

RISE

Retrofit information,
support & expertise

Developing a marketing and engagement plan

Toolkit

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What is the purpose of these plans?

Developing a marketing and engagement plan for a retrofit scheme is essential for several reasons. It raises awareness and educates the target audience about the benefits of retrofitting, such as energy efficiency and cost savings. This targeted outreach ensures that the right people, for example residents, are informed and engaged. Engaging stakeholders like local governments and community organisations can also enhance credibility and reach.

Additionally, a marketing plan can help optimise resources, ensuring efficient use of budget and efforts. Furthermore, a marketing plan allows for measurable results, enabling you to track progress and adjust strategies as needed.

Ultimately, effective marketing and engagement ensure that a retrofit project can grow effectively, by continuously attracting new participants and maintaining their interest. By developing a marketing and engagement plan, you can promote your work in sustainability, while achieving your targets efficiently.

The purpose of engagement:

- **Improving resident experience:** Engaging residents ensures that their needs and concerns are addressed, leading to a better overall experience during and after the retrofit process. It is crucial to put residents first and at the heart of your retrofit programme
- **Building trust and support:** Effective engagement fosters trust between residents and the project team, which is essential for gaining community support for the retrofit initiatives. This can lead to a greater level of collaboration with local communities
- **Ensuring successful implementation of works:** Residents can provide valuable insights that can help shape the scope of work to the extent of being a form of co-design, making the retrofit process more efficient and effective

The purpose of communication:

- **Transparency:** Clear and consistent communication helps keep residents informed about the project's progress, timelines and any potential disruptions. It is important in the case of disruption to keep all stakeholders of the project informed
- **Addressing concerns and questions:** Open communication and providing listening opportunities helps alleviate any fears or uncertainties residents may have about how the retrofit will impact their daily lives. This may help reduce the risk of refusals for retrofit works
- **Celebrate success:** Whilst it is important to keep residents informed about the progress of the project, and addressing any concerns, it is also important to celebrate the successes of retrofit. Ensure that residents are aware of the

benefits of retrofitting and how it has positively improved lives. This may also help to improve engagement in the retrofit opportunity you're presenting

The purpose of marketing:

- Raising awareness: Bespoke marketing efforts help raise awareness about the benefits of retrofitting, such as improved energy efficiency, cost savings and enhanced living conditions. This should also involve celebrating any success stories of local residents who have already undergone the retrofit process and are already feeling the benefits
- Encouraging participation: Effective marketing can encourage more residents to participate in the retrofit process, ensuring a higher rate of uptake

Understanding your stakeholders

During a retrofit project, it is essential to understand the differing priorities of the project's stakeholders. Stakeholders could include the project sponsors and end users, as well as community members. All play a pivotal role in the success of a retrofit project.

Alignment of goals:

- Stakeholders may have diverse objectives and priorities when considering a retrofit project
- It is therefore important to take time to understand their differing needs and expectations, so that project goals can be tailored accordingly
- This alignment helps ensure that everyone is working towards a common objective, reducing conflicts and enhancing cooperation

Effective communication:

- Effective communication is the backbone of any successful project
- Knowing your stakeholders allows you to tailor your communication strategies to meet their specific needs
- This helps ensure that the right information reaches the right people at the right time, minimising misunderstandings and fostering a collaborative environment

Risk management:

- Stakeholders can provide valuable insights into potential risks and challenges
- By engaging with them early and understanding their perspectives, project managers can identify and mitigate risks more effectively. For example,

identifying any negative resident perspectives on retrofit early, will mean having time to address these perspectives proactively and help avoid resident refusals

- This proactive approach helps in developing robust strategies to address potential issues before they escalate

Enhanced buy-in and support:

- Engaging stakeholders from the outset and addressing their concerns can significantly increase their buy-in and support for the project
- This support is crucial for smooth implementation, as it can help overcome obstacles and facilitate the achievement of project milestones

Improved decision-making:

- Stakeholders bring a wealth of diverse perspectives and expertise to the table. Their input can enhance the quality of decision-making, leading to more effective and sustainable retrofit solutions
- Consider their viewpoints so that more informed decisions can be made to benefit the project throughout its lifecycle.
- A stakeholder management matrix (figure 1) might help you decide which stakeholders to focus more attention on

Stakeholder	Ability to influence (1 -3)	Interest (1-3)	Stakeholder score (A x I)	Actions to take
Internal				
CEO	3	3	9	Engage
Customer team	1	3	3	Inform
Finance partner	2	2	4	Consult

Figure 1a indicates which internal stakeholders to focus attention on, based on their interest and ability to influence the project's outcomes. A stakeholder score of: 1-3 means they are low influence or interest and need only be kept aware of project progress; 4-6 means they are medium influence or interest and should be informed; 7-9 are high influence and interest stakeholders that should be consulted.

Stakeholder	Ability to influence (1 -3)	Interest (1-3)	Stakeholder score (A x I)	Actions to take
External				
Residents	3	3	9	Engage
MP's	1	3	3	Inform
Faith groups	2	1	2	Consult

Figure 1b indicates which external stakeholders to focus attention on, based on their interest and ability to influence the project's outcomes. A stakeholder score of: 1-3 means they are low influence or interest and need only be kept aware of project progress; 4-6 means they are medium influence or interest and should be informed; 7-9 are high influence and interest stakeholders that should be consulted.

Developing an engagement and marketing plan

When developing an engagement and marketing plan it is important to consider a variety of points in order to ensure that the targets for the engagement and marketing plan are met. These can be broken down as follows:

- What – what are you trying to achieve from the plan? Is this a piece of engagement, consulting, informing or communicating a specific message?
- Who – who is responsible within your organisation for this piece of work. Will this be internal, or an external resident liaison officer?
- Audience – who is this aimed at? What stakeholders will you be targeting with this engagement plan, will it be just residents, or perhaps more senior internal stakeholders? It is also worth thinking about how engagement should be tailored to each of these groups
- How – How will you plan to do this? What forms of engagement have you identified, and how have these been tailored to ensure maximum engagement. Figure 2 below suggests ways to engage residents:

MEDIA

Digital

TikTok, Instagram, web pages, community influencers, VR headsets, WhatsApp groups, questionnaires.

Print

Press releases, leaflets, letters, flyers, posters, questionnaires.

Face-to-face

Community events, community champions, demo homes, meet the contractor events, drop-ins, knocking on.

Figure 2 shows several forms of engagement

- When – what is the best timing for engaging with these stakeholders? It is worth noting that one of the key factors for success in a retrofit project is engaging with residents early
- Resource required – do you need specific resources to do this? For example, do you have internal capabilities for stakeholder engagement, or do you require external resources for example a dedicated resident liaison officer? It is also worth considering what the physical resource of this engagement plan will be, for example a specific software, or will you need to create resources such as leaflets
- Success criteria – how will you know this has been successful?

This information is encapsulated in figure 3:

What?	Who?	Audience ?	How?	When?	Do you need any resources?	Who can help?	How do you know its successful?
Energy efficiency assessments to start at <u>Arcacia</u> avenue.	Asset manager	Residents of <u>Arcacia</u> Avenue	Letter	3 weeks before	-Letter -Diagram of process -Logo of contractor - Image of assessor	-Comms manager	Access rates No of refusals
	Community engagement partner	Residents group	Attend group meeting	Quarterly meeting before start	Slide deck	Neighbour hood team	Access rates No of refusals
	Resident liaison partner	Residents of <u>Arcacia</u> Avenue	Neighbour hood walkabout	1 week before	No	Neighbour hood team	Access rates No of refusals

Figure 3 shows a guide to an engagement and marketing plan

Making your plans bespoke

When developing a marketing and engagement plan it is crucial to ensure that they are both bespoke and inclusive to all stakeholders. If this is not the case, then this could lead to lower levels of senior buy-in as well as resident refusals to partake in the scheme. Here are some factors to consider when developing your plan:

Tailored communication:

- Having a bespoke plan ensures that the language and messaging are appropriate for the target audience
- This may involve explaining technical details in a clear and understandable manner, using analogies, visual aids, and breaking down complex ideas into digestible parts
- Tailoring communication helps in bridging the gap between technical experts and non-technical stakeholders, fostering a better understanding of the project

Project specific considerations:

- Each retrofit project is unique in terms of its scale, scope, and geographical setting. A bespoke plan takes these factors into account, ensuring that the strategies are relevant and effective for the specific context
- This could include understanding the local climate, building type and demographics, as well as any previous works done, and potential challenges or barriers
- By considering these elements, the plan can address specific needs and opportunities, enhancing its impact

Inclusivity and representation:

- An inclusive marketing plan acknowledges and values the diversity of the target audience. It ensures that all groups, regardless of their background, feel seen and valued
- This approach not only meets ethical standards but also expands the reach and effectiveness of the marketing efforts
- Inclusive marketing can build stronger connections with the audience. Some examples to consider could include language barriers and residents' accessibility to digital resources and contact methods

In summary, making an engagement and marketing plan bespoke and inclusive ensures that it is relevant, effective, and resonates with the target audience. This approach enhances communication, addresses specific project needs, and fosters a more inclusive and supportive environment for the retrofit scheme.

