

RESIDENTIAL CAMPAIGN ALLY APPLICATION CENTRAL AIR CONDITIONING



WHAT IS A CAMPAIGN ALLY?

The **Campaign Ally** promotion (the “Promotion”) is an opportunity for Energy Trust of Oregon (“Energy Trust”) trade allies to participate in a joint marketing campaign with Energy Trust. The ideal candidate for participation in the Promotion will serve the technology and geographical region(s) below. If Energy Trust selects your company as a Campaign Ally Promotion participant (a “Campaign Ally”), then Energy Trust’s marketing efforts will direct customers to your company’s co-branded website where they will be prompted to call or email to request a quote for the campaign offer. Campaign Allies will receive customer leads, complete equipment installation and submit qualifying projects to Energy Trust.

Campaign Ally Promotion

- Home Energy Upgrade: Central Air Conditioning
- Campaign distribution: Oregon

Key Dates*	
Energy Trust opens campaign application	January 15, 2020
Application submission deadline	February 12, 2020
Trade allies contacted with decision	February 19, 2020
Trade allies update landing page on website with Energy Trust content	March 4, 2020
Campaign Launch	March 9, 2020
Campaign End	June 8, 2020
Feedback Period	July 2020

*All dates are subject to change

HOW TO BECOME A CAMPAIGN ALLY

Energy Trust invites trade allies to apply to participate in Energy Trust marketing campaigns as a Campaign Ally.

To become a Campaign Ally:

- **Step One:** Be enrolled as an Energy Trust Home Retrofit Trade Ally
- **Step Two:** Submit this completed application to campaignally@energytrust.org by February 12, 2020.

Energy Trust will select Campaign Allies based on application responses. Applicant is not a Campaign Ally unless and until Energy Trust provides written notice that it has approved this application and that the trade ally is now a Campaign Ally participating in the Promotion.

ABOUT THIS CAMPAIGN

For more information on scoring criteria, examples of co-branded email campaigns and paid search, important campaign guidelines, and instructions on how to submit your own marketing Campaign Ally Concept Proposal, visit <https://insider.energytrust.org/programs/home-retrofit/campaignally>

Energy Trust of Oregon is an independent nonprofit organization dedicated to helping utility customers benefit from saving energy and generating renewable power. Our services, cash incentives and energy solutions have helped participating customers of Portland General Electric, Pacific Power, NW Natural, Cascade Natural Gas, and Avista save on energy bills. Our work helps keep energy costs as low as possible, creates jobs and builds a sustainable future.

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Scoring Criteria		
Criteria	Weight	Description
Qualifications	30%	<ul style="list-style-type: none"> • Campaign Location • History of participation with Energy Trust • Participation in specialized trade ally offers • Star Rating • Financing offers/availability • History of serving diverse customer base • Multilingual support
Campaign Delivery and Management	30%	<ul style="list-style-type: none"> • Ease of updating website • Ability to share web analytics and/or call volume data • Bandwidth to handle an increase in installation volume
Customer Service	25%	<ul style="list-style-type: none"> • Ability to serve diverse customer base through various communication methods • Availability for customer inquiries and requests • Bandwidth to handle additional customer volume
Additional Marketing	10%	<ul style="list-style-type: none"> • Ability to provide additional marketing or bonus offers • Current marketing promotions
Other	5%	<ul style="list-style-type: none"> • Ability to share past customer data • Participation interest

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APPLICANT CONTACT INFORMATION

Company Name: _____

Campaign Contact name: _____

Campaign Contact phone: _____ Campaign Contact email: _____

Please provide public-facing contact information, if different than that provided above:

Company name: _____ phone: _____ email: _____

If this contact information changes, please contact campaignally@energytrust.org.

QUALIFICATIONS

1) What Energy Trust HVAC incentives does your company currently offer your customers?		
<input type="checkbox"/> Central Air Conditioners	<input type="checkbox"/> Smart thermostats	<input type="checkbox"/> Heat Pump Controls
<input type="checkbox"/> Ducted Heat Pumps	<input type="checkbox"/> Ductless Heat Pumps	<input type="checkbox"/> Gas Furnaces
<input type="checkbox"/> Gas Fireplaces	<input type="checkbox"/> Other	
2) Does your company participate in other specialized trade ally offerings?		
<input type="checkbox"/> Savings Within Reach	<input type="checkbox"/> On-Bill Repayment	<input type="checkbox"/> Instant Incentives
<input type="checkbox"/> Direct Install		
3) Does your company offer financing? <input type="checkbox"/> Yes, please describe: _____ <input type="checkbox"/> No		
4) Has your company installed central air conditioning units on Energy Trust's Qualified Products List within the past year? (Visit energytrust.org/central-air-conditioners for current list). <input type="checkbox"/> Yes <input type="checkbox"/> No		
If no, would your company be able to install units from this list during the duration of the campaign? <input type="checkbox"/> Yes <input type="checkbox"/> No		
5) As specific as you're able, list which cities/zip codes your company is able to serve. <i>Please note: Serviceable area should be within 100 miles of company's office.</i> Company zip code: _____		
If you need Energy Trust zip codes, please reach out to campaignally@energytrust.org .		
6) Describe your overall staff's size and language proficiency		
# of employees	List of languages spoken (excluding English)	
Office		
Sales		
Technicians		
7) Is your company recognized as any of the following? (Check all that apply)		
<input type="checkbox"/> Woman owned business	<input type="checkbox"/> Minority owned business	<input type="checkbox"/> Veteran owned business

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CAMPAIGN DELIVERY AND MANAGEMENT

8) How quickly can your company make changes to your website?					
<input type="checkbox"/> 24 hours		<input type="checkbox"/> Within 5 business days		<input type="checkbox"/> Within 10 business days	
				<input type="checkbox"/> Within 30 business days	
9) If your company analyzes traffic to your website, are you able and willing to give Energy Trust "Edit" access?					
				<input type="checkbox"/> Yes	
				<input type="checkbox"/> No	
* This level of access will allow us to view additional website performance data as the promotion is happening to improve campaign's success.					
10) Is your company able and willing to participate in check-ins with Energy Trust during the campaign and afterwards, if necessary?					
				<input type="checkbox"/> Yes	
				<input type="checkbox"/> No	
11) Does your company contract with a 3 rd party media company?					
				<input type="checkbox"/> Yes	
				<input type="checkbox"/> No	
12) If yes, would you be willing for your media company to work directly with Energy Trust staff on media builds and web updates?					
				<input type="checkbox"/> Yes	
				<input type="checkbox"/> No	
13) How far out does your company anticipate being booked for installs during the dates of this campaign?					
<input type="checkbox"/> 0-1 weeks		<input type="checkbox"/> 1-2 weeks		<input type="checkbox"/> 3-4 weeks	
				<input type="checkbox"/> 4+ weeks	
14) How many central air conditioning questions and bid requests does your company receive, per week, through the following communication methods?					
Phone	Email	Website form	Text message	Social media	External sites (Home Advisor, Yelp, etc.)
15) Would your company be willing to install a smart thermostat on Energy Trust's smart thermostat qualified products list with each central air conditioner installation? (Visit energytrust.org/smart-thermostats for current list).					
				<input type="checkbox"/> Yes	
				<input type="checkbox"/> No	
16) List the hours your company will be able to take customer questions and bid requests for central air conditioning.					
Monday- Friday		Saturday		Sunday	
: - :		: - :		: - :	
17) Use the space below to provide any additional information on your company's hours or communication methods, i.e. 24-hour customer support phone line, bid estimates provided using customer emailed photos, etc.					
18) Will your company be able to respond to customer questions about central air conditioning within 2 business days of receiving them?					
				<input type="checkbox"/> Yes	
				<input type="checkbox"/> No	
19) During the campaign, how many <i>additional</i> customer questions and bid requests for central air conditioning is your company able to respond to, per week, through the following communication methods?					
Phone	Email	Website form	Text message	Social media	External sites (Home Advisor, Yelp, etc.)

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20) List the hours your company will be able to install central air conditioning promoted by this campaign.		
Monday- Friday	Saturday	Sunday
: - :	: - :	: - :
21) How many central air conditioning installations does your company complete per week?		installs per week:
22) Taking current workload into consideration, how many additional central air conditioning installations is your company able to complete per week?		installs per week:
23) Does your company anticipate any staffing limitations during the duration of the campaign? i.e. employee vacations or scheduled trainings. <input type="checkbox"/> Yes <input type="checkbox"/> No		

ADDITIONAL INFORMATION

24) Are you running digital ads?	<input type="checkbox"/> Yes <input type="checkbox"/> No	Please list or describe:
25) Are you marketing via social media?	<input type="checkbox"/> Yes <input type="checkbox"/> No	Please list or describe:
26) Are you marketing via print media?	<input type="checkbox"/> Yes <input type="checkbox"/> No	Please list or describe:
27) Are you marketing via tv or radio?	<input type="checkbox"/> Yes <input type="checkbox"/> No	Please list or describe:
28) Do you do outdoor ads?	<input type="checkbox"/> Yes <input type="checkbox"/> No	Please list or describe:
Please describe other marketing efforts here:		
If able, please send any current marketing material as an attachment when submitting this application to campaignally@energytrust.org		

29) What additional bonuses will your company be willing to offer, i.e. extended warranties, pricing deals, equipment upgrades, others, etc. that will set you apart from other competing campaign ally applications? Please describe:

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PROMOTION PARTICIPATION REQUIREMENTS

Application and approval process: Applicant must fill out this application completely, truthfully, and accurately. Applicant may wish to retain a copy of this application. Applicant may withdraw their application and submit a revised application prior to the response deadline. After the response deadline, applications and Applicant-initiated changes will not be accepted unless Energy Trust, in its sole discretion, determines otherwise. Energy Trust will not be responsible for lost documentation. If Energy Trust provides written notice that it has approved this application, then (i) the applicant becomes a Campaign Ally, and (ii) this application, including all its terms and conditions, becomes a binding agreement between Campaign Ally and Energy Trust (“Agreement”).

Termination: This Agreement can be terminated at any time for any reason by either Energy Trust or Campaign Ally.

Trade ally status: Campaign Ally must be an Energy Trust Residential Home Retrofit trade ally before the Promotion launch. Applicants are encouraged to enroll as a trade ally and attend orientation webinars early to avoid being disqualified from Promotion participation. Subcontractors of Campaign Ally do not need to be trade allies.

Website landing page creation and approval: Campaign Ally must create a Promotion landing page two weeks before campaign start and be available for feedback and webpage update requests. Energy Trust must approve landing page prior to launch of the Promotion. If website is not updated by campaign launch date, then Campaign Ally will be excluded from the Promotion.

Logo, messaging and program copy use: Campaign Ally agrees to use Energy Trust-provided copy for the duration of the Promotion. Campaign Ally is permitted to use Energy Trust’s trade ally logo consistent with Energy Trust logo usage guidelines, provided that proposed materials are submitted to Energy Trust for advance review and approval. Such permission is not an assignment or grant of any right, title, or interest to our logo or related goodwill, and Energy Trust may deny or revoke logo-use at any time in its discretion.

Customer communication: Campaign Ally will respond to customer inquiries and leads regarding the Promotion within two business days. Campaign Ally will supply pricing quotes to customer within one week of scheduled site visit. If these timelines are unable to be met, then Campaign Ally must notify Energy Trust within two business days of inability to service campaign leads. Campaign Ally shall honor campaign promotions that it commits to throughout during the duration of the Promotion.

Program communication: Campaign Ally shall maintain phone and/or email communication with Energy Trust about changes in lead volume capacity and/or circumstances that prevent Campaign Ally from fulfilling all obligations to customers pursuant to this Agreement. Campaign Ally shall be available for feedback after the Promotion concludes.

Applicant Authorized Signature

By signing below, I represent to Energy Trust that (i) I am duly authorized to submit this application on behalf of the Applicant named herein; (ii) the information provided in the named Applicant’s **Form 1171A: Trade Ally Enrollment Application** agreement with Energy Trust and Applicant’s **Form 371A: Home Retrofit Addendum** agreement with Energy Trust continue to be true, accurate, and complete; (iii) the information contained in this application is true, accurate, and complete; (iv) I have read the **Form 1171A, Form 371A**, and this application in their entirety; (v) I understand and accept the terms and conditions contained in the **Form 1171A, the Form 371A**, and this application.

I further understand and accept that approval or rejection of this application is in the sole discretion of Energy Trust and that ONLY upon receipt of an application approval notice for the Promotion will Applicant be a Campaign Ally for the Promotion.

Authorized Representative: _____

Printed name: _____

Title: _____

Date: _____

SEND COMPLETED APPLICATIONS TO:

campaignally@energytrust.org Call 866.365.3526 option 4 for more information