

Oregon Community Solar Program

Developing a Marketing and Acquisition Plan



This document is intended to help project managers develop a marketing and acquisition plan for a community solar project. When a project manager applies for project pre-certification, they must answer a series of questions regarding marketing and acquisition. This guidance document can help prepare thoughtful and complete answers to those questions.

Project managers must have a well-thought-out plan to conduct outreach to customers in order to be pre-certified. Through this plan, a project manager demonstrates its understanding of the challenges and sensitivities of customer marketing and outreach, and that they are equipped to undertake this task.

Project managers are encouraged to review the questions asked in the *Customer Allocation and Acquisition* section of the pre-certification application form, as well as this document, along with their marketing and outreach team and partners prior to preparing their application responses.

Identifying Outreach Partners

In the *Contractors, Affiliates, and Partners* section of the application form, project managers will be asked to identify the various organizations that they will work with as part of their project. The role and responsibilities of each listed outreach or acquisition partner should also be discussed in the narrative descriptions that are included as part of the project manager's marketing plan. This should include any entity that will be marketing to or recruiting participants, such as:

- **Customer acquisition agents**, such as a firm specializing in customer lead generation, or that is retained to conduct direct marketing and outreach.
- **Community outreach partners**, such as a local community organization that agrees to promote a project to their community or members.

Low Income Customer Recruitment

Indicating Your Preference on Low-Income Customer Recruitment

Project managers have the option of either recruiting their own low-income participants, or asking the Low-Income Facilitator (LIF) to recruit low-income participants on their behalf (at no cost to the project manager). Project managers may also collaborate with the LIF to recruit low-income participants, either by asking the LIF to recruit a portion of customers or by combining resources and collaborating directly.

Recruiting Your Own Low-Income Customers

Project managers that wish to recruit all their own low-income customers or collaborate with the LIF on some recruitment must explain why. Project managers could discuss, for example, whether and how such an approach is in line with their organizational mission or business model, and whether they would be able to leverage existing connections to low-income communities. Project managers that wish to collaborate with the LIF should also take this as an opportunity to discuss their preferences regarding that collaboration.

Preference for LIF Participant Recruitment

Project managers that prefer for the LIF to recruit low-income customers on their behalf will be asked whether they have any requirements in the participants that enroll in their project. If a project manager does not have any constraints in this area, you may simply enter “not applicable” or similar. By default, the LIF will pursue a broad outreach strategy to recruit low-income participants and enroll them across projects. If a project has unique participant or subscription size requirements, that may be taken into consideration by the LIF when enrolling low-income customers. The LIF will attempt to accommodate any requests, but this will be subject to the impact that any requirements would have on the LIF’s ability to successfully recruit low-income participants.

Small Customer Recruitment Plans

Project managers will be asked to answer a series of questions about their marketing and outreach approach for residential and small commercial customers. Project managers that choose to self-recruit low-income customers will be asked to answer similar questions for the low-income sector. If the same approach will be used for all residential customers, regardless of income, the same answers may be used in both sections.

Outreach Methods and Target Markets

Project managers should list the anticipated marketing and outreach channels that they plan to utilize in conducting marketing and outreach, and should also advise on any groups (such as specific communities or geographic areas) that will be targeted for the project. This is collected for informational purposes only to provide a sense of how different project managers will be marketing their projects, and to demonstrate that a project manager has considered the outreach needs of the project. There are no requirements regarding specific outreach channels that must be used.

Narrative Description

Project managers must provide an open-ended narrative description of their intended marketing and acquisition approach. There are no specific requirements for this narrative, but project managers are encouraged to discuss factors such as:

- What the key outreach channels for their project are expected to be, and how these channels build either on existing relationships or programs, or on successes from past programs.
- How project managers will utilize and collect leads from project partners, if applicable.
- The expected timeline for various outreach activities, and how it aligns with project construction.

Large Customer Recruitment Plan

Project managers must describe their outreach plans for large commercial, agricultural, and industrial customers, if applicable. First, project managers will be asked about any potential anchor customers. Additionally, project managers will be asked to discuss any plans they have to recruit other large customers to their project.