



**CPUC ME&O Consensus Project Landscape Analysis
Campaign Practitioner Interview Guide
MARCH 2019**

Introduction

Thank you for taking the time to speak with us today. We are working with the California Public Utilities Commission (CPUC) to help stakeholders come to a consensus about how to measure the success of Marketing, Education, and Outreach (ME&O) campaigns related to energy conservation topics, deployed across the state of California. The campaigns in question include a statewide campaign called Energy Upgrade California, as well as more localized efforts run by various electric and gas utilities and other Program Administrators. We reached out to you because you have expertise in managing, supporting, and/or evaluating [Campaign definition] campaigns. The objective of our discussion today is to learn more about your experience working on [Campaign definition] campaigns.

Talking Points [Tailor based on interviewee & use to help frame questions]

- We are particularly interested in getting your perspective on...

Campaign Definitions

Energy conservation campaigns: Campaigns intended to promote energy efficiency programs and/or engage with customers around energy efficiency topics. We will refer to these campaigns as “energy conservation campaigns” throughout this interview

Social marketing campaigns: Campaigns aimed at shifting a behavior or increasing the acceptability of a social idea or practice within target audiences. We will refer to these campaigns as “social marketing campaigns” throughout this interview.

Before we begin, would it be ok we record this discussion? It will help us minimize the note taking that we have to do and ensure that we capture all of the important details that we discuss today.

As a reminder, we would like to send you a \$100 gift card as a thank you for your time.

Roles and Responsibilities

1. To start, could you please describe your organization and your role at your organization?
2. Can you please describe your experience [managing/supporting/evaluating/researching] marketing campaigns? [Probe for experience with energy and social marketing campaigns; experience with campaigns that involve umbrella/subsidiary brands (example MLB)].
 - a. What were the key objectives of these campaign(s) [Probe: behavioral change objectives]
 - b. What role did you play in supporting these campaign(s)?
 - c. What were the key outcomes of these campaign(s)?
 - d. Which campaigns do you feel were the most successful? What were the objectives of those campaigns? What made them successful?

Now I would like to ask you some detailed questions about measuring campaign success. For these questions, we would like you to think about [describe campaign selection] from here on, we will refer to this campaign as “the campaign.”

Campaign Metrics and Effectiveness

3. How did you measure the success of the campaign?
 - a. What aspects of this approach worked well? What challenges did you face?
 - b. What aspects of this approach would you choose to improve in the future? How would you suggest improving this approach?
4. Did you use any metrics or Key Performance Indicators (KPIs) to measure the success of the campaign?
 - a. Metric Selection Approach Details
 - i. Who was involved in selecting these metrics?
 - ii. Was there a specific person or people who were most influential on the metric selection process?
 - iii. Is there anything about your metric selection approach that you would change in the future? How would you suggest changing this approach?
 - b. Metrics Details
 - i. Which metrics did you use? [PROBE: Did you use any metrics intended to measure behavior change?]
 - ii. Why did you select these metrics? [PROBE: If relevant, where did “rules of thumb come from?”]
 - iii. Did these metrics vary at all by campaign channel? If so, how did they vary?
 - iv. How frequently did you measure or track these metrics?
 - v. Which metrics did you find to be most useful for measuring campaign success? Why?
 - vi. Which metrics did you find to be least useful for measuring campaign success? Why?
5. What methodology did you use to measure the success of this campaign(s)? [PROBE: Did you use surveys, interviews, secondary or market data, modeling, or other types of methodological approaches?]
 - a. What aspects of these approaches worked well? What challenges did you face? [PROBE: Did you face any challenges with teasing out the effects of the campaign

from other factors that may influence attitudinal changes, behavior changes, or other outcomes of interest]

- b. What aspects of these approaches would you choose to improve in the future? How would you suggest improving these approaches?
6. Did you develop benchmarks, goals, or success criteria to measure progress against these metrics? [GIVE EXAMPLES: 25% awareness among target audience or 1% CTR]
 - a. Which metrics did you develop benchmarks for?
 - b. How did you determine the benchmarks? (Past performance – internally and/or compared to other similar campaigns, marketing industry standards, etc) [PROBE: IF RELEVANT, where did “rules of thumb come from?”]
 - c. What factors did you consider when developing these success criteria?
 - d. [IF APPROPRIATE] Would you be willing to share these success criteria with us?
 7. Thinking bigger picture, how do you think about the relationship between marketing objectives, activities, metrics, goals, and/or outcomes relative to the larger campaign marketing strategy or strategic marketing plan, if at all? (Please describe) [IF NEEDED: Describe the “marketing funnel”]
 - a. How did you develop this marketing plan?
 - b. Did you use any research or theories about customer behavior change inform your metric selection? (Please describe)
 - c. Why did you select this theory or research?

I would like to wrap up our interview by asking you to reflect on your overall involvement with marketing campaign(s)

Social and Energy Marketing Campaign Best Practices

8. What advice would you give to others looking to evaluate similar campaigns based on your own experience managing, supporting, or evaluating campaigns?
 - a. What advice would you give to others looking to measure the success of these campaigns?
9. Are there any aspects or characteristics of [Campaign definition] campaigns that are unique from traditional campaigns that should be considered in decisions about measuring the success of these campaigns? [IF RELEVANT, ground in examples (Toyota vs. Aliso Canyon)]
 - a. What aspect of measuring the success of [Campaign definition] campaigns have you found to be most challenging?
 - b. What aspects have you found to be the most straightforward?
10. Do you believe that the size of a campaign budget correlates with brand awareness and/or behavior change outcomes? ie – Do you think there is a general rule of thumb around the budget that a social marketing campaign needs to spend to achieve brand awareness and/or behavior change? Generally speaking, what is that threshold? [IF NEEDED: Some stakeholders in California do not feel that the statewide ME&O campaign has been allocated enough budget to move the needle on the behavior change, others disagree.] [PROBE: If relevant, where did “rules of thumb come from?”]
 - a. Do you feel that you had sufficient budget to achieve your campaign objectives? Why or why not?

Umbrella/Subsidiary Campaign Best Practices

11. [FRAMING: EUC vs localized PA efforts, MLB] Are there any aspects or characteristics of campaigns that involve multiple messengers that are unique that should be considered in decisions about measuring the success of these campaigns?
 - a. What advice would you give someone trying to manage a campaign like this?

Closing

12. Is there anything else you would like to share with us about your experience managing, supporting, or evaluating marketing campaigns?
13. Are there any foundational resources (articles, books, etc.) related to marketing campaign metric development would you recommend we take a look at?
14. Are there other individuals you look to as resources on these topics that you would recommend we speak with?

Thank you for taking the time to share your expertise with us! Those are all the questions we have today.