



Pathways to Connected Lighting – Trade Ally Network Addendum

6-C. Trade Ally Network – Outreach Plan

WHAT & WHY:

- Developing and sustaining communication with a local trade ally network (TAN) was widely cited as the most important thing a utility or energy efficiency program can do to increase savings today and ensure savings tomorrow.
- In the most traditional sense, TANs consist of the electrical contractors, distributors and manufacturer's rep. agencies who work directly with programs to implement EE lighting offers.
- The phrase Design Ally is often used when talking about lighting designers, architects, and electrical engineers who specify products for larger or new construction projects.
- For most programs, the phrase Trade Ally covers the full spectrum of program partners including trade allies, design allies, and even facility operators.
- Developing a TAN communication plan is an effective way for programs to share updates, build awareness for training events, and as a means of initiating the feedback cycle.

THE PLAY:

Utilities and EE programs that do not have a pro-active outreach plan for communicating with trade allies should prioritize the effort. A pro-active TAN outreach plan should include the following:

- Identify all trade allies who have participated in projects within the last three years and organize their information in a format that can be filtered and searched like the example provided below.
- Develop an annual communications plan which targets trade allies on regular intervals like once quarterly or every other month.
- Use the TAN database to promote relevant events like TAN workshops and efficiency program webinars.
- Provide participation benefits such as directory listing, preferred communication channels, access to financing, co-op marketing/advertising opportunities.

DOs and DON'Ts:

When developing a TAN outreach plan, programs should consider the following:



DO

- Expand the networks to include design allies, facility operators, and even trades and professionals outside just lighting.
- Include sign-in sheets at events to add new trade allies to the communication data base.
- Include a “sign-up here” link in TAN e-newsletters to help identify new trade allies.
- Be mindful of communications frequency and content brevity to prevent outreach fatigue.
- Consider leveraging an email service that is capable of:
 - Sending emails from a trusted utility or EE program email account.
 - Providing anonymity for all contacts.
 - Allowing recipients to opt-out or unsubscribe from further communications
- Include the TAN adjacent community including: customers, relevant program staff such as key account reps and the marketing team, neighboring utilities, efficiency programs and strategic partners.

RESOURCES:

When developing a trade ally network communication plan, programs should leverage the following existing trade ally networks:

- Bonneville Power Administration: Trade Ally Field Guide
- Consumers Energy (MI): Preferred Trade Allies and Distributors
- Efficiency Vermont: Efficiency Excellence Network
- Energy Trust of Oregon: Trade Ally Network
- Focus on Energy (WI): Focus on Trade Allies

6-D. Utility and Energy Efficiency Program Trade Ally Network – Events

WHAT & WHY:

- Developing the skills, knowledge, and abilities of trade allies is critical to getting connected lighting systems specified and installed properly.
- Without repeat exposure to new technologies, and best practice resource guides to support them, trade allies are likely to keep installing what they know and are comfortable with. For most trade allies, that means stand-alone controls and a code-minimum approach to project compliance.
- When programs host trade ally training events, they create a neutral platform that invites in multiple vendors and the opportunity for working professionals to participate directly in continuing education.
- Trade ally events are also a great way for programs to share updates, highlight program successes, expand the network, and to receive feedback.

Four Types of TAN Training Events

There are at least four distinct types of TAN training events a program can host. These are:

- Big Tent Events
- Workshops
- Design Focus
- Webinars.

Big Tent Events

Big Tent Events refer to TAN events that invite everyone in the network. They are all about getting as many people at the event as possible to create a critical mass that creates program excitement and validates the existence of the network.

- Starting these events as early as 8:00 AM works well for contractors schedules and helps ensure people are out of the event before lunchtime.
- Big tent events work well for addressing everyone in one large room – but often benefit from a few smaller breakout rooms and sessions which can be used to target specific topics like program guidelines or technical requirements.



- Big tent events also benefit from structured networking breaks and are a great platform for EE program staff to
 - Recognize key achievements of TAN members
 - Solicit calls for TAN feedback
 - Highlight upcoming program deadlines or changes to the program.

Workshops

TAN Workshops are designated by the use of hands-on / physical training aides to support learning objectives.

- Workshops are a great way to demonstrate concepts like *ease of use* to participants.
- Workshops are also an effective way to teach participants about not only installation practices, but set up and configuration to support concepts like Sequence of Operations.
- By featuring 2-4 systems at workshops, programs can remain brand neutral and avoid the appearance of favoring any single system. Featuring multiple systems also has the added benefit of reinforcing what all connected lighting systems have in common.
- Workshop events benefit from leveraging local rep agencies to help lead hands-on activities so multiple systems can be demonstrated. Including local rep agencies has the added benefit of providing product specific expertise and helps build local relationships.

Design Focus:

Design Focused events are designated by their focus on new construction and major renovation type projects and their targeting of lighting specifiers and controls engineers who participate regularly in the spec and design-build markets.

- These events typically focus on meeting and exceeding energy code and benefit from information that focuses on key updates to technology which can assist in specifying products.
- Examples of Owner Provided Requirements that connect project drivers to LLLC spec language may be particularly helpful for the design audience.
- Offering CEU's is often an effective tool for helping attract attendees to Design Focus events.

Webinar Format:



Webinar events are designated by their online delivery.

- TAN webinars are ideally suited for broadcasting key information about incentive programs.
- The biggest benefit of webinars is that they are lower cost and do not require logistics associated with securing a training space and providing breakfast accommodations.
- Topics ideal for webinars include: changes to incentives, program guidelines, technical requirements, and information regarding key timelines.

THE PLAY:

Programs should commit to hosting a series of annual lighting events for trade allies which include the following:

- Utilities or EE programs with large service territories should consider multiple events or a roadshow that seeks to meet trade allies closer to where they are.
- Promote hands-on learning opportunities so participants can experience the technologies and try to minimize PowerPoint as a means of adult education.
- Offer a diverse range of topics throughout the year covering technology, sales strategies, best practices, and program participation.

DOs and DON'Ts:

When planning a TAN event series, programs should consider the following:

DO

- Consider offering a range of event types including: Big Tent, Workshops, Design Focus, and Webinars to target the message and hit a wide range of participants.
- Regardless of the event type, schedule the event around *contractor time* which means an early start and early release. Half-day events that start around 8:00am and end around 12:00pm have proven an effective format.
- Provide breakfast and light refreshments to registered participants and promote this in the registration links.
- Make the events free to attend but consider including a “*valued at*” figure on the events flyer (it is important to remind participants that there is a real value associated with it).
- Use the opportunity in front of trade allies to introduce the face of EE programs and highlight how feedback and routine program communication is handled.



- Use the opportunity in front of trade allies to address some of the most commonly asked questions and provide the *why and how* as opposed to just the *what*.
- Be sure to communicate with local rep agencies and neighboring utilities and energy efficiency programs on any potential event dates to avoid scheduling conflicts.
- Consider inviting neighboring utilities and energy efficiency programs to the events and allowing them to either co-host or at a minimum share relevant program information.

DON'T

- Rely on a single event type to reach the full spectrum of trade allies.
- Feature a single brand / controls system at TAN events
- Schedule full day or multi-day TAN events
- Try to teach technical topics via the webinar platform.

RESOURCES

Programs seeking to develop and deliver a TAN workshop series should leverage the following resources:

- Bonneville Power Administration: Trade Ally Field Guide
- Fernhill Shopworks: Hands-on NLC & LLLC Demo Boards

Trade Ally Network – On-Demand Resources

WHAT & WHY:

- Utility and energy efficiency program in-person workshops and training events are a great way to build skills and create program awareness but are commonly limited to only a few events per year.
- To meet trade allies where they are at, and when they are ready, it is critical that programs invest in on-demand training and resources that help fill the gaps between in-person events.
- On-demand training can provide education on foundational concepts that support and enhance in-person workshops.

THE PLAY:

- Programs should consider leveraging on-demand training and TAN certification tools available on the market.
- Offering a program specific version of on-demand training and TAN certification accomplishes the following:
 - Provides basic lighting controls education so in-person workshops can focus on specific skills.
 - Creates stratification within the TAN ranks by establishing course certified personnel.
 - Promotes existing resources so programs can realize value from them.

DOs and DON'Ts:

When offering TAN on-demand resources, programs should consider the following:

DO

- Consider on-demand training opportunities.
- Consider making program requirements and incentives a part of the offering.
- Allow trade allies who complete the course to add their certification to business cards and sales proposals.
- Be mindful of how the procurement of a 3rd party service will integrate with your existing webpage and marketing guidelines.
- Be mindful of organizational PII guidelines when discussing data requirements related to populating a learning management system.



ON-DEMAND RESOURCES

Programs seeking to develop on-demand resources should leverage the following resources:

- Evergreen Energy Partners: NXT Level
- Lighting Controls Association: Education Express
- Bonneville Power Administration: Online Course Catalog
- Bonneville Power Administration: Trade Ally Field Guide
- NAILD: Lighting Specialist in Controls Training Program
- [WBDG: Whole Building Design Guide DoD Course on Advanced Lighting Controls](#)



Trade Ally Network – Building User Demand

WHAT & WHY:

- Building demand for connected lighting systems is just as important as building the skill sets necessary to support the supply side.
- EE programs have a unique ability to create a neutral platform that brings together facility operators, building owners, and key decision makers who all share common goals to reduce operating expenses and improve tenant comfort.
- Educating end-use customers and creating demand for NLC and LLLC systems reduces the chances a connected lighting system will be value engineered out of the project.
- Building demand for connected lighting within market segments and with key accounts is also a great way for programs to generate a large pipeline of project savings

THE PLAY:

- Programs seeking to develop their trade ally networks should consider hosting an EE Technology Trade Show for end-use commercial and industrial customers.
- The trade show should invite and leverage multiple connected lighting vendors and provide them with booth space allowing them to highlight competitive advantages.
- The trade show should include complementary C&I measures including HVAC and refrigeration.
- In addition to featuring products, the trade show should offer short educational sessions which speak directly to end-users, puts the value proposition in their terms, and connect them with resources for when they are ready to make a decision.

DOs and DON'Ts:

When trying to build user demand, programs should consider the following:

DO

- Leverage utility account executives and EE outreach staff to identify key accounts and to target specific market verticals including: schools / universities, car dealerships, healthcare, warehouses / logistics, government / military, grocery, large office, etc.
- Open the invites to all trade allies and design allies, but make sure the primary focus is on reaching end-use customers.
- Consider charging a reasonable fee from participating vendors for booth space to help offset event costs. Vendors typically have budget for such events and the opportunity to present their products to utility and EE program customers is well worth the price of admission.
- Consider highlighting previous projects to draw attention to positive success stories.
- Consider adding a list of active trade allies and their relevant location to the TAN webpage.

RESOURCES:

Utilities and efficiency programs seeking to build user demand via their Trade Ally networks should leverage the following resources:

- Utility Sponsored: [Powerful Facility Energy Conference](#)
- Ameren Illinois: [Business Symposium](#)
- Efficiency Vermont: [Best Practices Exchange](#)



Trade Ally Network – Policy and Guidelines for Risk Mitigation

WHAT & WHY:

It behooves all programs to consider what can go wrong when TAN members are interfacing with utility and efficiency program customers and offering incentives for projects. While most market actors operate in good faith – it is an unfortunate reality that issues will arise. In these instances, it is important for programs to have policies / program language in place beforehand to address such issues.

THE PLAY:

- Include language in program guidelines that hold the program harmless and clarify incentive eligibility requirements and branding guidelines. Be clear that efficiency program incentives are subject to program oversight and cannot be committed by trade allies.

DOs and DON'Ts:

When developing TAN guidelines, programs should consider the following:

DO

- Consider remedial steps for dealing with a trade ally when issues arise. This could be a one-on-one meeting to address the issue and review TAN participation guidelines. Consider what actions or activities would warrant a trade ally being banned from program participation
- Include program language specific to branding guidelines to make it clear that trade allies cannot represent themselves as agents of the utility or energy efficiency program and cannot speak on behalf of the program.
- Proactively review TAN and program branding guidelines at least annually at TAN events.