Simple Steps, Smart Savings

BPA Utility Direct Installation Experiences

Presenter: Ryan Crews, Fluid Market Strategies

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Overview

- Overview of four direct install projects
- Benefits
- Process steps
- Examples
- Success stories
- Lessons learned

Overview of first projects

Presentation of 4 unique projects:

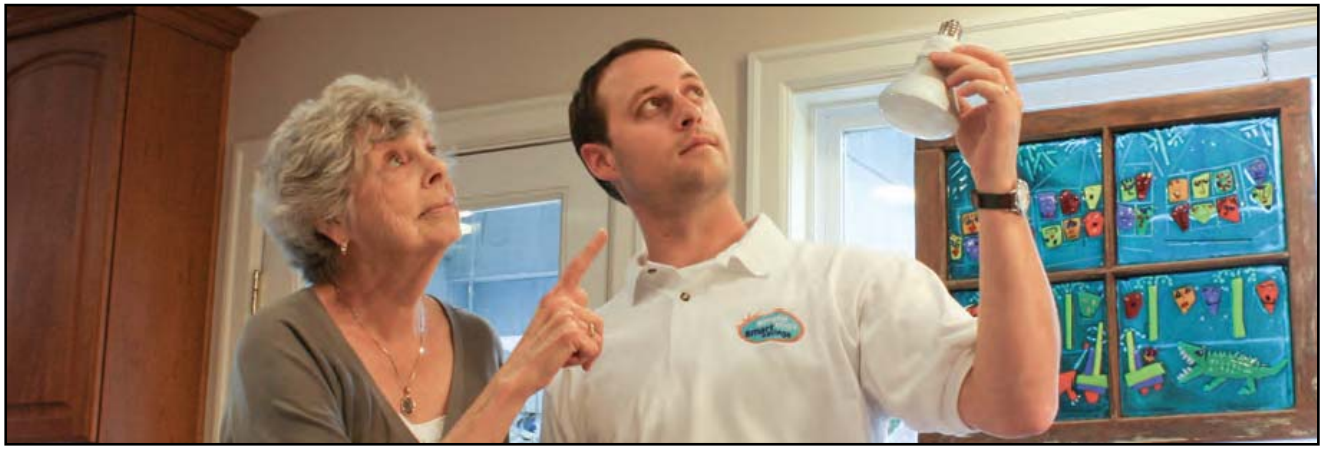
- Monmouth, Pacific County, Richland, Franklin

Each varied by:

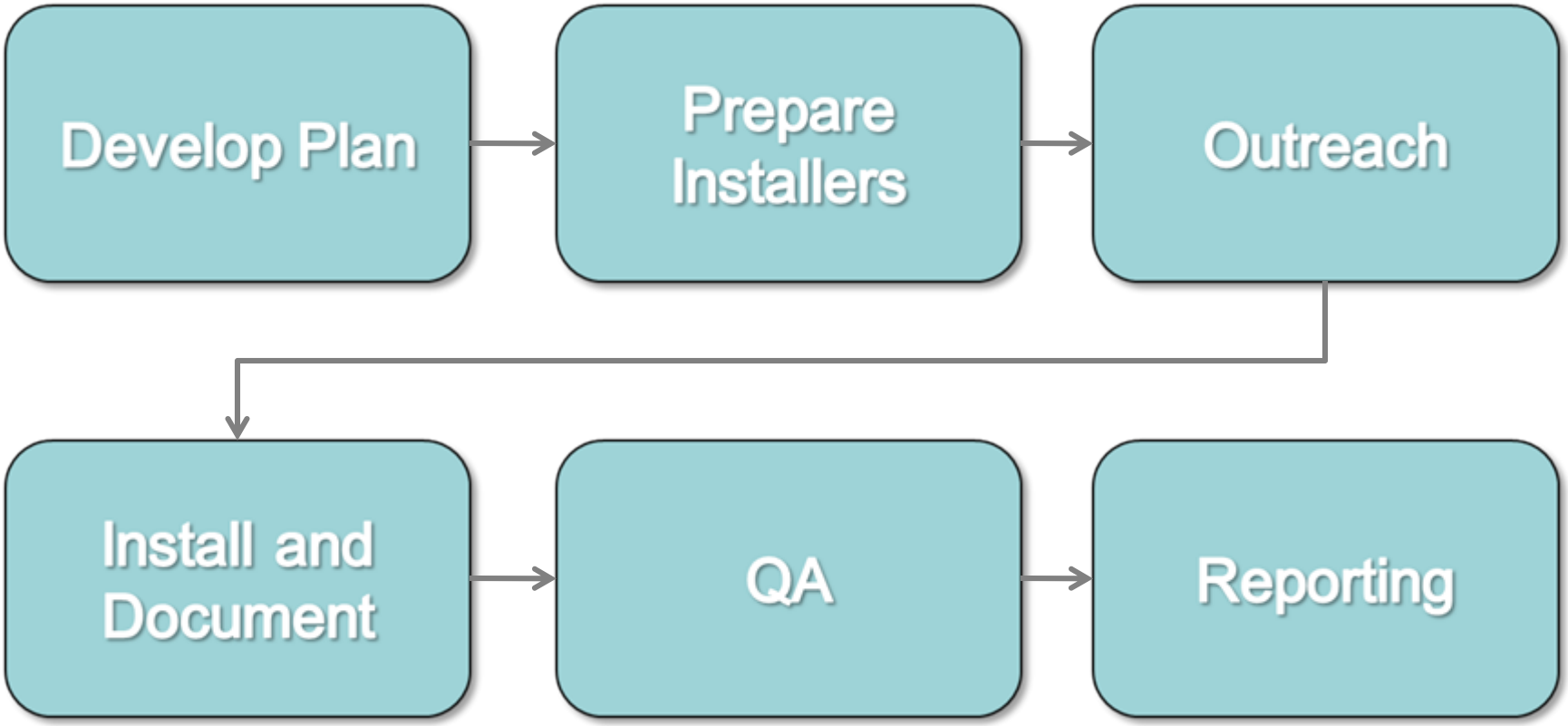
- Size
- Scope
- Goals
- Outreach strategy

Benefits

- Valuable service delivered to customer with energy efficiency information (outreach, education)
- Verification of measures installed (documentation)
- Data gathered from mini-audits (program planning)
- Opportunity to promote utility and other utility programs (marketing)



Process Overview



Develop Plan

- Establish parameters
  - Scope
  - Start/end dates
  - Targeted areas
  - Products offered
- Determine goals
  - Provide a benefit for customers
  - Achieve kWh savings
  - Capture household data
- Outreach mix
  - Door-to-door canvassing
  - Press releases
  - Direct marketing

Prepare Installers

- Recruitment
  - Hire locally
  - Background checks
- Training
  - Customer service emphasis
  - Installation best practices
  - Product information
  - Overview of energy efficiency industry
  - Importance of audit data

Outreach tools

Outreach materials/tools:

- Direct mail postcard
- Utility bill insert
- Newspaper ad
- Press release
- Posters
- Door hanger

Customer contact / feedback:

- Web site (www.SimpleStepsNW.com)
- Customer support hotline

Installer materials:

- ID badges and installer shirts
- Showerhead install instructions
- Home Energy Saving Steps brochure

Install and Document

- Forms
  - Document measures installed
  - Track households visited by installer
  - Capture mini-audit data as defined by utility
- Installation
  - By neighborhood or by appointment
  - 30-45 minutes in home
  - Installation parameters defined by utility
- Customer information
  - Product options and benefits
  - Other utility programs available
  - CFL recycling and broken CFL disposal

Quality Assurance

Fluid QA process ensures oversight of installers on:

- Quality
- Accuracy
- Customer service

Reporting

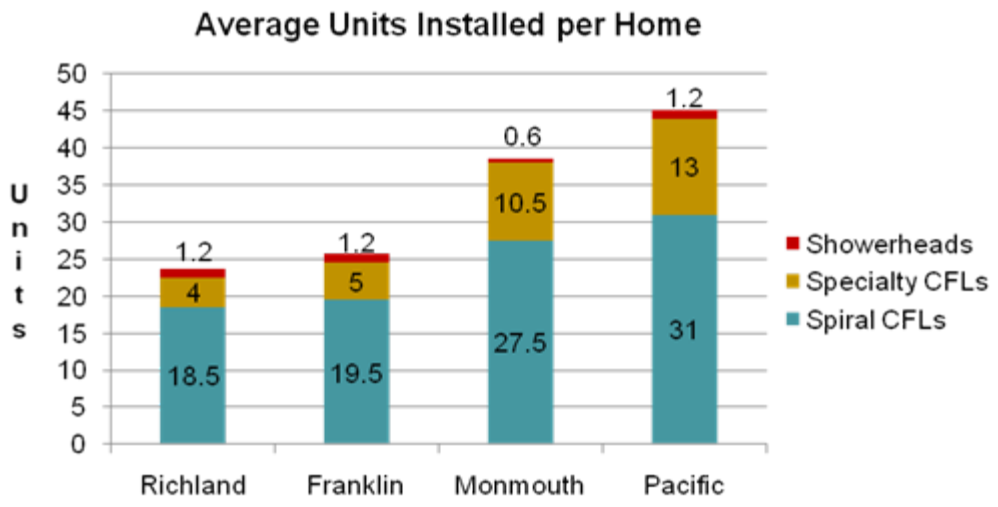
Detailed monthly reports including:

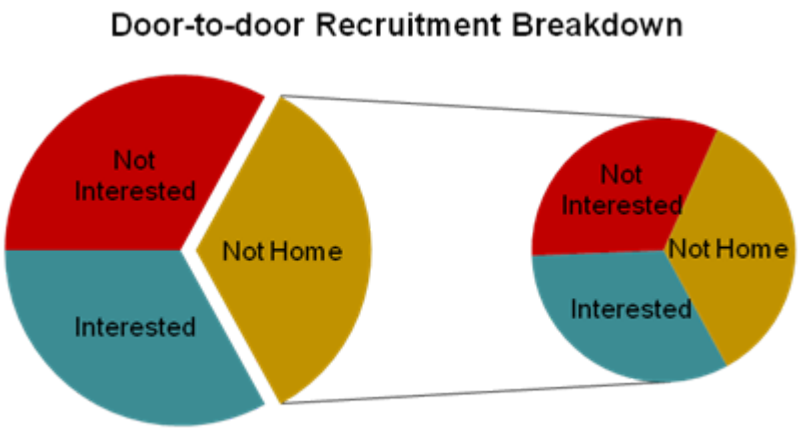
- Number of households visited / goal
- Household energy profiles
  - Customer info
  - Products installed
  - Audit data
- Quality assurance reports

Four Recent Program Examples

Currently implementing four programs:

- Pacific County PUD
- Monmouth Power & Light
- Franklin PUD
- City of Richland





Current Project Details

Pacific County PUD

Goals:

- 4,000 homes
- Recruit vacation home owners
- Provide coverage for large target region

Marketing efforts include newspaper ad, door hangers, bill inserts and direct mail postcards.

Monmouth Power & Light

Goals:

- 4,200 homes
- Utility program referral

Marketing efforts include press releases, door hangers, and bill statement.

Current Project Details

Franklin PUD

Goals:

- 10,400 homes
- Collect comprehensive audit data
- Accommodate Spanish speaking population

Marketing efforts include newspaper ads, events, bi-lingual door hangers, and bill inserts.

City of Richland

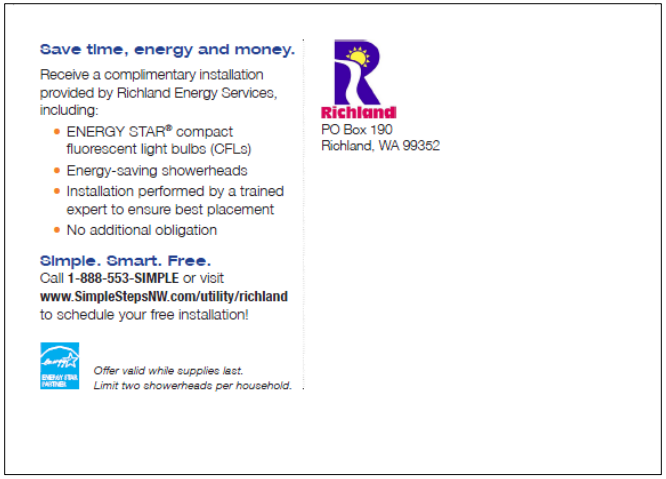
Goals:

- 700 mobile homes
- Provide multiple product options
- Licensed plumber for showerhead installs

Marketing efforts include posters, direct mail postcards, door hangers and events.

Richland Marketing Pieces

City of Richland Postcard



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- ENERGY STAR® compact fluorescent light bulbs (CFLs)
- Energy-saving showerheads
- Installation performed by a trained expert to ensure best placement
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Call **1-888-553-SIMPLE** or visit **www.SimpleStepsNW.com/utility/richland** to schedule your free installation!

Offer valid while supplies last.
Limit two showerheads per household.

Richland
PO Box 190
Richland, WA 99352

City of Richland Poster

Franklin PUD Marketing Pieces

Franklin PUD Door Hanger

(front)

(back)

Franklin PUD Newspaper Ad

Success Stories

Customer Service

- 171 of 173 customers indicated overall satisfaction with services performed
- No major customer service issues

Marketing

- Customer signups more than tripled immediately following boosted marketing efforts (Franklin, Richland)

Implementation

- 5 week start up on Franklin project
- 1,673 installations performed and 38,697 units installed in 5 weeks before 9/30 deadline

Lessons Learned

Obstacle	Solution
Inconsistent data collection	Make forms simple and easy to avoid confusion and inefficiency
Installers misinterpreting protocol	Training, training, training
Keeping installers motivated to perform auditing	Limit Snapshot data to items of high importance
Reaching hard to reach customers	Offer an alternative direct mail option

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