



Creating, Communicating, and Delivering Value:

Guidelines for Marketing EPA Partnership Programs



The National Center for Environmental Innovation wishes to thank the members of the Innovation Action Council's EPA Partnership Programs Workgroup, many EPA Partnership Program managers, and other EPA contributors who assisted us in this effort.

This document was developed for EPA managers and staff and their contract consultants to use as they develop EPA Partnership Programs.

These Guidelines are not regulations and do not change or substitute for any legal requirements, as indicated by the use of non-mandatory language. They provide non-binding policy and procedural guidance and are therefore not intended to create legal rights, impose legally binding requirements on EPA or the public, nor to contravene any other legal requirements that might apply to particular Agency determinations or actions. The Guidelines outline recommended best practices and policies for marketing EPA Partnership Programs. The information provided in these Guidelines does not constitute an endorsement by EPA or of any non-Federal entity or its products or services, nor does it recommend for or against the purchase of specific products.

U.S. Environmental Protection Agency

National Center for Environmental Innovation (I807T)

Washington, DC

December 2007



Executive Summary

Purpose

Strategic marketing and branding of EPA Partnership Programs are essential to achieving EPA's mission. In order to provide stronger and more strategic marketing and branding of EPA Partnership Programs, EPA's Innovation Action Council's Workgroup on EPA Partnership Programs and EPA's Partnership Programs Coordination Team have identified best marketing practices for EPA Partnership Programs. These guidelines take best practices and policies and organize them into a step-by-step format to help all EPA Partnership Program managers effectively apply principles of marketing and branding. EPA staff are experts on many topics, but this expertise does not automatically translate into skills in marketing, which is a critical component of EPA Partnership Program success. EPA Partnership Programs that adopt these best marketing principles are better positioned to achieve greater environmental results.

The term "target decisionmakers" is used deliberately instead of the more common marketing term "target audience" because it is more helpful in program design and marketing strategy work. The term "target decisionmakers" conveys the idea of real individuals with actual titles and roles within a company, organization, or household who have actual decision-making authority to participate in an EPA Partnership Program. By contrast, the term "target audience" conveys the wrong image, that of a large, nameless and faceless mass of people who are passive in terms of program participation.

What is marketing?

Chapter 2 explains what marketing is and what it isn't, including myths about marketing. This chapter will help you understand how marketing is more than a logo, tagline, name, or mission statement.

How do you market an EPA Partnership Program?

Chapters 3 – 9 take you through a step-by-step process in applying marketing principles to your program:

- **Chapter 3. Define the Scope of Your Program.** This chapter helps you establish the scope of your program and formulate clear environmentally linked marketing goals
- **Chapter 4. Focus Your Program Based on the Value It Delivers to External Parties.** This chapter helps you take a potentially very large pool of people in your market and narrow it down to the segments of the market that will help your program best achieve its long-term goals.
- **Chapter 5. Understand Your “Target Decisionmakers.” (Often Referred To As “Target Audience”).** This chapter helps you identify the specific decisionmakers who will be the priority for your program. By knowing your target decisionmakers and their needs, you can apply the principles of marketing to meet those needs.
- **Chapter 6. Develop Your Program’s “Positioning Statement.”** This chapter helps you develop a brief statement describing what your program is, what it does, what it offers people, and how to differentiate it.
- **Chapter 7. Recognize Strong Environmental Performance.** This chapter helps you weigh the use of recognition as an incentive and ensure recognition strengthens your program and other EPA programs as well.
- **Chapter 8. Develop Your Program’s Trademarks—Name, Logo, and Taglines.** This chapter explains how to work with OGC to select the most appropriate name, logos, and taglines for your program from a legal standpoint and ensure they will be effective in terms of marketing.
- **Chapter 9. Promote Your Program.** This chapter helps you develop clear, consistent, cohesive, and effective communication strategies.

What resources can you use to market an EPA Partnership Program?

Appendices A – G contain a wide range of additional tools, checklists, samples, and resources that you can use as you market your EPA Partnership Program.

For additional information please visit the EPA Partnership Programs Intranet site at <http://intranet.epa.gov/partners> or contact Stephan Sylvan, the EPA Partnership Programs Coordinator, at sylvan.stephan@epa.gov or (202) 566-2232.

Table of Contents

Chapter 1. Introduction.	1
Why is marketing important to EPA?	1
Strategic marketing goals for EPA Partnership Programs.	1
What is marketing?	2
What is a brand?	2
What will these guidelines help you do?	3
Who should use these guidelines?.	3
What is the goal of this document?	3
What sources were used in producing this document?	4
Chapter 2. Understand What Marketing Is and Isn't.	5
What is marketing image?.	5
What are the myths of marketing?	6
How do you create a marketing strategy?	7
Chapter 3. Define the Scope of Your Program	8
Identify what your program represents	8
Define the market for your program	9
Define your program's scope	9
Build your program and its marketing strategy around core competencies	10
Create a marketing goal	11
Create marketing objectives	12
Chapter 4. Focus Your Program Based on the Value it Delivers to External Parties	13
Focus your program	13
Criteria for segmenting	14
Chapter 5. Understand Your "Target Decisionmakers"	16
Understand your target decisionmakers	16
Create a vivid profile of a single target decisionmaker	18
Define EPA's image among the target decisionmakers.	19

Chapter 6. Develop Your Program’s “Positioning Statement”	20
Use a template to create a positioning statement	21
Make sure your statement matches EPA’s mission and values	22
Leverage cultural values	23
Incorporate relevant customer service and accessibility standards into positioning statement	23
Gain buy-in from program staff and allies on your positioning statement	24
Consult with your office’s communications staff	24
Consult with the Office of Public Affairs on possible positioning statement	24
Chapter 7. Recognize Strong Environmental Performance.	25
Select the number of levels to recognize	25
Recognize strong environmental performance—Select the level to recognize	26
Adhere to compliance screening guidelines	28
Chapter 8. Develop your Program’s Trademarks—Name, Logo, and Taglines.	29
Create a name and logo	29
Create a program tagline	31
Work with the Office of General Counsel to select and protect your marks	31
Test program name, logo, and tagline	33
Create guidelines for appropriate use of trademarks	33
Chapter 9. Promote Your Program	35
Identify your touch points	35
Reinforce the positioning statement	36
Work with a “creative team” to create materials	37
Use EPA name, seal, and logo appropriately in materials	38
Adhere to EPA’s “endorser branding strategy”	38
Make sure your materials are accurate, consistent, and accessible	39
Submit communication materials to PROTRAC	39
Ensure communication channels are on message	40
Train staff to communicate about the program	40
Appendices	42
Appendix A: Senior EPA Leadership Marketing Checklist	43
Appendix B: Program Manager’s Marketing Checklist/Worksheet	44
Appendix C: Key Definitions	54
Appendix D: Program Marketing When Decisionmakers Are Household Consumers	56
Appendix E: Program Marketing When Decisionmakers Are in the World of Business	58
Appendix F: Suggested Reading	59
Appendix G: Suggested Web Sites	60

Chapter 1:

Introduction

Why is marketing important to EPA?

Do any of the following statements sound familiar to you?

- My new program needs just a name and a logo. Why bother with marketing?
- My program already has a name and logo so I don't need to worry about marketing.
- If a marketing issue comes up, I would just bring in a communications specialist to resolve it.
- At EPA we are primarily scientists, engineers, attorneys, and policy analysts. Why worry about marketing?
- My program doesn't advertise so I don't need marketing.

You may have heard these statements, and you may have even said them yourself. To a large extent, they reflect some of the myths of marketing EPA Partnership Programs.

Marketing is critical and central to the success of every EPA Partnership Program. The effectiveness of a program's marketing frequently determines whether a program will achieve significant

environmental results and thereby contribute to the Agency's many other activities to protect public health and the environment. Just like the world's most successful companies, well-designed EPA Partnership Programs apply the principles of marketing to everything they do.

At the same time, the EPA name has come to represent a highly respected and valued brand—built up over decades of hard work by thousands of people.¹ Its value to all of us in the Agency in fulfilling our mission of protecting public health and the environment is immeasurable. Protecting the EPA name is therefore critically important, especially by EPA Partnership Programs that tend to be highly visible to outside parties.

Strategic marketing goals for EPA Partnership Programs

In June 2004, then Deputy Administrator and now Administrator Steve Johnson signed the Charter for Coordinating and Managing EPA's Partnership Programs. This charter called on EPA Headquarters and Regional Offices to

¹ Roper: (2002). Green Gauge 2002: Americans Perspective on Environmental Issues: New York, NY. 2001 showing that 66% of Americans believe EPA is fulfilling its responsibility to protect the environment very/moderately well.

improve the design and coordination of EPA Partnership Programs, enhance their customer-orientation, and ensure delivery of meaningful environmental results. To assist the Headquarters and Regional Offices, this charter directed the Office of Policy, Economics, and Innovation to develop guidelines for EPA Partnership Program design, measurement, and branding, a central component of marketing.

Stronger and more strategic marketing of EPA Partnership Programs is critical to achieving EPA's mission. The Agency is currently supporting a growing number of EPA Partnership Programs, which often operate independently in terms of communications and marketing. These guidelines call on all EPA Partnership Program managers to take the necessary steps to ensure the Agency moves towards fewer but stronger programs linked to each other and the Agency's brand and mission. It is critical that EPA programs targeting similar outside groups appear to be as coordinated as possible in all marketing, branding, and communications.²

What is marketing?

For our purposes, marketing is the process by which EPA convinces outside actors—companies, governments, individuals—to voluntarily take actions to protect public health and the environment. Marketing is about increasing the receptivity of the target decisionmakers (see Appendix C: Key Definitions for a definition of target decisionmaker). Perhaps more than anything else marketing will determine the likelihood target decisionmakers will take the action steps EPA is asking them to take.

² While this document focuses on strategies, it is important to remember that these strategies are used to promote an EPA Partnership Program that is based on achieving environmental results. These Guidelines should be read and used in conjunction with other guidance regarding the design and measurement of EPA Partnership Programs.

The most obvious EPA Partnership Program marketing activities are producing and distributing brochures, producing Web sites, organizing recognition and media events, and sending letters to potential partners inviting them to join programs. There are many other less obvious marketing activities that EPA Partnership Programs conduct that are just as important—deciding who the program will target for joining, developing persuasive messages to deliver to them, identifying the most valued incentives, selecting who would be best to deliver these messages, and determining the most effective channels to deliver these messages (e.g., brochures, e-mail, phone calls, trade magazines, letters). All EPA Partnership Programs make these decisions but perhaps not always as strategically as they could.

What is a brand?

Branding is a component of marketing. A brand is not merely a logo, icon, tagline, slogan, name, or mission statement. Rather, a brand is about a **relationship** between a particular group of people—target decisionmakers—and the value they perceive in a particular product, service, company, or organization as symbolized by a name. Simply put, a brand is about a **promise** (or “value proposition” as described in the *Guidelines for Designing EPA Partnership Programs*) symbolized by a name. A company uses a name to represent a promise it makes to target decisionmakers, a promise that its products will consistently solve one of their pressing problems. A strong brand is perceived positively by target decisionmakers and represents some-

thing they believe will deliver significant value in solving these problems both on a rational and emotional level.

The EPA name can be seen as the brand representing the promise the Agency makes to the American people to ensure they are properly protected from environmental risks.

EPA's Office of Public Affairs is responsible for the Agency's brand through the concept of "One Agency, One Voice." OPA is charged with ensuring that all EPA Partnership Programs communicate consistently about the Agency's promise. While many principles of branding apply to EPA Partnership Programs, the EPA brand is paramount. It is critical that EPA Partnership Programs take steps to ensure they are fully integrated with the EPA brand.

What will these guidelines help you do?

These guidelines are the third part of a set including *Guidelines for Designing EPA Partnership Programs* and *Guidelines for Measuring the Performance of EPA Partnership Programs*. The entire set of guidelines should be used in developing and operating EPA Partnership Programs. See the following EPA internal Web site:

<<http://intranet.epa.gov/partners>>

By using marketing principles, your program will better deliver environmental results—and positive experiences—to target decisionmakers. Applying these guidelines will help ensure your program is positioned for success and contributes to the EPA mission. The guidelines are designed to:

- Help managers and staff understand and ap-

ply principles of marketing.

- Ensure that programs are scoped to deliver on the expectations of target decisionmakers and stakeholders.
- Help programs create a cohesive and compelling image and communicate it effectively.
- Protect and enhance EPA's credibility and reputation.

Who should use these guidelines?

We developed these guidelines primarily for the following audiences:

- **EPA Partnership Program Managers and Program Staff** can use these Guidelines to plan and design new, improved, or expanded EPA Partnership Programs.
- **EPA Managers and Senior Decision-makers** can use these Guidelines to assess existing, new, improved, or expanded EPA Partnership Programs.
- **Consultants to EPA Partnership Programs** can use the Guidelines to better assist the EPA staff members they work with.

What is the goal of this document?

The primary goal of this document is to help you develop a strategic program "market positioning statement" that will serve as the "DNA" for all your interactions with outside parties. The following is an example of a positioning statement template (adapted from one by Geoffrey Moore).

Positioning Statement Template:

1. For <target decisionmakers>.
2. Who <have the following problem>.
3. Our program is a <describe the solution>.

4. That provides <cite the unique or breakthrough capability>.
5. Unlike <reference other players working with these target decisionmakers>.
6. Our solution <describe the key point of differentiation>.

See Appendix B: Program Manager's Marketing Checklist/Worksheet for a worksheet to help produce a marketing positioning statement for your program.

What sources were used in producing this document?

These guidelines incorporate best practices from several fields, including private sector marketing, social marketing for public health, and environmental marketing. The following sources were among the most influential:

- Kotler, Philip, *Marketing Management*. 11th edition (Prentice Hall 2002). (This book by Professor Philip Kotler of Northwestern's Business School, the Kellogg School of Management, is the marketing textbook used by most major business schools.)
- Kotler, Philip, Ned Roberto, Nancy Lee, *Social Marketing, Improving the Quality of Life* 2nd edition (SAGE Publications 2002). (This book is widely regarded as the seminal book on the field of social or public sector marketing.)
- McKenzie-Mohr, Doug, William Smith, *Fostering Sustainable Behavior, An Introduction to Community-based Social Marketing* (New Society Publishers 2001). (This book applies powerful social marketing principles to environmental protection.)
- Nordhielm, C.L., *Marketing Management: The Big Picture* (John Wiley & Sons 2005). (Nordhielm is an award winning marketing professor from Northwestern's Business School, The Kellogg School of Management, and, more recently, the Ross School of Business at the University of Michigan.)
- Ries, Al., *Positioning: The Battle for Your Mind* (McGraw-Hill 2000). (This book is widely considered a classic in marketing on the subject of framing a particular offering to a particular market segment.)
- Colehour, Julie and Cohen, Bryan of Colehour+Cohen. *Planning for Effective Social Marketing Campaigns: A step-by-step guide and workbook* (2005).
- Academy for Educational Development (AED) *Social Marketing Lite: A Practical Resource Book for Social Marketing*. (2000).

Chapter 2:

Understand What Marketing Is and Isn't

What makes people want to participate in your program? Is it the services or recognition you offer, is it how they feel when they make positive environmental decisions, or a co-benefit like cost savings? The answers to these questions point to your program's marketing strategy and activities. Strategic marketing is focused heavily on the perceptions of the target decisionmakers. It involves how they perceive your program and the value they believe it provides, including everything they experience, see, hear, and think about your program. This perception influences their receptivity to taking the action steps you want them to take.

This chapter answers the following questions:

- What is marketing image?
- What are the myths of marketing?

What is marketing image?

For these guidelines, we will use the following definition for marketing image:

- The program's marketing image can be seen as the sum total of what target decisionmakers think about your program and organiza-

Even a relatively small Partnership Program can have a significant impact—positive or negative—on EPA's name and reputation.

tion and especially what they think about the value your program promises to them.

- Your program has a strong marketing image if these individuals have heard of your program, understand it, and believe it can offer significant value, the kind of value you want them to see in it.
- If these individuals haven't heard about your program, misunderstand it, or don't value it in the way you want them to, your program still has a marketing image. It's just a weak marketing image.
- If your program confuses people, frustrates them, or upsets them, you not only have a weak marketing image, you may have one that undermines not only your program but the Agency's overall effectiveness.

Example

A recent phone company campaign emphasizes the need for a strong marketing image. The phone company conducted research and found that its customers

had a very negative perception of the brand, or marketing image. They felt that the company was slow, unresponsive, and out of touch with their needs. To remedy this situation, the phone company launched a new marketing campaign focusing on the company's commitment to customer service. But the company didn't do anything to improve its internal operations including customer service. Because the company didn't live up to its marketing promise, it lost even more credibility with its customers.

What are the myths of marketing?

1. **Myth: You only need marketing when you deal with the household consumer market.**

Marketing is not just important when dealing with the household consumer market. Some people mistakenly believe they don't have to worry about marketing if their program targets the business community or other governments. Lack of a solid marketing strategy and implementation will reduce the environmental impact of your program even if it targets the business community or other government agencies.

2. **Myth: Providing information is the most important thing, more important than marketing.**

Many environmental professionals would like to think people, organizations, and companies will do the "right thing" if only they had more

information or the right kind of information. Unfortunately, the research shows that just providing information rarely has a significant environmental impact.³

3. **Myth: Marketing is not something a program manager needs to worry about (just leave it to the communications person).**

Marketing is an activity that requires the work, experience, and skills of your entire program staff. But it also requires at least one individual with strong strategic marketing and marketing expertise to lead the effort, someone respected by the team. If your team doesn't have such an individual, consider training opportunities and enlisting a highly skilled marketing consultant (see the EPA Partnership Program Coordinator for suggestions on how to secure these skills).

4. **Myth: Marketing is too expensive for my budget.**

In short, marketing does not need to be expensive. Marketing is rooted less in expensive, splashy campaigns than it is in making a clear and valued promise to target decision-makers and then consistently communicating and delivering on it. One thing is certain: not thinking about marketing is far more expensive in the long run than making an upfront investment in it. Lack of strategic marketing could mean that your program wastes valuable resources targeting people or organizations that will never take the desired action

³ See Schultz, P.W. (2002). Knowledge, information, and household recycling: Examining the knowledge-deficit model of behavior change. *New Tools for Environmental Protection: Education, information and voluntary measures*. T. Dietz and P. C. Stern. Washington, D.C., NATIONAL ACADEMY PRESS: 67-82. See also *Fostering Sustainable Behavior: An Introduction to Community-Based Social Marketing* by Doug McKenzie-Mohr and William Smith. New Society Publishers 1999.

steps, or it wastes resources by using messages or incentives that won't motivate them to act.

How do you create a marketing strategy?

Marketing strategy is a dynamic process that focuses on elements from scoping your program to communicating about it effectively. All of these elements interact dynamically, and all affect how others will perceive your program. Together, they create a strong marketing strategy.

These marketing guidelines focus on each of these elements—helping you create a strong, effective program, and as a result, an effective marketing strategy.

- Chapter 3. Define the Scope of Your Program
- Chapter 4. Focus Your Program Based on the Value it Delivers to External Parties
- Chapter 5. Identify Your “Target Decisionmakers”
- Chapter 6. Develop Your Program’s “Positioning Statement”
- Chapter 7. Recognize Strong Environmental Performance
- Chapter 8. Develop Your Program’s Trademarks—Name, Logo, and Taglines
- Chapter 9. Promote Your Program

Chapter 3:

Define the Scope of Your Program

If you don't know where your program is going, then how will you know when it gets there? Marketing strategy is the outgrowth of scoping your program and then formulating clear environmentally linked marketing goals based on that scope. Defining the scope of a program can be tricky. One danger is creating a marketing strategy that is too broad in scope and tries to be too many things to too many people. Another danger is creating a marketing strategy that is so limited in its scope that it has no connections to other EPA Partnership Program efforts or room for future growth. With a clear sense of your program's marketing goals and objectives, you can help ensure the long-term success and survival of your program.

This chapter will help you:

- Identify what your program represents
- Define the market for your program
- Define your program's scope
- Build your program and its marketing strategy around core competencies
- Create a marketing goal
- Create marketing objectives

Identify what your program represents

The first step is formulating a clear sense of what your program represents to others. A clear marketing strategy starts with clear thinking about the program.

As you begin formulating your program, think about:

- What does my program stand for?
- What am I offering target decisionmakers?
- Is the promise of my program compelling enough for target decisionmakers to respond?
- What do I want people to walk away thinking about my program?
- What words would I use to describe my program?
- What are all the ways my program will interact with others?
- How will program interactions create value in the minds of target decisionmakers?

As big picture as these questions seem, they are critically important in applying marketing principles to your program. Unless you clearly

articulate your program's value and promise, you can't expect others to understand or value it.

Define the market for your program

Before you can define your program's marketing goal, you should define the market in which it is operating. Your program's market is the category of people, consumers, producers, organizations, and professionals that the program will be targeting. Your subsequent marketing strategy relies on knowing this market well.

Define your program's scope

Once you have defined the market in which your program is operating, the next step is narrowing the scope of your program within that market. To create a strong marketing strategy, scope your program carefully—what it will do and how it will provide service. If it is too general, then it won't provide value to anyone; if it is too specific, your program could become isolated and might not be able to grow.

1. Focus your program

A focused program equates to a more powerful marketing strategy. Why? Marketing professor Michael Ryan illustrates this point using the example of "warm tea." Many people love hot tea. Many also love to drink iced tea. But demand for warm tea is nearly zero. A common mistake by Partnership Programs is trying to be too many things to too many different people. By doing so, you will end up offering the equivalent of "warm tea," delivering little value to anyone.

The same is true for your program. If you focus on satisfying a particular need for a particular group of people, your program has

the chance of becoming known as the solution that truly satisfies that need.

A more focused program and marketing strategy also means your resources do not have to be spread across such a large and general marketplace. Attempting to be too many things to too many different target decisionmaker groups (or too large a group) is a recipe for failure, yielding few, if any, environmental results.

2. Don't make your program so focused that it has nowhere to go

The other extreme—a too narrowly focused program that does not plan for future expansion—also has risk. Be sure to consider ways your program can satisfy a similar need of other target decisionmaker groups once it has established itself and achieved its objective with the first target decisionmaker group.

Example

Consider the ENERGY STAR® Program as an example. The first ENERGY STAR Program targeted key manufacturers and consumers of personal computers. Once the program was firmly established as the respected resource for cutting computer-related energy waste, the program pursued something akin to a "brand extension." The "brand extension" extended the ENERGY STAR labeling concept to copiers, fax machines and eventually dozens of other product markets. The brand extension allowed EPA to leverage the relationships, exposure, meaning, and value the ENERGY STAR name had for personal computers into these other markets. By doing so, EPA saved significant

time and money, reduced the risk of failure, and increased the chances of success and program effectiveness.

3. Create a plan to extend into additional initiatives

Be forward thinking when you develop your program's marketing strategy and name. One danger is creating a program name that can't easily move into other markets or be extended into other initiatives. As you plan your program and its name, be sure to plan for future growth.

Example

Let's assume for a moment, that EPA did not launch the ENERGY STAR program for computers back in 1992. Let's also assume instead that EPA was thinking only in terms of computer equipment and launched a program called the "Comp-ufficiency Program" or some such name. The poor program name notwithstanding, EPA might have had a very difficult time extending the program into houses as it did with "ENERGY STAR Homes," into commercial buildings as it did with "ENERGY STAR Buildings," or even space-heating products or consumer electronic products like "ENERGY STAR-labeled TVs" or "ENERGY STAR-labeled furnaces."

EPA would face a different decision: Establish an entirely new name that would take years to establish or invest heavily in changing and explaining its new name. Long-standing partners in the computer-related program might not understand why the EPA is suddenly moving into home electronics.

In the world of marketing, this issue can be described as leveraging existing "brand equity" through the process of "brand extension."

4. Explore opportunities to coordinate program design and marketing strategies with other government programs

EPA Partnership Program developers should consult with OGC and the IAC Partnership Program Workgroup on opportunities to coordinate with other programs within the Agency or the federal government. In some cases, sharing program concepts and extending a program name and marketing strategies to include these new ideas may be the best way for enhancing Agency effectiveness and saving government resources.

Build your program and its marketing strategy around core competencies

After identifying your market and focusing the scope of your program, you should ensure that your program has the means to fulfill the promise you are making to customers. The best way to do this is to build your program solidly around both the Agency's core competencies and your program team competencies.

Identify Agency core competencies

Your task will be identifying those Agency core competencies that best support your program, particularly those that are unique to EPA. (In some cases it will be critical to also identify and recognize EPA weaknesses as perceived by outside parties.)

To help you produce a market positioning statement described later in this document, consider

the following core competencies often considered unique to EPA and general points of differentiation from other agencies and organizations:

1. EPA is one of the most visible, widely known, and respected environmental organizations in the United States (high nationwide “name recognition” outside the Washington Beltway, which few other organizations enjoy).
2. EPA is often considered to be among the most technically skilled environmental organizations in the United States.
3. EPA has significant technical, analytical, and communications expertise.
4. EPA is a very large environmental organization and one of the few with national reach (given the EPA regional offices, labs, etc).
5. EPA has the ability to bring a wide variety of stakeholders together and significant experience balancing the perspectives of a wide variety of stakeholders.
6. EPA is one of the few organizations in the United States with environmental regulatory powers at the federal level.

Identify program team core competencies

Your program team’s core competencies are also important to the long-term success of your program. To build a strong marketing strategy, take an honest look at your team’s skills and experience. Make a special effort to identify areas of expertise within your team that other potential players in your “market” may not have. Or identify areas where your team is much stronger than other players. Consulting firms

are also available through the new GSA schedule approach to federal contracts. Through the new GSA schedule approach to federal contracts, program offices can quickly and easily tap national and world experts in a wide variety of subject areas (including marketing and branding).

Don't forget to consider the expertise available through OGC. OGC has trademark experts and is the only appropriate source for trademark searches, opinions on availability or the risks associated with your choice of trademarks, or applying for registrations.

Example

If Volvo, for example, built its marketing strategy and brand around product safety but lacked the expertise to deliver on this “promise,” it would not be the successful brand it is today. Volvo succeeded as an “excellence in safety” brand because creating safe vehicles is a core competency of the company, supported heavily by the Swedish government, and demanded by the Swedish public. Workers at the company have both the strong commitment to safety and the expertise to deliver it.

Create a marketing goal

One of the most important steps in creating a program marketing strategy is clearly identifying its marketing goals and objectives. Every decision you make as you develop, market, and communicate about the program should be designed to accomplish these goals and objectives.

Marketing goals are broad. Think of your goal as a long-term vision statement of what you want the program to accomplish in five to 10 years.

Create marketing objectives

Marketing objectives are specific and measurable. Objectives map the steps you need to take to accomplish your marketing goal. Marketing experts define objectives in the following ways:⁴

1. **Measurable.** Usually this means it's quantifiable.
2. **Time delimited.**
3. **Single minded.** Your objectives need to be single-minded enough to help you choose between competing actions.
4. **Realistic and achievable.**
5. **Integrated.** All objectives should link naturally to higher and lower-level objectives.

Example

A hypothetical EPA Partnership Program might be one designed to reduce the environmental impacts associated with government-related air travel (note that the *Guidelines for Designing EPA Partnership Programs* has a chapter dedicated to this hypothetical program). This program would be designed to get U.S. government employees to take the train or bus instead of an airplane for “short haul” trips when traveling on official government business. Using the hypothetical green travel program, the program’s marketing objective might be:

Increase the market share of green business travel (e.g., train vs. air travel when it’s time- and cost-competitive) by federal employees from 5 percent to 20 percent by 2010.

⁴ Nordhielm, C.L., *Marketing Management: The Big Picture* (John Wiley & Sons 2005).

Chapter 4:

Focus Your Program Based on the Value it Delivers to External Parties

A strong marketing strategy generates the interest of target decisionmakers by focusing on what they want and need. It promises only what it can deliver and does so without diluting itself. Since most EPA Partnership Programs have significant resource constraints, focus on only those target decisionmakers you can realistically reach with the resources you have. This step helps you take a potentially very large pool of people in your marketplace and narrow it down to the segments of the market that will help your program best achieve its long-term goals. In the field of marketing this is called **segmenting the market** or just **segmenting**.

This chapter will help you:

- Identify what constitutes a good market segment.
- Segment your target decisionmakers.

Focus your program

Segmenting is a tool that allows you to focus your efforts on a particular, highly receptive, and reachable decisionmaker group, saving your program resources and increasing its effectiveness. If you segment properly, the size of your target decisionmaker group shrinks and your probab-

ility of appealing to this group increases.

Consider the hypothetical example of an EPA Partnership Program that promotes a voluntary standard for “green airports.” If the program is typical, it will not have sufficient staff or budget in any given year to reach and convince more than a fraction of the managers of the 20,000 airports in the United States.

Let’s assume the program can reach 100 airport managers in a given year. Should the program randomly select the 100 airports it can reasonably reach over the next year? Should it simply select the largest 100 airports?

The answer is neither. Segmenting is the act of strategically selecting which 100 to target. If, for example, the program can offer substantial cost savings to airports, one segmenting approach might be to find and target the 100 U.S. airports undergoing major cost-cutting initiatives. The managers of this airport “segment” may be more receptive to the program since the program aligns with their goals. They are more likely to join the program and therefore increase the program’s environmental impact. Note, however, that this is one of many ways to segment the market of U.S. airports.

Another effective segmenting approach is by stage of behavior. For example, it may make strategic sense to target 100 airports that have adopted at least some environmental measures due to their likely receptivity. (See the Chapter 5 reference to stages of behavior: Awareness, Understanding, Relevance, Trial behavior, Satisfaction, Loyalty/long-term engagement).

Private Sector Example

In the fast food category, companies have focused on taste (Wendy's), freshness/low fat (Subway), and customization (Burger King) to "steal" customers from the market leader (McDonalds). Note that these companies deliver not just on these special benefits of taste, freshness, or customization; they deliver at some level on the main benefit of this market emphasized by the leader: convenience. They rely on McDonalds to attract consumers to the category of fast food based on their need for convenience and then "steal" some of McDonald's customers who highly value one of these benefits, like taste, by emphasizing that benefit.

Criteria for segmenting

You know you have a good segment of decision-makers to target if:

- 1. The segment contains decisionmakers most likely to value what's offered by your program.** If the segment contains decisionmakers who are not among those who would value your program the most, consider another segment. You want the most receptive decisionmakers you can find.

- 2. The segment is small enough for your program to reach with the resources it has.** If there are too many decisionmakers for your program to reach by calling, mailing, or meeting with them, you need to narrow your segment.

- 3. The segment is large enough to make a significant environmental impact.** If your segment is so small your program wouldn't have a significant environmental impact even if you convinced the entire segment to join your program, you may need a larger segment.

- 4. The segment is accessible to your program.** If you don't have a communications channel to effectively reach decisionmakers in the segment and expose them to your program, then you need to consider a different segment.

Consider Subway, from the example above. It is very likely the marketing strategists at Subway know that their marketing/advertising budget is too small to reach all consumers of convenient "quick-service," or "fast food" as it is commonly called. They probably don't have the marketing budget nearly as big as the market leader, McDonalds. Besides, not all fast food consumers would be interested in the kind of food offered by Subway. So Subway marketing strategists are likely to segment the fast food market of consumers according to value they place on health, fitness, and freshness. Subway marketing strategists then look for some practical ways of dividing up or segmenting consumers based on their values of health, etc. Through market research, they may have determined, for example, that the group of people who exercise at least twice a

week 1) values health and fitness sufficiently to place a high value on Subway food, 2) is a small enough group that their marketing/advertising budget can reach it, 3) is large enough to draw enough customers to their stores to make them profitable, and 4) is reachable through the TV programs, radio programs, magazines, etc. that are viewed heavily by this group.

EPA Partnership Programs target businesses, schools, nonprofits, individuals, and other governments. Marketers generally use four types of segmentation⁵ to narrow down household consumer decisionmakers: 1) demographic, 2) behavioral, 3) attitudinal, and 4) aspirational.

Demographic segmenting is done with an attribute of the target group such as their geographic location (e.g., Midwest vs. West Coast or urban vs. rural), education level, or family status (e.g., parent, married, single), etc. Behavioral segmenting is done with a particular behavior by the target group. For example, Subway may target people who exercise at least twice a week. Attitudinal segmenting is done with attitudes. For example, Subway marketers may target people who believe, based on market research, that exercising and nutrition are important. Aspirational segmentation refers not to current attitudes but to wishes, hopes, and dreams of the target decisionmakers. Aspirational segmentation has been used in weight loss marketing, playing on people's inner desires to become thin, active, and/or healthy.

Example

A hypothetical EPA Partnership Program to green federal employee business travel could segment by desire to be better environmental stewards (focusing on employees who wish they were better environmental stewards).

Marketers and branding specialists today rely less on demographic segmentation and more on the qualitative types of factors that you get from behavioral, attitudinal, and aspirational segmentation. Market research shows that a simple demographic screen (e.g., age) is much less likely to predict the behavior of a group of people than it was 20 years ago.

Note that the household consumer market is the most challenging in terms of segmenting. In most cases, an EPA Partnership Program will not have sufficient resources to reach and influence more than a tiny fraction of household consumers on its own. If meaningful environmental results depend on reaching more than a few hundred thousand household consumers, you will probably need to partner with an entity with greater capacity to reach and influence them.

⁵ Nordhielm, C.L., Marketing Management: The Big Picture (John Wiley & Sons 2005).

Chapter 5:

Understand Your “Target Decisionmakers”

Your program’s marketing image doesn’t exist on paper. It exists in the minds of your customers or target decisionmakers. For a program to be successful, it is critical that the program’s marketing image—the promise of what it can do—resonates with the target decisionmakers. And you can’t influence someone you don’t know very well. So who are they? This step is about identifying the specific decisionmakers who will be the priority for your program’s marketing strategy. You need to know who they are, what they need, and what provides value to them. Once you know, you can continue building a program—and a marketing strategy—that is effective in meeting those needs.

This chapter will help you:

- Understand your target decisionmakers.
- Create a vivid profile of a single target decisionmaker.
- Define EPA’s image among target decisionmakers.

See the Guidelines for Designing EPA Partnership Programs for additional suggestions on how to develop a deep understanding of target decisionmakers.

Understand your target decisionmakers

Once you’ve segmented the market of potential decisionmakers and identified a general sense of your audience, get specific: develop a clear understanding of their current practices, needs, and how they think. This information is essential in developing an effective program.

Surveys, focus groups, and one-on-one conversations can be important. But a few conversations with the target decisionmakers or even a few good surveys or focus groups often do not provide the depth of understanding necessary to build a strong marketing strategy and effective program. Like a good anthropologist, you need to spend considerable time observing their behavior in their “natural habitat” (where they work, live, or play), talking to the target decisionmakers, viewing the world through their eyes.

Consider the following ideas for gaining access to their “natural habitat”:

1. Offer to meet potential target decisionmakers at their offices and facilities (instead of yours).
2. Ask for a tour of their offices and facilities and if anyone would mind if you chatted with people along the way.
3. Ask if you can attend gatherings for their industry, profession, etc.
4. Invite people to meet informally for coffee instead of only in formal office settings.
5. Read their trade publications or other materials when insiders are speaking to other insiders.
6. Review materials used by companies with a successful track record in selling to your target decisionmakers.
7. Find a few knowledgeable and respected “insiders” willing to spend extra time to educate you on their world. If you have trouble, investigate whether a consulting firm can identify and give you access to such individuals.
8. Ask questions like “How did you get started in this field?”, “How would you describe the organizational culture in your field, company, industry, etc?”, “How are decisions about environmental matters made in this field, industry, company, etc.?”

During this observational process, do your best to eliminate your cultural and professional biases. For example, if you are an environmental scien-

tist by training, you will have to leave this world view “at the door” unless the target decisionmakers happen to be environmental scientists.

To build an effective marketing strategy, you should be able to answer questions like:

1. What is the practice or attitude I am trying to change with my target decisionmakers?
2. What is the aspiration that I am appealing to in target decisionmakers?
3. What are their current practices, attitudes, and environmental practices?
4. What needs of theirs are being satisfied by their current practices?
5. What are the barriers to their changing their practices?
6. What benefits or incentives could I offer that would convince them to change their practices?

Marketing campaigns typically aim to move target customers through the following stages:

1. Awareness
2. Understanding
3. Relevance
4. Trial behavior
5. Satisfaction
6. Loyalty/long-term engagement

Each of your program’s target decisionmakers might be at a different stage on the continuum. It is important to understand where they are in terms of these stages so you can move along

the model towards behavior change and loyalty. In order to change practices, they need to be aware of the issue, program or product being promoted. Once they are aware, they need to understand enough about the program's marketing image to begin to believe that it is relevant to them. Once relevance has been established, the target audience is likely to try the behavior. Assuming that they are satisfied with the experience, they are likely to become a loyal supporter of the program (yielding meaningful environmental results).

Create a vivid profile of a single target decisionmaker

The purpose of this step is to create an image of an individual target decisionmaker that is so vivid and concrete that everyone on your team will understand who you are targeting. Knowing this target decisionmaker will help your entire program team be customer-focused when creating communications materials and interacting with others about the program. The profile will help them better deliver on the promise of your marketing image.

Marketing experts tell us that generic statistical profiles of target decisionmakers tend not to encourage the creative, customer-focused thinking as a vivid profile of an individual target decisionmaker who your team can relate to. The kinds of questions that you want to ask to develop this profile include:

1. Do the target decisionmakers do anything similar to the desired action steps you are seeking? Why?

2. What kinds of issues do they worry about most?
3. What do they feel are their greatest accomplishments?
4. What kinds of principles, individuals, and organizations do they respect and value?

Example

The following is a hypothetical, generic profile based on market research: Your target decision makers are mid-level manufacturing executives between 45 and 55 years old.

A more vivid profile might be: Jane Smith. She's 53 years old, worked for Acme Pharmaceuticals, Inc. for 10 years, most recently as vice president of manufacturing. She received a bachelor's in mechanical engineering from the University of Michigan and her evening MBA from Rutgers. She is most proud of playing a role in helping provide new medicines to people that need them. At work she faces continual pressure to reduce the time-to-market of two new drugs while also rapidly increasing production of the company's old blockbuster drug. She has two kids in high school and a husband who works from a home office.

Your program's team will have an easier time developing a strong marketing strategy and marketing image if they have a vivid profile like the second one. Give this description to your entire team, especially those developing communications materials and those developing or providing services for target decisionmakers and other outside parties. Note that this profile is not intended to represent all target decisionmakers but rather, a profile of a single target decisionmaker plucked from the middle of the group.⁶

Define EPA's image among the target decisionmakers

For many, if not most, target decisionmaker groups, EPA's name will be one of your team's most valuable assets. What's most important during this step is to be sure your program team understands what EPA's image is among your target decisionmakers. By understanding how EPA is perceived, you can build a program marketing strategy that leverages its strengths and avoids any weaknesses.

Example

Many potential target decisionmaker groups believe EPA is the ultimate national authority on what defines an environmentally safe product, company, facility, etc. Some potential target decisionmaker groups may believe EPA "goes too far" in what it defines as environmentally friendly. Other potential target decisionmaker groups may believe EPA "doesn't go far enough," allowing "green washing" to occur. Still others may have no experience or feelings about EPA. Whatever image they have will have strategic implications for your marketing strategy, indicating whether it should build upon or mitigate this pre-existing image (including the possibility of forging and leveraging strategic partnerships).

⁶ Nordhielm, C.L., Marketing Management: The Big Picture (John Wiley & Sons 2005).

Chapter 6:

Develop Your Program's "Positioning Statement"

A market positioning statement is a brief statement that describes what your program is, what it does, what it offers people, and how it is different from similar players in your market or field.⁷ The market positioning statement serves as the "DNA" for your program marketing strategy and will help dictate your program's name, logo, tagline, communication materials, media statements, and more. Your program's positioning statement is linked to the value proposition you created as you designed your program. It should accurately reflect the scope of your program in the marketplace, and it should reflect the marketing "promise" your program plans to communicate to target decisionmakers.

This chapter will help you:

- Use a template to develop a positioning statement.
- Ensure your positioning statement complements EPA's mission and values.

- Incorporate EPA's customer service and standards into your positioning statement.
- Gain buy-in from program staff and allies for your positioning statement.
- Consult with the Office of Public Affairs and your office's communications staff on your positioning statement.

A positioning statement is a brief, but very accurate, statement that explains what your program is, what it does, what it offers people, and most important, how it's different from similar players in your market. Philip Kotler defines a positioning statement as:

*"The act of designing a company's offering and image so that they occupy a meaningful and distinct competitive position in the target customer's minds."*⁸

A positioning statement is externally focused.

A positioning statement:

- I. Places the program within context of the market.

⁷ Adapted from the Web site of Beaupre & Co. Public Relations, Inc. <http://www.beaupre.com/news/views/views_MakeAStatement.htm>

⁸ Kotler, Philip, *Marketing management*. 11 edition (May, 2002); **Publisher:** Prentice Hall; **ISBN:** 0130336297. Kotler is possibly the most widely respected and published marketing expert in the world. Many of his books are worth reading for branding insights.

2. Describes how the program relates to the existing offerings by both the public and private sector.
3. Is brief.
4. Describes strong rational and—if possible and appropriate—emotional benefits. (For example, when you purchase a hybrid car you experience the rational benefit of saving money in fuel. But you may also get emotional benefits such as feelings of pride if your friends or co-workers perceive you as an innovative or more environmentally responsible person after the purchase).

Use a template to create a positioning statement

As mentioned at the beginning of this document, the following template will help you produce a program market positioning statement:

1. For <target decisionmakers>.
2. Who <have the following problem>.
3. Our program is a <describe the solution>.
4. That provides <cite the unique or breakthrough capability>.
5. Unlike <reference other players working with these target decisionmakers>.
6. Our solution <describe the key point of differentiation in terms of benefits>.

1. Create your positioning statement as a team.

One of many advantages of a positioning statement is that the program team, in order to produce such a statement, should have

reached consensus about how it views and talks about itself. If your program team can't agree, you will have little chance of convincing target decisionmakers to respond favorably to your program.

2. Describe the value and promise of your program.

The positioning statement describes the actual or potential value of your program to the target decisionmakers. It should clearly relate to the behaviors, attitudes, or aspirations that you've identified as important.

3. Directly relate the position statement to your value proposition.

Note that items #3 through #6 in the positioning statement template relate directly to the value proposition described in the *Guidelines for Designing EPA Partnership Programs*. The value proposition describes both “what the target decisionmaker gets out the deal” and “what EPA gets out the deal.” The market positioning statement is focused on the first part of the value proposition or “what the target decisionmaker gets out of the deal.”

Examples

Got Milk Campaign

1. For American consumers.
2. Who count on milk to accompany various foods.
3. Our product should always be available in their homes.
4. This will provide a sense of security that they will not run out when they most want it.

5. Unlike other beverages.
6. Our beverage solution provides a healthy comfort to consumers.

Or to put this market positioning statement into one sentence, “If I always make sure that I have milk at home, I will feel good because I will never be caught without milk when I want it.”

Florida Truth Campaign

1. For teenagers.
2. Who might start thinking that smoking is cool and is a way to address their need to connect with their peers and rebel against authority like parents and teachers.
3. Our program shows the coolest teenagers banding together against big tobacco companies trying to manipulate them into smoking.
4. This will provide teenagers with the desire to say no to cigarettes as an act of rebellion against authority and a way to connect with the coolest teens.
5. Unlike other anti-smoking programs that focus on the health issues of smoking or have messages delivered by authority figures (e.g. the health department).
6. Our message is delivered by teens and addresses fundamental needs of teens to feel cool and rebel by taking a stand against big tobacco.

Make sure your statement matches EPA’s mission and values

It is critical that your program’s positioning statement supports the mission of EPA:

“...to protect human health and the environment. Since 1970, EPA has been working for a cleaner, healthier environment for the American people.”

Likewise, any potential conflicts between your program’s positioning statement and the Agency’s mission must be avoided. Consider an example of how a potential conflict was resolved:

Example

If your program addresses one environmental issue but potentially exacerbates another environmental issue, your program could be in conflict with the EPA mission. ENERGY STAR has tackled this situation in the case of energy-efficient home electronic products. On the one hand, EPA wants consumers to upgrade their home electronics to more energy efficient products that have earned the ENERGY STAR label. This, however, means that old products need to be disposed of and the disposal of electronic products has the potential impact of putting hazardous wastes into the environment. ENERGY STAR works with EPA’s Plug Into eCycling program to make sure that proper disposal is part of the message strategy.

Leverage cultural values

Identifying and tapping the cultural values of the target decisionmakers can dramatically improve your program's ability to encourage environmental stewardship behavior. In his book *Social Marketing: Improving the Quality of Life*⁹ marketing guru Philip Kotler applies this concept to public health campaigns. An effective environmental example is the Don't Mess with Texas anti-littering campaign; the program's name leverages the great pride many Texans feel about their state in achieving environmental stewardship behavior.

Incorporate relevant customer service and accessibility standards into positioning statement

EPA established standards for customer service, Partnership Programs, and public access

that apply to the marketing of EPA Partnership Programs. Good customer service can go a long way towards building a program's marketing image in terms of positive feelings target decisionmakers and others will feel about your program. These standards can be found at:

www.epa.gov/customerservice/standards.htm

www.epa.gov/customerservice/standards/public.htm

www.epa.gov/customerservice/standards/partnership.htm

Several EPA statements point the way towards developing and implementing effective positioning statement and program marketing strategy:

Statement	Where it comes from
We will proactively provide our customers accurate, up-to-date, and reliable information, products, and services, including high-quality documents and publications.	Partnership Program standards
We will recognize and publicly acknowledge the accomplishments of our customers who achieve success in EPA Partnership Programs.	
We will make every effort to streamline and make customer reporting requirements as practical and least burdensome as possible.	
(EPA will) make clear, timely, accurate information accessible.	Customer service standards
We will strive to make information available through a variety of channels, including electronic media and intermediaries, such as community organizations and local libraries.	Public access standards

⁹ Kotler; Philip, Ned Roberto, Nancy Lee (2002), *Social Marketing*. SAGE Publications; 2nd edition (March 19, 2002); ISBN: 0761924345

Gain buy-in from program staff and allies on your positioning statement

If you or only some members of your program team “buy into” your proposed positioning statement, your program is likely to suffer. A positioning statement is not just a document used by those creating the program’s name, logo, print materials, and Web site. It should be the guiding document for all program activities and decisions where an external party is involved. Therefore all program staff and allies who do anything with an external party, which is typically everyone, should be committed to the positioning statement or at least be willing to support it.

Consult with your office’s communications staff

Your office employs a communications staff responsible for coordinating the communications by your office and between your office and other EPA offices. It is therefore strongly recommended that you consult with them at the early stages of marketing strategy development. Because your office’s communications staff might insist on coordinating your program’s interactions with the Office of Public Affairs, please consult with them before the Office of Public Affairs.

Be sure to contact EPA Office of Public Affairs (OPA) before releasing a marketing positioning statement.

Consult with the Office of Public Affairs on possible positioning statement

The EPA Office of Public Affairs (OPA) has responsibility within the Agency to ensure that all EPA programs, including Partnership Programs, create communications products that are:

“accurate, timely, and targeted to appropriate audiences, while minimizing redundancy and conflict between products.”

Your program’s market positioning statement will drive all decisions on the print and electronic materials produced by your program. By consulting early with OPA on possible program market positioning statements, you can help optimize your program and OPA’s time, energy, and resources. OPA should be able to give you a preliminary signal as to whether it believes communications materials developed to fulfill your proposed program market positioning statement will be timely and appropriate for the audience and will minimize redundancy and conflict.

We request that you notify the EPA’s Partnership Programs Coordinator within the Office of Policy, Economics, and Innovation (OPEI) to ensure that you are following the best practices, taking advantage of prior research and resources, and following the applicable guidelines.

Chapter 7:

Recognize Strong Environmental Performance

Recognition can be a powerful motivational tool. As the lead federal agency for environmental protection, EPA is in a unique position to recognize the strong environmental performance of American products, services, companies, governments, nonprofits, buildings, and factories. EPA's recognition is valued; however, because it is valued, it needs to be protected. As an EPA Partnership Program manager you need to ask: when does recognition build the brand and reputation of EPA and its programs and when does it undermine them? The following guidelines are designed to ensure such recognition strengthens—and doesn't diminish—the brand and reputation of EPA and its programs. Since many of the issues in this chapter are program design issues as well as marketing issues, they are also covered in the *Guidelines for Designing EPA Partnership Programs*.

This chapter will help you:

- Determine whether a multi-level or single-level standard of environmental performance is appropriate.
- Select the number of levels of your program.
- Select the appropriate level of environmental performance for recognition.

Select the number of levels to recognize

As you set up your program and identify action steps, be careful when thinking about defining multiple action step levels of participation (e.g., Gold, Silver, and Bronze levels of participation). A single level of performance is recommended for most EPA Partnership Programs (e.g., a company or a product either meets the single performance level or it doesn't).

Some state leadership programs have used this multi-level approach, and been successful, as has the U.S. Green Building Council. It can allow programs to give different support and recognition to different kinds of partners.

From a program marketing perspective, however, this approach can be risky, resource-intensive, and time-consuming. A new program or program with limited resources should generally avoid multiple levels. The following are some marketing risks and resource challenges associated with multiple action step levels:

- 1. Loss of producer leveraging.** Product/service producers rarely, if ever, promote claims about their products being “second

best” or “third best” as the Silver and Bronze levels would indicate. Thus the program will not be able to leverage the marketing resources of product/service producers.

- 2. Loss of market identity.** Multiple levels of performance are not the way most buyers/consumers make their buying decisions. Most do not make significant efforts to accumulate additional information or investigate multi-level indicators of product/service performance.
- 3. Lack of resources.** Few EPA Partnership Programs will ever have sufficient resources to adequately define and communicate multiple levels to a reasonable number of target decisionmakers (e.g., manufacturers, retailers, consumers). Every additional tier or level requires 1) data, time, and resources to propose, negotiate, and define it (with stakeholder input); 2) additional time and expense to explain in communications materials; 3) additional time and expense answering questions that arise from stakeholders (inside and outside EPA) about it; and 4) additional time and resources to revise it once it becomes obsolete.
- 4. Added complexity.** Most EPA Partnership Programs struggle to maintain a single standard of performance or level of participation. Multiple levels of participation/performance add complexity few programs can afford.

Recognize strong environmental performance—Select the level to recognize

The *Guidelines for Designing EPA Partnership Programs* discuss how aggressive the environmental

action step should be, or, put another way, how much should you be asking of the target decisionmaker in terms of environmental improvement. This is not just a program design issue but a critical marketing issue. If recognition is given to entities not widely perceived as better or it's given to a group of entities widely perceived as excessively elite, or if it's given in a confusing manner, that recognition can damage the brand and reputation of the Agency and the program.

The decision on recognition can be tricky due to the competing pressures to specify either a very “tough action step” or a very “easy action step.” You might think that a very tough action step will protect the program's image of environmental excellence, but the actions might be so hard that few will take this step. This will diminish environmental results but also hurt the program's reputation and marketing because participation will be so low that few will have heard about the program.

On the other hand, excessively easy action steps may be so obvious or simple that your program will get a lot of participants, but the action may not have a significant environmental impact unless very large numbers take this step. It may attract more participants, but make no real, sustainable changes, which could also diminish the program's environmental impact and damage the program's marketing effort.

Neither extreme—excessively tough action steps nor excessively easy action steps—is typically appropriate when developing a program. A far better approach is to begin your program with an action step already taken by a small share of potential target decisionmakers—the “doers”—who make up perhaps 15 percent

of the market you are targeting. In subsequent phases of the program when the “doers” have increased from, say, 15 percent to 50 percent or 60 percent of the total, the action step can be adjusted so it once again represents approximately 15 percent.

Recognition comes in many forms: eco-labels on products or buildings; award ceremonies; designation of an organization or company as being clean, green, a leader, a star, smart, sustainable, wise, and so on. When does such recognition build the brand and reputation of EPA and its programs and when does it undermine them?

The following criteria are designed to ensure such recognition strengthens the brand and reputation of EPA and its programs. A Partnership Program should only confer recognition on an entity—a product, service, facility, company, government, or other organization—when:

1. Recognition is given to meeting what most experts in the field would consider to be better than average (top 50 percent) environmental performance within the particular environmental category (or categories) in question or implied by recognition. For example, if EPA qualifies a certain airport as a “water efficiency star airport,” then water efficiency experts would generally agree the airport is at least more water efficient than average. If EPA qualifies an airport as a “green airport”, then experts in all the implied fields—energy efficiency, water efficiency, water quality, solid waste, etc.—would generally agree the airport is at least better than average in these areas. (Note that it is often preferred that entity being recognized

qualifies not just as above average but in the top 15 percent of its category).

Or:

2. Recognition is given for the implementation of “beyond compliance” environmental management measures such as adopting an Environmental Management System (EMS) implementation, completing a facility-wide or enterprise-wide environmental inventory (e.g., greenhouse gas inventory), publicly committing to and publicly reporting progress towards environmental “stretch goals,” and/or assigning staff with responsibility for implementing beyond compliance measures.

Plus:

3. The company or organization affiliated with recognition has not been cited by EPA for significant failure to comply with environmental laws and regulations.
4. In the case of products, the qualifying product generally performs at least as well as conventional products (e.g., recognition is not given to a water-saving toilet that fails to flush properly).
5. The requirements for receiving recognition are accessible to all interested firms or organizations (e.g., posted to an EPA Web site).
6. All reasonable steps have been taken to eliminate bias in the requirements (e.g., small firms are not at a disadvantage).
7. It is clear that EPA is only recognizing the strong environmental performance but **not endorsing** a particular product, service, or company.

Adhere to compliance screening guidelines

Note: Before recognizing a company or other outside party, please see the following documents (available on the EPA Intranet site at <<http://intranet.epa.gov/partners>>):

- Guidance on Compliance Screening for EPA Partnership Programs (1999) issued by the

Office of Enforcement and Compliance Assurance (OECA) and Office of Policy, Economics, and Innovation (OPEI)

- “Primer” on EPA’s 1999 Compliance Screening Guidance and Updated List of contacts (November 2006) also issued by OECA and OPEI.

Chapter 8:

Develop your Program's Trademarks— Name, Logo, and Taglines

You or your managers may be tempted to create a name, logo, and tagline (slogan) almost the moment you envision your program. However, there are many considerations that need to be weighed before deciding on the trademarks to symbolize your program. For example, the program's positioning statement, a well thought out understanding of the potential program expansion, current and future program resources and all likely uses of the program marks are big considerations in selecting the trademarks for the program. The Office of General Counsel can assist you every step of the way in the selection and protection of your trademarks to ensure you do not waste time or risk starting over because of a bad choice.

This chapter will help you:

- Create a program name and logo.
- Create a program tagline.
- Work with the Office of General Counsel to select and protect your marks.
- Test your program name, logo, and tagline.
- Create guidelines for the appropriate use of trademarks.

Create a name and logo

The trademarks you choose will be the most identifiable aspects of your program. Likely, the name and logo will follow your program throughout its existence, so it is important to choose wisely. In selecting a name and logo, consider the following:

1. Select a program name and logo distinctive enough to be protected legally and easily remember by target decisionmakers.
2. Work with the Office of General Counsel to ensure your selected name and logo does not infringe a third party's mark.
3. Develop a program name and logo that won't be confusing or misunderstood by target decisionmakers and other key stakeholders.
4. Test draft program name and logo options with members of the target decisionmaker group.

Contact EPA's Office of General Counsel if you have questions about how your trademark can be protected legally.

The book *Marks of Excellence* offers a strategic and comprehensive set of criteria for designing and selecting trademarks. See the “Suggested Reading” section of this document for the full set of criteria. Here are some that apply to names and logos:¹⁰

See the Guidelines for Designing EPA Partnership Programs for information and guidance about trademarks in Chapter 7 and Appendix D. Read these guidelines and then contact the trademark specialist in the EPA’s Office of General Counsel (OGC).

Criteria	Questions to ask...
Visibility	<ul style="list-style-type: none"> • Is the logo graphically recognizable? Graphic qualities must ensure the mark distinguishes itself from its surroundings so that consumers can easily identify it. • Where will the name/logo be used? Investigate the circumstances and contexts under which they will be used.
Application	<ul style="list-style-type: none"> • Can the name/logo be used in all desirable applications? • Where will the name/logo be used? On letterhead, on TV, a Web site, etc.?
Competition	<ul style="list-style-type: none"> • Does the name/logo distinguish itself from other marks used in the same market?
Legal protection	<ul style="list-style-type: none"> • Can this name/logo be protected legally?
Simplicity/brevity	<ul style="list-style-type: none"> • Is the name/logo simple in its concept and therefore easy to understand?
Culturally appropriate	<ul style="list-style-type: none"> • Is the name/logo culturally appropriate for purposes of EPA and your program? • Does the name/logo consider all the cultures that may be exposed to it?
Color and black and white reproduction	<ul style="list-style-type: none"> • Does the logo use standard colors to reduce the cost of reproduction? • Does the logo work well in black and white?
Description	<ul style="list-style-type: none"> • Does the name/logo reinforce—or at least hint at—the nature of the program or its offering?
Timelessness	<ul style="list-style-type: none"> • Is the name/logo durable? • Will the name/logo stand the test of time?

¹⁰ *Marks of Excellence* by Per Mollerup; Publisher: Phaidon Press (March 18, 1999)

Create a program tagline

For program taglines or slogans, the program should weigh, in addition to the above considerations for names and logos, the following:

Poor taglines can hurt an otherwise strong program.

	The program taglines should...
Do target decisionmakers understand it?	<ul style="list-style-type: none"> • Have meaning for decisionmakers. • Demonstrate how the program delivers value. • Be clear to all target decisionmakers and other key stakeholders. • Be written in plain language.
Does it inspire your target decisionmakers to take the actions you want?	<ul style="list-style-type: none"> • Guide decisionmakers to action. • Show the desired outcome. • Engage decisionmakers.
Is it non-offensive?	<ul style="list-style-type: none"> • Appeal to a cross-section of target decisionmakers. • Show an awareness of cultural norms. • Avoid being too cute or juvenile.
Does it reflect the positioning statement?	<ul style="list-style-type: none"> • Include the key words, phrases, and ideas of the positioning statement. • Stay “on message.”
Have you used professional judgment vs. personal preference as the deciding factor?	<ul style="list-style-type: none"> • Reflect the best thinking of the program team and not one or two individuals within EPA. • Not be based on what EPA personnel “like” (vs. strategic).
Is it distinctive?	<ul style="list-style-type: none"> • Memorable for target decisionmakers. • Be distinctive and unique enough to be protected legally.

Work with the Office of General Counsel to select and protect your marks

The Office of General Counsel (OGC) has expertise in the selection and protection of trademark rights. Working closely with OGC from the beginning of this process can save your program money, time, and the frustration of needing to choose a new trademark after investing resources into one you can't use. OGC, not contractors, are the appropriate office for providing trademark searches and legal opinions based on those searches as to the availability of a mark for

your program's use. OGC also can advise your program on the type of mark your program is using, the restrictions on its use, if any, as well as its strengths or weaknesses for protecting it. Along with actually filing for registration of the marks, OGC also reviews partnership agreements involving the licensing of the marks, as well as any trademark use guidelines. So once your program has some ideas for names, logos, or taglines, it should proceed as follows:

- I. Read the *Guidelines for Designing EPA Partnership Programs* to get information and guid-

ance about using trademarks.

2. Consider the intended purpose and proposed uses of the name/logo/tagline.
 - Who would you allow to use it, and why?
 - How or where will it be displayed?
 - Do you intend to monitor and stop unauthorized uses?
3. Develop a set of options for program name, logo, or tagline concepts, generally a half a dozen each. Weigh considerations set forth earlier in this chapter for selecting a mark.
4. Contact OGC to discuss options. Work with OGC on a preliminary screen for options. OGC can identify trademarks that aren't distinctive or would encounter other obstacles; run a Web search for each name to see if it is currently being used; check within industry/stakeholders to see if there is a similar name/logo/tagline currently being used.
5. When the list of name/logo concepts has been narrowed, test them on some typical target decisionmakers. See section below titled "Test program name, logo, and tagline."
6. OGC can enlist a professional name/logo search company to help determine if final name/logo concepts can be registered and protected legally.
7. OGC files and prosecutes the trademark application. It usually takes at least one year to get a registration, provided there are no objections from the Patent and Trademark Office.
8. Before rolling out program, OGC advises on partnership agreements and trademark use guidelines, which are then drafted by the program and reviewed by OGC.
9. While the application is being prosecuted, OGC can advise on the risks or obstacles that the program has or may encounter. Based on OGC advice, the program can determine when to roll out the program under the proposed name/logo/tagline.

Logos and names that the program does not intend to monitor and protect may not need to be registered, but should still receive OGC review and search to ensure that they aren't infringing on an existing mark. Moreover, program marks, if distinctive, may have common law trademark rights even if they are not a registered trademark, because rights in the U.S. are established by use of the mark, as well as by registration.

The more unique and **distinctive** the mark (name and logo), the more likely it can be protected. Consider the name "JiffyLube." This service mark not only conveys the value proposition of quick and convenient oil change service, it is also very unique since it is not a common word but a new term made from two common and somewhat descriptive words. Since it's an entirely new term, other companies would not be able to claim that they need to use it to describe their automobile service. Therefore this mark, for trademark law purposes, is not **merely descriptive** and is more easily protected as a service mark. Had the company named itself "Quick Oil Change" it may have no

trademark rights to the name because the mark would be considered **merely descriptive** of the services offered.

If unauthorized use of the name or logo could be damaging to the program or to the Agency, it is recommended that they are registered, monitored, and protected. For example, if the program wants the consumer to associate only certain products, services, organizations, or buildings with the program name, the integrity of the program is best preserved if the marks are registered. However, if the program is not concerned about limiting who can use the marks and wants as broad distribution of the program marks as possible, registering and protecting the marks may not be cost effective. OGC can assist each program in determining its strengths and weaknesses, as well as the potential risks to the program's integrity for determining whether to register and protect a program's name, logo, or tagline.

Test program name, logo, and tagline

Test your program name/logo/tagline concepts on typical target decisionmakers. Create a research plan and conduct the test. It is always a good idea to test multiple options so you can compare how the target decisionmakers react to various options. It is usually not very helpful to simply ask if they like the concepts or not. Instead, present the program name/logo/tagline concepts to typical and representative target decisionmakers and ask them first:

- Do these program names and /logos/taglines convey any messages to you?
- What messages do these program names

and /logos/taglines convey to you?

- What would be the dominant message they convey?
- Are these messages clear or is something confusing to you?

If they tell you that the intended message is being conveyed clearly and strongly, you may have a winner. If not, consider asking them what changes they would make to ensure your intended message is communicated (but don't tell them your intended message until after they've answered the questions above). The ultimate success is whether the target decisionmakers (not EPA staff alone) believe the name, logo, and tagline convey the positioning statement in the most compelling way possible.

Note: An Information Collection Request (ICR) approval issued by the White House's Office of Management and Budget (OMB) might be necessary to do this survey research. The EPA Partnership Program Team can provide general advice in this regard. OGC should be consulted for a definitive determination on whether an ICR is necessary.

Create guidelines for appropriate use of trademarks

When partnership agreements involve the licensing of the Agency's trademarks (which is almost always the case), the program needs to describe to those wanting to use its marks just how, when, and by whom the marks can be used. The documents describing the proper use have often been referred to as logo use guidelines, but the document is also needed even when only the name or protected tagline is used. Many Partnership Programs in the Agency have logo use guidelines on their Web pages and OGC

Program	Web site Containing Example of Logo Use Guidelines
Performance Track	www.epa.gov/performancetrack/members/membership/logo.htm
ENERGY STAR	www.energystar.gov/index.cfm?c=logos.pt_guidelines www.energystar.gov/ia/partners/logos/downloads/BrandBook_allpages.pdf

can advise each program as to which document is most appropriate as a starting point for developing guidelines for the use of your program's trademarks. Each Partnership Program needs to customize their guidelines for its specific program and specific use of its trademarks.

When putting together trademark use guidelines, consider including the following:

1. Examples of acceptable uses of the trademarks.
2. Specifications on font type, sizes and colors for the logos when used.
3. Basic information about different file types and how to use them.
4. Conditions for use of the trademarks.
5. Details on who oversees use of the trademarks.
6. Purposes of the trademarks—how to use them correctly in different scenarios.
7. Examples of proper and improper trademark use.

Chapter 9:

Promote Your Program

“Touch points” is a fancy term for the ways target decisionmakers (and other stakeholders) are exposed directly or indirectly to your program (see Appendix C: Key Definitions). Because a marketing image is based on everything decisionmakers see, feel, experience, or perceive about your program, each touch point represents either an opportunity to strengthen your program’s marketing image or to damage it. To build a strong marketing image, every touch point needs to reinforce your positioning statement. As you might expect, touch points include the program’s name, logo, and tagline. Additionally, they also include print materials, Web sites, and slides associated with your program. Touch points also include, however, every e-mail and phone call, and even how people speak on behalf of the program. It is important to remember that even the best marketing images, brands, and programs can be damaged by a bad customer experience or a public relations problem. This chapter helps you develop clear, consistent, and cohesive communication strategies that support the marketing image you are creating.

This chapter will help you:

- Identify your external program touch points.

- Ensure your program marketing image is properly conveyed through all touch points.
- Work with a creative team in developing materials.
- Use the EPA name and logo appropriately in communications materials.
- Adhere to EPA’s “endorser branding strategy.”
- Ensure accuracy, consistency, accessibility, and relevance of all materials and language.
- Submit communication materials to PRO-TRAC (EPA’s Product Review Tracking System).
- Train staff to communicate effectively.

Note: The Office of Public Affairs (OPA) is developing additional guidelines on the design of communications materials (including sample templates for EPA reports, fact sheets, slides, Web sites, etc.). Please consult with OPA before producing new communications materials for use outside EPA.

Identify your touch points

Because a marketing image is based on everything your decisionmakers see, hear, and experience concerning your program, you need to identify all the ways you interact with them.

The table below identifies some of the touch points between your program and your target decisionmakers and other stakeholders. Each

of these touch points represents a chance to strengthen—or undermine—your program's reputation.

Program Area	External Touch Points Influencing Your Marketing Image
Program Identifiers	<ul style="list-style-type: none"> • Program name • Program logo • Program tagline
Print Materials	<ul style="list-style-type: none"> • Brochures • Fact sheets • Flyers • Frequently asked questions • Letters • Memoranda of understanding/partner agreement • Reports • Display booths
Electronic Communications	<ul style="list-style-type: none"> • E-mail sent by EPA staff/contractors • E-mail sent by allies/partners in name of the program • Program's Web site (including text, navigation, speed, layout, colors, links) • Web pages by contractors/allies/partners that reference the program
News Coverage	<ul style="list-style-type: none"> • Statements to news organizations • Statements by partners/allies to news organizations about your program • Press releases/packets by EPA staff • Press releases by partners/allies about your program • Press coverage (print articles, TV stories, online news etc.)
Phone Calls/ Conference Calls/ Meetings/Events/ Training	<ul style="list-style-type: none"> • Anything said by EPA staff/contractors/allies/partners over the phone or conference calls • How EPA staff/ contractors/allies/partners answer the phone and the general demeanor over the phone • Anything said by EPA staff/contractors/allies/partners during meetings, training, or events • Responsiveness and tone when responding to questions or concerns

Reinforce the positioning statement

Every touch point—from name and logo to every other form of written, electronic, and verbal communication—needs to reinforce your program positioning statement in content, delivery, and tone.

Compared to private sector marketing, EPA Partnership Program marketing is unique in at least one very important way. A company has the ability to exert a significant amount of control over its marketing image. Every aspect of a private sector brand can be carefully planned and managed. EPA programs often rely on

partners and other third parties to help carry marketing messages to target decisionmakers. This inevitably leads to less direct control on the part of EPA over the marketing image. To manage this situation, work carefully with all partners involved to make sure that a united marketing image is being portrayed. Consider developing a partnership agreement (MOU) with third party supporters defining roles and responsibilities.

1. Content

Make sure that the content of information stays “on message” and reflects your positioning statement.

Example

Let's assume your positioning statement is focused on reducing the costs for pharmaceutical manufacturers as an incentive to reduce the sourcing of toxic materials. With few exceptions, every brochure, report, and fact sheet your program releases should emphasize early and often the cost savings potential of your program.

2. Delivery

Delivery is also critical, and you need to ensure it is consistent with your program's market positioning statement.

Example

Let's assume your program emphasizes cost savings to the program participants as an incentive to take certain action steps. But your brochure is printed on the fanciest of paper stock using fancy embossed lettering, implying that your

program really doesn't care about cost savings internally. Your choice of paper and letter has undermined your marketing image because it conflicts with your positioning statement.

3. Tone

If you've determined that target decisionmakers are more likely to join your program if they believe you and program staff are serious minded, then all communications should avoid a playful, flippant tone. Or just the opposite may be true. For another program, target decisionmakers may be more likely to participate if the program appears to be fun to join. In this case, a bit of tasteful humor during presentations, for example, may be something you should consistently pursue.

Work with a “creative team” to create materials

A creative team can help you bring a good positioning statement to life through various communications media such as print materials, Web sites, PowerPoint presentations, public service announcements, and conference booth displays. A creative team may include a graphic designer, a Web page designer, a copywriter, an art director, and a creative director who directs the creative process by these designers. Your job is to find a good creative team, give them your highly strategic positioning statement, and tell them the communications media with which you want them to “execute” that positioning statement (or you may ask them to recommend the communications media or channels).

Use EPA name, seal, and logo appropriately in materials

When appropriate, you should prominently display the EPA name and logo in EPA distributed communications materials—electronic and print. Before using the EPA name and logo, refer to OGC for trademark and ethics (endorsement) issues and to the following Web site for information and guidance on proper use:

www.epa.gov/productreview/guide/seal_logo/index.html

Two special cases may prevent some EPA Partnership Programs from prominently highlighting the EPA name and logo on its program materials:

1. The program has strong evidence that doing so would significantly diminish the efficacy of the program. (One example of this occurred during the first years of EPA's highly successful Coalbed Methane Outreach Program. EPA found that by initially downplaying the EPA name, the target decisionmakers—owners and operators of coal mines—were more likely to embrace new practices in dealing with the methane leaking out of coal mines).
2. The program is designed in a way that EPA is just one of many members of a coalition and doing so would require every coalition member to include their name and logo.

In both cases, the program is expected to identify and pursue all reasonable opportunities to

highlight EPA's support and contribution to the program.

When developing materials containing EPA's seal or logo, you should remember that: 1) Partners may not be permitted to use the EPA's seal or logo, so if the materials are template for Partners, different rules apply; and 2) no one is allowed to change the EPA seal or logo in any way.

Adhere to EPA's "endorser branding strategy"

Strongly encouraged by EPA's Office of Public Affairs, the "endorser branding strategy" refers to an Agency-wide branding strategy for EPA Partnership Programs and how the EPA name is used in program communications.¹¹ Fortunately, adhering to the "endorser branding strategy" is relatively easy. The following words appear in a reasonably prominent place near the program name in most of your communications materials and on your Web site:

"A U.S. EPA Partnership Program"

By "endorser branding strategy," we mean an Agency-wide strategy that makes it clear that all EPA Partnership Programs are connected to and supported by the U.S. EPA. United Technologies Corporation (UTC) provides a good example of an "endorser branding strategy." The various business units of UTC all have their own distinct names—Carrier (heating and cooling equipment), Otis (elevators), Pratt & Whitney (engines), etc. But these business units

¹¹ The endorser branding strategy was carefully selected among the Agency-wide brand strategy options because it: (1) makes clear all EPA programs belong to EPA, (2) prevents the EPA name from dominating and crowding out other important program messages when this is not strategically possible or wise, (3) helps ensure the value various stakeholder groups perceive in some EPA program can be transferred to other EPA programs and to the Agency, (4) allows EPA programs to conform relatively quickly and easily to the strategy.

also make it clear in their communications that they are part of UTC with a statement under their names and logos, “A United Technologies Company.” For comparison, consider the “master brand strategy” of General Electric in which the distinctive name GE is given to all business units: GE Lighting, GE Appliances, GE Plastics, etc. (If EPA were to pursue this strategy for EPA Partnership Programs, all distinct EPA Partnership Program names would be eliminated, replaced by names like “EPA waste reduction program,” “EPA energy efficiency program,” etc.).

Make sure your materials are accurate, consistent, and accessible

Few things can undermine the credibility of a public authority more quickly than inaccuracy, inconsistency, or inaccessibility in its communications.

1. Consistency

To ensure consistency in text (and even format), try to develop one communications piece (e.g., your program’s Web site) and use it as the master. All other communications pieces largely follow that master. You can also create an internal style guide or graphic standards guide, often called a “branding guide” to help staff members’ create information that looks and sounds similar.

2. Accuracy

It’s important to make sure that you avoid using any unsubstantiated assumptions, facts, or claims. EPA has a solid reputation for providing accurate data and information. If you borrow facts or claims from others, make sure that you are comfortable with the

source and methodology used to create the information. Ensure your master communications piece and all that follow are accurate and consistent with messages delivered by other parts of EPA. Advise other program staff, consultants, and allies to use only language and especially program “factoids” found in that master.

3. Accessibility

Use plain language. Your target decision-makers should be able to read and easily understand all of your materials. Achieving this goal might mean producing your materials in another language. One suggestion for accessibility is to ask non-technical support staff for your program to review all significant communications materials. You should go back and revise your materials if, for example, these individuals don’t know the meaning of “non-point source pollution” or can’t understand why the materials refer to “excess nutrients” in the water supply as a problem.

Submit communication materials to PROTRAC

EPA’s Office of Public Affairs (OPA) has guidelines that apply to all media, including print, Web, audio-visual, and displays. OPA ensures that information is accurate, timely, and targeted while minimizing redundancy and conflict between products.

See

www.epa.gov/productreview

for guidelines on developing communications products and getting them approved.

See <www.epa.gov/productreview/> for the *Policy and Implementation Guide for Communications Product Development and Approval*. As part of this process, print communications materials need to be submitted to OPA through a system called PROTRAC.

When reviewing material, OPA will consider the following questions:

1. Is it appropriate?
2. Does it convey the correct message?
3. Does it have a good look and feel? (e.g., colors, shapes, words, images, common elements, graphics).
4. Will anything hurt EPA later?
5. Who paid for the design (are there legal issues)?
6. Has the trademark been screened by OGC?
7. Is the message sensitive to all people?
8. Will the audience understand the terms?
9. Is the font printable by the EPA print shop (or do we have to pay for a new font)?

Ensure communication channels are on message

Choose communication strategies—including partner organizations, events, venues, and channels—very carefully so they strengthen, not weaken, your program.

Consider the case of the U.S. Marines officer recruiting campaign. This brand campaign worked hard and invested heavily to strategically brand

position the Marine officers as “tough, smart, elite warriors.”¹² The campaign was faced with a major recruiting goal and what appeared to be a great opportunity: market at a professional wrestling event. Demographically, the event looked ideal, given the large number of young American males drawn to this sport. In the end, the campaign wisely decided to pass on this marketing opportunity, believing the “elite warrior” brand positioning was in conflict with the raucous environment of a professional wrestling event.

Train staff to communicate about the program

The good will built up over many years can often be lost quickly if even one decisionmaker touch point is poorly managed. Your Web site and communication materials might do a brilliant job of bringing your highly strategic positioning statements to life, but if some e-mail sent to your decisionmakers is confusing or conflicts with the positioning statement, your overall marketing image will suffer.

The private sector often uses the term “customer facing staff” when referring to staff who interact with customers. To ensure that you deliver on the promise of your program’s marketing image, all customer-facing program staff, consultants, and allies should be trained in the positioning statement. But you should also ensure they are trained in the EPA standards for customer service, Partnership Programs, and public access discussed earlier in these guidelines.

The training would emphasize the importance

¹² See <http://www.effie.org/award_winners/images/317_2001.pdf>

of “staying on message” and how repetition and consistency with this message is essential to creating a strong marketing image. You may even find it to your advantage to train program staff that is not customer-facing. By doing so, they may have an easier time supporting requests and decisions by other members of the team that are based on the positioning statement.

If your program staff or external supporters are very new to marketing or struggle with some of these concepts, consider having them trained in public sector/social marketing. The EPA Partnership Program Coordination Team can help you find good trainers and courses.

Appendices

- Appendix A: Senior EPA Leadership Marketing Checklist
- Appendix B: Program Manager's Marketing Checklist/Worksheet
- Appendix C: Key Definitions
- Appendix D: Program Marketing When Target Decisionmakers Are Household Consumers
- Appendix E: Program Marketing When Target Decisionmakers Are in the World of Business
- Appendix F: Suggested Reading
- Appendix G: Suggested Web Sites

Appendix A: Senior EPA Leadership Marketing Checklist

The following marketing checklist has been provided for senior EPA leaders when an EPA Partnership Program is being developed or significantly changed or expanded within your organization.

Reviewing the Guidelines

- Has the Partnership Program Manager within your organization read the Guidelines for Designing EPA Partnership Programs and the Guidelines for Measuring the Performance of EPA Partnership Programs?
- Has the Partnership Program Manager within your organization read the Guidelines for Marketing EPA Partnership Programs?

Market Strategy and Coordination

- Has the Partnership Program Manager within your organization produced a draft marketing strategy with a strong customer orientation?
- Has the Partnership Program manager explored opportunities to coordinate program design and marketing strategies with other government programs?
- Has the Partnership Program Manager produced a draft marketing positioning state-

ment in a format similar to the following:

1. For <target decisionmakers>.
2. Who <have the following problem>.
3. Our program is a <describe the solution>.
4. That provides <cite the unique or breakthrough capability>.
5. Unlike <reference other players working with these target decisionmakers>.
6. Our solution <describe the key point of differentiation in terms of benefits>.

Review by OPA, OGC, and the IAC Partnership Programs Workgroup

- Has the Partnership Program Manager presented the draft marketing strategy and marketing positioning statement for review to the IAC Partnership Programs Workgroup?
- Has the Partnership Program Manager presented the draft marketing strategy and marketing positioning statement to OPA for review?
- Has the Partnership Program Manager consulted with OGC and submitted the marketing positioning statement and possible program names, logos or taglines to OGC for trademark availability and protection review?

Appendix B: Program Manager’s Marketing Checklist/ Worksheet

Marketing Question	Your EPA Partnership Program (Fill in)	Checklist
Program Scope		
What is the scope (or “market”) of your program?		<input type="checkbox"/> Is the scope specific enough to allow you to make an impact within the available resources but also broad enough to allow future program expansions? <input type="checkbox"/> Have you checked with key stakeholders about the planned market/scope of the program to make sure you have their support?
Have opportunities to coordinate program design and marketing strategies with other government programs been explored?		<input type="checkbox"/> Check with OGC <input type="checkbox"/> Check with the Partnership Programs Coordinator <input type="checkbox"/> Check with IAC Partnership Programs Workgroup
What are your program team’s existing and needed core competencies?	Needed core competencies : How will you get them?	<input type="checkbox"/> Have you identified core competency sources as follows? 1. From within your team 2. From within EPA 3. From potential partners 4. From contractors <input type="checkbox"/> If you need help identifying resources, contact EPA’s Partnership Program Coordination Team.
What are the strengths, weaknesses, opportunities and threats facing your Program?	Strengths: Weaknesses: Opportunities: Threats:	<input type="checkbox"/> Remember that strengths and weaknesses are internal to your program; opportunities and threats are external forces affecting your program.

Marketing Question	Your EPA Partnership Program (Fill in)	Checklist
Goals & Objectives		
What is the program's marketing goal?	Goal:	<input type="checkbox"/> Management approval of goal? <input type="checkbox"/> Is your goal realistic in terms of the resources, staff and time?
What are the measurable marketing objectives of your program?	Objective #1: How will it be measured: Objective #2: How will it be measured:	<input type="checkbox"/> Does each objective link to your stated goal? <input type="checkbox"/> Is each objective measurable, time-delineated and single-minded? <input type="checkbox"/> Have you allocated resources for measurement of objectives?
Target Decisionmakers		
Who are ALL of your target decisionmaker groups? Identify if they are primary, influencers, or gatekeepers.	Audience: Role (primary, influencer or gatekeeper):	
Of these target decisionmaker groups, which will be your programs priority decisionmaker group?	Priority audiences:	<input type="checkbox"/> Are the priority audiences chosen the ones that can most quickly and in a resource efficient manner get you to your goal?
What are the characteristics of your priority audiences?	Priority audience #1 characteristics: Priority audience #2 characteristics: Priority audience #3 characteristics:	<input type="checkbox"/> Did you look for existing research sources from within EPA? <input type="checkbox"/> If you need to do original research, are you following EPA information collection protocols (e.g., ICR)? <input type="checkbox"/> Did you include a mix of demographic characteristics with behavioral, attitudinal or aspirational information?
Write your vivid profile of a single target decisionmaker in each priority audience group.	Priority audience #1 vivid profile: Priority audience #2 vivid profile: Priority audience #3 vivid profile:	<input type="checkbox"/> Does the vivid profile you created help you better understand the values, beliefs and feelings of this target decisionmaker? <input type="checkbox"/> Did you use research (either existing or original) to develop and verify this profile?

Marketing Question	Your EPA Partnership Program (Fill in)	Checklist
Target Decisionmakers		
What behavior do you want your priority audiences to change?	Priority audience: Behavior change:	<input type="checkbox"/> Is the desired behavior change specific and measurable?
What are the barriers and motivations for each desired behavior change?	Audience: Behavior change: Barriers Motivations:	<input type="checkbox"/> Now that you have a full profile of each priority audience with the barriers and motivations defined, are there any audiences that should be removed from your priority list?
Program Marketing Positioning		
What is your program's marketing positioning statement?	For <target decision-makers> Who <have the following problem> Our program is a <describe the solution That provides <cite the unique or breakthrough capability Unlike <reference other players working with these target decisionmakers> Our solution <describe the key point of differentiation>	<input type="checkbox"/> Is your positioning statement consistent with EPA's mission? <input type="checkbox"/> Does your positioning statement focus on benefits, not features? <input type="checkbox"/> Have you consulted with your office's communications staff on draft positioning statement? <input type="checkbox"/> Have you consulted with the Office of Public Affairs on your draft positioning statement? <input type="checkbox"/> Have you involved your program's stakeholders in the process to develop your positioning statement?
What are the name, logo, and tagline planned for the program?	Name: Tagline: Logo (if created):	<input type="checkbox"/> Do all your name, logo and tagline options support your positioning statement and program goals? <input type="checkbox"/> Have you consulted the Office of General Counsel about trademarks issues? <input type="checkbox"/> Have you tested draft program name, logo, and tagline with priority audience groups and stakeholders? <input type="checkbox"/> Have you made sure that your name is not going to compete with or cause confusion with other EPA programs?

Marketing Question	Your EPA Partnership Program (Fill in)	Checklist
Program Marketing Positioning		
How will EPA be incorporated into program market positioning?		
Recognizing Performance		
Communications Planning		
What materials do you plan to develop to support the marketing strategy?		<input type="checkbox"/> Remember to submit materials to PROTRAC for review and approval before publishing. <input type="checkbox"/> Remember to include the following language on materials: "A U.S. EPA Partnership Program"
How do you plan to train program staff and allies on the marketing strategy?		<input type="checkbox"/> Remember that trainings should start with your team and then move to partners and others.

Example of Completed Marketing Checklist/Worksheet

Marketing Question	Best Workplaces for Commuters (EPA and DOT)
Program Scope	
What is the scope (or "market") of your program?	BWC is an EPA and DOT partnership program created with the goal of reducing single-occupancy vehicle (SOV) commuting trips in order to reduce greenhouse gas emissions and help relieve traffic congestion. The program scope includes promoting a national standard of excellence in commuter benefits to employers to make it easy for employees to change commuting behavior.
Have opportunities to coordinate program design and marketing strategies with other government programs been explored?	Existing program: It All Adds Up to Clean Air Campaign led by U.S. DOT Leverage potential: After extensive investigation, it was determined the Adds Up campaign is targeting a different audience (commuters vs. employers) with different primary benefits/messages.
What are your program team's existing and needed core competencies?	Needed core competencies: Recruitment support How will you get them: Partnering with local Transportation Demand Management (TDM) organizations, Metropolitan Planning Organizations, and Chambers of Commerce agencies; contractor support
What are the strengths, weaknesses, opportunities and threats facing your Program?	Strengths: National program, EPA/DOT sponsorship, strong environmental benefits/messages, off-the-shelf ready to implement program Weaknesses: Funding constraints, staff levels, need a stronger business case for commuter benefits, multiple decisionmakers within firms Opportunities: Markets with emerging traffic problems, rising gas prices, competitive labor market Threats: Competing local brands/programs, America's love affair with their cars, lack of transit for some employers
Goals & Objectives	
What is the program's marketing goal?	Goal: Make BWC the national program name or "brand" that makes excellent commuter benefits a standard part of employee benefits packages

Marketing Question	Best Workplaces for Commuters (EPA and DOT)
Goals & Objectives	
<p>What are the measurable marketing objectives of your program?</p>	<p>Objective #1: Partner with local TDM agencies in X markets to conduct local BWC campaigns</p> <p>How will it be measured: Number of local partnerships/campaigns</p> <p>Objective #2: X number of employers join program representing X number of employees</p> <p>How will it be measured: Number of employers that join BWC and number of employees represented</p> <p>Objective #2: Establish BWC as a known and trusted name among priority target audiences</p> <p>How will it be measured: Name recognition among TDM community, name recognition/demand for program by employers, marketing message exposure measurements (volume of media clips, impressions etc.)</p>
Target Decisionmakers	
<p>Who are ALL of your target decisionmaker groups? Identify if they are primary, influencers or gatekeepers.</p>	<p>Audience: Role (primary, influencer or gatekeeper):</p> <p>Employers:</p> <ul style="list-style-type: none"> • Business owner/manager (primary) • Transportation Coordinator (influencer) • Human Resource Manager (influencer) • Facilities Manager (influencer) • Administrative Staff (gatekeeper) <p>Local TDM (Transportation Demand Management) Partners (influencer)</p> <p>Employees (primary)</p>
<p>Of these target decision-maker groups, which will be your programs priority decisionmaker group?</p>	<p>Priority audiences:</p> <p>Employers:</p> <ul style="list-style-type: none"> • Business owner/manager (primary) • Transportation Coordinator (influencer) • Human Resource Manager (influencer) <p>Local TDM Partners (influencer)</p> <p>Note: employees will become a priority audience for BWC once the name is established and there is a solid base of organizations offering excellent commuter benefits.</p>

Marketing Question	Best Workplaces for Commuters (EPA and DOT)
Target Decisionmakers	
<p>What are the characteristics of your priority audiences?</p>	<p>Business owner/manager characteristics: President or chief-level title. Tend to commute in single-occupant vehicles to work. Upper income. Busy people with many things competing for their attention. Financial performance of company is the key focus of most decisions. Recognition/ leadership are often strong motivators for this group.</p> <p>Transportation coordinator characteristics: Mid- to low- level employee within their organization. Transportation responsibilities are probably not their primary job function making being proactive about these issues often a low priority.</p> <p>Human resource manager characteristics: In charge of employee relations, benefits, recruitment and retention. Reports to company management/ownership. Wants company to offer the best benefit package possible to employees while also staying within the company's needed financial parameters. Will advocate for new benefits if a case can be made that they are a smart business decision for the company.</p> <p>Local TDM partner characteristics: Public sector employees working for local government or transit agency. Usually mid-level employees that are personally committed to the goal of reducing SOV commuting. They are often busy with many job responsibilities and have to operate within tight funding parameters. Likely use alternate modes of commuting themselves.</p>

Marketing Question	Best Workplaces for Commuters (EPA and DOT)
Target Decisionmakers	
<p>Write your vivid profile of a single target decisionmaker in each priority audience group.</p>	<p>Business owner/manager vivid profile:</p> <p>Jim Smith is the chief operating officer of a telecommunications firm with 200 employees in Los Angeles. He prides himself on the benefits package that his company offers employees. He is in charge of overall recruitment and retention of the workforce but is also very focused on his role in helping to achieve bottom-line profitability for the company. Jim commutes more than an hour each way to work in his Ford Explorer. While he believes that is important for other people to use public transportation, he is too busy and has too much of an unpredictable schedule to allow him to do so.</p> <p>Transportation coordinator vivid profile:</p> <p>Bill Neil is a facility manager and transportation coordinator for a grocery store chain. He works at the downtown headquarters, while the company's employees are spread throughout the region at various retail and processing locations. Local government requires that companies of his size create a commute trip reduction (CTR) plan and appoint transportation coordinator. This job duty was added to his facility management duties two years ago. He believes in public transportation as a concept, but feels that for many of his company's employees, the hours and locations where they work make it hard for them to use. He resents the requirement to put together a CTR plan and feels that the reporting requirements are burdensome.</p> <p>Human resource manager vivid profile:</p> <p>Theresa Jones is the HR manager for a private healthcare facility. Her industry has a high turnover rate, and she is constantly working on ways to retain existing employees and recruit new ones. The facility is on the outskirts of town with somewhat limited public transportation options. Her employees work round-the-clock. The facility's top priority is patient care, meaning anyone proposing new programs or benefits needs to prove to management that they will improve patient care while stewarding the organizations limited resources.</p> <p>Local Transportation Demand Management partner vivid profile:</p> <p>Jane Mitchell is a transportation coordinator for the Clark County Transit Authority. She graduated three years ago with a graduate degree in urban planning. Her primary job function is to manage the sale of their universal transit pass to businesses. She considers herself an environmentalist and is committed to the idea that reducing SOV trips is a better solution than building new roads. She lives downtown and either takes the bus or rides her bike to work.</p>

Marketing Question	Best Workplaces for Commuters (EPA and DOT)
Target Decisionmakers	
What behavior do you want your priority audiences to change?	<p>Priority audience/Behavior change:</p> <p>Business Owner/Manager: Meet the national standard of excellence in commuter benefits and become a BWC employer.</p> <p>Transportation Coordinator: Advocate for offering employees commuter benefits and for signing their organization up for BWC.</p> <p>Human Resource Manager: Advocate for offering employees commuter benefits and for signing their organization up for BWC.</p> <p>Local TDM Partners: Adopt BWC as a CTR program in their community and recruit local employers into the program.</p>
What are the barriers and motivations for each desired behavior change?	<p>Audience: Business Owner/Manager</p> <p>Barriers: Cost, other issues competing for their time</p> <p>Motivations: Recognition, competitive edge (retention/recruitment), productivity, cost savings (in some cases, avoided parking, tax benefits etc.), leadership/being a good community steward</p> <p>Audience: Transportation Coordinator</p> <p>Barriers: Lack of decisionmaking authority, time constraints, implementation logistics concerns, surveying and reporting requirements</p> <p>Motivations: Employee satisfaction, doing a good job – recognition from management, recognition for company</p> <p>Audience: Human Resource Manager</p> <p>Barriers: Perceived lack of demand by employees, lack of management support, surveying and reporting requirements, implementation logistics concerns</p> <p>Motivations: Retention/recruitment, recognition for company, praise from management</p> <p>Audience: Local TDM Partners</p> <p>Barriers: Competing CTR programs in market, lack of time to implement, lack of funding</p> <p>Motivations: Existing program – ready to implement, being part of national EPA program, opportunity for national recognition, ability to connect with and learn from other BWC markets</p>

Marketing Question	Best Workplaces for Commuters (EPA and DOT)
Program Marketing Positioning	
What is your program's marketing positioning statement?	<p>For employers</p> <p>Who need to keep a motivated and productive workforce</p> <p>Our program is a way to help their employees by offering options for commuting to work</p> <p>This will provide better retention, recruitment, and productivity for the organization</p> <p>Unlike organizations that do not offer commuter benefits</p> <p>Our solution will provide valuable recognition that will position their organization as a leader in their community</p>
What are the name, logo and tagline planned for the program?	<p>Name: Best Workplaces for Commuters</p> <p>Tagline: Recognizing excellence in commuter benefits</p>
How will EPA be incorporated into program market positioning?	TBD
Recognizing Performance	
Communications Planning	
What materials do you plan to develop to support the marketing strategy?	<ul style="list-style-type: none"> • Web site • Fact sheets • Press materials • Sharing of locally developed materials with other markets
How do you plan to train program staff and allies on the marketing strategy?	<ul style="list-style-type: none"> • Web site • Tele-seminars • Speaking engagements at conferences • E-mail communication

Appendix C: Key Definitions

- **Brand.** In the case of EPA Partnership Programs, the brand and marketing image conveyed will determine, perhaps more than anything else, the receptivity of the target decisionmakers to the action steps EPA is asking them to take. Many textbooks on marketing and brand management start by saying “what a brand is not.” A brand is not a logo, icon, tagline, slogan, a program name, or mission statement. A strong brand is like an unwritten **promise** to a group of target decisionmakers that your program will solve a pressing problem for them and then consistently delivering on that promise. The program name and logo are symbols of that promise. Whether the target decisionmakers believe you will deliver on that promise is based on all of the experiences, information, and observations they may have about your Program and EPA.
- **Positioning statement.** A positioning statement is a brief, but very accurate, message that explains what your program is, what it does, and most important, how it's different from competitors¹³. A positioning statement is externally focused. A positioning statement needs to: 1) place the program within context of the external “market,” 2) describe how the program relates to the existing offerings by both the public and private sector 3) be brief, and 4) be entirely defensible.
- **Target decisionmaker.** These are the people an EPA Partnership Programs tries

to convince to take certain action steps to protect human health and the environment. In marketing publications they are often referred to as the “target audience.” For purposes of this document, target decisionmakers is more appropriate because the term implies the program is more highly focused on fewer individuals with actual decisionmaking authority instead of a mass audience. Most EPA Partnership Programs have resources sufficient to target a small set of individuals and not a mass audience directly (at least without the help of partner organizations whose leaders then become the target decisionmakers). For many EPA Partnership Programs, target decisionmakers are the people targeted for signing a memorandum of understanding (MOU) agreement with EPA.

- **Touch point.** Touch point is a common term in the fields of marketing and branding to mean the ways outside parties—customers, suppliers, stakeholders, shareholders—are exposed to anybody or anything associated with a particular company. The more obvious touch points are a company's advertisements, Web site, press releases, and products because outside parties will be exposed to the company in these ways. Less obvious but equally important touch points include the company's customer service people, technical support people, product packaging, product manuals, training courses, and speeches given by employees of the company. A smart company (and EPA Partnership Program) ensures their brand or market positioning is reinforced—and never

¹³ Adapted from the web site of Beaupre & Co. Public Relations, Inc. See <http://www.beaupre.com/news/views/views_MakeAStatement.htm>

compromised—through every interaction outside parties have with the company (or program) through every touch point. For EPA Partnership Programs, touch points not only include all of materials and human interactions described above but also MOU/ partner agreements, logo use guidelines, partner reporting forms, etc. (they all need to support and not undermine the program’s reputation nor its marketing positioning statement in the minds of stakeholders).

- **Trademark.** The word “trademark” is an umbrella term to refer to any kind of legally protected mark used in commerce and used to indicate the source or sponsorship. Trademark rights give the owner of the mark exclusive rights to use (or license) the mark,

but with those rights come obligations to protect the mark from the unauthorized use of it. This in turn protects the public from being confused as to source or sponsorship. Trademarks symbolize the goodwill or “promise” the owner of the mark makes. Other kinds of trademarks include service marks, certification marks, collective membership marks and collective marks. Each kind of mark has its unique purpose.

- **Value proposition.** A value proposition is the deal or promise you make with target decisionmakers that articulates what action steps you want stakeholders to take and what value of benefits they will receive as a result of taking those action steps.

Appendix D: Program Marketing When Decisionmakers Are Household Consumers

The household consumer market is probably the most challenging to pursue in terms of segmenting and targeting. In most cases, an EPA Partnership Program will not have sufficient resources to effectively reach and influence more than a tiny fraction of American household consumers. Therefore, it usually is unwise for an EPA Partnership Program to select household consumers as the target audience unless it can partner with an entity with sufficient resources and commitment to reach and influence such a broad audience.

That said, there are several good sources for segmenting American citizens or household consumers for environmental purposes: Roper Starch Green Gauge, LOHAS, Cultural Creatives, etc. One of the most useful segmentation tools out there today is the Lifestyles of Health and Sustainability (LOHAS) Consumer Report. It segments the population into four groups based on their receptivity to sustainability, health and lifestyle variables. The four segments are as follows:

- 1. LOHAS.** A consumer group whose attitudes, behaviors, and usage of goods and services are significantly affected by their concern for health – the health of their families, the sustainability of the planet, their personal development, and the future of society (this group represents about 32 percent of the adults in the United States).
- 2. Centrists.** An assemblage who congregate toward the conservative end of the spectrum when it comes to dealing with health and sustainability (this does not necessary refer to one's political values and behavior just behavior as it relates to their health and the environment). They are more steadfast in their attitudes, behavior, and usage of specific products and services – regardless of their impact on the planet and self (this group represents about 25 percent of adults in the United States).
- 3. Nomadics.** A conglomeration of consumers who are in search of their true “sense of well being.” As so, they tend to move from place to place with regard to personal ideals, environmental platforms, and the overall relevance of sustainability (this group represents about 39 percent of adults in the United States).
- 4. Indifferents.** A consumer group that sees no need or recognizes no connection between their consumption patterns and the effect it has on resources. They are caught up in the day to day challenges, not necessarily looking out for tomorrow. (This group represents about 4 percent of U.S. adults).

The LOHAS and other segmentation reports are available for purchase either as a final report or on a subscription basis. You can also contact the companies that own this research to run custom sorts within the segments defines. For example, ENERGY STAR has done extensive analysis of the LOHAS data, looking specifically at behaviors that deal with energy use. Check with the Partnership Program Coordination

Team about sources of research within EPA before you make your own purchase or subscription.

It may not come as much of a surprise that the greenest consumers in terms of attitude and values tend to have higher incomes and educational levels (people at lower income levels are

often “greener” due to lower overall consumption). Women also tend to have greener attitudes than men, and East Coast and West Coast residents tend to be greener attitudes than other parts of the country. Children also tend to have greener attitudes and also have influence on the purchase and other decisions of their parents.

Appendix E: Program Marketing When Decision-makers Are in the World of Business

The *Guidelines for Designing EPA Partnership Programs* encourages you to be strategic and specific when defining your Program's target decisionmakers. For EPA Partnership Programs targeting businesses, marketing guru Philip Kotler offers additional advice on precise and strategic identification of decisionmakers in his classic book *Marketing Management*¹⁴. For businesses, he describes the following roles:

- 1. Initiators.** These are individuals who initiate the process by asking that something be purchased or some other organizational change is made. They may be users or others in the organization.
- 2. Users.** These are individuals who will use the product or service or most directly experience the organizational change.
- 3. Influencers.** These individuals influence the buying or other decisions. They often help define specifications and provide information for evaluating alternatives. Technical personnel are particular important influencers.
- 4. Deciders.** These people decide on product requirements and/or suppliers.
- 5. Buyers.** These individuals have the formal authority to select the supplier and arrange the purchase. They often shape product specifications, help select vendors, and negotiate the deal.
- 6. Gatekeepers.** These individuals have the

power to prevent sellers or information from reaching other decision-makers.

It is important to note that in some cases an audience group can play more than one of these roles. In the case of EPA's SunWise Program, for example, teachers are both a primary audience, because EPA wants them to sign up for the program, as well as an influencer audience because EPA wants them to influence kids to practice sun-safe behaviors.

Once you have brainstormed all possible audiences and identified each of their roles as a primary, influencer, or gatekeeper, you then need to choose priority audiences for your program. Priority audiences are those that can most quickly deliver you to your goals and objectives within the resources that you have available. As mentioned earlier, Partnership Programs can easily fail if they try to be too many things to too many people. Strong marketing is focused on the needs of its key target audiences. This is where you choose which audiences are the most important for your program's success.

For example, EPA's C²P² (Coal Combustion Products Partnership) program aims to help create markets for coal ash in order to keep it out of landfills. In order to be successful, C²P² needed to target both the industry creating the ash, the local regulators that regulate its disposal, and the potential end users of the ash (construction companies). All of these audiences are a priority for the program because they all need to change their behavior in order for the program to be successful and achieve its goal creating a market for the beneficial reuse of industrial coal ash.

¹⁴ Kotler, Philip, *Marketing management*. 11 edition (May, 2002); Publisher: Prentice Hall; ISBN: 0130336297

Appendix F: Suggested Reading

- Academy for Educational Development. *Social Marketing Lite: A Practical Resource Book for Social Marketing*. AED, 2000.
- Checco, Larry. *Branding for Success: A Roadmap for Raising the Visibility and Value of Your Nonprofit Organization*. Trafford, 2005.
- Colehour, Julie and Cohen, Bryan of. *Planning for Effective Social Marketing Campaigns: A step-by-step guide and workbook*. Colehour+Cohen, 2005.
- EPA. Using the ENERGY STAR Identity to Maintain and Build Value. See <www.energy-star.gov/ia/partners/logos/downloads/Brand-Book_allpages.pdf>
- Gilbert, Jill. *The Entrepreneur's Guide to Patents, Copyrights, Trademarks, Trade Secrets & Licensing*. Berkley Trade, 2004.
- Haig, William L., L. Harper. *The Power of Logos: How to Create Effective Company Logos*. Wiley, 1997.
- Kapferer, Jean-Noel. *Strategic Brand Management: New Approaches To Creating And Evaluating Brand Equity*. The Free Press, A Division of Macmillan, Inc., 1994.
- Kempton, Willett, J. Hartley, J. S. Boster. *Environmental Values in American Culture*. Rebound by Sagebrush, 1996
- Kotler, Philip. *Marketing management*. 11 edition. Prentice Hall, 2002.
- Kotler, Philip, N. Roberto, N. Lee. *Social marketing: Improving Quality of Life* 2nd edition. SAGE Publications, 2002.
- Lodish, L.M., Morgan, H.L., Kallianpur. A. *Entrepreneurial Marketing: Lessons from Wharton's Pioneering MBA Course*. John Wiley & Sons, 2001.
- McKenzie-Mohr, D., W. Smith. *Fostering Sustainable Behavior. An Introduction to Community-Based Social Marketing*. New Society Publishers, 2001.
- Mollerup, Per. *Marks of Excellence*. Phaidon Press, 1999.
- Nordhielm, Christie L. *Marketing Management: The Big Picture*. John Wiley & Sons, 2005.
- Ries, Al, L. Ries. *The 22 Immutable Laws of Branding*. HarperBusiness, 1st edition, 2002.
- Ries, Al, Trout, J. *Positioning: The Battle for Your Mind*. McGraw-Hill, 2000.
- Rogers, Everett M. *Diffusion of Innovations, Fourth Edition*. Free Press, 1995
- Roper. *Green Gauge 2002: Americans Perspective on Environmental Issues: Yes ... But*. Roper-Starch. 2002.

Appendix G: Suggested Web Sites

For a good summary of the major market research studies on American citizen and consumer attitudes about the environment, see:

<www.thegreenlife.org/greenprofiling.html>

For a summary of the (somewhat dated) 2002 Roper Starch Green Gauge survey of American environmental attitudes (more recent surveys of this type may be available; Please contact the EPA Partnership Program Coordinator):

<www.windustry.com/conferences/november2002/nov2002_proceedings/plenary/greenguage2002.pdf>

To learn more about the LOHAS green consumer marketing research and market segmentation see:

<www.lohasjournal.com>

<www.lohas.com>

To see how another federal agency has set standards for the look, feel, and style of communications products, see:

<www.usaid.gov/branding/>

<www.usaid.gov/branding/USAID_Graphic_Standards_Manual.pdf>