RFP for Business Marketing Services: Respondent Questions & Answers

QUESTIONS

1. Does the $50,000 budget include production costs/expenses for things like: photography, illustration, printing, programming, etc.?

   Yes, the budget includes production costs such as sourcing creative assets (including photography, illustration, etc.). Printing, mailing and postage, list acquisition, and advertising costs are accounted for in a separate budget managed by VEIC marketing staff.

2. I understand that the budget does not include media planning and buying. Just to be clear, does "media planning and buying" include costs for media placement, as well such media outlays as list acquisition, postage, etc.?

   Yes. All media planning and buying activities (including placements, trafficking, reviewing tear sheets, etc.) are being managed outside the scope of this project.

3. How exactly will success be measured?

   Project success will be measured by timely and thorough delivery of stated project deliverables within the schedule developed in the project plan, as well as outstanding execution based on insight provided by Efficiency Vermont stakeholders, internal research, and analytics, and B2B research and B2B industry expertise provided by the partner.

4. What are your soft and hard goals?

   Marketing goals are to drive several hundred leads to customer support that can be directly tied to marketing initiatives such as direct mail; and to develop with the program team a better understanding of how leads are influencing the overall sales funnel.

   The goals of this project are 1) to drive awareness among business customers of the benefits of energy efficiency and the breadth of services we provide, and 2) to use clear and relevant calls to action to drive businesses leads to our customer support team.


   The term “project plan” refers to creation of and adherence to a schedule for project execution. The terms “action plan” and “marketing plan” refer to the same document, also referred to as an “action-oriented marketing plan.”
6. **Who are the SMB Strategy & Planning Manager and Commercial & Industrial Portfolio Program Manager?**

The SMB Strategy & Planning Manager and Commercial & Industrial Portfolio Program Manager are Efficiency Vermont staff, to be introduced at or before project kickoff meeting.

7. **By numbering protocol for the order in which the Response Requirements are to be present (page 1 of the RFP), do you mean the 8 items listed on page 4 of the RFP? (the information which needs to be included in the response).**

Yes, when responding via e-mail, all of the documents for the submittal must be presented in the same order as the 8 numbered requirements on page 4.

8. **Is the cover letter counted in the 10 page presentation or is that separate? If separate, should it be included in the PDF file or can the cover letter be formatted in the email when the RFP is sent electronically?**

If you wish to submit a cover letter, please include it within the 10 page PDF response.

9. **As part of this services requirement: “Creative concepting for new B2B messaging and design, and execution across tactics outlined in the above plan,” are you seeking the design of a new Efficiency Vermont brand, or just new collateral design/messaging?**

No, the design of a new Efficiency Vermont brand is not included in the scope of this project.

10. **Can you describe the “bundling” initiative – is it about “packaging” all of Vermont Energy’s services for the SMB market under a single brand/program name with core messaging?**

The bundling initiative is intended to better frame Efficiency Vermont’s many services for business customers under a single umbrella with core messaging and groupings of related products that could be based on customer delivery mechanism, technology, business type, and/or other key similarities.

11. **How does Vermont Energy define the SMB sector in terms of business size/revenue?**

Efficiency Vermont offers dedicated account managers for the state’s top 300 business energy users. The SMB market represents all other Vermont commercial accounts, with the exception of government institutions, municipalities, wastewater facilities, and farms & agriculture. Business size and revenue in Vermont tends to be smaller than elsewhere in the country. See the SBA Vermont profile for more information. Additional information on the demographic and psychographic profile...
of this audience will be shared during the discovery phase of this project.

12. Do you have a database of these businesses? What fields are in your database?

Yes. An appropriate level of information about verticals and past participation will be shared with the selected partner.

13. Can you clarify what you mean by “service distribution approach” mentioned on page 3?

“Service distribution approach” refers to recommendation, in partnership with VEIC Marketing, of the best channels (whether in person or otherwise) to deliver the creative generated, based on external and internal research and analytics.

14. In terms of the scope, are you looking for design concepts/templates or specifically for your partner to execute all of them across the deliverables?

We are looking for a partner to create concepts and then execute them across a variety of print- or web- specifications.

15. How do SMBs engage with EVT (or its partners) to implement energy efficiency measures? How do you want them to engage with EVT? How has Live Chat on the website performed?

SMBs engage with Efficiency Vermont through upstream programs, though our prescriptive rebate forms (e.g., lighting or HVAC), and/or through our custom projects process. Levels of contact range from simple processing of rebates to extensive technical assistance.

16. What bundling programs have you done previously? What’s worked/not worked and why?

None. In the past Efficiency Vermont has marketed individual programs to businesses, and now strives to offer a more holistic perspective that acknowledges the entire range of business services.

17. What marketing communications activity to SMBs has been successful/not successful and why?

To date, direct mail and proactive in-person outreach have been our most successful engagement strategies for generating SMB leads. Information regarding past performance will be shared with the partner selected for this project.

18. What are your business and marketing/communications KPIs? How will you determine if the program is successful?

See answers to questions 3-4.
19. **What are the top 3 services that we need SMBs to leverage more of?**

   Comprehensive lighting upgrades (involving controls and/or professional lighting design); fixture-based lighting replacements (upstream program where Efficiency Vermont buys down the cost and customers can buy fixtures and bulbs direct from their supplier); and building performance audits. Second priority: other general SMB prescriptive offerings (HVAC, compressed air, refrigeration, and commercial kitchen equipment).

20. **What vertical markets do you have more traction/engagement with and which ones do we need to develop more? What are top 5 vertical market priorities?**

   Within the SMB market (see answer to question 11 for definition), we have the most traction/engagement with groceries, convenience stores, and the hospitality industry. Strategies regarding priorities will be shared with the selected partner.

21. **Is it anticipated that the existing visual branding for Efficiency Vermont (e.g. logo, graphic elements, color palette, general look and feel) would remain unchanged for this project?**

   Efficiency Vermont’s existing visual branding (logo, look and feel) will remain unchanged.

22. **With respect to the contemplated advertising campaign(s), do you currently have an idea of:**
   a. What the duration of any such campaign might be; and/or
   b. How much of such campaign would be devoted to marketing specific program offerings versus pushing general awareness of Efficiency Vermont, as described in the RFP (item 3 under Scope of Work)?

      While we understand that the answer to these questions will be influenced by what is discovered and recommended during the course of the project, any thoughts you now have will help us estimate how many different creative concepts may be warranted, which will impact cost.

      a. We will likely kick off a targeted media campaign in late spring (3-4 months) that will reflect collateral generated through this project, and will continue to use much of that collateral through the rest of 2015 and possibly beyond.

      b. Please see answers to questions 16 and 20.

23. **Does the 10-page limit include the cover letter?**

      See answer to question 8.
RFP for Business Marketing Services: Respondent Questions & Answers

24. What trade shows and industry events does EVT currently have an event display at? What are your plans for 2015?

Efficiency Vermont engages with customers through dozens if not hundreds of public and private events each year. Please see Efficiency Vermont’s online calendar of events for more information. Of particular focus for the business market in 2015 are the Vermont Business Expo and Manufactured in Vermont events.

25. On page 3 of the RFP, you noted that you will sharing with the selected vendor the research conducted in 2014 on the SMB market. Can you describe for us the sort of information we can expect to find in that research, especially any types of details that might relate to EVT’s current or target customer base?

Much of the research on the SMB market to date is qualitative, and explores customer barriers to participation. More research is planned for 2015. A quantitative survey of small businesses was conducted in 2012. Analytics include call response, click through rates, and web traffic from SMB media campaigns.

26. Why is EVT choosing to focus on this SMB marketing effort now?

Efficiency Vermont has been working with business customers for over a decade, but much of its effort has been directed toward our largest account-managed customers and small business customers. Because SMB customers are harder to reach (extremely pressed for time and resources), a comprehensive but concise model for engagement in our programs is crucial to developing better partnership.

27. What is the driver for the February 27, 2015 completion period?

The hope is to complete this project by end of February and to use created collateral to populate a media campaign set for spring.

28. Do you expect the $50,000 include printing costs? If it does, what are your expectations for production?

See answer to question 1.

29. The proposed timeline for this project kick off and production spans several holidays in November, December, and January. What is the availability of EVT staff to meet with selected the vendor for planning sessions and to approve designs?
The project plan/workback schedule will be completed by the selected agency following a kickoff meeting, at which time any holidays/vacation time can be identified and worked around.