



Limited-Time Offer

PLAYBOOK

HOW TO EXECUTE AN LTO!



CUSTOMER EXPERIENCE



PROMOTION DETAILS



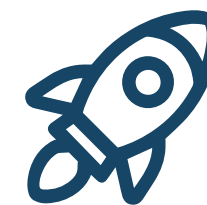
CART REQUIREMENTS



MARKETING APPROACH



CREATIVE ASSETS



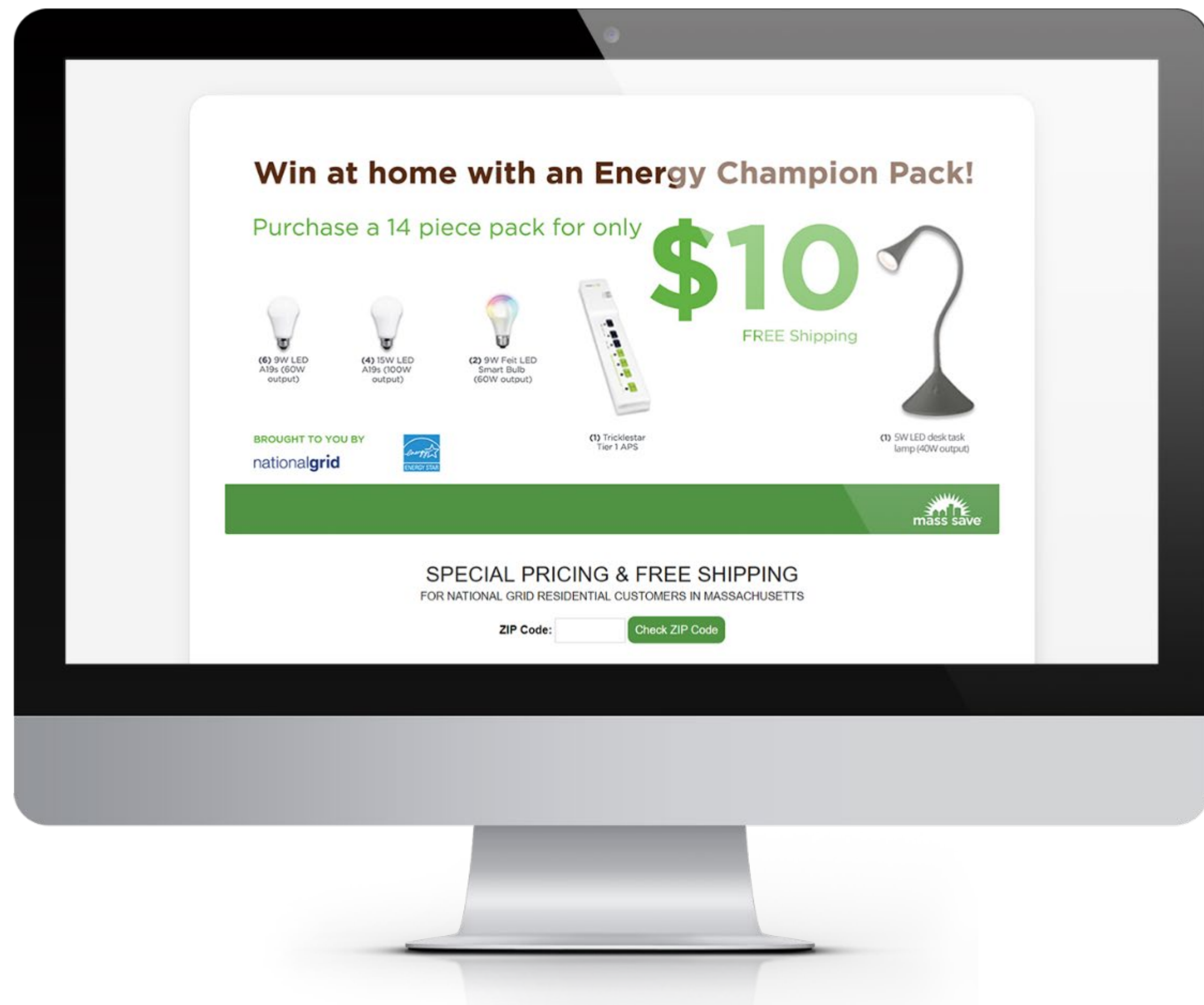
LAUNCH PREPARATIONS



BACKEND SUPPORT



CUSTOMER EXPERIENCE



IDENTIFY OFFER

- Select promotion dates
- Determine product mix for the offer and pricing strategy
- Determine incentive levels, shipping cost, and taxes

DEVELOP APPROACH

- Pick from one of the following standard promotion types:
 - Customer has a choice of one product or bundle with limited permutations (e.g. bathroom pack in warm white or daylight)
 - Customer has the choice between two products or bundles with limited permutations (e.g. either a dehumidifier or room air cleaner)
 - Customer has the choice of a handful (no more than four) products (e.g. smart t-stat, APS, etc.)
- Determine add-ons: customer can choose to add onto their order a product or two (e.g. 4-pack A19 60w LEDs)



PROMOTION DETAILS

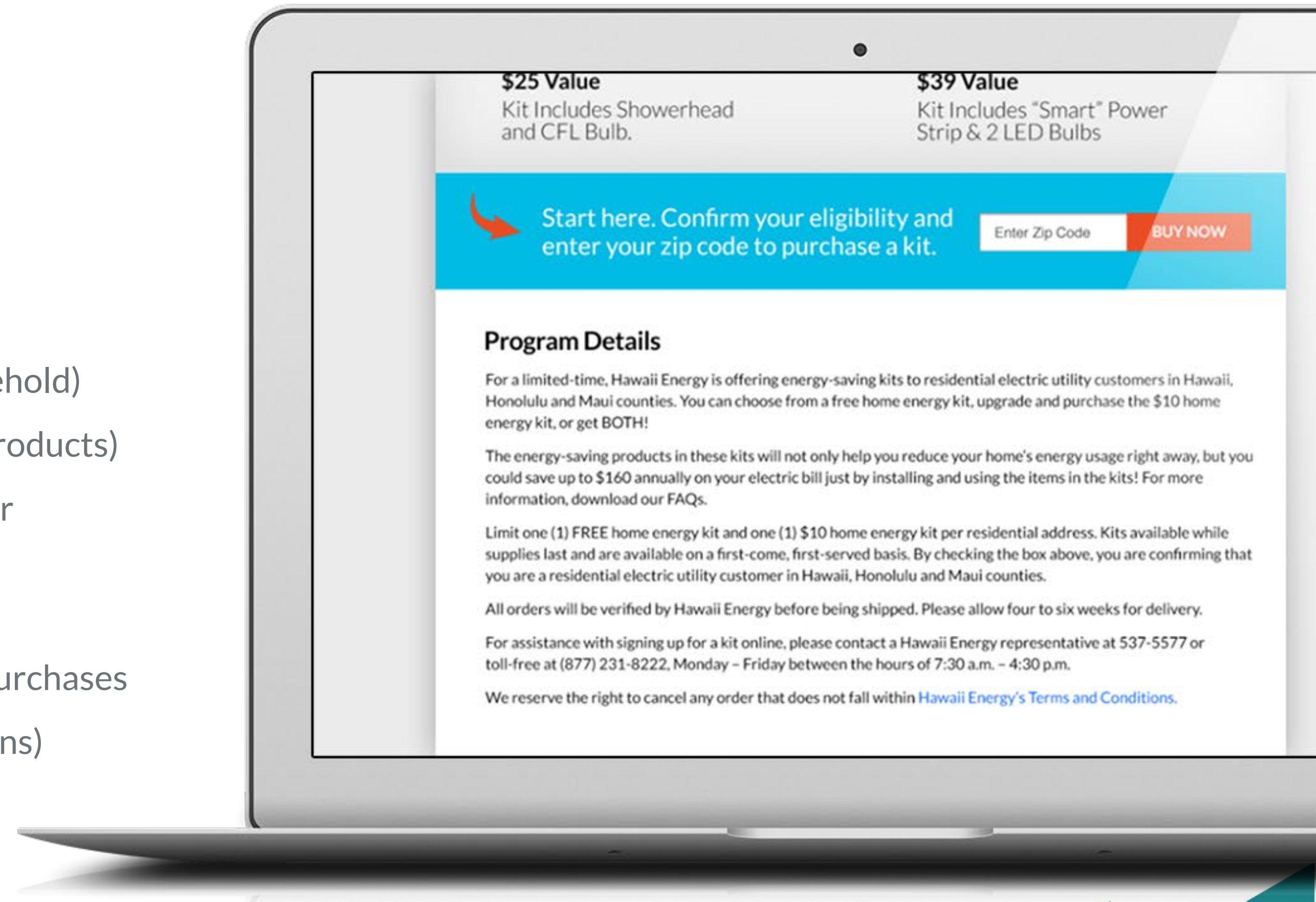


DEFINE ELIGIBILITY & SHIPPING TERMS

- Define customer eligibility process (5-digit zip code recommended)
- Define order and shipping restrictions and timeline

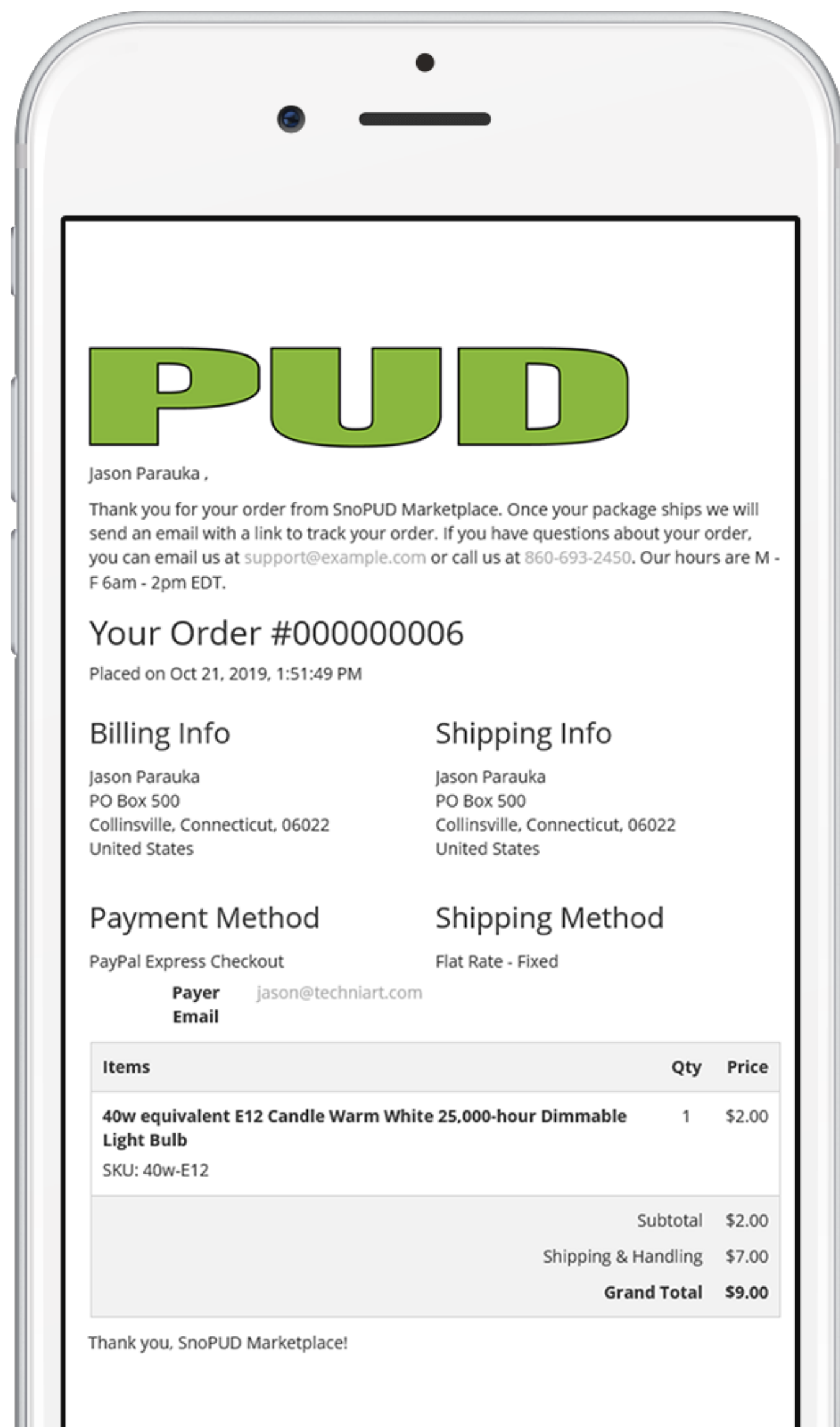
OUTLINE OFFICIAL RULES

- Determine per customer purchase limit (i.e. 2 per household)
- Determine maximum promotion sales limit (i.e. 5,000 products)
- Identify “sold out” approach (i.e. how to message to your customers)
- Select customer type (gas, electric, gas & electric, etc.)
- Provide approved utility legal language for programs/purchases
- Provide official rules (refer to sample Terms & Conditions)





CART REQUIREMENTS



DEFINE ORDER INFORMATION

- Define customer information fields needed for data collection/reporting
- Provide communication opt-ins/opt-outs if needed

SHIPPING VERIFICATION

- Provide approved customer or zip code list for shipping verification process
- Agree upon shipping cadence (15 days from date of order recommended)

CUSTOMER RECEIPT CONTENT

- After customer places order, receipt is emailed
- See example file for template; provide amended version if needed. We suggest including a program URL or utility program information
- Note: we suggest no logos or images due to spam filters



MARKETING APPROACH

DETERMINE URLS

- Identify promotion URL
- Select redirect URL for purchase completion and for “sold out” or expiration notification (i.e. general savings page, Marketplace, etc.)
- Recommend using multiple URLs or placing tracking pixels for channel analysis

SCHEDULE EMAIL MARKETING CAMPAIGN

- For highest conversion rate distribute offer to customer email list (if applicable)
 - Email graphic should focus on offer price/discount and products
 - Email subject line should highlight products and price
- Consider two sends: one within a day of the promotion’s launch and the other as the “last chance” opportunity

UTILIZE OTHER SUCCESSFUL TACTICS

- Promote via digital channels, e.g. website button or content, blogs, social media, paid search
- Use direct mail or bill stuffers to broaden reach
- Consider partnership marketing with other program vendors and touchpoints

CREATIVE ASSETS



PROVIDE BRANDING MATERIALS

- Provide brand guidelines, logo assets (.eps, .ai, .jpg), and any additional assets: video content, images (if needed) for us to build the site

TechniArt can provide creative and design services upon request

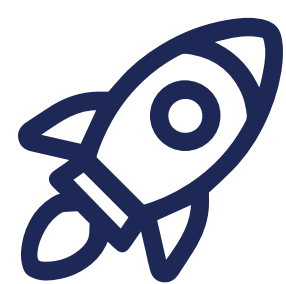
DESIGN PROMOTIONAL GRAPHICS

- Two sets of graphics are needed:
 1. Hero image; this image prominently displays the product mix, promotional price, branding, and a strong CTA to “buy now” before they miss out
 2. Thank you image; this image thanks customers for participating and grants attribution for the program
- These graphics should be sized no more than 1200 pixels wide
- A second image sized to a 4:3 ratio is required for each graphic for mobile reactive scaling

DEVELOP CROSS-PROMOTIONAL MATERIALS (OPTIONAL)

- Develop (or provide) inserts to highlight other offers and programs, e.g. appliance recycling, home energy assessment programs, etc.
- We will insert into the packs during fulfillment





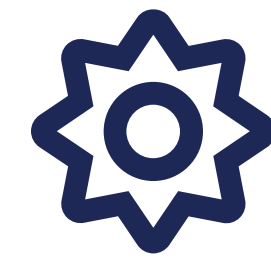
LAUNCH PREPARATIONS

SITE REVIEW AND SIGN-OFF

- Receive site within 2-5 days of promotion launch for review
- Review all site components, e.g. site copy and graphics, cart, confirmation page, email receipt, etc. to ensure all the information is accurate

COMPLETE PRE-LAUNCH CHECKLIST

- Complete an updated MOU for the promotion
- Provide mandatory promotion info and assets
 - Operations: shipping info, order limits, max quantity product available, customer data collection requirements
 - Legal: terms & conditions, approved language for purchases
 - Branding: graphics, guidelines, logos, attribution copy, URL redirects
- Identify when marketing will occur during the promotion
- Send creative for sticker and insert to us for print (if applicable)
- Send collateral to us for inclusion during fulfillment (if applicable)
- Conduct thorough site review and quality assurance
- Approve promotion site via email



BACKEND SUPPORT



CUSTOMER SERVICE

- We will answer customer questions and inquiries throughout the promotion during our normal business hours (9 a.m. to 5 p.m. EST Monday thru Friday)
- Our team will update you on any irregular requests, complaints, and conversations if they occur

TRACKING

- We will send updates to you at your discretion for you to track program performance during the promotion's execution
- If we are in situation where we could sell out, we will increase our monitoring of the page and flag any adjustments in marketing approach you may want to take

FULFILLMENT

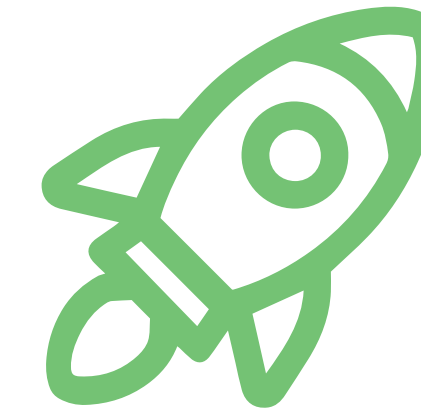
- We review customer purchases for over-the-limit orders, duplicate addresses, and other eligibility violations, communicate with you on how to address our findings, and then finalize for fulfillment
- If we receive timely responses and approval, we can fulfill orders within 7 to 14 business days

FINAL REPORT & INVOICE

- After fulfillment we will send you the complete customer order list securely and submit an invoice for incentive processing so you can claim savings as soon as possible



TIMELINE



ONE MONTH PRIOR TO LAUNCH

- DEFINE CUSTOMER EXPERIENCE, PROMOTION DETAILS, AND CART REQUIREMENTS
- FINALIZE MARKETING APPROACH
- BEGIN DEVELOPING CREATIVE ASSETS

TEN DAYS PRIOR TO LAUNCH

- PROVIDE STICKER AND INSERT CREATIVE FOR PRINT (IF APPLICABLE)

THREE DAYS PRIOR TO LAUNCH

- PROVIDE CREATIVE ASSETS
- COMPLETE LAUNCH PREPARATIONS

LAUNCH!

- INITIATE MARKETING PLAN
- BACKEND SUPPORT KICKS IN