

# Tapping into Feelings: Upgrading Your Marketing Evaluation Paradigm

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## ABSTRACT

Confusion, frustration, or just plain indifference; utilities have often face an uphill battle when it comes to messaging and promoting energy efficiency programs. However, recent technological developments and industry advancements are paving the way for a new type of relationship to form between utilities and their customers; one that draws participation using advanced marketing techniques to create an emotional connection to energy efficiency and promotes behavior change. The challenge for evaluators will be to provide measurable attribution in the somewhat murky, and perhaps foreign, waters with topics such as brand affinity. While difficult to measure, this paper will argue that conquering these challenges will become all the more worthwhile as marketing plays a greater and greater role in energy efficiency efforts. The aim of this paper is to provide a theoretical framework which evaluators, marketing experts, implementers and utilities can work from, ultimately leading to greater understanding and integration across these disciplines. Drawing on a series of in-depth interviews, secondary research and professional experience, this paper provides tactical strategies and insights to upgrade our collective marketing evaluation paradigm.

## Introduction

In the years to come the energy industry will see a decisive shift in the role that communication and marketing plays in energy efficiency programming. While the growing significance of marketing has been percolating over a number of years, soon the change will be exponential. As a result, evaluators will need to employ new strategies and measurement instruments to keep pace with the changes. This paper will argue that:

- A) Modern energy efficiency programs, particularly those fueled by smart grid technology, will increasingly position utilities and customers to change their relationship from a *uni-directional* provider-recipient relationship to a *bi-directional* partnership.
- B) Further, in order to cultivate and sustain the levels of participation needed to help programs realize their full cost savings, communication campaigns will continue to shift from “push” marketing tactics to “pull” branding strategies. While evaluating *branding* is significantly more challenging than evaluating marketing (still a somewhat hairy proposition), the potential energy savings makes this area of study necessary for evaluators to address in a meaningful and critical manner.

We build this argument from a review of the literature, our own experience in marketing and evaluation, as well a series of five in-depth interviews with experts in marketing, implementation and utilities, each with at least 10 years in their respective fields. During these interviews we discussed the challenges, opportunities and future advancements in their field. We elicited case studies of their most successful projects and the lessons they had learned over their decades of experience. As a result, we were able to glean valuable insights from inside and outside of the industry and ground our theory in practice. We selected interviewees who have sterling reputations for industry leadership in their field. Figure 1 illustrates the overlapping but distinct areas of expertise represented by our interviewees.

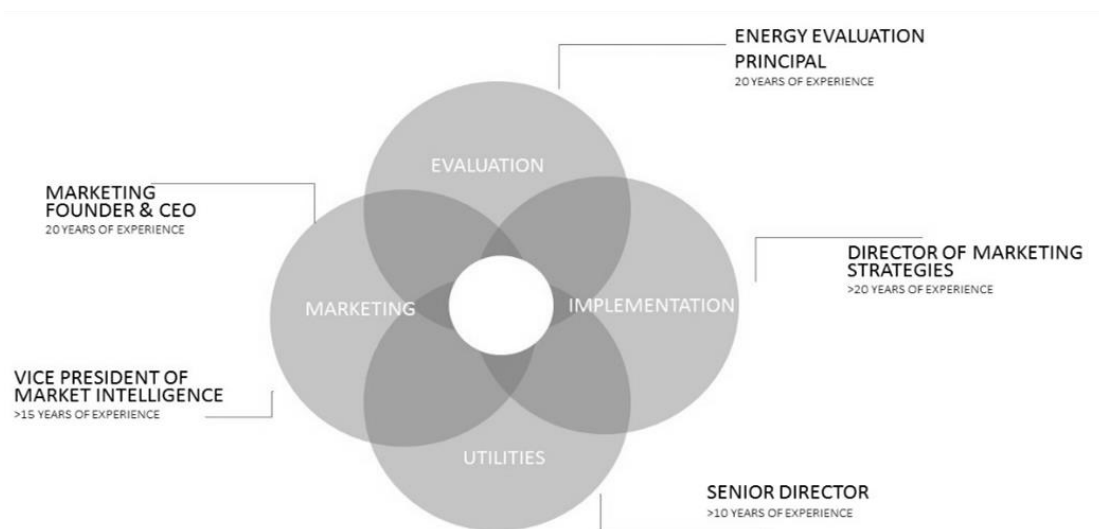


Figure 1: In-depth interviews were conducted with high level professionals across the multiple intersecting industries.

Drawing on our multilayers of data collection, we will map out the changes we see transpiring in the energy efficiency industry, exploring root causes and practical application. Finally, we provide evaluators with recommendation and strategies to develop rigorous and meaningful evaluations of bi-directional programs.

### Keywords Defined in This Paper

One result of the in-depth interviews was the observation that each industry uses language quite differently. In order to break down industry silos and craft truly integrated multi-disciplinary teams, a common language must be established. The following section includes keywords used in this paper.

**Marketing:** Marketing is an umbrella term that broadly describes a set of activities and processes for creating, communicating, delivering, and exchanging offerings that have value for customers, clients, partners, and society at large.

**Advertising:** Advertisement speaks directly to the action of placing of a message before a target audience.

**Push Vs. Pull Marketing:** The central difference between ‘push’ and ‘pull’ marketing strategies is the approach a company takes to their customer and the desired longevity of the interaction between customer and product. Push marketing is a promotional tactic design to put a product or service in front of a customer. This may include direct sales or placement of product in a retail location. Typically, these are tactics look for brief, short-term interactions. “Pull” marketing uses innovative techniques to bring the customer to them, looking to foster a long-term relationship with the customer and ongoing loyalty. These techniques may include peer-to-peer recommendations, content rich digital media and values/emotion based messaging.

**Branding:** Branding is inherently about market positioning. Branding separates one company, service or product against alternatives by demonstrating the value, trustworthiness or superiority of one over the other.

**Brand Affinity:** Brand affinity is a metric that can be used to predict behavior. Brand affinity behaviors are consistent because the customer has made an emotional connection with a product or service and will align behaviors in accordance with that product or service. One of the best examples of brand affinity is Apple—Apple customers’ behaviors are strongly predictive, based on their level of brand affinity with that company.

**Unidirectional v. Bidirectional Customer Relationship:** The directionality of a customer relationship refers to the flow of data between company and customers. In a unidirectional relationship, the company provides information to the customer. In a bidirectional relationship, both the customer and company provide information to each other, most often facilitated through smart technology channels.

**Prosumers:** Since the social media explosion, “prosumer” has come to mean a customer who has become a vocal brand advocate for a company. Prosumers, primarily through their digital presence, can significantly impact the success or failure of a company. Brand affinity is closely linked to prosumer behaviors.

**Key Performance Indicator (KPI):** KPI’s are clearly defined, observable metrics that assist in evaluating the efficacy of a given effort. KPIs can be overarching, such as cost-of-customer-acquisition, which contrasts all marketing efforts in a given time frame to desired customer behavior. KPI’s can also be highly specific. For example, KPI’s for the performance of an email marketing campaign may include multifaceted metrics such as open rates, unsubscribe rates, and forward/shares.

## Background

Customer communication strategies in energy efficiency have traditionally been viewed by both utilities and evaluators primarily as a vehicle for delivering a program vis à vis program awareness. An interviewee experienced in marketing evaluations explains,

*The primary goal of the marketing, from the program perspective, is to deliver awareness of the program itself. If there are some benefits to the brand or the utility, that’s great, but typically not measured. A standard evaluation may include general population surveys about community awareness as well as specific questions for those who participated in the program and about what platform they heard about it. But realistically, by the time the evaluation is being conducted, they may have been exposed to the marketing months ago so getting into how they felt about the messaging is impractical.*

However, as a consequence of the pinch between delivering cost-effective programs and shrinking kWh savings, utilities are now grappling with creating a bi-directional relationship (detailed later in Figure 3) with their customers. This new relationship requires a shift from minimal, short-term transactions with customers, to creating on-going partnership where a customer will come to their utility when they need information on their energy use and what actions to take to reduce it. To realize this shift, communication strategies for energy efficiency programs will increasingly become *a core ingredient* in the program itself, due to the changing dynamics between utilities and their customers. As one energy-efficiency program marketer describes:

*The energy sector doesn’t have an awareness issue. Energy has two fundamental problems. The first is perceived value. Electricity has the perceived value of less than a cup of coffee. You have this incredibly fundamental resource that if it was turned off, we would literally die. But we don’t make that connection, it has no value. So, no one cares-- unless there is a problem. And then, when there is a problem, it is the utility they think about. Which leads me to the next problem, which is brand affinity. You have, in many cases, a relationship between customers and utilities that is based on negativity. They think about the utility when there is a problem. The warm fuzzies just aren’t there. The good news is, these are problems that can be overcome with time.*

Many utilities are aware of these endemic problems and are shifting focus to behavioral programs that require engaging customers in new ways, and, consequently addressing the hurdles of perceived values and brand affinity. As they develop innovative programs, utilities will look to evaluators to deliver strong empirical data; however, evaluators are placed in a quandary of how to measure and quantify, as the interviewee so accurately dubbed, “*the warm fuzzies.*”

Difficult to quantify topics such as brand affinity have typically fallen outside of the scope of traditional program evaluations, but it is precisely the evaluators ability to quantify complex behaviors and establish attribution that will make them indispensable to utilities as they navigate the changes on the horizon. This evaluation expert explained,

*The concept of ‘evaluation’ is used so narrowly. Evaluators are researchers at their core and bring market research expertise. As “evaluators” we get involved too late. We can actually help shape strategies by keeping it focused on data. Sometimes we are put in a box, but we have rich insights we can bring to the process. It’s something we have talked about for years in the industry, but it’s still rare.*

Yet, there is evidence this is changing. The need for evaluators to help utilities quantify difficult-to-measure topics was specifically raised by a senior marketing manager for a large utility.

*One of the biggest areas of concern for me—how do I justify my marketing spends? I think we are seeing a shift towards seeing the value of marketing; however some of the barriers that we run into are in the non-widget-based reporting. At the portfolio level that’s what I’m concerned about, and it’s a tough sell.*

From this perspective, high quality evaluation is the key. “We pull in outside evaluation to gather the data points together, presenting a story, ‘Here is the value we are bringing.’”

## **Understanding the Changes Affecting Utilities and their Customers.**

Critical thought on the theoretical underpinnings of the shift that utilities, regional energy efficiency organizations, and customers are undergoing will help identify techniques and tools that evaluators can use to facilitate data-driven strategies. In addition to intervening at the market-level using market transformation approaches, technology is a driving force in the changing relationship between utilities and their customers. One particularly clear example of how technology is transforming customer/utility communication is smart grid technology (Anda and Temmen 2014). Prior to smart grid technology, utilities had no choice but to develop uni-directional connection to customers. Analog meters were read monthly and utilities would provide bills to customers with course-grained and ill-timed feedback to their customers. However, the smart grid introduced the possibility of a bi-directional, ongoing dialogue between the energy provider and the user. The interconnected system of digital controls, computerized systems and advanced equipment provides potential for the customer to remain actively engaged in the energy efficiency process. From the utilities perspective, the full benefits these investments hinge in large degree on customers remaining activated and consistent in their implementation of energy efficient behaviors (Anda and Temmen 2014). Smart-grid-informed behavioral programs include, but are not limited to:

- correctly installing and consistently using advanced metering infrastructure technology to communicate with metering technology;
- downloading applications that prompt positive behaviors (such as text message notice or other signals) and then repeatedly modifying their behaviors in response to prompts;

- modifying their habits and household schedules to contribute to peak demand reduction; and
- successfully evaluating their own non-critical energy use and systematically reducing consumption in these areas.

In traditional, non-integrated efficiency programs where customers are the recipients of energy efficiency services or products, the theory of change is straightforward and fundamentally based on *basic education* and *economic self-interest*. At its most stripped down form, illustrated in Figure 2, it might be described as:

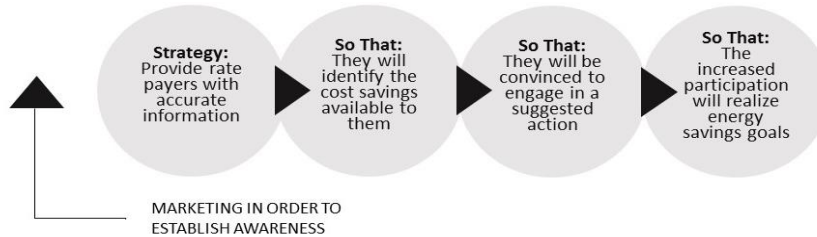


Figure 2: Uni-directional theory of change.

In this model, marketing is a “push” strategy used to facilitate the uni-directional flow of information from the utility to the customer. For example, in a straightforward rebate program design, marketing is used to inform eligible customers of the offer. While formative research prior and during a given campaign may include gathering information about the customer segments most likely to respond to the marketing, and some attention may be paid to messaging and platform based on those segments, the primary goal of the marketing effort is awareness, not hearing from the customer. After the point of rebate fulfillment, the transaction is essentially complete and the marketing effectiveness will be evaluated based on the saturation of the messaging and rebate fulfillment numbers.

In contrast, bi-directional programs flow information from utility to customer, customer to utility, typically over a longer period of time and typically requiring a higher cognitive demand of the customer. An example of an increasingly popular bi-directional program design is pairing a smart meter with a synchronized mobile application (app). In our experience with energy efficiency smart technology program designs, in order to realize the full benefits of their investment, the utility must successfully:

- bring awareness to their customer-base about the availability of the home device and the mobile app;
- optimize the process so that ordering the device and downloading the app are clear and customer-friendly;
- provide careful instructions for the customer to install the device at home;
- provide easily accessible help-desk to trouble shoot errors, and
- finally, they must consistently reengage customers so that they continue interacting with the device and responding to push notifications and energy use alerts.

If the customer is lost, confused or disengaged anywhere along this complex multi-step process, the energy savings goals may not be fully realized. Sophisticated messaging, marketing, and education must work in unison throughout the process to carry the customer from start to finish of this complex and layered effort. As the following section will demonstrate, basic education and economic self-interest are not sufficient motivators to sustain a customer over the long term; rather, their participation in this process depends entirely on *emotionally* perceived value and trust in the source of information, the cornerstones of brand affinity (Rossiter 2014).

Therefore, brand affinity becomes a key ingredient in the energy efficiency program, rather than merely a delivery system of the program. As Figure 3 illustrates, the gap between customer behaviors and energy savings must be bridged with advanced communication strategies that build a trusting partnership between utilities and customers in order to sustain the relationship and maintain engagement. These techniques establish an ongoing dialogue in terms and on channels that are meaningful to the customer; they build brand loyalty and establish the utility as a source of value in the customer's life—disrupting the status quo of passive provider-recipient.

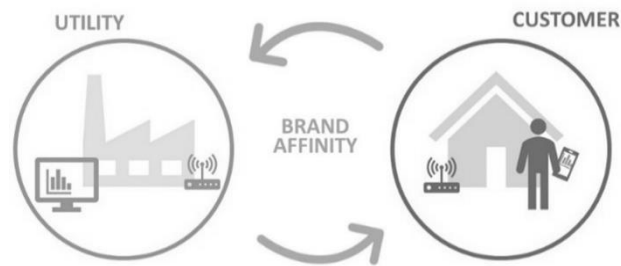


Figure 3: Bi-directional programs flow information from the customer to the utility and vice versa using smart grid technology. This relationship is crafted and sustained through the development of brand affinity.

More and more utilities are interested in using bi-directional program designs as the technology improves and evidence for cost saving potential becomes more abundant. As the utility interviewee describes it,

*From our perspective, it is the long game we need to think about. The end result of [our marketing] is to drive participation in our programs, but it is really a journey towards participation. We want to create a process that allows them to find something of value and interest to where they are now. Are short term metrics important? Yes. Do we measure them? Yes. But we argue the long term.*

The challenge for evaluators, however, is that these systems use marketing in a dramatically different way than previous programs. After all, measuring the strength of a relationship is vastly more complex than measuring awareness. Redefining frameworks and searching out new instruments and evaluation models will ensure evaluations continue to accurately crystalize program dynamics into compelling narratives to drive excellence in program design and implementation. Within this new paradigm, it would be a grave mistake to relegate marketing concepts such as “brand affinity” and “messaging” to less rigorously measured corners of an evaluation plan or, as is often the case, lacking altogether. The shifts occurring in the utility industry are not simply cosmetic- an attempt to “stay with the times”- but rather, utilities are now making a fundamentally different request of customers which demands a redefinition of their relationship.

### **Uni-directional vs. Bi-Directional Program Designs Demands Unique Evaluation Strategies**

As we have demonstrated, modern energy efficiency programs will require greater, higher complexity and longer-term demands on the customer, and this is a tough ask of customers. From a theoretical level, it is helpful at this point to step back and look carefully at *why* a customer may choose to stay involved and engaged throughout a complex interaction with a utility, such as the one described

above. Understanding the *why*, provides evaluators with the key ingredients upon which to focus their measurement lens. In practice, energy efficiency messaging often relies heavily on cost savings on a customer's bill (and, to a lesser degree, non-energy benefits). However, there is evidence to suggest that cost savings is only one reason why a customer may participate over the long haul.

Sebastian Bamberg and Guido Möser conducted a comprehensive meta-analysis exploring why individuals engage in responsible environmental behaviors (2007). Their work builds on Hines, Hungerford, and Tomera's original meta-analysis (1986/1987). Both studies emphasized that the underlying driver for positive behavior change are in fact non-rational, but rather deeply social and emotional. Self-interest and external motivation-- for example cost savings-- do play into intention but, critically, a complex network of norms, problem awareness, feelings of perceived behavioral control (PBC) better explain long-term engagement in desired behaviors.

What this literature tells us is that for brief, transactional choices, utilities can rely on the external motivation of cost savings, but for long-term engagement, utilities must tap into the non-rational, emotional factors that contribute to behavior change (Deci and Ryan 1986; Sweeney, et al. 2014; Valta 2013). Indeed, some studies have found that an overreliance on external motivation (such as cost savings) can foment defiance and resentment in customers over the long term (Moller, Ryan and Deci 2006). These empirical observations are strongly reflected in an interview with a marketing expert. Speaking to more traditional energy efficiency messaging he notes,

*Utilities need to rethink their current strategy because, right now, they are contributing to the devaluing of energy on the part of their customers...the whole branding is 'saving money' and every once in a while, 'save the environment'. They are feeding the cycle about money and it isn't going to work. The utilities are missing the 'value'. The message is never about the value of energy. Right now the strategy is all 'intellectually-based' marketing. Where is the emotion? Where is the value? We are human beings; we make decision based on emotions.*

The driving forces behind bi-directional relationships are value and trust. The utility must connect with the values of their customers and the customer must trust the utility's' problem definition or social norm proposition and accept the behavioral control that is being suggested. The theory of change in this new paradigm becomes as illustrated in the below figure:



Figure 4: Bi-directional theory of change model

In order to keep customers seeking out energy efficient solutions and maintaining the level of behavior change necessary to realize energy savings, utility customers must come to associate their utility with both value-added and positive customer experiences. Substantial research outside of the energy industry has established that effective branding plays a mediating role in sustaining ongoing interactions between companies and customers (Veloutsou 2015; Albert, Merunka and Valette-Florence 2013).

## Branding vs. Marketing

In response to technological advancements, particularly in social media, industries have been experiencing a shift in the relationship between customers and companies. The gold standard, explained one marketing expert, is to “make your product or service something people want to tell their friends about.” When customers have high brand affinity they will seek out information from companies, rather than passively receive, and promote the company within their networks voluntarily (Aaker 2014).

The need to “pull” customers rather than “push” messaging onto them is that in the digital era people are inundated with marketing messages and have become deaf to them. One marketing expert noted, “The challenge for any industry is attention...we see that consumers are prioritizing their control over their attention. They want to engage with goods and services that don’t tax them cognitively and brands that bring them something useful in the marketing itself.”

Essential to providing that experience, she continued, is an emotional connection, “the most successful companies make their brand human and even fun.” This is the key difference between marketing and branding. In Figure 5, adapted from Marty Neumer (2007), illustrates the differences between marketing and advertisement (which are “push” strategies) and branding (which is a “pull” strategy).



Figure 5: Adapted from Marty Neumer, Zag, 2007, Liquid Agency

Or, otherwise stated, branding is “far more than a name and logo, it is an organization's promise to a customer to deliver what a brand stands for ... in terms of functional benefits but also emotional, self-expressive, and social benefits” (Aaker 2014, 1). Marketing generates consumers, whereas branding develops proactive consumers or “prosumers.” At a high level, creating “prosumers” involves truly listening to your customer, creating an experience that meets their needs on platforms that fit naturally into their daily life, and then sustaining the relationship through feedback channels. Customers identify a products’ consistency, through the services and through visual and messaging cues, and trust is developed. As one marketing expert reflects, “Give a person a message and they’ll listen for a moment; give them wonderful experiences and they’ll embrace you for a lifetime.” Researchers who focus on “prosumers” have identified the distinct process by which this transformation is successfully initiated and sustained in programs that have integrated technology. The following model, Figure 6, has been adapted and expanded from a social marketing model developed by Anda and Temmen (2014).



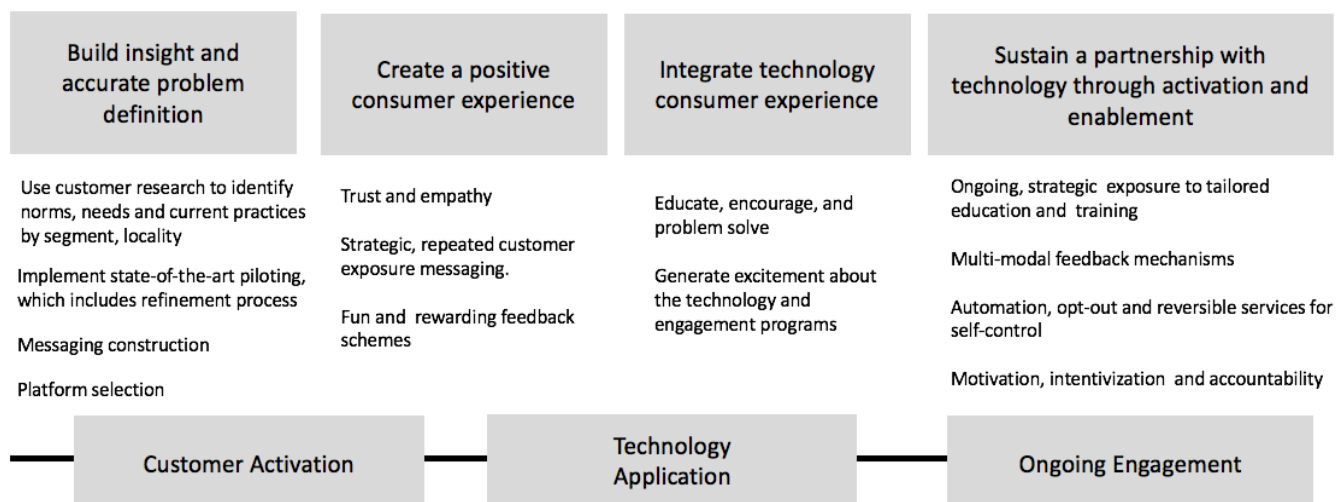


Figure 6: “Prosumer” development process adapted from Anda and Temmen (2014)

Defining the key ingredients to creating a brand affinity that leads to behavior change, such as the ones in this model, can help evaluators “ask the right questions” within their evaluation. The second step is to quantify the responses into something that can speak to stakeholders in a language to which accustomed. The evaluator interviewed explained the need for rigor, stating,

*Experimental or quasi-experimental design is going to be very important in the early days of creating standardized practices for measuring [brand affinity] efforts in the energy efficiency industry. Effectiveness needs quantitative data. The qualitative can be very helpful, but that quantitative piece needs to be established if it’s going to fit into our industry.*

In the following section, we will provide recommendations for developing a rigorous evaluation strategy for brand affinity and relational or bi-directional program designs.

### Evaluating the New Paradigm: Case Studies & Recommendations

As mentioned, evaluating branding presents some challenges, particularly in an industry that has such rigorously established evaluation methods and standards. An evaluation interviewee described her prior experience evaluating the branding efforts of a large utility. While the lack of empirical support in one case could have multiple explanations, this experience did lead this evaluator to some key observations about evaluating branding. She notes, in particular the importance of setting up a baseline and planning the evaluation while the marketing effort is being designed.

*The utility made a big effort to brand several of their energy efficiency programs. They developed consistent messaging and look and feel. As evaluators, they asked us to find out if their branding efforts increased effectiveness of their programs. But, at that time, we were not able to demonstrate effectiveness. We did not see a change in behaviors that we could directly attribute to the branding effort. But this was really a result of being brought in too late. Before any marketing action was taken, we needed to understand what we were starting with and design the evaluation for the beginning. You have to*

*think about the timing and plan around that—how many times do people need to see a new marketing materials to have it connect to their behaviors?*

It is not that energy efficiency branding and marketing is not evaluated, or not evaluated rigorously, but rather that branding and marketing evaluations use a different evaluation language, and, at times, use different tools to assess the effectiveness of marketing campaigns. We are now, however, at a point in energy efficiency program implementation, where marketing is becoming a key component of program participation and program design. And this shift will require evaluators, marketers, implementers, utilities, and utility oversight staff to work together to create an integrated marketing and evaluation team before marketing campaigns are fully designed. This team will then need to shift evaluations from sporadic after-the-fact evaluations into continuous near-time evaluations, designing evaluation timelines to assess components of marketing efforts. Finally, to facilitate a cohesive marketing and evaluation team, evaluators, marketers, and utilities will need to create a common language and understanding of evaluation methods.

The following examples provide evidence that this approach can lead to positive, and quantifiable, results for both branding and marketing, and for utility programs.



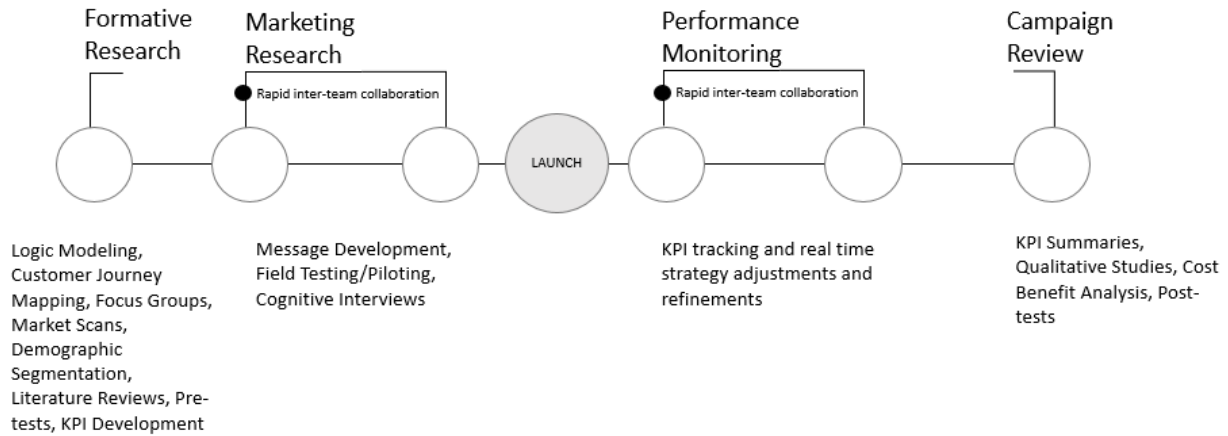
For a midstream consumer electronics program, prior evaluations found evidence suggesting that providing cohesive branding and marketing campaign, including in-store television wall advertisements and sales associate training, increased sales of qualified products. These findings, while providing some indication of an effective strategy, were not sufficient to provide specific estimates of program savings attributable directly to the branding and marketing strategy. Subsequently, evaluators, program and implementation staff, and marketers worked together to design an in-field experiment to assess whether sales of qualified models were directly attributable to in-store marketing activities. Using an evaluation plan, the whole team designed an experiment that directly tested whether TV wall advertisements and sales associate training increased sales of targeted TV models. This partnership between evaluators and program-side staff allowed evaluators to quantify the effectiveness of both sales associate training and branding using video walls (increasing sales by 3.5% and 3.4% respectively). When combined, sales associate training and branding video walls increased sales of qualified TVs by 4.6%.



Currently underway, a research project in California set out to identify specific marketing frames that could be effective in increasing energy efficiency program participation for Latino households. The project created a partnership of evaluation experts, implementers, and utility and city program staff. Findings from this research have led to some interesting insights on Latino engagement with energy efficiency programs. The mix of qualitative focus groups and literature review, and experimental test and re-test research design provided some interesting results. Latinos are a diverse group of electricity customers, and researchers found that the degree of acculturation more accurately predicts whether multi-generational and ecological frames resonate with Latinos than whether customers identify with their Hispanic heritage.

The case studies we describe are unique because they show how integrated teams of implementers and evaluators can create dynamic research studies to improve program design. These these examples, coupled with our literature review and interviews, suggest that integrated, developmental evaluations can build quantifiable foundations for relationship-centered program designs.

## RESEARCH LEVEL



## ACTIVITIES

*Figure 7: Integrated developmental evaluation model*

Figure 7 below outlines an integrated, multidisciplinary collaborative model for generating high quality research on a communication effort. In this model, evaluators contribute at various research levels, informing the process with empirical support throughout and work closely with marketing teams to establish baselines, deliver program feedback and suggest mid-campaign adjustments.

To summarize, the following three recommendations will assist in creating and implementing an integrated developmental evaluation model.

### FORM AN INTERDISCIPLINARY TEAM.

- Include evaluators with deep understanding of the energy industry, marketers with private sector experience, and utility and implementation staff who know of both programmatic and marketing goals.
- Evaluators need to place themselves in the role of a researcher, not evaluator. To do this effectively, evaluators will need to step out of their third-party role and engage with implementers and program designers to identify what research questions can help program designers meet their goals. In essence, evaluators must rethink their role as distant appraisers but as integrated researchers that can use their knowledge of research design and analysis to guide design.

### CREATE AN IMPLEMENTATION PLAN THAT INVOLVES KEY EVALUATION POINTS, RESEARCH QUESTIONS, METRICS, AND KPIS.

- Research components could include identification of KPIs, customer journey mapping, logic modeling, baseline measurements for KPIs.
- Use customer journey and logic maps, show how marketing leads to program participation (develop new metrics that can be acceptable and useful for program staff, not just marketing staff).

### ONGOING MONITORING OF INTEGRATION OF EVALUATION INTO CAMPAIGNS

- Use the plan to integrate evaluative techniques into the marketing campaigns.

- Build and advocate for evaluation duration periods to adhere to best practices in marketing and behavior change (for example gather information on the level of saturation or exposure must take place for messaging to be effective). The most impactful findings will occur over the long-term, not necessarily fit neatly into quarterly reporting structures.

## Summary

Here we have laid out a case that energy efficiency programs of the future will become increasingly relationship-centered. The nature of the emerging bi-directional relationship between utilities and customers introduces challenges for evaluators—specifically, capturing quantifiable attribution from notoriously ephemeral drivers. We have argued that dismissing these drivers—for example feelings, values and affinity— simply because they are challenging to measure will inhibit the industry from tapping into a wealth of energy savings potential. Fundamentally, the shift must come from the evaluation paradigm. As one evaluator notes “too often there is a misperception that evaluation is strictly after-the-fact bean counting. Of course it’s not, but the perception exists.” Instead, the evaluation community must embrace their mantel as dynamic and embedded researchers, in partnership with program developers and marketing teams. Evaluators can leverage their vast knowledge and skill set to help implementers and utilities design dynamic programs that connect to customers in real-time and in ways that create value for them. The perception that participating in multiple levels of research throughout the process will somehow delegitimize the rigor or impartiality of evaluations does not hold up to scrutiny. Embedded and developmental evaluations are a standard practice in every field that deals in human behavior change (see Patton 2008). As the industry becomes more relationship-centered and bi-directional, so must evaluation strategies.

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