



BPA Simple Steps, Smart Savings

Appendix C: Customer Engagement and Marketing Approach

The 2019 marketing and customer engagement approach for the Simple Steps program will focus on increasing utility attribution, EE awareness and kit portal traffic. This will be accomplished in part by utilizing traditional and online retail channels through collaborative marketing with utility stakeholders.

Target Audiences and Key Market Influencers

The program will target the following market actors and influencers, with a goal of increasing consumer awareness and driving sales through these audiences. Marketing activities will be coordinated and implemented across each of these groups in collaboration with BPA when appropriate.

- **Utilities**
 - Utility attribution will be paramount through collateral and in-store promotions. Marketing tactics will be deployed year round balancing between evergreen campaigns as well as promotion-specific events.
- **Consumers**
 - The program will directly and indirectly market to residential consumers in targeted stakeholder territories with special consideration directed to the rural territories.
- **Retailers**

Retail is a key channel for influencing consumer purchases, and when leveraged in tandem with manufacturers can be a strong ally in devoting floor space to promotional efforts and investing in customer outreach to drive traditional or digital 'foot-traffic'.

Marketing Goals and Tactics

Coming together for an effective 2019

The Simple Steps marketing goals are intended to increase sales of qualified products and increase participation in the kit program component. They will be grouped into the following themes:

- **Amplify partner promotions**
 - One of the key activities for the year is to be at the right place, at the right time with our marketing. We'll strive to be "in-market" with Simple Steps messaging and utility attribution when our brand and retail partners have qualified product on-promotion. We intend to double-down on efforts during pre-specified drive times – overlaying the efforts of the program, utilities, brands, and retailers.
- **Increase consumer familiarity with qualified products**
 - Throughout the year – while we're in and out of the promotional windows – we'll want to have a baseline of consumer awareness activities running. This will be accomplished by having paid Google ad and search products live and running in defined territories and ensuring that our program collateral is fresh and doing its job at the point-of-sale. This will be accomplished through coordination between the field and marketing teams.
- **Increase supply chain engagement in marketing qualified products**
 - This will be informed by program meetings with key brand and retail accounts – at a national, regional, and local level where possible. The goal of this is to leverage our partners with the most money and muscle to elevate the program offerings – through any tactics that are feasible/meaningful in a particular utility territory. This could be in the form of direct customer emails, co-branded paid search and paid social media, every-



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door-direct mailers, and custom in-store promotions during sales holidays.

Proposed Touchpoints and Deliverables

Engaging with utilities and their customers through a holistic, integrated approach

Program-driven activities	
Tactic	Purpose
Retail collateral	We will refresh key pieces where it makes sense and set aside budget for new promotional pieces.
Digital assets	This will include items that we create and place in program digital campaigns, as well as items we create and hand over to stakeholders for placement in utility digital campaigns.
Utility-driven activities	
Tactic	Purpose
Paid online search	We will develop a messaging and creative asset set – to be deployed on behalf of utility partners. This is a great tactic for our product categories since most customers do considerable research online before making a store visit. Paid search ads will be placed in relevant SEM networks and targeted at participating retail locations.
Direct e-mail messages	This is the single most cost-effective tactic in the mix. Where possible, we will work with key utility partners to implement an email campaign promoting the kit portal and limited time offers. This can be highly targeted to specific customer profiles. We will develop the creative and targeting – handing this over to the utility to deploy.
Direct mail template	Direct mail is proven to be more effective in rural territories. We will utilize this tactic to promote the kit portal and limited time offers. We will develop the creative and have it “in the can” for certain utilities to deploy if digital engagement isn’t seeing as much uptake as other areas.
Bill Inserts and messaging	40% of customers learn about EE programs through information included on their energy bill. We will leverage this channel to promote the program in general and to highlight special offers.

Schedule of Activities

The shaded squares indicate when the activity will be actively deployed and/or taking place. Work back schedules will be developed for individual activities where necessary and feasible throughout the year.



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DELIVERABLE	JAN	FEB	MAR	APR	MAY	JUN	JUL	AUG	SEP	OCT	NOV	DEC
Program Driven Activities												
Retail collateral (by promo)												
Digital assets (placed by promo)												
Utility-driven Activities												
Paid online search												
Direct e-mail messages (tbd by promo)												
Direct Mail												

Key promo periods

President's Day

Earth Month/Memorial

Independence/Labor

Lighting Month/Holidays