Smart Grid Marketing Communications

What Will Success Look Like?

Gailanne Barth
Director, Marketing Communications

Karen McCabe
Director – IEEE-SA Marketing

27 August 2009
Today’s Session
Components of a Successful Marketing Communications Program for Smart Grid

- Strategy
- Messaging/Positioning
- Technical Experts
- PR/Media Campaign
- Thought Leadership
- Mechanisms
- Social Media Elements
- Rollout Plan

Real Examples from Successful IEEE Marketing Communications Programs
Marketing Communications for Smart Grid

- It is a “Total Package” delivered in a consistent, coordinated manner
- Commitment over a sustained period
What Will Success Look Like?
A Quick Exercise... At the End of This.

In terms of...

- Positioning as a “Thought Leader”
- What We Need to Accomplish
- In terms of Forming Relationships
- Extending & Leverage our Brand/Identity
- Other... ?
Situation Analysis – Smart Grid

- **Increased Visibility**... Companies and organizations impacted by Smart Grid or contributing to Smart Grid are gaining increasing visibility via their respective marketing and public relations activities.

- **Hot Topic**... Smart Grid is a “hot topic” in the trade, business and general media, with hundreds of articles daily fueled by a focus on green technology, government directives and funding for Smart Grid and industry competition.

- **Information Overload**... Hundreds of blogs and forums exist on Smart Grid and continue to multiply.

- **Portals**... Many external Smart Grid “portals” exist, including those hosted by IBM, Siemens, GE, Smart Grid TMC. Net, US Department of Energy, CISCO and EPRI’s Intelligrid (see addendum 1.0).

- **Events**... A significant increase in Smart Grid events, forums, conf’s.

- **Consortiums**... Formation of consortium/associations about Smart Grid.

- **Standards Competitors**... Many standards developers/bodies involved and these bodies are positioning themselves as the “lead” for standards setting in Smart Grid-related technologies.

- **Competitive factors**... multiplying rapidly.
IEEE is uniquely positioned to play a vital role in supporting the realization of Smart Grid via:

- The global expertise and synergy of its broad spectrum of organizational resources. IEEE integrates 44 technical societies and councils supporting technology development, education, publication, in synergy with a global standards community.
- IEEE Standards Association enabling technology integration across a spectrum of fields, necessary for a forward looking platform, e.g. power, communications, digital information management controls technology, networking, security, reliability assessment, interconnection of distributed resources including renewable energy sources to the grid, sensors, electric metering, broadband over power line and systems engineering.
- The collaborative venues and opportunities IEEE provides for technical discussion and advancement of technology.
- The channels and environments IEEE offers for publishing and providing access to information.
Step 1: Strategy
Defining the Program

Public Visibility Initiative

A communications initiative that seeks to raise IEEE’s visibility and create a global “voice”; increasing public understanding of how engineering, computing & technology benefit humanity; positioning IEEE as the world’s trusted source and forum.

BoD-endorsed, multi-year, multi-million dollar project…

Big Audacious Goal: Make IEEE a household name
IEEE is helping to unify the power, communications and IT technical disciplines

IEEE is a central force in Smart Grid initiatives

IEEE is actively engaged in a number of Smart Grid initiatives globally

IEEE is collaborating with government and industry

IEEE is committed to working with NIST to expeditiously achieve a Smart Grid roadmap

With over 375,000 members among the academic, government and private sectors worldwide, IEEE is a unique position to bring all interested parties together to collaborate to create this standard foundation

IEEE has been providing leadership for Smart Grid development and continues to build upon its vast membership, expertise, materials and conference venues to facilitate understanding

IEEE is leveraging its strong foundation and collaborating to evolve standards, share best practices, publish developments and provide related educational offerings to advance technology and facilitate successful deployments throughout the world
Step 2: PR/Media Campaign

Components

- Target Audience(s)
- Themes/Messages
- “Technical Experts”
  - Database of Smart Grid TE’s to Draw From

Approaching the Media

- What’s the NEWS??? “Hook”
- Building relationships with the media
- Positioning IEEE as “Trusted Source” on Smart Grid

Vehicles

- Press Releases -- Byline Articles
- eNewsletter to Engage the Media
PR/Media Campaign

Engaging the Media -- Tools

Online Newsroom

Byline Articles

Press Direct
Meet Our Experts

Press Releases
Bylines
Media Pitches
Media Interviews
Media Coverage
Editorial Calendar

Top Tier Media

The Economist
The New York Times
TIME
FORTUNE
CNBC

INTERNATIONAL
Herald Tribune
THE WALL STREET JOURNAL
IEEE P2030 PR Program Highlights

- April 27 – May 1: Press briefings on P2030 project approval & WG kick off meeting 3 June
  - Dick Deblasio & Chuck Adams spokespersons
- May 4: News release wired
- 1,649 headline impressions (BusinessWire)
- 49 news stories (global)
  - EE Times
  - EDN
  - Business Week
  - T&D World
  - Power Engineering
  - SmartGrid Today
  - Computer World
  - CNET
  - Network World
  - ZDNet
- Post 3 June meeting updates to media
**Bylines (contributed articles)**

Bylines secured

- **Power Engineering**
  - From Abstract Concept to Realistic Vision: Defining the Smart Grid
  - 4 Aug issue

- **Pure Power**
  - Unifying Power, Communications and IT on the Smart Grid
  - 4 Sept issue

- **Utility Automation and Engineering T&D**
  - P2030 Efforts and Attempts to Develop Smart Grid
  - 7 September
IEEE P2030 PR Program

Next Steps

- Continue to pursue contributed (bylined) articles
- News releases on outcome of subsequent meetings of P2030 WG and sub-groups & standards-related activities
- Media briefings on significant developments/decisions of P2030
P2030 Smart Grid Communications

- Opt-in mailing lists created
  - ieee2030@ieee.org
  - smartgridnews@ieee.org

Pushing out information on P2030
  - Internal IEEE audiences
    - What’s News
    - Society news vehicles
  - External audiences (via the media)
Step 3: Thought Leadership
Positioning IEEE as a Thought Leader on Smart Grid...

Strategic Positioning At Top-Tier Forums

Examples

Smart Grid Forum

Innovation Roundtables

“Hearts & Minds” Videos

Top-Tier Media Opportunities

... And Generating Elevated Mindshare
Step 4: Social Media
Evolution/Growth of Tactics and Channels

**Web 1.0**
"The Destination"

- Destination Website
- Search Engines
- CRM
- Viral
- eMarketing
- Message Boards

**Web 2.0**
"Tools and Distribution"

- Blogosphere
- Social Networks
- Micro Content
- Social Bookmarking
- Online Video
- Content Mashups

**Age of Social Media**
"Niche Channels and Mass Participation"

- Blogger
- del.icio.us
- flickr
- Google

- Twitter
- LinkedIn
- Ning
- Digg
- YouTube
- Wikipedia
Step 5: Metrics
Tracking & Monitoring Success

What Will Success Look Like?

- How will you measure success?
- Tracking & Reporting
  - Scorecard
- What tools?
  - Already in place?
  - Need to be put in place?
  - Can leverage from others?
Metrics & Evaluation

- Number of Smart Grid-related standards
- Microsite “stickiness” (website traffic related to pages viewed and time spent on site)
- Attendance at IEEE conferences and events related to Smart Grid
- IEEE, IEEE Society and IEEE-SA membership and retention driven by Smart Grid interest and involvement
- Open and click thru rates on e-campaigns
- Views of videos
- Number of downloads of related content
- Perception and satisfaction ratings of the IEEE because of its involvement in Smart Grid
- Number of queries about Smart Grid activities (leads)
- Number of new business opportunities (partnerships, new content offerings, etc)
- Number of citations of IEEE Smart Grid-related IP
# Global-10 Metrics Scorecard

## IEEE Global Scorecard 2009

### Global-10 Scorecard - 2009-to-date

<table>
<thead>
<tr>
<th>Metric</th>
<th>Total</th>
<th>U.S.</th>
<th>Canada</th>
<th>Mexico</th>
<th>Brazil</th>
<th>U.K.</th>
<th>Germany</th>
<th>Finland</th>
<th>China</th>
<th>Japan</th>
<th>India</th>
</tr>
</thead>
<tbody>
<tr>
<td>Number of Press Releases Distributed</td>
<td>70</td>
<td>14</td>
<td>6</td>
<td>6</td>
<td>6</td>
<td>7</td>
<td>0</td>
<td>0</td>
<td>7</td>
<td>0</td>
<td>0</td>
</tr>
<tr>
<td>Unique Number of Press Releases</td>
<td>19</td>
<td>6</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
</tr>
<tr>
<td>Number of Media Pitches Distributed</td>
<td>82</td>
<td>6</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
</tr>
<tr>
<td>Unique Number of Media Pitches</td>
<td>36</td>
<td>6</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
</tr>
<tr>
<td>Media Opportunities Secured</td>
<td>20</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
</tr>
<tr>
<td>Media Interviews Conducted</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
</tr>
<tr>
<td>Number of Bylines Drafted</td>
<td>14</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
</tr>
<tr>
<td>Number of Bylines Placed</td>
<td>11</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
</tr>
<tr>
<td>Total Coverage-to-Date: 2009</td>
<td>34</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
</tr>
</tbody>
</table>

### Global Reach

- Total: 1934
- U.S.: 672
- Canada: 277
- Mexico: 23
- Brazil: 206
- U.K.: 197
- Germany: 17
- Finland: 17
- China: 312

### Distinct Media Articles

- Total: 71
- U.S.: 24
- Canada: 13
- Mexico: 10
- Brazil: 13
- U.K.: 11
- Germany: 0
- Finland: 0
- China: 6
- Japan: 0
- India: 0

### Press Release Pick-Up

- Total: 487
- U.S.: 229
- Canada: 122
- Mexico: 24
- Brazil: 11
- U.K.: 7
- Germany: 0
- Finland: 0
- China: 0
- Japan: 0
- India: 0

### Video Service Special Event Pick-Up

- Total: 275
- U.S.: 195
- Canada: 35
- Mexico: 3
- Brazil: 0
- U.K.: 0
- Germany: 0
- Finland: 0
- China: 0
- Japan: 0
- India: 0

### Pre-University Audience Coverage

- Total: 20
- U.S.: 8
- Canada: 6
- Mexico: 0
- Brazil: 0
- U.K.: 0
- Germany: 0
- Finland: 0
- China: 0
- Japan: 0
- India: 0

### University Audience Coverage

- Total: 2
- U.S.: 1
- Canada: 1
- Mexico: 0
- Brazil: 0
- U.K.: 0
- Germany: 0
- Finland: 0
- China: 0
- Japan: 0
- India: 0

### Professional Audience Coverage

- Total: 55
- U.S.: 42
- Canada: 5
- Mexico: 1
- Brazil: 0
- U.K.: 0
- Germany: 0
- Finland: 0
- China: 0
- Japan: 0
- India: 0

### Internal/Membership Audience Coverage

- Total: 0
- U.S.: 0
- Canada: 0
- Mexico: 0
- Brazil: 0
- U.K.: 0
- Germany: 0
- Finland: 0
- China: 0
- Japan: 0
- India: 0

### Business Coverage

- Total: 215
- U.S.: 169
- Canada: 3
- Mexico: 0
- Brazil: 15
- U.K.: 7
- Germany: 0
- Finland: 0
- China: 0
- Japan: 0
- India: 0

### Trade Coverage

- Total: 118
- U.S.: 79
- Canada: 1
- Mexico: 0
- Brazil: 7
- U.K.: 2
- Germany: 0
- Finland: 0
- China: 0
- Japan: 0
- India: 0

### Consumer-General Interest Coverage

- Total: 580
- U.S.: 580
- Canada: 0
- Mexico: 0
- Brazil: 0
- U.K.: 0
- Germany: 0
- Finland: 0
- China: 0
- Japan: 0
- India: 0

### Online Coverage

- Total: 198
- U.S.: 177
- Canada: 0
- Mexico: 0
- Brazil: 0
- U.K.: 0
- Germany: 0
- Finland: 0
- China: 0
- Japan: 0
- India: 0

### Event Coverage

- Total: 30
- U.S.: 24
- Canada: 0
- Mexico: 3
- Brazil: 0
- U.K.: 0
- Germany: 0
- Finland: 0
- China: 0
- Japan: 0
- India: 0

### Ad Equivalency

- Total: 23,900,000
- U.S.: 19,957,000
- Canada: 3,980
- Mexico: 0
- Brazil: 0
- U.K.: 0
- Germany: 0
- Finland: 0
- China: 0
- Japan: 0
- India: 0

### Impressions

- Total: 3,187,418
- U.S.: 2,520,200
- Canada: 23,296
- Mexico: 0
- Brazil: 0
- U.K.: 0
- Germany: 0
- Finland: 0
- China: 0
- Japan: 0
- India: 0

---

**IEEE Celebrating 125 Years of Engineering the Future**
Sample Tactics: Smart Grid

- Develop IEEE Smart Grid Awareness campaign for IEEE Societies, Sections, Chapters and Business Units on how to get involved in the IEEE Smart Grid Communications Program, namely how to provide content/feed information into the program so we include in the communications among IEEE entities and external audiences
  - Create a “tool-kit” (messaging, stats, up-to-date information, templates) for entities to use

- Develop proof points to substantiate the IEEE smart grid value proposition and be used in the marketing and public relations efforts
Develop an interactive IEEE Smart Grid web presence (microsite--providing editorial content and keywords for increases in search engine inclusion since they carry topic-specific keyword-rich content with the goal of having search engines rank them highly).

- The site should not link out extensively to external, non-IEEE sites (take visitors off the IEEE site).
Sample Tactics *(continued)*

- Develop a Smart Grid PR plan (leverage and tie into the IEEE Public Visibility effort and exploit related issues/trends being covered by the media)
  - Contributed articles
  - Media briefings
  - Media relations
  - Analyst briefings
  - Speaking engagements
  - Event calendaring
  - Expert sourcing
  - Columnist campaigns
  - Analysts relations (building relationship with smart grid industry analysts—reporters and customers seek out analysts for their opinions; well briefed analysts are indispensable advocates; many analysts publish reports)
  - Events (sponsor, organizer or participant)
Sample Tactics (continued)

- Develop a Smart Grid contact strategy (roadmap for reaching out and communicating with IEEE constituency—members, volunteers, program participants, customers, etc.)
- Deploy use of rich media (podcasts, blogs, media sharing, wikis, virtual networks, chat and online messaging)
  - Create an IEEE Smart Grid forum/discussion (an environment where people can ask questions and get answers)
  - Create an IEEE Smart Grid Wiki (collaborative environment/tool to work on a document(s)—e.g. defining Smart Grid, impact of technology on smart grid, etc.)
- Sponsor and/or attend leading smart grid industry events
- Purchase sponsorship or secure authorship in relevant, popular blogs or online zines
Develop a search engine optimization (SEO) strategy to ensure IEEE is in top results related to searches on smart grid or intelligent grid, etc.

Have in place a Google ad words campaign

Post relevant presentations on slideshare.com

Develop collateral materials (e.g. fact sheets, brochures, signage for exhibits)

Ensure Smart Grid materials and information are present at IEEE meetings, conferences and events
Challenges Ahead:
What we are up against

- Companies/oranizations involved in or impacted by Smart Grid gaining increasing visibility
- Smart Grid is a hot topic in the trade, business & general media
- Hundreds of Smart Grid blogs & forums
- Media wants “News” – What’s new?
- External Smart Grid “portals” exist
- Increase in Smart Grid events
- Many standards bodies and other tech organizations positioning themselves as the “lead” or “go to place” for Smart Grid
What we need

- A united IEEE Smart Grid presence
- Knowledge of initiatives, activities and related information
- Core, consistent messaging & proof points
- Ability to ID opportunities for co-marketing/co-communications for a stronger IEEE Smart Grid story
What Will Success Look Like?
A Quick Exercise

In terms of...

- Positioning as a “Thought Leader”
- What We Need to Accomplish
- In terms of Forming Relationships
- Extending & Leverage our Brand/Identity
- Other...?
Recommendation

- Development of a cross functional team to oversee and implement the IEEE Smart Grid marketing plan.
- Enlist outside vendor/agency
Thank You

What Will Success Look Like?
Advanced Preparation

RF defines Topic/sub-topic and an editorial calendar

1) Be more specific in our request for TE's. Drill down topic
2) RF tells us 4 months in advance of a topic, the specific themes/sub-topics they need focus on.
3) Go to relevant Soc's/Regions/etc and ask specifically for this info
4) Do test of new process on H/C

Societies
Regions
Fellows
Magazines (Editors)
Distinguished Lecturers/Awards

Names

Status Verification w/ BMS To ensure they are an IEEE Member

Criteria for Expert
- IEEE member
- Media Savvy
- Expert in their field
- Willing to participate

YES

Send intro letter & survey to Technical Expert

Receive survey response from TE and enter into DB

Hand Off To Ruder Finn

Data mining in Xplore

1) Welcome package sent to TE
2) RF research (google, factiva) for ESS/Background research call prep
3) Interview with TE
4) Go/No-go decision by RF IEEE

TE added to database

Expert Source Sheet Draft

Public Visibility Technical Experts Vetting Process

Media Request for Interview with TE (E.S.S. sent to media) - RF informs IEEE

Pitching to Media (RF)

E.S.S. Signoff/Approval
- IEEE
- Tech Expert

RF tracks for coverage

RF send coverage/thank you to TE

RF updates PV tracker

IEEE sends follow-up/thank you to TE/CC-society, IEEE leadership/mgmt council

IEEE updates PV DB off of RF tracker

1) Welcome package sent to TE
2) RF research (google, factiva) for ESS/Background research call prep
3) Interview with TE
4) Go/No-go decision by RF IEEE

Receive survey response from TE and enter into DB

Hand Off To Ruder Finn