



DON'T LEAVE CASH ON THE TABLE: WAYS TO TAKE ADVANTAGE OF CO-OP MARKETING PROGRAMS

Peter Troast, Founder & CEO

Energy Circle Webinar Series

July 24, 2019

Next Week's Webinar



STRIKE WHILE THE IRON (AND WEATHER) IS HOT: PREPARING FOR FALL

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July 31, 2019



Utilizing Case Studies to Set Your Business Apart



By Jake VP | July 24, 2019

We hear it consistently here at Energy Circle — one of the most rewarding aspects of working in the business of energy efficiency is improving the lives of real life homeowners and business owners within a given community. In the HVAC, home performance, and solar industries, we can get caught up in the technical. But at the end of the day, the goal is to serve the needs of real human beings — each with their own unique story.

A case study on your website should be telling the story of your customer, along with the story of how you helped them on their journey. But there is more value in case studies than just storytelling! Case studies are a valuable part of a digital marketing strategy, and are a big part of growing your website as a lead generating tool. [In last week's webinar](#), Energy Circle CEO Peter Troast covered the importance of utilizing case studies for your HVAC, home performance, or solar website. Here's what we've learned.

Why Case Studies

At the heart of it, case studies offer a unique opportunity for you to talk about your business and the services you provide, in the context of a real life example. You can show visitors to your website "Hey, this could be YOU!", while explaining some of the more granular details of how you solved a real world problem. But more than just story, case studies provide an opportunity for fresh content.

Freshly Picked Website Content

What We'll Discuss

- 1 Co-op Marketing Basics**
- 2 Typical Program Formats in Efficiency & Solar**
- 3 Advantages of Co-op Marketing**
- 4 Overcoming the Hurdles & Challenges to Maximize Marketing Impact**



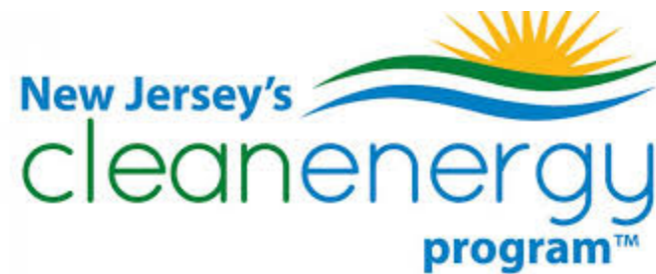
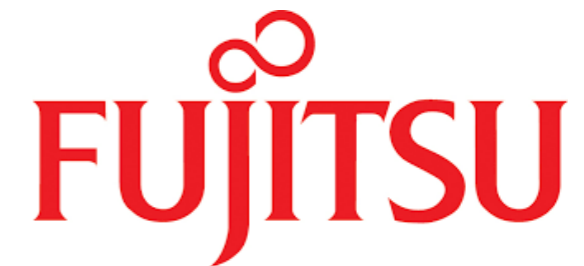
CO-OP MARKETING BASICS

Co-op Marketing in Efficiency & Solar

Cooperative marketing is a way that manufacturers, distributors, suppliers and programs support contractors by aligning marketing resources. The most common form of co-op marketing is by funding specific advertising campaigns or through matching co-op dollars.

everyone is pushing value-added programs to differentiate their brands & products

Many Programs



Co-op Marketing Tracker

Provider	Who's Eligible	\$ Summary	Maximum \$	Eligible Measures	Dates	Fiscal Period End	Notes
NJ Clean Energy	NJ Clean Energy HVAC & HPwES Contractors	50%	\$50,000 HVAC, \$75,000 HPwES	Print, Yellow Pages, Direct Mail, TV, Radio, Web Banner, Signage, Billboard, Social Media, Events	Campaign approvals	June 30	
Mitsubishi Electric	Mitsubishi Electric Diamond Contractors	Contractor receives 1/3 reimbursement		Specific references to Mitsubishi Electric Heating and Cooling; all content must be submitting for pre-approval	Monthly Submissions	Dec 31	
Nu-Wool	Nu-Wool Insulation Contractors	50%	Up to max. 2% of dealer's Nu-Wool insulation and accessories purchases per calendar year less discounts; up to 3% for Exclusive Dealers	Cannot be advertised with any other brand; contractor must be Nu-Wool exclusive	Annual deadline	Dec 31	
American Standard	American Standard Contractors	Up to 50% reimbursement		Specific T+C and brand standards must be adhered to	Rolling	Dec 31	
Trane	Trane Comfort Specialist Dealers	Contractor receives 1/3 reimbursement; Trane may roll off co-op funds of Dealers not utilizing their funds by July 1 and again by October 1,	Funds accrue on residential purchases. Buy < \$500k equipment, 2% in funds; 3% for up to \$1m; > \$1m is 4%	Very specific T+C; must submit through portal	Monthly Submissions	Dec 31	
Panasonic	Certified Panasonic solar dealers/installers	Unspecified				Dec 31	No marketing portal but they seem to offer to pay for marketing and websites. They do supply some standard marketing assets to the dealer/installer.
Owens Corning	Certified Energy Experts	No matching requirement. Funds can be used flexibly.	Funds accrue	Most marketing activities and agency fees along with myriad other eligible non marketing items		Dec 31	
National Energy Improvement Fund (NEIF)	NEIF Preferred Contractors	Marketing Portal w creative assets customized for contractor, Discounted services from partners	none	no restrictions	ongoing	Dec 31	



TYPICAL PROGRAM FORMATS IN EFFICIENCY & SOLAR

Co-op Program Types

- **Manufacturer Matching Fund Programs for Specific Marketing Tactics**

Typically 30-50% match (Mitsubishi, Trane, Nu-Wool)

Some split programs (manufacturer, distributor, contractor)

- **Dealer Incentive Programs with Marketing as Eligible Expense**

Formula based on purchase volume. (Owens Corning)

- **Efficiency Program Matching Funds**

Incentive program promotions. (NJ Clean Energy)

- **Dealer Network Benefit Packages**

Pre-developed marketing assets & discounts (National Energy Improvement Fund, NEIF)

Mitsubishi: Very Flexible

Eligible Contractor Activities

Advertising options include but are not limited to:

Digital Advertising (see details below)

- Paid Search Advertising (i.e. Google Adwords)
- Banner Display Advertising (i.e. Google Display Network)
- Social Media Advertising (i.e. Facebook Lead Gen Ads & Sponsored Posts)
- Targeted/Paid Email Campaigns
- Mitsubishi Electric branded website/landing page development (co-op available only for percentage of website devoted to Mitsubishi Electric)

Traditional Advertising

- Newspaper & Magazine Ads
- Billboards and out-of-home advertising
- Direct Mail including list procurement and postage
- Broadcast Media - Radio & TV Commercials (if using MECH TV spots, please submit Consent Form found on Canto)

Branding

- Branded Apparel – requires prior approval from Mitsubishi Electric’s Marketing Manager
- Home Shows, Displays, & Demo Units (must provide photo of whole booth with MECH products displayed). If additional non-competing brands are advertised on the wraps MECH will prorate the co-op amount.
- Truck wraps that are exclusive to Mitsubishi Electric. If additional non-competing brands are advertised on the wraps MECH will prorate the co-op amount.
- Yard Signs

Programs: Still Somewhat Old School

PRINT (NEWSPAPER, MAGAZINE, NEWSLETTER)

- Please refer to the “Requirements for All Ads” section.
- Minimum size eligible is one quarter page.
- The logo must be proportional (at least 1.5” for a quarter or half-page ad and at least 2” for a full-page ad).
- Please note that a multi-page piece, e.g. a newsletter, must include program messaging on all sides. The overall theme of the multi-page piece must include energy efficiency related topics.
- The details of all sponsorship ads and ad journal advertisements including description of event or sponsorship, location (if applicable), dates, audience (number and type), ad cost and placement type must be sent with the approval request notification and provided program approval before the ad is placed.

YELLOW PAGES

- Please refer to the “Requirements for All Ads” section.
- Size is subject to contractor’s discretion.

DIRECT MAIL

- Please refer to the “Requirements for All Ads” section.
- Eligible direct mail expenses include: third-party printing, fulfillment, postage, mailing list rentals or list purchases. Creative design or agency costs are not eligible. All costs should be itemized separately. Printing and postage requests must correlate with each other.
- The logo must be at least 1” for a 4.25” x 6” postcard and at least 1.5” for a 6” x 9” postcard or 8.5” x 11” letter.

TELEVISION

- Please refer to the “Requirements for All Ads” section.
- Minimum 30-second spot. The NJCEP logo must be recognizable and prominent. The logo must appear for at least 5 seconds in a 30-second commercial; 8 seconds in a 45-second commercial; and 10 seconds in a 60-second commercial.
- The appearance of the logo must be prominent and accompanied by the following verbal tag: "Rebates are

available from the New Jersey Board of Public Utilities and its *Clean Energy Program*.”

- Please note TV scripts must be submitted and pre-approved before production.

RADIO

- Please refer to the “Requirements for All Ads” section.
- Minimum 30-second spot.
- The following verbal tagline should be mentioned at the end of the spot: “Rebates are available from the New Jersey Board of Public Utilities and its *Clean Energy Program*.”
- Please note radio scripts must be submitted and pre-approved before production.

WEB BANNER

- Please refer to the “Requirements for All Ads” section.
- Web banners are intended for external websites and not the contractor website.
- The NJCEP logo is optional, but preferred.
- The consumer benefit statement is not required, but language highlighting the program should be featured.
- Web banners will be reviewed on a case-by-case basis and requirements are subject to program approval.

SIGNAGE

- Please refer to the “Requirements for All Ads” section.
- Signage includes lawn signs, banners, banner stands and door hangers.
- The NJCEP logo should be recognizable and prominent.
- The primary message should be about the program and its benefits.

BILLBOARD REQUIREMENT

- Please refer to the “Requirements for All Ads” section.
- Billboards are required to include the NJCEP logo and the logo must be predominant (ideally 1/8 of the image).
- Billboards will be reviewed on a case-by-case basis and requirements are subject to program approval.
- The consumer benefit statement is optional, but preferred.

Sometimes: Lots of Requirements

REQUIREMENTS FOR ALL ADS

- The NJCEP logo is required and should be proportional to the size of the ad.
- This consumer benefit statement is required and must be of equal text size to that used in the body copy: “Look for heating and cooling equipment with high energy efficiency ratings to maximize your energy savings.”
- The following sponsorship statement is also required: “*New Jersey’s Clean Energy Program*™ is brought to you by the New Jersey Board of Public Utilities and does not endorse any one particular contractor. Information can be found at NJCleanEnergy.com.” There is no size requirement for the sponsorship statement (this may be noted in small print at the bottom), but it should be clearly legible.
- An explanation must be included in a footnote when combining rebates from various sources, e.g. “up to \$1,500 in rebates.*” “*Up to \$500 COOLAdvantage rebate and \$1,000 manufacturer rebate”.



ADVANTAGES OF CO-OP MARKETING

Other People's Money



Advantages of Co-op Programs

- **Other People's Money**
- **Stretch your Marketing Dollars**
Tactics you might not utilize on your own
More marginal tactics (print, billboards, etc) that might not ROI at 100% cost
- **Use Large Company Creative Assets & Images**
- **Leverage Big Company Brand Recognition & Advertising Campaigns**

Mitsubishi:

Photo assets
Brand on
landing page

Sponsored · 

Want to harness the energy source of the future?



Embrace the all electric home

[Learn More](#)

Discover the benefits of switching to an all electric home....

 Like

 Comment

 Share

Mitsubishi:

Facebook Ad

Photo asset

Branded

Sponsored · 

Want to feel more comfortable at home and save money?



Get a Mitsubishi Electric heat pump

[Learn More](#)

A heat pump system by Mitsubishi Electric Heating &...

 Like

 Comment

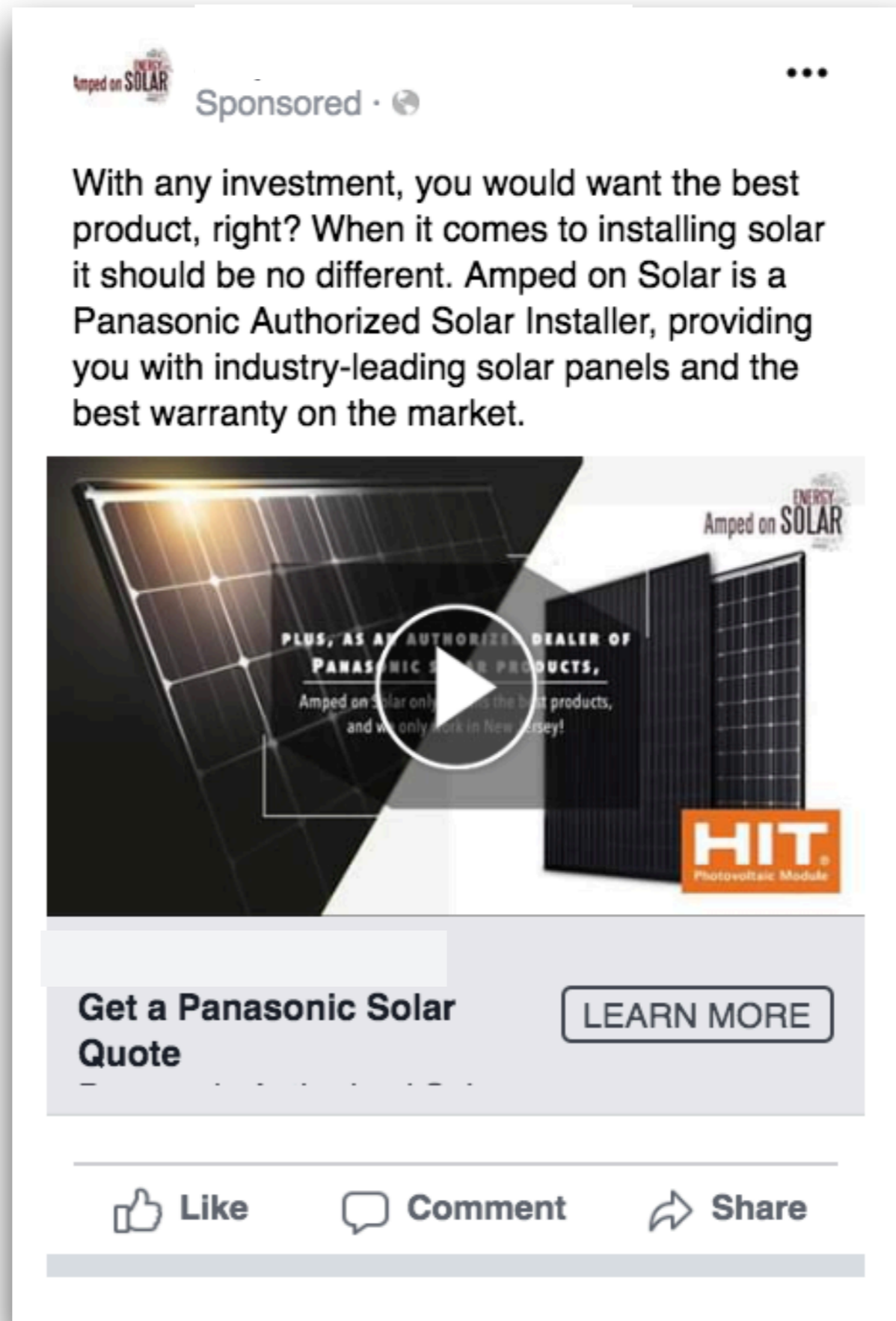
 Share

Panasonic:

Facebook Ad

Photo asset

Branded



Amped on SOLAR Sponsored · 🌐

With any investment, you would want the best product, right? When it comes to installing solar it should be no different. Amped on Solar is a Panasonic Authorized Solar Installer, providing you with industry-leading solar panels and the best warranty on the market.

PLUS, AS AN AUTHORIZED DEALER OF PANASONIC SOLAR PRODUCTS,
Amped on Solar only provides the best products, and we only work in New Jersey!

Amped on SOLAR

HIT
Photovoltaic Module

Get a Panasonic Solar Quote [LEARN MORE](#)

👍 Like 💬 Comment ➦ Share

Mitsubishi:

Facebook Ad

Photo asset

Branded

 **Kearney HVAC, Inc**
Sponsored · 

Did you know heat pumps both heat and cool? Find out more about Mitsubishi Electric Heating and Cooling heat pumps installed by Kearney HVAC!



KEARNEYHVAC.COM

How Does a Heat Pump Work? [Learn More](#)

 13 4 Comments 1 Share 41K Views

 Like  Comment  Share

Video



The video player shows a background image of a construction worker in a grey shirt and dark pants working on a wall. A large white circle is centered over the image, containing promotional text. At the bottom left of the video frame, the Nu-Wool logo is visible, and at the bottom right, the Energy Smart logo is present. The video player controls at the bottom include a play button, a volume icon, a progress bar showing 1:02 / 1:08, and icons for closed captions, HD, and full screen.

**HAVE THE EXPERTS AT
ENERGY SMART HOME IMPROVEMENT**

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IN YOUR HOME**

Schedule your installation today
PAENERGYSMART.COM | 215-344-7142

NU-WOOL
PREMIUM CELLULOSE INSULATION
GREEN Since 1949

ENERGY SMART
Home Improvement

1:02 / 1:08



OVERCOMING CO-OP HURDLES TO MAXIMIZE MARKETING IMPACT

Free Money is Never Free



I am a bit suspicious... In my experience, there is no such thing as a "Free Lunch"...

- **Expectation of exclusivity**
- **Complicated processes & approvals**

Overcoming Co-op's Major Challenges

- **Complicated Processes & Paperwork**

Embrace the system

Let us do it

- **Uncertain or Inconsistent Approval Processes**

Campaign approach: consistent monthly program

Use co-op for specific, recurring campaigns (seasonal)

- **Cash Flow Timing (Reimbursement)**

Spread campaigns evenly across the year

Avoid the year end rush

- **Creative Requirements**

Leverage big company creative assets

the
LAST WORD

**DON'T WAIT UNTIL
DECEMBER**





QUESTIONS?

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