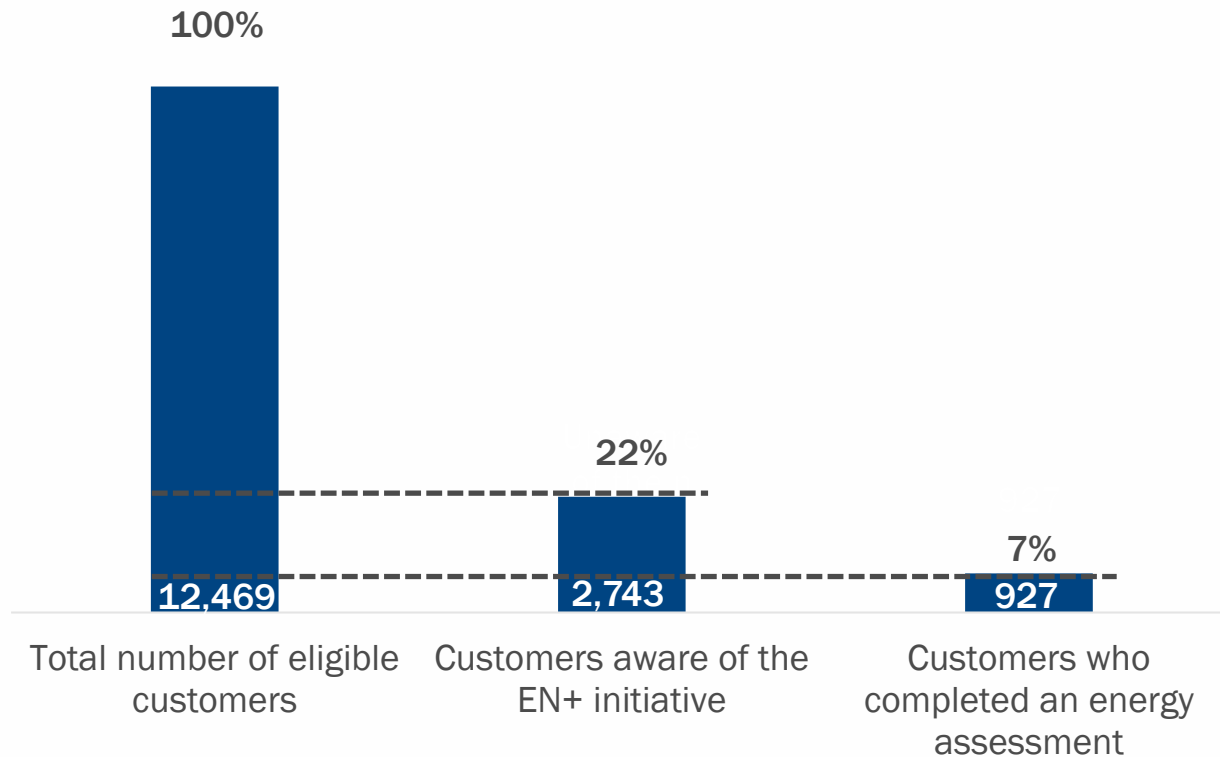
# EN+<sup>SM</sup> Core Initiative (Cont.)





# Initiative Reach

- The initiative reached 22% of all eligible customers in EN+<sup>SM</sup> target communities and completed assessments among 7% of them



# The initiative was successful at lifting participation and achieving energy savings

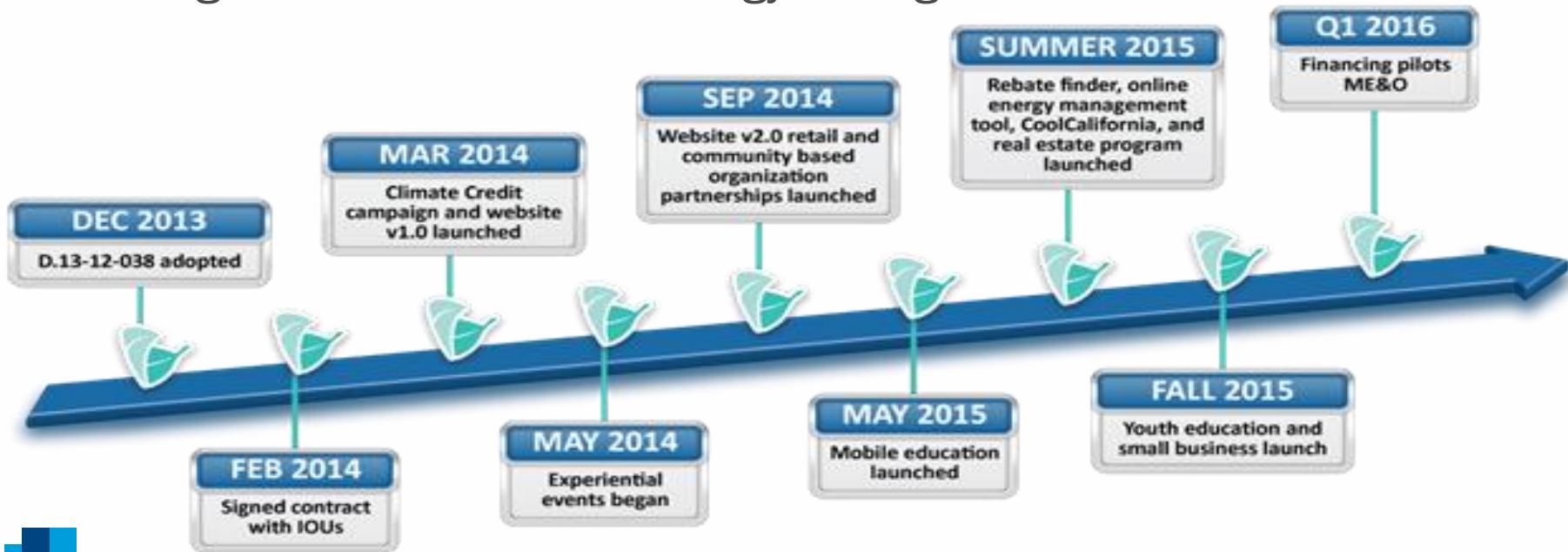
	Achieved During the Initiative's Implementation	% Incremental to the Initiative	# Incremental to the Initiative
Total # of energy assessments	927	69%	636
Total # of projects	248	76%	188
kWh savings	699,587	74%	516,784
Therm savings	35,351	84%	29,691
MMBTU savings	10,698	73%	7,786
Total # of LI customers channeled into the LI program	91	--	--

# Umbrella Marketing

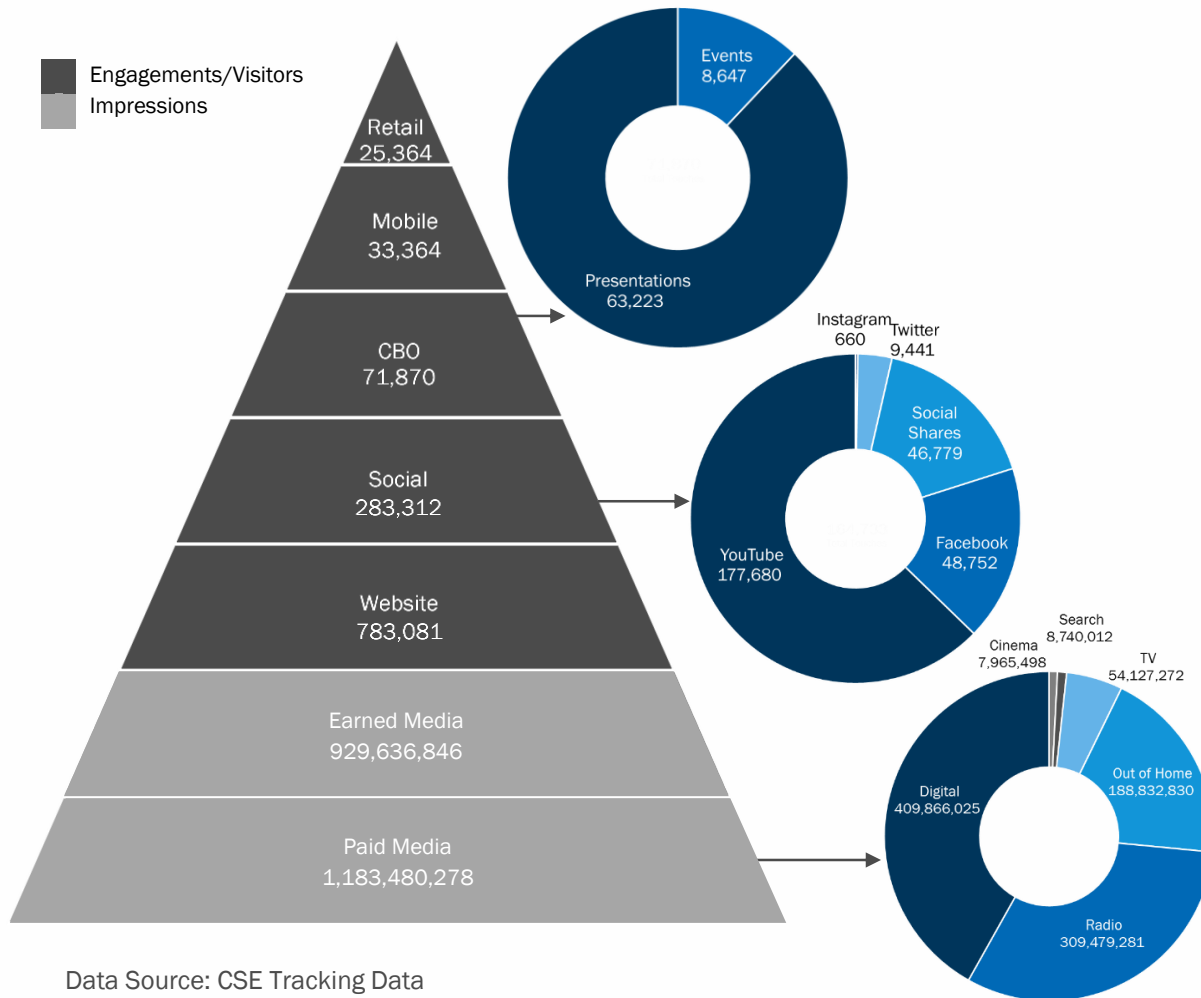


# Energy Upgrade California

The Statewide Marketing, Education and Outreach (SW ME&O) program, implemented under the umbrella brand, Energy Upgrade California, is a social marketing initiative that utilizes a wide range of marketing channels – with the goal of educating, motivating and activating consumers to take energy-saving actions

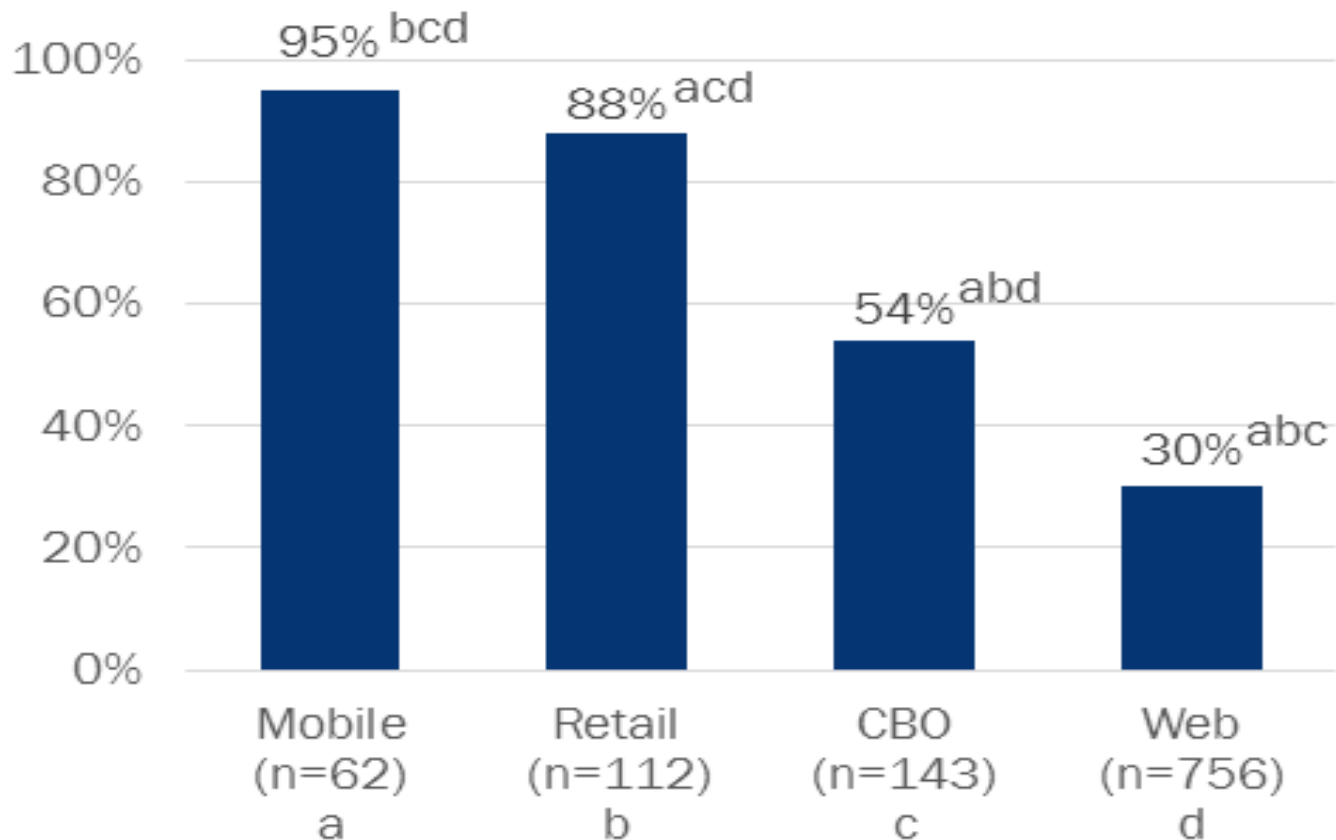


# Each marketing channel reached vastly different numbers of California residents



Data Source: CSE Tracking Data

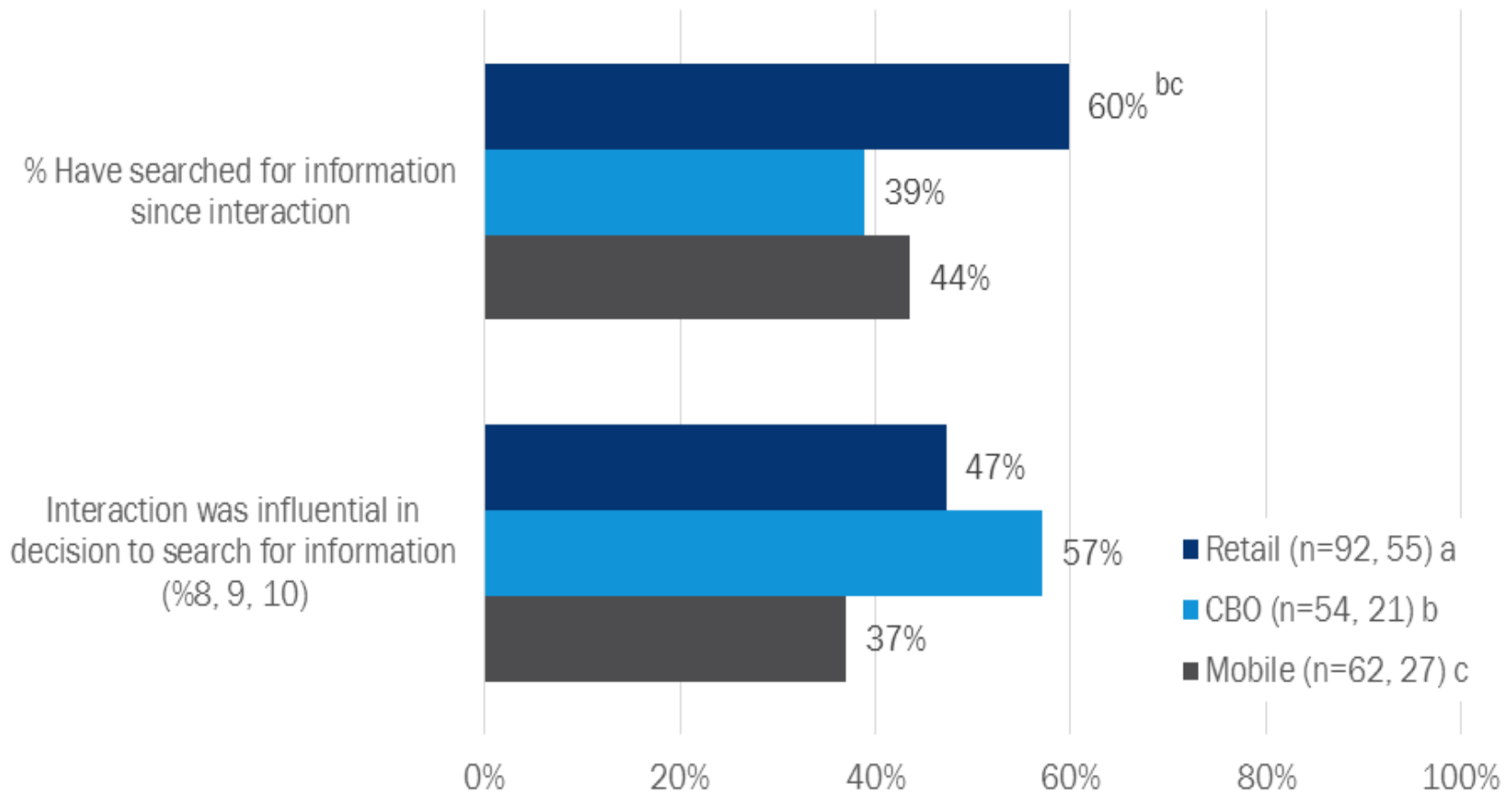
# Consumers were significantly more likely to remember some types of interactions than others



Note: Letters are assigned to each marketing channel. Letters next to percentage indicate the percentage is significantly different from the indicated marketing channel at the 90% level. Source: Attribution, Event Follow-Up, and Mobile Surveys, Fall 2015.



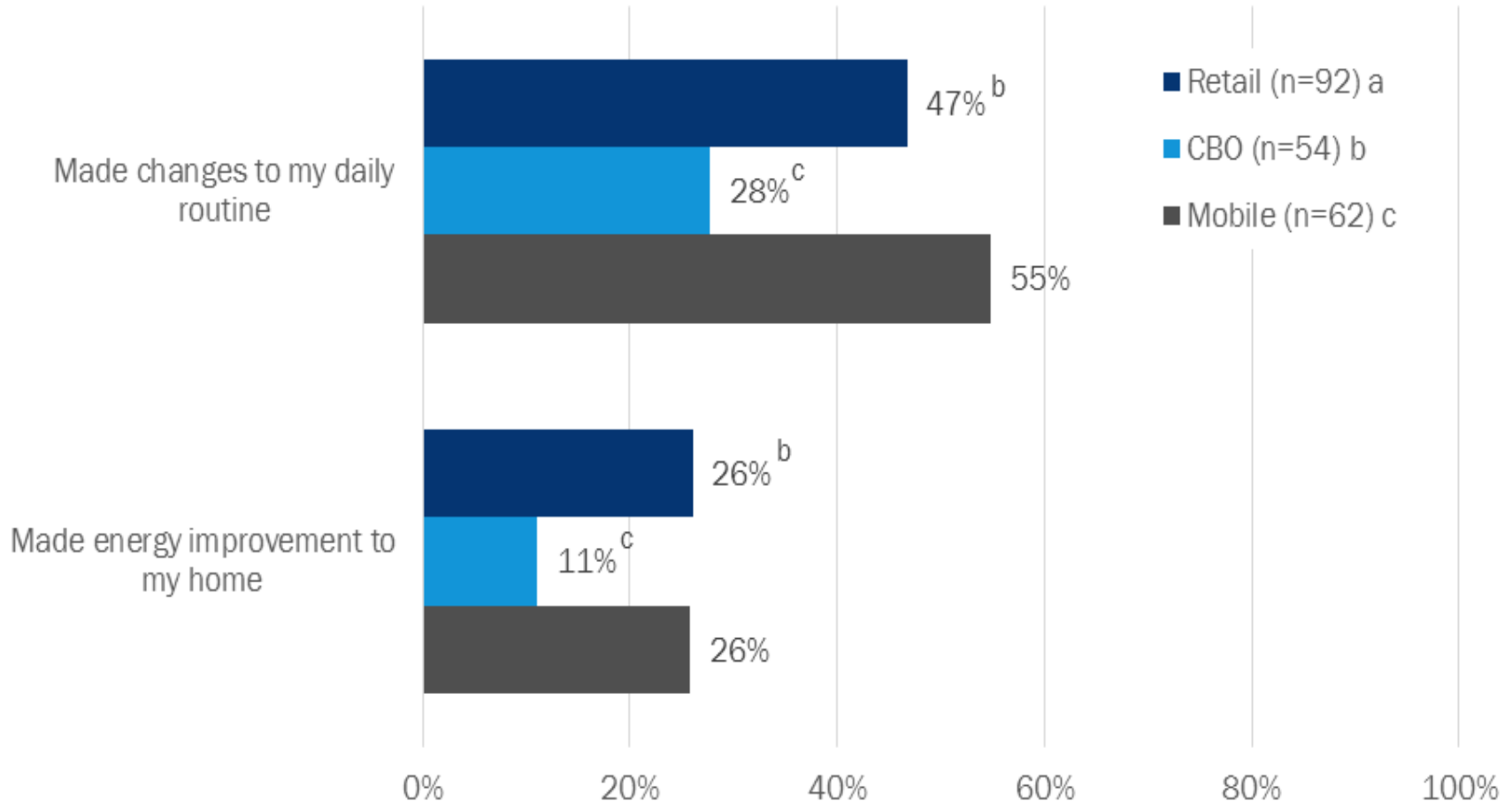
# Retail events appeared to have the greatest impact on information seeking behavior



Note: The first # in legend refers to the # of survey respondents answering "% Have searched for information since interaction", and the second # refers to the # answering "Interaction was influential in decision to search for information". Source: Event Follow-Up and Mobile Surveys, Fall 2015.



# Changes in daily routine were more common than home improvements



Note: Letters are assigned to each marketing channel. Letters next to percentage indicate the percentage is significantly different from the indicated marketing channel at the 90% level. Source: Event Follow-Up and Mobile Surveys, Fall 2015.







What does this mean for your organization?



# Customer engagement can spur participation and savings

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- The outreach strategies best suited to your organization's efforts will depend on your goals
- The success of those strategies will depend on a number of factors

Nature of the  
Interaction

Quality of the  
Information

Where the  
Engagement  
Happens

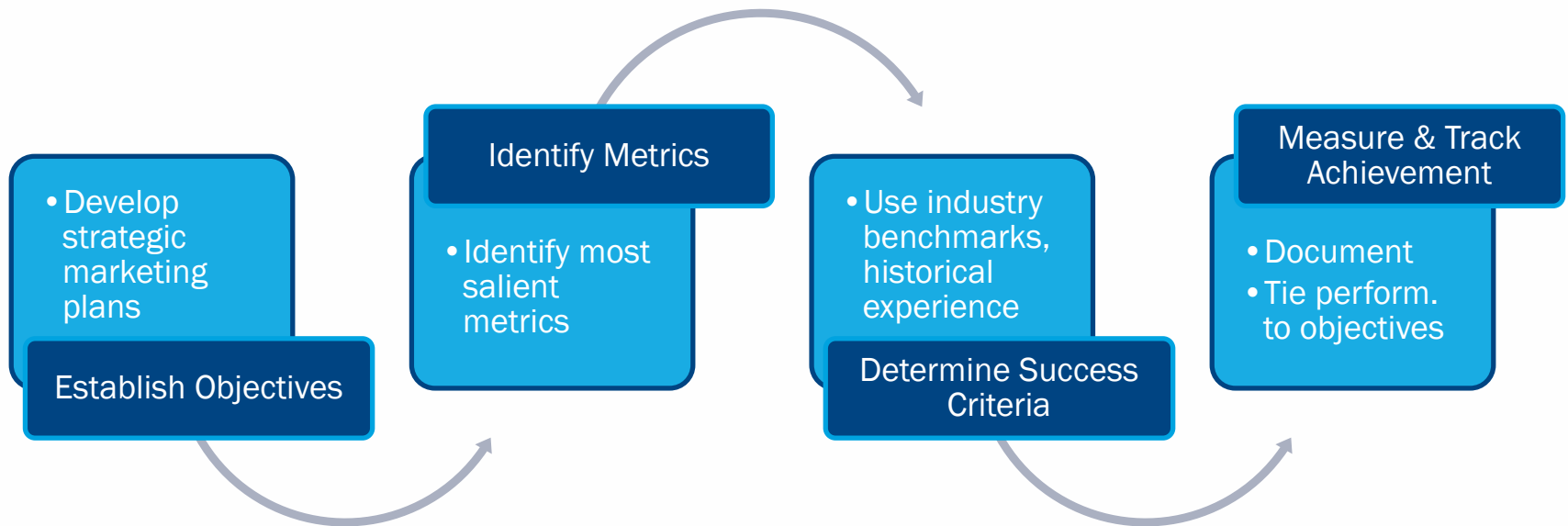
Reach and  
Frequency



# Establishing metrics and success criteria is key

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- However, planning, tracking and measurement are critical to implementing successful customer engagement efforts



# Contact

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