

THE PROCESS FOR FUELING IMPACT MEASUREMENT

THE SITUATION

The 1973 national oil crisis brought the conversation about alternative sources of energy to the forefront. Today, renewable energy is a mainstream, low cost energy approach for reducing global carbon emissions as result of the efforts by organizations such as the National Renewable Energy Lab (NREL). NREL is the U.S. Department of Energy's (DOE) primary national research and development laboratory for renewable energy and energy efficiency. NREL works with agencies and public and private organizations domestically and abroad to support the appropriate deployment or renewable energy technologies.

Advancing wind technology and making it more commercially viable has been a key area of focus for NREL over the past 40 years. As new wind technologies become ready for commercial use, you need a pathway to go from the lab and R&D efforts to commercial deployment. These technologies are new and often involve complexity. Education is a critical part of the adoption process. "There are many entities involved in the energy industry. There is a real need for an independent organization to provide unbiased information and

resources to all parties interested in considering wind," said Ian Baring-Gould, a Technology Manager at NREL."

THE NEED

To facilitate the adoption process of new energy technologies, entities known as Regional Resource Centers (RRCs) are formed to provide needed information to those considering these new technologies. RRCs are on the front line, they have direct contact with the stakeholders. These stakeholders exist within the public and private sectors. A primary role of the RRC's is to introduce new technologies to stakeholders. The RRC's develop content, and facilitate events and meetings, to support outreach and education.

Ian and the NREL team initiated a competitive solicitation to identify organizations willing to become RRCs for wind. Fifteen (15) organizations responded and six were selected. NREL decided to use this opportunity to establish a process for how to measure more than the output of these organizations responded and six were selected. NREL decided to use this opportunity to establish a process for how to measure more than the output of these organizations. NREL wanted to be able to

measure the impact of these organizations. "Our taxes are used to fund these initiatives. We wanted a data-driven metrics approach for evaluating the impact of the RRCs on the adoption process," explained Ian.

THE DECISION

As a technology organization focused on energy, NREL is accustomed to data, measures and analytics. This is part of the day-to-day work at the lab. Measuring communication and marketing beyond counting activities and outputs wasn't part of the daily routine. "It was clear to us that although we had ideas about a data-driven metrics approach, we recognized it wasn't our area of expertise," admitted Ian. "We wanted to develop metrics beyond specific activities and stakeholder touch points." NREL had prior experience working with VisionEdge Marketing (VEM) on other efforts that leveraged VEM's data, metrics, and analytics experience. It was a natural fit for NREL to re-engage VEM for this project.

THE PROCESS

What data? What metrics? How to measure? What and how to report? NREL wanted to bring the answer to these and other questions to the kick off meeting with the RRCs. To address these questions, VEM and NREL

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designed their work together around five primary phases, the:

1. **Foundational** phase to establish logic and data chains from activities to impact; define the data and metrics, and determine how the data, metrics, and results would be captured and reported.
2. **Onboarding** phase to educate the RRCs on the chains, measures, reporting and developing their frameworks for their outreach and education plans. This was done in a collaborative working session.
3. **Implementation** phase where the RRCs implemented their plans, tracked and reported results.
4. **Evaluation** phase where the RRCs results and impact were captured and reported to the DOE.
5. **Feedback** phase to understand how the data being collected could be used internally and with the RRC's to both improve their actions and the reporting process, improving both outcomes.

"The most important element was the concept of developing what VEM calls an outcome-impact chain," emphasized Ian. "These chains served as the guide for how we would measure the initiative and what data would be required."

Based on the chains, a ladder of three primary metrics (engagement, consideration and acceptance) and how they would be measured was established. In addition to the chains and metrics, several other essential components were addressed:

- a set of rules and processes for segmenting stakeholders was developed
- the accounting rubric for measuring the value of different touchpoints
- how to calculate the overall impact

The onboarding phase incorporated these components. "This was the first time many of these people were exposed to these concepts. We wanted to help them understand the concepts and why they were important," related Ian. After the onboarding sessions, the RRCs went to work. As they implemented their plans, they knew in advance what data and metrics to collect. Throughout the implementation, the RRC's collected the data and reported against their performance targets.

THE RESULTS

The process has been in place for two years. Data and the metrics were collected at specific intervals. The process guided NREL and the team to the data and metrics needed to demonstrate the effectiveness of the initiative. Armed with the data, NREL and the RRCs have assessed and documented the impact and value of the initiative. They have been able to use the

data to determine whether the initiative should be continued and if so, what if any changes are needed. "The metrics and process enabled us to clearly articulate both the local and overall impact of the RRC initiative. We know how and what moves stakeholders from engagement through consideration and ultimately acceptance of wind as a viable renewable energy alternative," added Ian.

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Over the first two years of the efforts NREL recorded:

- 2.5 million stakeholders being provided actionable information relating to the appropriate use of wind energy, of which 115,000 were specifically identified as being key stakeholders or decision makers
- 92,220 Engagement actions, indicating active use of materials developed and provided by the RRC's
- 1,045 documented examples of information resources or stakeholders. Considering wind energy in a formal way

- 445 documented examples of documents or influential stakeholders that actively demonstrate the Acceptance of wind energy as a viable energy option for the Nation based on RRC engagement.

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“We wouldn't know the results of the initiative without this process,” acknowledged Ian. While the results are solid, the process and being able to measure and document the value of the initiatives to the industry and tax payers is extremely important.” Based on this work, NREL identified the best ways to connect with and engage stakeholders. On an energy front, “ Although no single action leads to a change on the ground regarding the use of wind energy,” Ian indicated, “through the collection of data on these interactions, NREL and their

RRC partners were much better prepared to provide solid examples of where information provided by the RRC had appreciable impact on wind energy development projects.”

PARTING ADVICE

Ian and the team recognized from the start that this would be a longer-term undertaking. He offers the following advice to anyone wanting to embark on a similar effort.

1. Start with Impact. It is relatively easy to document the value of innovation. It is much harder to document the impact of engagement efforts. It is easy to get mired down in the activities. It is much harder to stay focused on outcomes. “Have a clear keen view as to what you are trying to impact. Once we understood the outcomes we needed to affect and therefore measure, it was much easier to select activities and allocate resources.”
2. Employ a Process. This is one process. There are others. The key is to have one. “Without the outcome impact chains we would have developed programs and slapped metrics on the backside. VEM's process helped us select the right metrics at the outset and cut out the fat, allowing us to expand our impact
3. Construct Your Report Early. Working through this approach provides the pathway to what and how you will report results. “This outcome impact chains laid the foundation for what

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data we needed. It helped us create the framework for the reports,” stated Ian.

4. Keep an eye on your rear-view mirror. “One of the greatest outcomes of detailed metric tracking is that it allows you to gauge what is working and not working in real time with hard guardrails”. This knowledge allows shifting of projects and activities as soon as you identify which strategies are most effective.

ABOUT VISIONEDGE MARKETING

VisionEdge Marketing (www.visionedgemarketing.com) is a data-driven metrics-based strategic and product marketing consulting firm recognized as a trusted authority in the area of marketing performance management.

The company excels at helping companies strengthen their competitive advantage, accelerate their ability to acquire, keep, and grow profitable customers, and measure Marketing's contribution to business goals. Founded in 1999, VisionEdge Marketing is located in Austin, Texas.

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