

## Attachment E- Education Retail Event Guidelines and Application

Before completing your application, we encourage you to consider these items before you submit. These items are designed to help you form a clear and cohesive plan that will help ensure a successful event.

### 1. Objective

Before you hold your event, set goals for what you intend it to achieve. The more measurable your goals, the easier it will be to gauge your success. Think in terms of hard numbers: number of sales gathered, leads generated, informational brochures distributed, etc.

### 2. Budget

Determining your budget is critical to your ability to successfully plan and execute your event. Knowing what you can spend will inform what types of tactics you can utilize in your promotional mix, which will ultimately impact the amount of awareness you'll be able to generate. Include NYSERDA funding as you create your budget.

### 3. Timing

Pick a date and time that doesn't conflict with additional promotions you may be running, so that you can successfully execute your event. Also, choose a date and time when you know your retail location is likely to have a high amount of traffic, so your event can be as impactful as possible.

### 4. Location

If holding your event in-store, choose area(s) of your store that will not only see heavy foot traffic, but will also be nearby to the energy-efficient products and appliances you'll be selling. This will increase the likelihood that your efforts will generate interest and sales. If holding your event at another location, try to secure a high-traffic area that will position you for success.

### 5. Theme

Create a theme around your event that will generate excitement while offering a clear description of what's happening. It can be something as simple as "Energy Efficiency Product Expo"—something simple that will indicate that a special, energy-efficiency related event is happening.

### 6. External Promotion

After your theme is chosen, consider how you'll promote your event. Consider a mix of marketing tactics that will drive traffic to your store, including but not limited to social media, flyers, radio, email invites, etc. You may also want to consider inviting high-profile guests whose presence alone will generate interest in your event (local media, politicians, etc.).

### 7. In-Event Promotion

Once you have customers in the door, how will you grab their attention? Consider signage and point-of-sale materials that are highly visible, connect to your theme, tell customers where they need to go, and clearly state what's being offered.

## **8. Staffing**

When customers arrive at your event, they're bound to have questions – and your staff should be prepared to answer them knowledgeably. Make sure your staff is properly trained with talking points that drive home the benefits of energy efficient-products, including high performance and a lower total cost of ownership.

## **9. Printed Materials**

You may be able to get the attention of some customers without getting the chance to tell them the whole story. For these cases, make sure you have printed materials on hand that provide deeper details and drive customers toward a purchase.

## **10. Day-Of Logistics**

On the day of your event, make sure you give yourself enough time and resources to execute. Allow time to set up signage, printed materials and audio visual equipment, and make sure all staff knows their roles and responsibilities.

## **11. Measurement**

Remember the objective you set before your event? Use it as a measuring stick for your event's success. Once you identify where your event was successful, try to glean as much information as possible: did leads come from an informational card? Were sales generated by conversations? Understanding where results come from is the best way to replicate their success.

Get Started: Fill out the Education Retail Event Application on page 3.



## Education Retail Event Application

Applicants must describe, in detail, the proposed retailer event. NYSERDA encourages applicants to reference the Retail Event Guideline section of the application before completing this application.

For multiple events at multiple locations, NYSERDA will only approve three (3) events at a time, or up to a total of \$30,000 for each round of PON 3125.

Objective of event for your store:
Event overview/description (include theme, message of the event, logistics):
Expected outcome and how will you measure event:
How will you staff your event?
How you promote the event externally and internally?
Once you have the customers in the door, how will you grab their attention?
Approximate attendance:
Location, date and time(s):



Indicate the high-efficiency product(s) that will be promoted:

- High-efficiency clothes washers                       HVAC
- High-efficiency refrigerators                       Heat Pump Water Heaters
- Home Energy Management Systems

Total Budget and Cost-Share Breakdown  
(partner cost breakdown and supporting documents should be submitted as a separate attachment):

Partner Cost: \_\_\_\_\_ Partner cost includes: \_\_\_\_\_

NYSERDA Cost: \_\_\_\_\_

Total Cost: \_\_\_\_\_

Name: \_\_\_\_\_ Phone Number ( ) \_\_\_\_\_

E-mail: \_\_\_\_\_ Mailing Address \_\_\_\_\_

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