



GETTING THE RIGHT INGREDIENTS

A Framework for Enhancing Marketing Education & Outreach Evaluation Subtitle

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ME&O campaigns aren't always set up to support effective evaluation

- Goals of the presentation:
 - Discuss three common challenges to evaluating ME&O efforts
 - Present a four-step framework for enhancing ME&O evaluation
- Source: 2016 evaluation of 33 residential EE ME&O campaigns conducted in California by the IOUs and the RENs
 - Data review (33 campaigns)
 - In-depth interviews (4 IOUs, 2 RENs)
 - Case studies (11 campaigns, 1-2 per IOU/REN)

Common Challenges to Evaluating ME&O Efforts

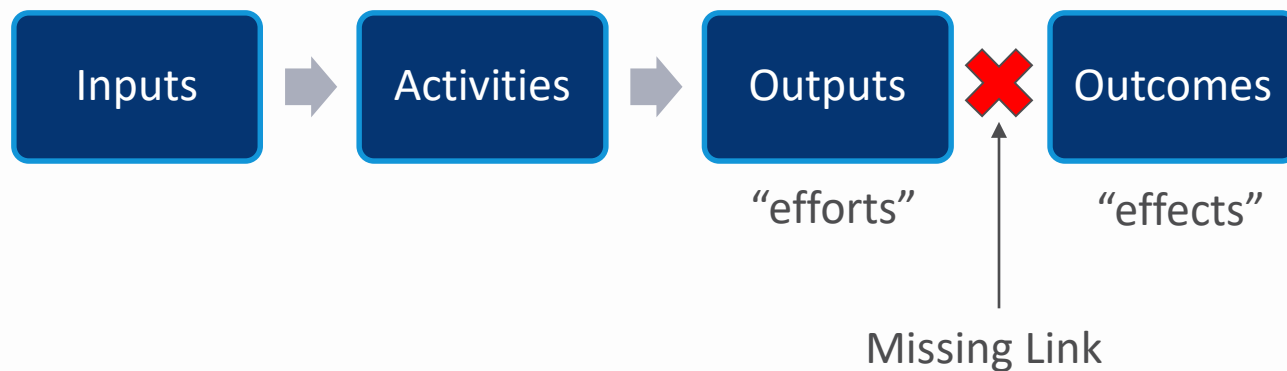
Challenge 1: No Recipe

- No marketing plans
 - Only around half (14 of 33) campaigns had plans available when requested
 - Content varied widely, some broad, some program-specific
- Unclear causal linkage
 - No means to prove the linkage between marketing activities and program results (e.g., lead tracking)
 - Focus on *efforts* rather than *effects*



Measuring *efforts* vs. measuring *effects*.

- Measuring “**efforts**” - determining what and how much was accomplished
 - e.g., number of mailers sent, click-through rate
- Measuring “**effects**” - assessing the changes that result from a campaign
 - e.g. knowledge, program participation, energy savings



Challenge 2: Missing Ingredients

- No metrics or “key performance indicators (KPIs)”
 - e.g., click-through-rate for e-mail campaigns, number of attendees for workshops
- No goals or “success criteria” for metrics
 - e.g., 2% click-through-rate, 100 attendees

Availability of Metrics and Success Criteria

Org	Percentage of Activities with Defined Metrics	Percentage of Activities with Defined Success Criteria
ORG1	0%	0%
ORG2	82%	89%
ORG3	87%	22%
ORG4	100%	60%
ORG5	100%	26%
ORG6	64%	0%
All Orgs	76%	36%

Source: Opinion Dynamics (2016). 2013-2015 California Statewide Marketing, Education, and Outreach Program: Cross-Cutting Process Study. California Public Utilities Commission.

Challenge 3: Watching the Oven

- Periodic performance assessment is critical to optimizing the allocation of marketing funds
- Two key data tracking issues make it difficult to assess performance vs. expectations:
 - Setting budgets and tracking expenditures at different levels
 - Lack of interim goals or documented expectations

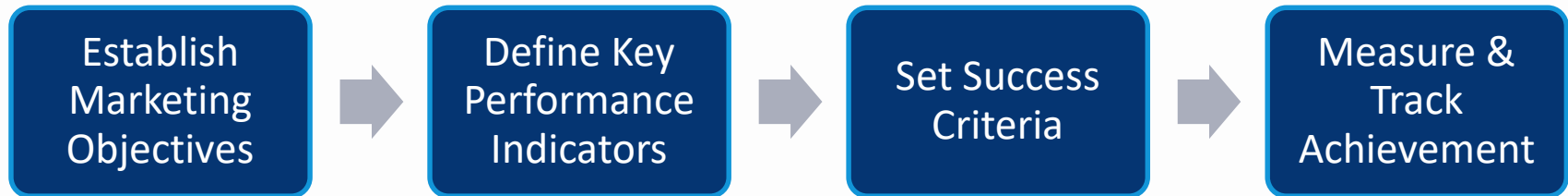


A Framework for Enhancing ME&O Evaluation



Step 1: Write down a detailed recipe

Components of a successful marketing plan



- Incorporate strategies to measure the linkage between *efforts* and *effects*
 - Lead tracking
 - “last click” analysis for websites (and “first click” more and more)
 - Unique links in e-mail campaigns
 - Survey checkpoints

Step 2: Gather the right ingredients

Example metrics to assess marketing performance

Channel	Sample Metrics
Digital media	<ul style="list-style-type: none">• Number of impressions• Click-through-rate
Email	<ul style="list-style-type: none">• Open rate• Click-through-rate
Events/Workshops	<ul style="list-style-type: none">• Number of events• Number of attendees
Social Media	<ul style="list-style-type: none">• Number followers, “likes,” shares• Number of impressions• Click-through-rate
Website	<ul style="list-style-type: none">• Number of unique visitors• Bounce rate (the percentage of single-page visits)• Number of page views



Step 3: Don't just leave it in the oven

- Setting interim goals can allow marketing teams to gauge how activities are performing after each “phase” of activity
- Track budgets and expenditures at the activity-level, as well as at the campaign level.

Step 4: Measure effects!

- Survey-based approaches
 - Self-report recall/marketing influence
- Experimental design
 - Treatment (received marketing) vs. control (did not receive marketing)
- Other types of advanced statistical methods
 - Latent Class Discrete Choice
 - Structural Equation Modeling
 - Multi-Level Modeling



Thank you

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Special thank you to my co-author!
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