



Energy Efficiency Service Providers Marketing & Communications Toolkit



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SECTION 1: Customer Experience Management

The success of Oncor's energy efficiency initiatives rests on the positive experience that customers have with a program. The customer's experience is shaped during every step in the program participation process. The journey a customer follows can begin from a multitude of starting points, such as a call center or an event, and concludes with the installation of energy efficiency and/or renewable energy generation measures or the completion of a satisfaction survey.

Oncor's goal is to provide customers with an enjoyable experience during the journey that leads to increased satisfaction and brand loyalty. To achieve this, Oncor is constantly improving the methodologies used to strategically manage a customer's entire experience during the process of participating in its energy efficiency programs. These customer experience management (CEM) processes are used to comprehensively manage a customer's cross-channel exposure, interaction, and transactions in order to create a more engaging, memorable, and pleasing experience.

Service Providers and Oncor program managers play a vital role in the successful implementation of Oncor's CEM processes. You are responsible for ensuring that every customer interaction is consistent with Oncor brand messaging and that the customer has a positive experience participating in Oncor's energy efficiency programs.

The *Marketing & Communications Toolkit* is your guide for accurately communicating Oncor's Take A Load Off, Texas® initiative to customers across multiple channels. The key areas of Oncor's CEM methodology also serve as your guide to the development of a comprehensive program design. Approaching your program using these guidelines will ensure that your customers have a positive experience with the program, which translates to program success, and ultimately, positive brand affiliation for Oncor.

Oncor's CEM processes cut across five key areas:

The Customer. *Customer understanding serves as the primary driver in shaping program design and implementation strategy.*

Who are you talking to? Define your customers or target audience and develop a multidimensional understanding of them. This understanding includes cultural, sociological, behavioral, and demographic analyses, and culminates in a detailed ability to articulate the needs, wants, desires, expectations, conditions, context, and intentions of various customer groups. This understanding informs audience segmentation and guides the prioritization of key segments. This customer analysis should be used proactively to benchmark your program's ability to meet customer needs—both in the present and the future.

The Environment. *Proactively shape the environment to ensure that customers will have a predictable and enjoyable program experience.*

Create integrated plans that "order the paths" that customers commonly follow in the program participation process. During this process, identify possible barriers that will confuse, inhibit, discourage, or demotivate customers. Develop innovative strategies that will create a more engaging, efficient, pleasing, personable, or memorable environment within which to



interact. These multipath strategies work to ensure that customers have an intuitive, pleasing experience at every step in the journey to brand discovery.

The Brand. *Each interaction with your program is an opportunity for a positive brand experience. Use those opportunities deliberately to enjoy program success.*

What is a brand? A brand is a promise—the embodiment of all the information connected to a company, service, or product. It is more than a logo, tagline, or customer service representative. It is a combination of all of these things and is the experience a customer expects when interacting with the brand. Program managers and implementers should understand Oncor’s core values and how its energy efficiency programs support those values and Oncor’s brand mission.

Consistency is the key to brand success. Program managers and implementers should identify every possible point of contact between their programs and the target audience(s). Develop strategies to ensure that Oncor’s brand is communicated properly at each and every point of contact. Strategies may include special training for Service Providers, field staff, and third-party vendors, and employing the templates and guidelines outlined in this Toolkit.

The Platform. *Design and implement functioning and healthy operations from the perspective of your customer.*

A company or program’s operational infrastructure is the platform on which customer experience is delivered. As a result, operational efficiency has a direct impact on customer experience. Develop your program using an “outside-in” focus (on customer-centric delivery). A successful platform includes conducting an operational analysis to evaluate and improve staff, processes, and policies. Developing a platform where technology and systems allow for tracking to measure customer interaction and transaction.

The Interface. *Produce desired and pleasing outcomes during communications with customers.*

The human-to-human, human-to-technology, and human-to-environment interactions directly influence a customer’s perspective of Oncor. Develop strategies to optimize customer interactions within and across channels from the customer’s discovery to post-sale experience to produce desired and pleasing outcomes.

SECTION 2: Electronic Toolkit

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Marketing Departments, Graphic Designers, and Copywriters

Marketing professionals, graphic designers, and copywriters who will be developing marketing and outreach strategies, and designing and writing program-specific collateral materials, should use the Toolkit as a resource guide. The Toolkit provides projected timing for review and approval of materials to aid in production schedule development. Consulting the brand guidelines prior to design development will reduce the number of revisions to design and copy.

Service Providers may **NOT** co-brand with Oncor in any print or broadcast marketing materials *except* for linking to www.oncor.com/takealloadofftexas. Web linking is allowed if the Service Provider signs Oncor's Website linking policy. See Section 4 for more information. Service Providers **MAY** distribute predeveloped program marketing materials on behalf of the program to potential program participants. Implementers and Oncor program managers may provide Service Providers with program materials as appropriate.

Any mention of Oncor in Service Provider/vendor-developed marketing materials is prohibited without the express written consent of Oncor. If consent is granted, materials are subject to Oncor's review and approval process prior to production and/or release. This requirement is explicitly stated in all contracts and partnership agreements with Oncor. *See Section 4: Marketing Material Development for approved language, guidelines, and tips to help Service Providers promote Oncor's energy efficiency programs.*

SECTION 3: Brand Guidelines

Oncor's energy efficiency identity system is designed to clearly demonstrate and explain the Take A Load Off, Texas initiative, communications policy, and practices.

These guidelines provide specifications for all marketing and communications items using the Oncor/Take A Load Off, Texas logotype. Employees, designers, and vendors should apply these specifications to all products displaying Oncor's identity. Below is an outline of the brand guideline categories provided within this section.

CATEGORY	DESCRIPTION	PAGE
Call to Action	Importance of the call to action and options for promotion.	7
Grammar, Language, Signatures, Disclaimer, and Boilerplate Preferences	Guidelines for language preferences in your communication materials.	7-8
Co-branding Policy	Guidelines for when other brands can be promoted with Oncor.	9

Call to Action

It is important to include a call to action on marketing materials. Typically, the call to action invites the target audience to take an action such as visiting a Web site or calling a phone number to learn more. If your program is promoted on www.oncor.com/takealoadofftexas, please use the following call to action:

For more information, visit www.oncor.com/takealoadofftexas.

If your program is not promoted on this Website, you may promote your program-specific Web site or phone number on your communications piece.

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Grammar, Language, Signatures, Disclaimer, and Boilerplate Preferences

Grammar Style Preferences. Oncor follows Associated Press (AP) style guidelines throughout the company's marketing materials. Please write your materials according to these guidelines. Any exceptions are noted below.

- "Email" should NOT be hyphenated
- "Service Providers" should always be referenced with initial capitals
- "Website" is always one word and "Web" is always capitalized
- The word "webinar" does not take a capital "w"
- Use the "www" before any Oncor URL, e.g., www.oncor.com/takealoadofftexas
- Hyphenate the noun "hard-to-reach"
- Hyphenate the noun "weather-stripping"
- Never use the word "free" when selling your services; use low-cost or no cost
- Use a serial comma before the words "and" or "or" in a series
 - Use these guidelines in their written, verbal, and electronic communications
- Always include the acronym in the text for a specific entity even if the acronym is not referenced directly in the text. Example: Environmental Protection Agency (EPA)
- Bulleted lists
 - The first letter of the first word in a bulleted item (whether one word, a phrase, or a complete sentence) is always capitalized. Do not use semicolons or commas at the end of bulleted items. If you want to use semicolons, delete the bullets and create a sentence or paragraph.
- Capitalization of the letter "p" in program names and in reference to a specific program
 - When referring to a specific program which has already been identified, the "p" in "program" should be capitalized.
 - Example: Oncor's Solar PV Program offers incentives to qualified customers. To learn more about the Program, please visit www.oncor.com/takealoadofftexas.
- Spell out numbers one through nine; for 10 and up use Arabic numerals
- For ages and percentages, always use Arabic numerals, even for numbers less than 10
- Spell out numerals that start a sentence
- Numbers are not spelled below ten when referring to millions
 - Example: Oncor has over 2 million customers.
- The first, last, and all major words in titles and subtitles are capitalized. Exceptions are:

- o Articles (*a, an, the*)
- o Coordinating Conjunctions (*and, but, for, nor, or, so, yet*)
- o Prepositions
- o Infinitive marker *to* (unless it is used in the first or last word in the title)

Language Preferences. The following language preferences should be used by program managers and implementers throughout their written, verbal, and electronic communications.

- Always refer to Oncor *not* Oncor Electric Delivery Company in marketing materials
- Always refer to Oncor service area *not* Oncor service territory
- Never use phrases referring to saving money on utility bills
 - o Unacceptable: *“Switching from traditional incandescent lights to energy-efficient LEDs can save you money on your utility bill.”*
 - o Acceptable: *“Switching from traditional incandescent lights to energy-efficient LEDs can help you use less energy.”*
 - o Acceptable: *“Switching from traditional incandescent lights to energy-efficient LEDs can help you save money.”*
- Avoid using the word “conserve” in marketing materials
 - o Conserve can imply that one must go without or undergo a difficult behavior change

Co-branding with Oncor. Co-branding with Oncor is prohibited in most cases unless special permission is granted by Oncor communications.

Service Providers may not use the Oncor Take A Load Off, Texas logotype in any printed or broadcast marketing materials unless the materials are reviewed and approved by Oncor. Predeveloped marketing materials for each program are available through program managers. Service Providers may be required to pay for printing program collateral for their use.

For additional guidelines on how to refer to Oncor programs in field communications, see Section 5 (page 16).

Website Linking Policy for Implementers and Service Providers.

Service Providers are permitted to link their Websites to www.oncor.com/takealoadofftexas if the company agrees to the terms outlined in Oncor’s Website linking policy and add required legal language on the company’s Website. Your Oncor program manager can provide you with a copy of the Website linking policy. Service Providers must submit a signed Website linking policy to their program manager prior to linking.

SECTION 4: Marketing Material Development

Any marketing materials developed for an external audience must be reviewed and approved by Oncor. This process should be followed regardless of whether they use the templates provided in this Toolkit or customized materials. General business correspondences through email do not need to be approved by Oncor.

The time allotted for review and approval is dependent upon several factors, including the type of marketing material and how widely the materials will be distributed. The following table outlines the review and approval process. Service Providers and program managers should work together to determine how long the review and approval process will take to allow ample time for review and revisions prior to release.

Review and Approval Process. This table provides general guidelines and estimated timing for all marketing material review and approval. Service Providers should take this schedule into consideration when building their production timelines. The approval time **does not** include time to make revisions requested by Oncor. Approval time is cumulative. For example, a Level 3 review must go through Levels 1 and 2 before reaching Level 3.

Material Review Table

LEVEL	MARKETING MATERIAL	APPROVAL TIME
Level 1	Official correspondence <ul style="list-style-type: none"> • Letters • Invitations • Emails • PowerPoint presentations 	<i>5 business days</i>
Level 2	Collateral <ul style="list-style-type: none"> • Brochures • Flyers • Handouts • Door hangers 	<i>10 business days</i>
Level 3	Direct mail Marketing strategy and media plan that includes mass media Mass media advertising <ul style="list-style-type: none"> • Online media • Print ads • Radio scripts • TV concepts and scripts • Website copy and images 	<i>15 business days</i>

Spanish-language materials must be submitted to Oncor in Spanish for review and approval prior to production.

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Promotional Materials. Oncor recognizes that the marketing of services and specific utility incentives can be challenging for some Service Providers. Oncor developed collateral materials to help assist Service Providers with their marketing. These materials will:

- Allow Service Providers easy access to marketing materials that help promote their business and utility incentives.
- Generate consistent messaging with participating Service Providers.
- Build trust and credibility between Service Providers and customers.
- Create and promote program awareness with Service Providers and their employees.

Residential Service Providers

Oncor offers pre-designed marketing materials for participating residential Service Providers ordered from a professional printer. These marketing materials, HVAC door hangers and energy efficiency tips brochures, will help facilitate Service Provider outreach activities and minimize future challenges with how to represent the relationship of utility incentives with Service Providers.

Ordering Information

- EE Tip Brochures can be ordered online in quantities of 200 brochures for \$25 per order or English/Spanish combo pack 300 brochures for \$30 per order.
- HVAC door hangers can be ordered in quantities of 200 for \$25 per order. To order, visit: <https://shop.faspod.com/login/Oncor>.

Commercial Service Providers

Oncor understands that marketing is a major component for Service Providers to conduct outreach and sell products and services that qualify for incentives. To assist Service Providers with marketing, Oncor will provide collateral templates for their use. The participating Service Providers may access and print on demand, or order from a professional printer.

- **Sales/Market Segment Sheets** – will provide industry-specific information about the benefits of energy efficiency and potential incentives of Oncor’s commercial programs. The flyers will provide an understanding of approved energy efficiency measures, incentive structure for a retrofit, and other benefits for the specific target market.

Commercial Service Providers may access the downloadable marketing sales sheets by visiting <https://eepm.oncor.com/Commercial.aspx> then selecting Commercial Flyers. Commercial Service Providers may request a starter packet that includes printed copies of each flyer from Oncor’s marketing manager.

Collateral Examples



SECTION 5: Media Contact and Field Communications

Media Contact Policy. Media outreach can be an effective vehicle for promoting your program and enhancing Oncor's brand affiliation in the marketplace. Oncor's media contact policy is designed to ensure the careful management of all interaction with news media for all Oncor business and to ensure that the company speaks with one voice. Media coverage must be carefully managed for the benefit of the company and each energy efficiency program. Following is a summary of key points.

- Oncor handles or coordinates *all* media interviews. Oncor's media team is responsible for the company's reputation and has been trained to handle media relationships.
- Oncor is viewed as a good source. Reporters are eager for stories, and Oncor has a positive story to tell about energy efficiency.
- Oncor/Service Providers benefit from the collaboration. Oncor needs your help with program details.
- Although media coverage is desirable and beneficial, reporters must be treated with caution and the flow of information carefully screened.
- Service Providers may not speak directly with the media on behalf of Oncor or in reference to any Oncor program without prior consent from Oncor.

Although the media contact policy prohibits Service Providers from speaking directly with the media, the policy does encourage Service Providers to develop robust media outreach and public relations plans, identify media opportunities, and implement plans. Planned or unplanned media outreach must be coordinated through Oncor's Communications Department. Following are the steps for developing and executing a public relations plan. (See Media Outreach Protocol for a visual representation of the workflow.)

No Service Provider should engage in conversation with broadcast or print media on behalf of Oncor or in reference to Oncor programs without prior consent of Oncor. Media inquiries should be directed to Connie Piloto at Oncor [connie.piloto@oncor.com or 214-486-4415] or by calling Oncor's media hotline number, 972-791-6200. Oncor will collaborate with implementers and Service Providers on media opportunities as appropriate.

Step 1. Develop a Public Relations Plan

Program managers and Service Providers should develop a media outreach plan specific to their program needs. This plan may be part of a larger marketing and outreach plan. Plans may include topics for stories—such as the launch of a new program or partnership with a respected entity—a list of specific media targets (print and broadcast), target dates, direct outreach events, and/or public relations activities to draw attention to specific programs or new technologies.

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Step 2. Plan/Opportunity Review and Approval

The public relations plan or opportunity must be submitted to Oncor for review and approval prior to implementation. Please allow ample time for developing and coordinating planned media outreach. If unplanned media outreach opportunities arise, work with your program manager to coordinate quickly and efficiently with Oncor communications.

Step 3. Plan Implementation

Upon review and approval, program managers, Service Providers, and Oncor communications will work together to implement the plan. Any materials necessary for the implementation of the plan must undergo Oncor's review and approval process.

Media 101

Following are a few helpful tips to help Service Providers and field staff interact with the media appropriately.

If a reporter approaches you for an interview or comment:

Be polite. Gracefully decline to participate in the story at that time. Offer the reporter Oncor's media hotline number, 972-791-6200, and encourage him or her to contact Oncor's Communications Department. Oncor has a representative on duty 24/7 who will refer the call to the correct subject matter expert on the communications team or to the appropriate area manager if the media contact is outside the Dallas-Fort Worth area.

Report the contact to Connie Piloto, 214-486-4415, or another member of the communications team. Provide the reporter's name, media outlet, contact information, and deadline. You may also email Connie at connie.piloto@oncor.com.

Oncor communications or an area manager will contact the Service Provider or implementer who has been approached to discuss the opportunity and collaborate on how to best meet the reporter's deadline.

If you are presenting in a public setting and may be quoted:

All materials for public consumption will be reviewed and approved through a standardized process outlined in this Toolkit (see section 4 Materials Review table). Communications will coordinate with Energy Efficiency on scheduling and invitations to media who may be interested in covering special events or presentations. Outside Dallas-Fort Worth, area managers will be responsible for making media aware of presentations and providing public comment. If a reporter attends without an Oncor communications representative or an area manager and would like a follow-up, please refer him or her to the media hotline for handling.

Contact an Oncor media relations representative immediately to report the potential for a story.

How to handle media contacts:

Bridging is an easy-to-learn technique that can help you respond to reporters. Always answer reporters' questions, transition to a bridge phrase and key message, then request information from the reporter. Once you have answered a reporter's question with an approved key message, ask for the reporter's name, media outlet, and contact information. Refer the reporter to Oncor's media hotline.

Bridge phrases:

- It's important to understand that
- The important thing to remember here is
- In addition, let me point out that

Key Messages:

- Oncor has programs that can help make your home energy-efficient.
- I'm an independent contractor working with Oncor, and I'm pleased to represent this program.
- Oncor has several programs that can help customers save energy. More information is available at www.oncor.com/takealoadofftexas.
- Oncor energy efficiency programs can help customers save energy.
- I'm not the right person to answer that question, but I can refer you to someone with Oncor who is.

Summary

- Always refer media inquiries to Oncor.
- Let media know that the first step is to contact Oncor about interviews.
- Refer media to an Oncor media representative and provide the Oncor media hotline 972-791-6200.
- Remember Oncor is here to help you. Oncor wants to be informed about all media requests or contacts.

Oncor values your expertise and is ready to work with you to ensure the success of Oncor's energy efficiency programs.

Field Communications

Service Provider field staff must present Oncor accurately in the marketplace. Service Providers are responsible to train field staff regarding the proper way to present themselves and the programs in the field. We have provided sample language to help you communicate effectively.

How do I represent myself in the field?

Service Providers

Service Providers may promote Oncor's programs to customers by distributing program marketing materials that are developed and approved by Oncor. However, Service Providers **may not** represent themselves as Oncor employees in the field, nor should they communicate in any way that they work on behalf of Oncor. **Oncor does not endorse any Service Provider; therefore, written or verbal communication implying an endorsement is prohibited.**

Any reference to Oncor programs by Service Providers should clearly state that the Service Provider is a **participant** in Oncor's programs. Service Providers participating in Oncor's programs will be listed on www.oncor.com/takealoadofftexas. Service Providers may link their company websites to www.oncor.com/takealoadofftexas if the company signs Oncor's Web site linking policy. See Section 3, Web site Linking Policy for Service Providers. Following is sample language Service Providers can use when communicating their relationship with Oncor.

George's Energy Solutions is participating in Oncor's Residential Low-Income Program. Through this Program, we install energy efficiency upgrades to help our customers reduce energy use at home.

George's Solar Solutions is participating in Oncor's Solar PV Program. Through this Program, customers can apply for incentives for the installation of solar PV systems.

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EE Contact - Marketing and Communications

Implementers and Service Providers are to contact the EE marketing and communications program manager before implementing your marketing plan, outreach, or campaign, and for all Toolkit or marketing inquiries.

India McKnight

Marketing and Communications

Sr. Program Manager

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214.486.4829

