



# Products and Marketing Update

January 14, 2025



# Newly Launched Energy Efficiency Products and Measures

## November: New Business Rebate Measures

- Small Business Building Management System
- Building Management System
- Retro-Commissioning
- Energy STAR Benchmarking
- Energy STAR Certification
- Energy STAR Building

## December: Small/Medium Business Direct Install

- Free level 1 building energy audit
- Labor rebate to be combined with existing Business Rebates (lighting, HVAC, ARC, building management system)
- Qualifying customers must be rate 230 or 231 with a maximum peak demand of 100kW

# Dollar & Energy Savings Loan Program

Program Expansion, Exclusively for OPPD Customers



## EXPANSION OVERVIEW

### ✓ BENEFITS

#### MARKETING

Enable marketing of program due to expansion

#### MODERATE INCOME SEGMENT

Funding available to increase CERA adoption within Moderate Income segment

#### SMALL MEDIUM BUSINESS

Additional resources for SMB CERA Adoption

#### MINIMAL RISK

Less than 1% average default rate, investment returned when partnership is terminated, OPPD has seen zero defaults

#### LIMITED RESOURCES

OPPD employee resource requirement is limited

#### LOW INTEREST RATES

3% or less interest charged to participants

### ✓ MEASURES

- WEATHERIZATION
- LIGHTING
- APPLIANCES
- ELECTRIFICATION
- SOLAR

### ✓ IMPACT

#### CUSTOMERS\*

- Estimated reach of 180 customers continual reach due to revolving funds
- 70% Residential
  - 30% SMB

#### SAVINGS

Minimum 8% average energy savings per month for the life of the measure

### ✓ FUNDING

#### \$1,000,000 INVESTMENT

- OPPD invested an **additional** \$500,000 into the program

#### \$2,800,000 Program

- **2.8M** total blended funding up from 1.4M prior to expansion
- OPPD funds purchase 35% of the approved loan at no interest, NDEE purchases 35% of the loan at no interest and the lender holds the remaining 30%

# 2025 Product Marketing Strategy Plan B2C

**STATEMENT OF STRATEGY:** Drive growth across all lines of business through consistent, high-quality execution of marketing campaigns.

Current State	<b>Plan:</b> Optimize the operating model and technology to increase efficiency and impact while focusing primarily on corporate priorities.			Target Future State
	Initiatives	Required Capabilities	Assumptions and Risks	
<p>85% of media budget focused on CERA Products (Energy Management Products &amp; Services)</p> <p>Increase enrollments in the Smart Thermostat, Weatherization, and Cool Smart programs by <b>20%</b></p> <p>Achieve <b>4x</b> ROI for every dollar spent, ensuring that marketing dollars are being utilized effectively.</p> <p>Improve customer engagement by <b>10%</b>, among key target segments such as Low to Moderate Income Customers.</p> <p>New Product Acquisition for Renewable Choice Product; 2.5% of Targeted Segment</p>	<p>Standardize marketing documentation and procedures to increase collaboration, communication efficiency, and accuracy.</p> <p>Build co-op marketing strategy to engage trade allies and contractors for shared costs in media spend to save money and cross promote related services and OPPD offerings.</p> <p>Increase grassroots marketing efforts to target Low to Moderate Income customers</p> <p>Develop transactional CSAT surveys for residential products and services</p>	<p>Data accuracy for segment building.</p> <p>Integration of digital marketing channel data with customer marketing platform.</p> <p>Digital Marketplace availability to make offerings more accessible.</p>	<p>Resource Constraints: Managing multiple initiatives and maintaining coverage during staffing changes and onboarding will require careful planning, delegation, and prioritization.</p> <p>Seasonal Variability: If the weather patterns in 2025 are similar to 2024, the program could once again see extended periods of down time in media. (Tornado Season, Derecho etc.)</p> <p>Budget Fluctuations: Unplanned expenses could require reallocation of funds, potentially limiting certain activities and demanding strategic flexibility</p>	<p>80% of campaigns delivered on time.</p> <p><b>90%</b> of campaigns delivered on budget.</p> <p>Only <b>15%</b> of campaigns have goals or scope changed after work began.</p>

# 2025 Product Marketing Strategy Plan B2B

**STATEMENT OF STRATEGY:** Drive growth across all lines of business through consistent, high-quality execution of marketing campaigns.

Current State	<b>Plan:</b> Optimize the operating model and technology to increase efficiency and impact while focusing primarily on corporate priorities.			Target Future State
	Initiatives	Required Capabilities	Assumptions and Risks	
<p>85% of media budget focused on CERA Products (Energy Management Products &amp; Services)</p> <p>Increase Business Rebate Program Participation <b>10%</b></p> <p>New Product Awareness and Acquisition for Direct Install Product; <b>2%</b> of Targeted Small to Medium Business (SMB) Segment</p> <p>Improve engagement with SMB tracked through Email Open Rates, CSAT, and Trade Ally Feedback.</p> <p>New Product Acquisition for Renewable Choice Product; <b>2.5%</b> of Targeted SMB Segment</p>	<p>Standardize marketing documentation and procedures to increase collaboration, communication efficiency, and accuracy.</p> <p>Build co-op marketing strategy to engage trade allies and contractors for shared costs in media spend to save money and cross promote related services and OPPD offerings.</p> <p>Build competitive marketing strategy for FERC 2222 aggregator entrances to market</p>	<p>Data accuracy for segment building.</p> <p>Integration of digital marketing channel data with customer marketing platform.</p>	<p>Resource Constraints: Managing multiple initiatives and maintaining coverage during staffing changes and onboarding will require careful planning, delegation, and prioritization.</p> <p>Market Variability: Changes in business conditions, industry trends, or unforeseen events may affect participation rates, necessitating agile marketing adjustments.</p> <p>Budget Fluctuations: Unplanned expenses could require reallocation of funds, potentially limiting certain activities and demanding strategic flexibility.</p>	<p>80% of campaigns delivered on time.</p> <p><b>90%</b> of campaigns delivered on budget.</p> <p>Only <b>15%</b> of campaigns have goals or scope changed after work began.</p>