

## How to Build, Execute and Evaluate a Customer Engagement Program

Laura Orfanedes, Fiveworx; Linda Dethman, Research into Action; and Jamie Lalos, Fiveworx

Wednesday, October 21

12:30 – 3:30 pm

Offered at no charge (includes 1 break | no lunch)

Workshop is unlimited

As energy efficiency programs mature, program administrators often must meet higher energy savings goals with smaller budgets. At the same time, in the era of big data and “apps for that,” customers increasingly expect more customized, seamless, and desirable product and services experiences. In the past, such tailored, convenient, and appealing customer journeys have been rare for customers targeted for DSM or renewables programs. Administrators can respond to these customer challenges if they employ up-to-date customer engagement platforms that other industries routinely employ – platforms that are technology-enabled, center on customer needs, and leverage customer psychosocial drivers and data analytics. Taking a page from outside of our industry, the right platform will motivate behavior change and increase participation across a portfolio of programs/offerings, while ultimately increasing energy savings and customer satisfaction.

This workshop’s trainers will present a set of guidelines, accompanied by applied exercises, that will step workshop participants through the planning/design, implementation, and evaluation requirements for a modern, integrated, and efficient customer engagement platform. Topics will include: building a consumer insight approach with consumer research and data analytics tools; planning the right mix of media for engagement campaigns; improving social media and digital engagement; planning and executing effective content marketing, implementing engaging and personalized online and offline communications; creating or re-designing effective websites; integrating mobile into the channel mix; selecting the right Key Performance Indicators to measure campaign performance; boosting ROI through analytics and optimization; and planning and designing for tracking, reporting, and evaluability.

After attending this workshop, participants will be able to understand and articulate the inputs needed to build and evaluate an effective customer engagement program for demand side management (DSM) (energy efficiency, demand response, renewables) program, including topics such as:

### Situational analyses

- Customer journey mapping and touch points
- Consumer research and mindsets
- Customer segments and personas
- Customer Information Systems/Program Tracking Communication
- IT integration
- Creative, content, and message development
- Marketing mix
- Engaging internal/external teams
- Experimental program design

Evaluability—Map out the behavioral strategies, elements, and applied interventions needed to implement that customer engagement platform, including topics such as:

- Establishing pilot populations, control/treatment groups
- Engagement and promotional calendars
- Marketing automation and email marketing
- Customer Relationship Management Systems
- Content marketing
- Social media integration
- Behavior-based marketing
- A/B Testing
- Concierge program models
- Customer experience
- Marketing integration
- Personalized marketing
- Campaign and data analytics

Reporting—Identify the key indicators of success for the program and specify how they will be measured, including topics such as:

- Defining success – from participation levels, to customer satisfaction, to attribution, to return on investment (ROI)
- Developing key performance indicators to measure success
- Choosing measurement options – real time to over time strategies
- Collecting and analyzing needed data
- Reporting and integration of findings into continuous program improvement

**Workshop format:** Lecture and case studies to inform each learning objective; regular Interaction during full group discussion – questions put to participants, Q&A for presenters; progressive small group exercises where participants work on a customer engagement platform for a specific efficiency or renewables program.

## About the instructors:



Laura Orfanedes has twenty years' experience as a professional communicator, helping clients change behaviors of consumers, businesses and public organizations around energy efficiency, water conservation and technology. She has designed and overseen the implementation of award-winning energy efficiency marketing campaigns that have been recognized by the Association of Energy Services Professionals (AESP), the Environmental Protection Agency (EPA), E-Source and the American Council for an Energy Efficient Economy (ACEEE), including Mass Save, Like to Save and Change a Light, Change the World, which helped transform the market for residential energy efficient lighting.

Laura is also on the board of directors for AESP, is a trainer for AESP's energy efficiency marketing course, and co-chair of its Topic Committees.

As Fiveworx Vice President of Customer Success, Laura helps our utility clients design, implement and evaluate successful energy efficiency and demand response programs by crafting successful customer engagement solutions.

Laura holds a B.S., Broadcasting and Film from Boston University and a M.S., Curriculum and Instruction, Educational Communications and Technology from University of Wisconsin-Madison



Over the past 30 years, Linda Dethman has worked with clean energy and water initiatives to ensure and expand their success. Her focus over the past decade has been to work with innovative and pilot programs, particularly those that foster behavior change and introduce new approaches and technologies. She has assessed hundreds of programs across all sectors, helping clients improve program design, marketing, delivery, and outcomes. Ms. Dethman is a trained facilitator, teacher, and award-winning writer and routinely presents on behavioral related topics at national and international conferences including BECC, AESP, IEPEC, and ACEEE. She is co-author of a pioneering white paper: "Paving the Way for Richer Mix of Residential Behavior Programs" for the California Investor-owned utilities and an upcoming article in AESP's newsletter on using real-time evaluation approaches ("Knowing More Sooner: Making Real Time Evaluation Work").

Prior to joining Research Into Action, Ms. Dethman built and managed Cadmus' Program and Market Analysis Group and ran her own consulting firm, Dethman & Associates.

Ms. Dethman holds a B.A. in Playwriting from the University of Missouri and completed an M.A. and all coursework and exams toward her Ph.D. in Communications Research from the University of Washington.



Jamie Lalos has more than a decade of experience in designing, marketing and evaluating energy efficiency programs. For the last six years, she helped build Cadmus' Energy Services Marketing and Communications Practice along with her longtime colleague, Laura Orfanedes. The practice focused on providing strategic marketing support and evaluating utility marketing efforts. Prior to that she was at the New York State Energy Research and Development Authority where she managed multi-million dollar implementation and marketing programs.

As Director of Customer Engagement at Fiveworx, Jamie oversees day-to-day management of client engagements, serving as the primary contact with utility clients, overseeing implementation of programs, and analyzing results. An experienced senior manager in utility energy efficiency programs, Jamie has demonstrated success leading sales, marketing and service. She also has a deep knowledge of industry trends and best practices for energy efficiency programs and customer engagement.

Jamie holds a B.S., Management and Technology from the Rensselaer Polytechnic Institute is working on an M.B.A. from Granite State College.