encentivenergy

The Ultimate Guide to Marketing Utility Rebates

2022

OVERVIEW OF CONTENTS

IN THIS GUIDE YOU'LL LEARN

For Your Sales and Marketing Teams
How to utilize utility rebates

Marketing ideas including news articles, email marketing, and social media

For Your Sales Channels (Distributors, Contractors, etc.)
Explanation of the different types of rebate programs

Various ways that programs can differ in their requirements

How to navigate the utility rebate application process

Why you should include rebate estimates in your quotes/proposals

The focus in this guide is on commercial and industrial downstream programs

WHO WE ARE

ENCENTIV ENERGY IS ON A MISSION

Encentiv Energy is making the world more energy-efficient by empowering the industries that build and sell energy efficiency solutions with technology, intelligence, and funding.

We're the leading source of technology and intelligence that **unlocks billions of dollars a year of incentives.** We strive to ensure that the energy savings generated by the installation of these products are tracked and reported so it can have a **transformational and permanent impact on the environment.**

HOW YOU CAN USE UTILITY REBATES

Create a multi-channel marketing campaign
Including rebates in email marketing when you're trying to sell overstock products, high margin products, or if launching a new product can increase clickthrough rates and conversions. Including a blog post, sales flyers, social media posts, and direct mail has a big impact on keeping you top of mind and getting buyers warmed up to make a purchase.

Include rebates and energy savings in your proposals / quotes you send to clients
Adding rebates can help offset project costs and get your client to say 'yes' faster. They will see the ROI in upgrading to more energy efficient equipment by the energy savings and the value you provided by including rebates in their quote.

Target locations where rebates are the highest for a specified product
Send product focused emails that are segmented by geography listing these rebates.

UTILIZING REBATES IN YOUR MARKETING STRATEGY

Effective content marketing programs focus on creating, distributing, and amplifying content via digital and offline channels, driving audience awareness and engagement to accelerate the achieving of business goals.

NEWS ARTICLE IDEAS

Writing news articles is an important part of your marketing strategy, but coming up with topics can be difficult. Don't sweat it, use these ideas when you're stuck!

Save Money and Be More Efficient. Why You Shouldn't Wait to Upgrade Your LED Lighting
(audience: end users)

Utility Rebates: A Powerful Idea to Get Your Customers to Say 'YES!' faster
(audience: distributors and contractors)

[Number] Ways to Save Money in your [Building/Hospital/Facility/School/Parking Lot] Include utility rebates as an economical way to upgrade to get energy savings
(audience: end users)

Advantages of Including Utility Rebate Estimates in Your Quotes/Proposals
Long term energy bill savings; environmental impact; offsetting project costs; reduce demand on the grid – less power plants will have to be built; payback time may be shorter than you think
(audience: distributors/agents and end users)

EMAIL MARKETING

Create, personalize, and boost email open and clickthrough rates with information about rebates

- Get more out of your email campaigns including opens and links clicked when you personalize each email

- Use contact stages, geography, or any information you use to segment your list of contacts to send emails with relevant subject lines, content, customized links, and more!

- Each email is a real person, keep this in mind when writing copy for email campaigns

- Remember to keep an eye on reporting and engagement and make updates to templates, copy and subject lines as needed to optimize

PRODUCT FOCUSED EMAILS SEGMENTED BY GEOGRAPHY

Subject Line Examples:

Big rebate for *[Product Category]* in [City/Location]

Big rebates for *[Product Category]* in [City/Location]

Rebatable products in [City/Location] right now

Body Copy Example:

UP TO A $000* REBATE ON THE [Product Name] AVAILABLE IN YOUR AREA NOW!

Use [Company Name]'s [what you're calling the widget] to quickly and easily add rebate estimates to your quotes/proposals. Using rebates to help offset project costs will get your clients to say 'yes' faster!

[INCLUDE PRODUCT IMAGE(S) AND PRODUCT DETAIL(S) HERE]

Just select your utility to see the rebates!

CTA Button Copy: See the rebate(s) now →

SOCIAL MEDIA CAMPAIGN IDEAS

Showcase happy customers

Make sure your posts include calls to action (remember on LinkedIn to post links in the comments)

Get more engagement with polls or contests

Publish behind-the-scenes content (new product launch, how a product is made)

Show faces behind your company and highlight company milestones

Create and share website content (including news articles) on LinkedIn

Post articles and statistics about the lighting industry or energy efficiency on LinkedIn

Provide educational content to your audience: ebooks, white papers, case studies, state of the "X" from your perspective

BUILD YOUR REBATE TOOLBOX

CATALOG WIDGET

Increase awareness of your utility-qualified products with your customers, distributors, and sales teams

PRODUCT AWARENESS

The fastest way to see the highest utility rebates in North America for your product SKUs that are in the planning, design, or growth stages

PAYBACK WIDGET

Energy savings, ROI, rebate estimates, project details, environmental impact, and more at the touch of a button

"

The [Catalog Widget] and [Payback Widget] have proven to be extremely valuable sales tools in promoting [our] energy-efficient products [and] offers a service that many of our customers never knew existed and allows us to get that edge up over competitors.
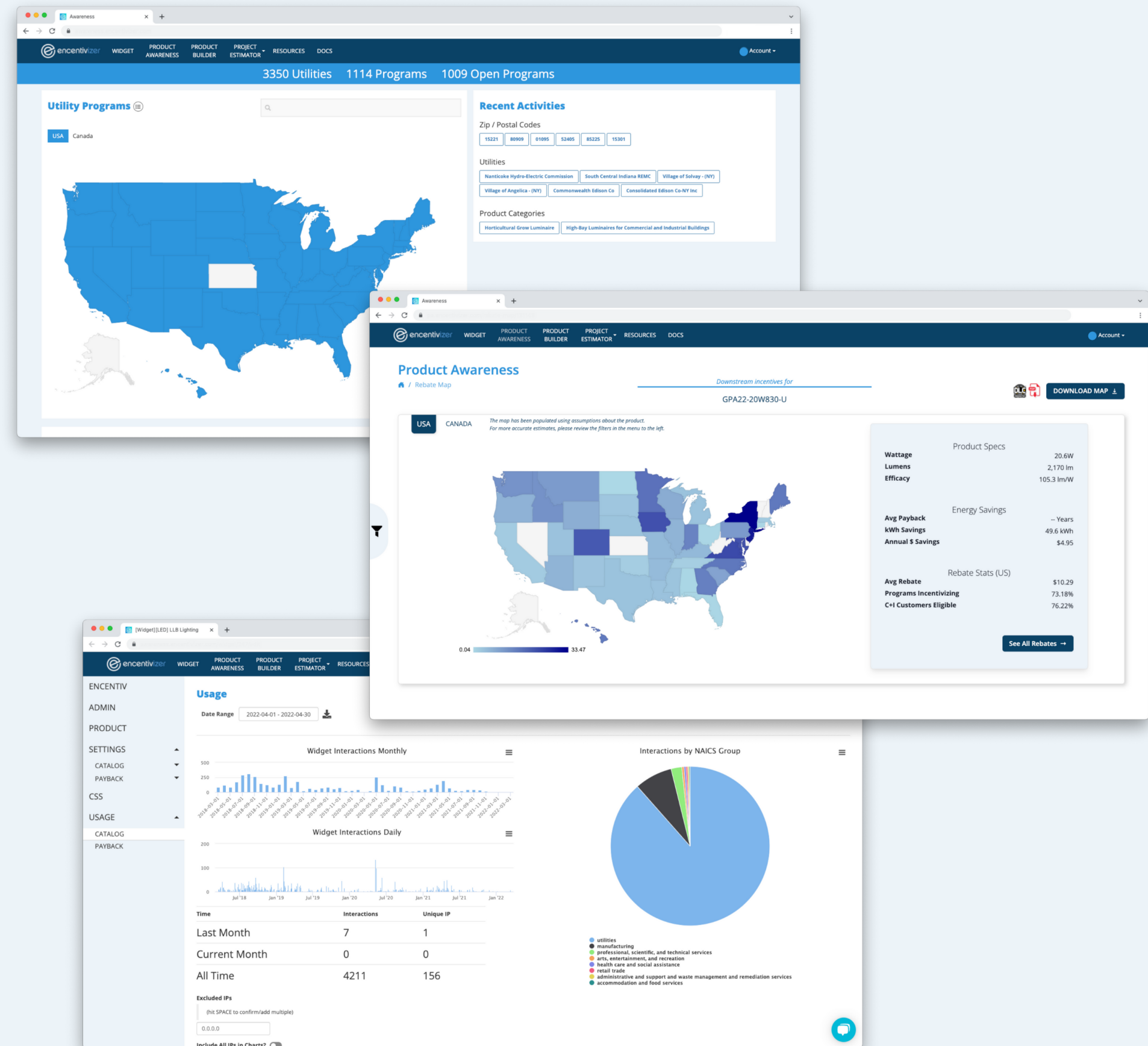

UTILITY SOLUTIONS COORDINATOR, LIGHTING MANUFACTURER

REIMAGINE THE UTILITY REBATE PROCESS FROM START TO FINISH.

The utility incentive process becomes a lot simpler when qualified products and utility program data are connected all in one place.

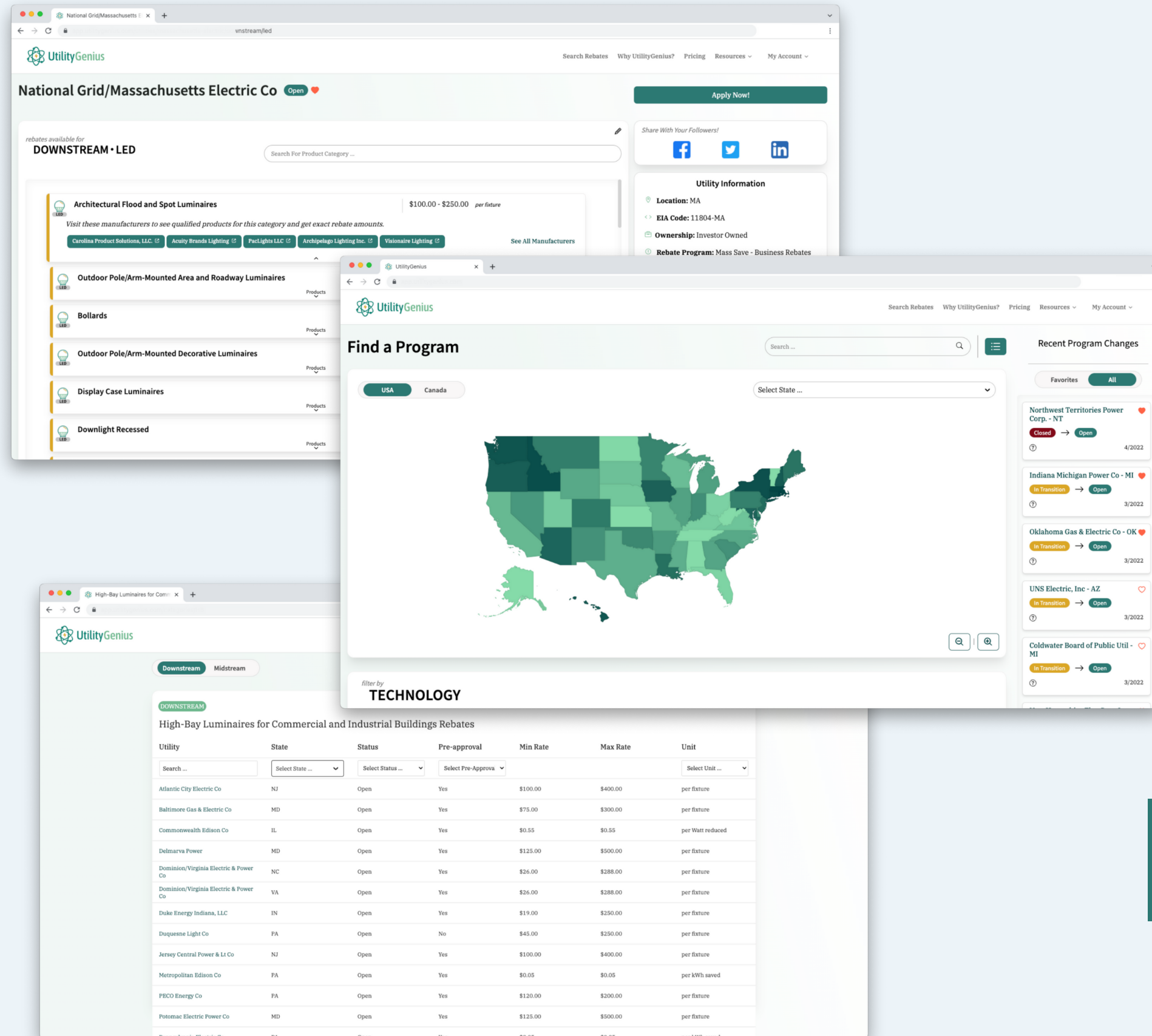**Learn More**

Get a Demo

BECOME A REBATE GENIUS WITH UTILITYGENIUS.

With UtilityGenius you can instantly get rebate estimates and utility program information for every utility in North America in three clicks or less

Search Rebates

Create Free Account

THE DIFFERENCE.

UTILITY REBATE PROGRAMS

FOR YOUR SALES CHANNELS (DISTRIBUTORS, CONTRACTORS, ETC.)

UTILITY PROGRAMS
OVERVIEW

Efficiency programs are delivered by large and small utilities and third-party implementers in most of North America that help make energy efficiency a more affordable option. These programs are used to help overcome barriers so that program spending is not only used to acquire demand-side resources, but also to accelerate energy-efficient purchases by consumers and businesses.

In general, utility programs vary based on who receives the incentive. Upstream programs pay the incentive to manufacturers. Midstream programs pay the incentive to distributors. Downstream programs pay the incentive to customers.

TYPES OF UTILITY PROGRAMS

1. DOWNSTREAM

Downstream programs pay the incentive to customers. Customers must apply for incentives and receive incentives after purchasing efficient equipment. Utility programs vary on how they implement both prescriptive and custom incentives.

2. MIDSTREAM

Midstream programs pay the incentive to distributors. Work with a qualifying distributor to receive a discount at the point-of-purchase.

3. UPSTREAM

Upstream programs pay the incentive to manufacturers.

DOWNSTREAM

Downstream programs pay the incentive to customers. Customers must apply for incentives and receive incentives after purchasing efficient equipment. Utility programs vary on how they implement both prescriptive and custom incentives.

Prescriptive
Prescriptive programs provide a simplified calculations and application process. Incentive rates tend to be fixed per qualifying energy efficient equipment.

Custom
The calculations and application process is more complicated for custom programs. Utility programs vary widely on what custom programs cover. Typically incentives are based on energy savings in the first year of operation for energy efficient equipment.

PRE-APPROVAL EXPLAINED

Pre-approval is a requirement set by the utility program where the customer or service provider must apply for and receive approval on their project prior to certain project milestones.

The utility program's intention is to confirm the project's eligibility, evaluate rebate metrics, and establish the potential rebate amount. For some utilities, pre-approval allows the service provider to reserve funding until the project is complete.

Keep pre-approval in mind when planning a project rollout. It will take additional time for the program to review the project details and perform a site inspection, if required. Planning for a utility's approval timeline will reduce the likelihood of project delays.

3 Ways Utilities Can Require Pre-Approval

1

PRE-APPROVAL BEFORE PURCHASE

2

PRE-APPROVAL BEFORE INSTALLATION

3

NO PRE-APPROVAL REQUIREMENT

1

Pre-Approval Before Purchase

A pre-approval application must be submitted prior to purchasing any products that would potentially receive a rebate. This requires confirmation of the products you want to purchase and their eligibility. Changes to the proposed products later in the process could impact whether or not you get the full pre-approved amount or even if the project still qualifies for rebates.

2

Pre-Approval Before Installation

A pre-approval application must be submitted after the equipment purchase but prior to installation. Although you can purchase the equipment prior to submitting, installing the equipment before the pre-approval process is complete could disqualify the project.

No Pre-Approval Requirement

The utility has no pre-approval requirement. Pay close attention to the program rules and the details for submitting the rebate application after the installation is complete.

UTILITY REBATE PROGRAMS ARE COMPLICATED.

Here are some things to keep in mind!

PAPERWORK

REQUIREMENTS

PAPERWORK

W9 AND PAYEE

Paperwork and requirements for third party participation vary by program. Establish early on who will submit the application and receive the rebate payment, whether the account holder or a third party. A W9 form is typically required from the payee, and additional paperwork may be necessary to assign the payment to a third party. A letter of authorization may be required if a third party will be working on behalf of a customer.

PAPERWORK
PRODUCT QUALIFICATION

Only products that meet program efficiency guidelines are eligible for rebates. Product qualification varies by program and type of technology: LED (DLC®), HVAC (AHRI Certificate), EV Charging, Solar, and more.

DESIGNLIGHTS CONSORTIUM®

The DLC® Qualified Product Listing has high-quality, energy-efficient lighting products that qualify for rebates in utility and energy efficiency programs.

ENERGY STAR®

ENERGY STAR® is the government-backed symbol for energy efficiency, providing simple, credible, and unbiased information that businesses rely on to make well-informed decisions.

THIRD-PARTY

Other third-party verification could be required depending on the technology you're applying for a rebate.

PAPERWORK

INVOICES AND PROOF-OF-PURCHASE

Along with the rebate application most utility programs require an invoice and/or proof-of-purchase to be submitted.

Even though invoices and proof-of-purchase (receipts) show detailed purchase transactions (itemized, full model numbers, quantity, price) some utilities require one or the other, or both – since these documents are not always interchangeable.

The program requirements will outline if an invoice (a request for payment) or a proof-of-purchase (receipt for payment) is needed.

PRE- AND POST-INSPECTION

The utility might require a program representative on site to conduct a pre- and post-inspection, which needs to be coordinated with the customer. Inspections allow the program to verify equipment, building type, hours of operation, and other project details. Post-inspections verify whether the approved equipment was installed.

Photo Documentation

Programs may require photo documentation of existing equipment, especially for unique or high output equipment. The wattage and hours of operation used by programs in calculations may differ from user inputs.

Recycling

Some programs require the recycling of existing equipment. A recycling certificate will typically be required to verify compliance.

WHAT IS A REBATE CAP?

Often programs will have rebate caps limiting the maximum rebate amount for an energy efficiency upgrade. Utilities use caps to limit the money paid out to a specific customer and/or for a specific project. The payment limit for a project can be a combination of: percentage of cost, payback requirement, or maximum dollar amount.
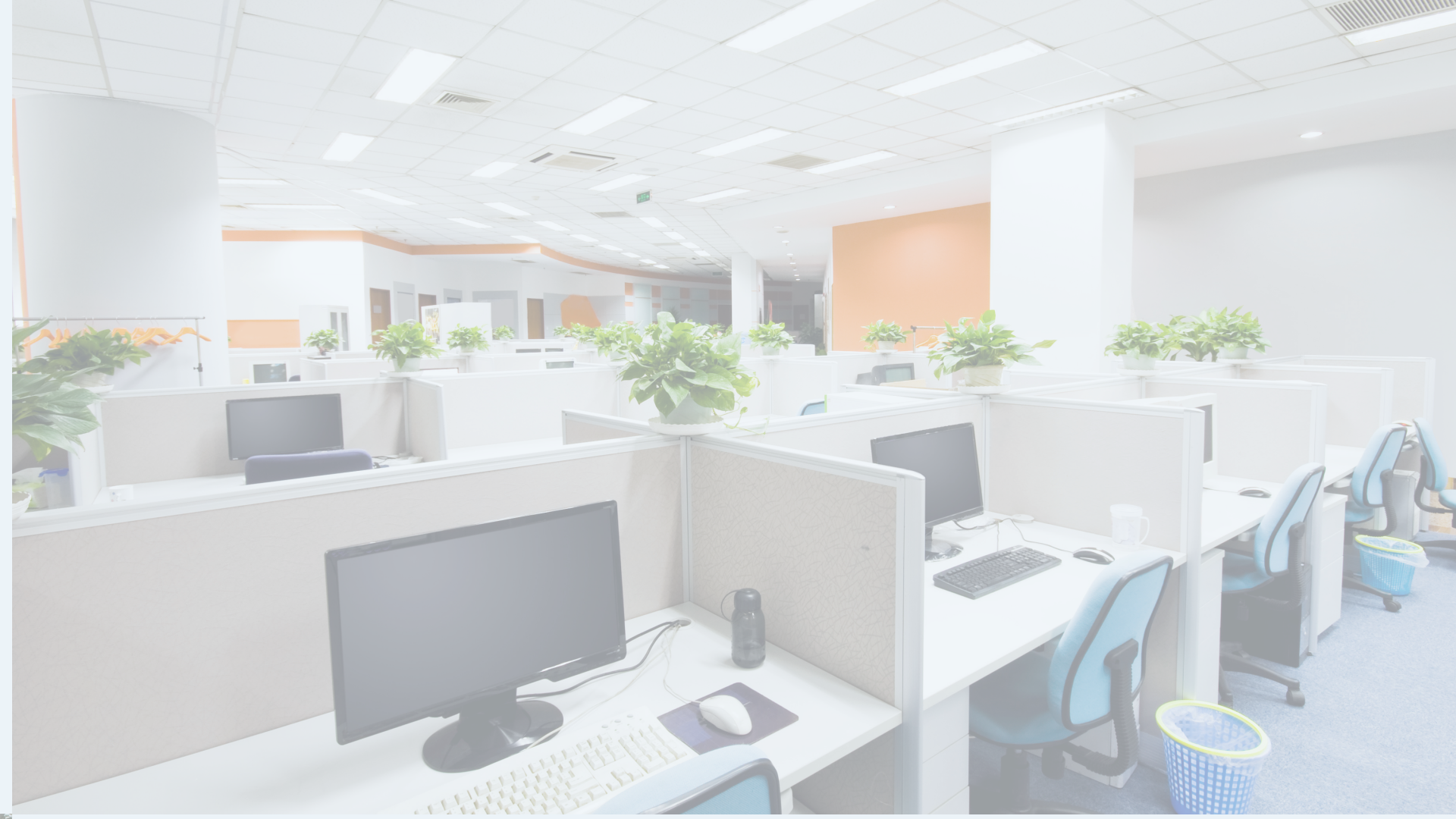
PERIOD OF TIME

The maximum rebate amount for an account or customer can be given over a period of time, such as: lifetime maximum, per multi-year period, per calendar year, or per program year.

INTERESTED IN LEARNING MORE ABOUT REBATE CAPS?

Keep reading →

WHY SHOULD YOU INCLUDE REBATES IN YOUR PROPOSALS?

Utility rebates can offset labor and product costs.

They can increase ROI and decrease the payback period.

Your customers will say 'Yes!' faster when they see a better ROI with the rebate!

EASILY ADD VALUE TO YOUR PROPOSALS WITH ENCENTIVIZER

RESEARCH

Searching for energy efficiency rebate information is frustrating, complex, and time consuming.

KEEPING UP

Programs are constantly changing, making things even more complicated.

VALUE

We can help you overcome these challenges and add value to your proposals. Encentivizer can estimate rebate amounts and provide insights into a project's eligibility.

HOW TO CREATE AN ENERGY EFFICIENCY PROPOSAL THAT CLOSES DEALS FASTER

Read in-depth how you can create proposals to close deals faster using a checklist.

See the checklist →

HAVE QUESTIONS?
WE'RE STANDING BY READY TO HELP YOU!

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