

ILLUME

# Building Trust and Demonstrating Value

Addressing the  
Human Side of the  
Great Deployment







Adoption at  
Scale  
and Fast

# Our Research

Observational  
Research



Market  
Research



Field Tests and  
Pilots



# The Findings

Understand people  
and interaction



Learn what creates  
behavior change



Create (and test!)  
holistic program  
designs



# Customers & Market Actors



# Customers & Market Actors





# People and interaction



# Customers

*We need to understand*

Current practices

Priorities

Values

Resources



# Market Actors

*We need to understand*

Current practices

Priorities

Values

Resources



# Manufacturers, Distributors & Installers

Status quo inertia

Prioritize reducing risk and chances for error

Value safety, quality and the value proposition

Time is a critical resource



# Hesitancy abounds

There is a lot of pressure and risk for contractors:

Impacts to operation, business continuity

Equipment cost

Warranties

Liability

Call backs



# Minor adjustments = major implications

Minor design variations and quirks of homes and buildings can create challenges for contractors, especially when less familiar with new appliances, products and technologies.



# Challenges transcend equipment

Some installation challenges are technology agnostic (spending 30 minutes looking for a stud)

Job, economic, and weather conditions can consume contractor bandwidth

- Long travel time to/from jobs

- Supply chain issues

There is often little bandwidth and incentive for learning about new appliances, products and technologies.



# Behavior change





# Customers

*We need to understand*

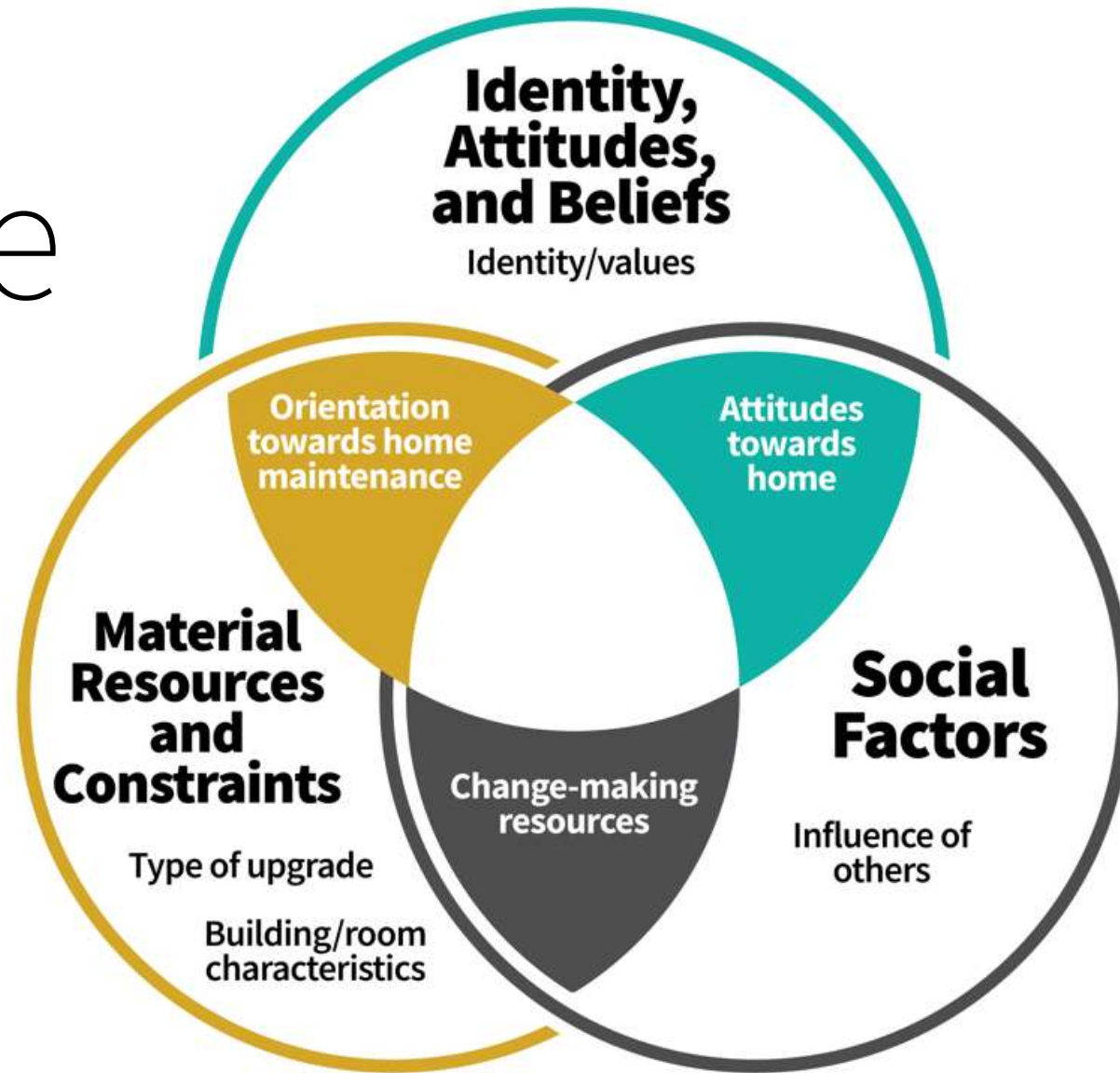
What customers know

Their trusted sources and channels of information

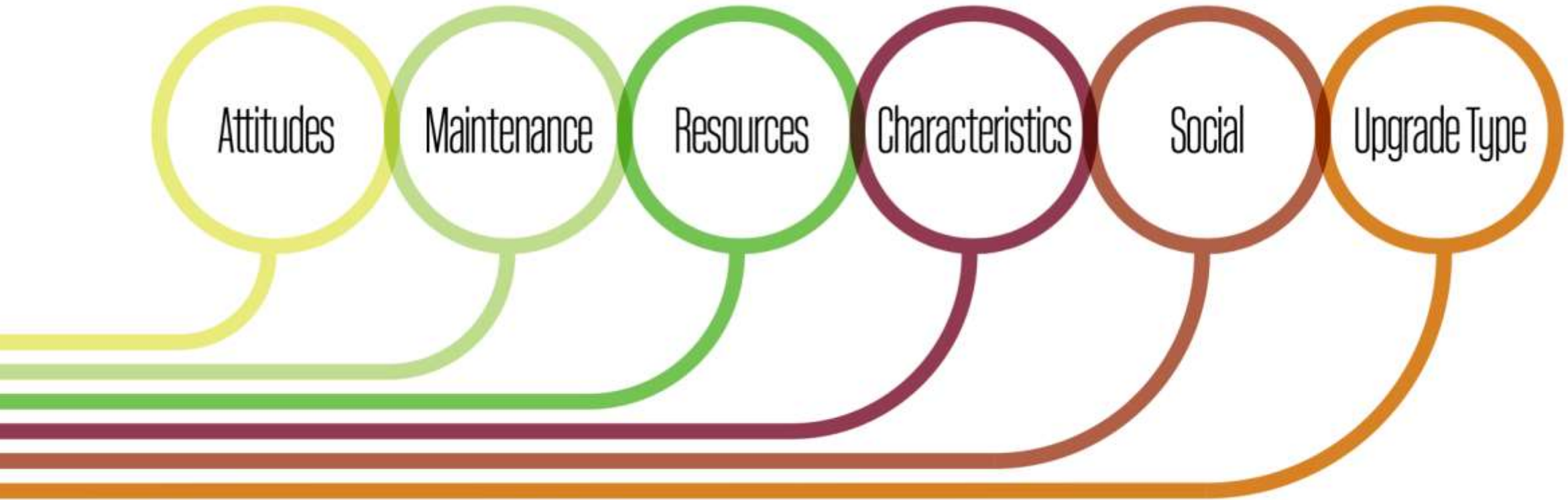
How they make decisions



# Interactions and Influence



# Decision Making Framework



What Does the Customer  
**Think and Feel?**

What really counts  
Major preoccupations  
Worries and aspirations



What Does the Customer  
**See?**

Environment  
Friends  
What the market offers

What Does the Customer  
**Hear?**

What friends say  
What boss says  
What influencers say

What Does the Customer  
**Say and Do?**

Attitude in public  
Appearance  
Behavior towards others

**Pain?**

Fears  
Frustrations  
Obstacles

**Gain?**

Wants/needs  
Measures of success  
Obstacles

# Consider **the many** behavior changes required



Operation and maintenance

Bill impacts

Thermal comfort

Form factor

Sensory experience

# Market Actors

*We need to understand*

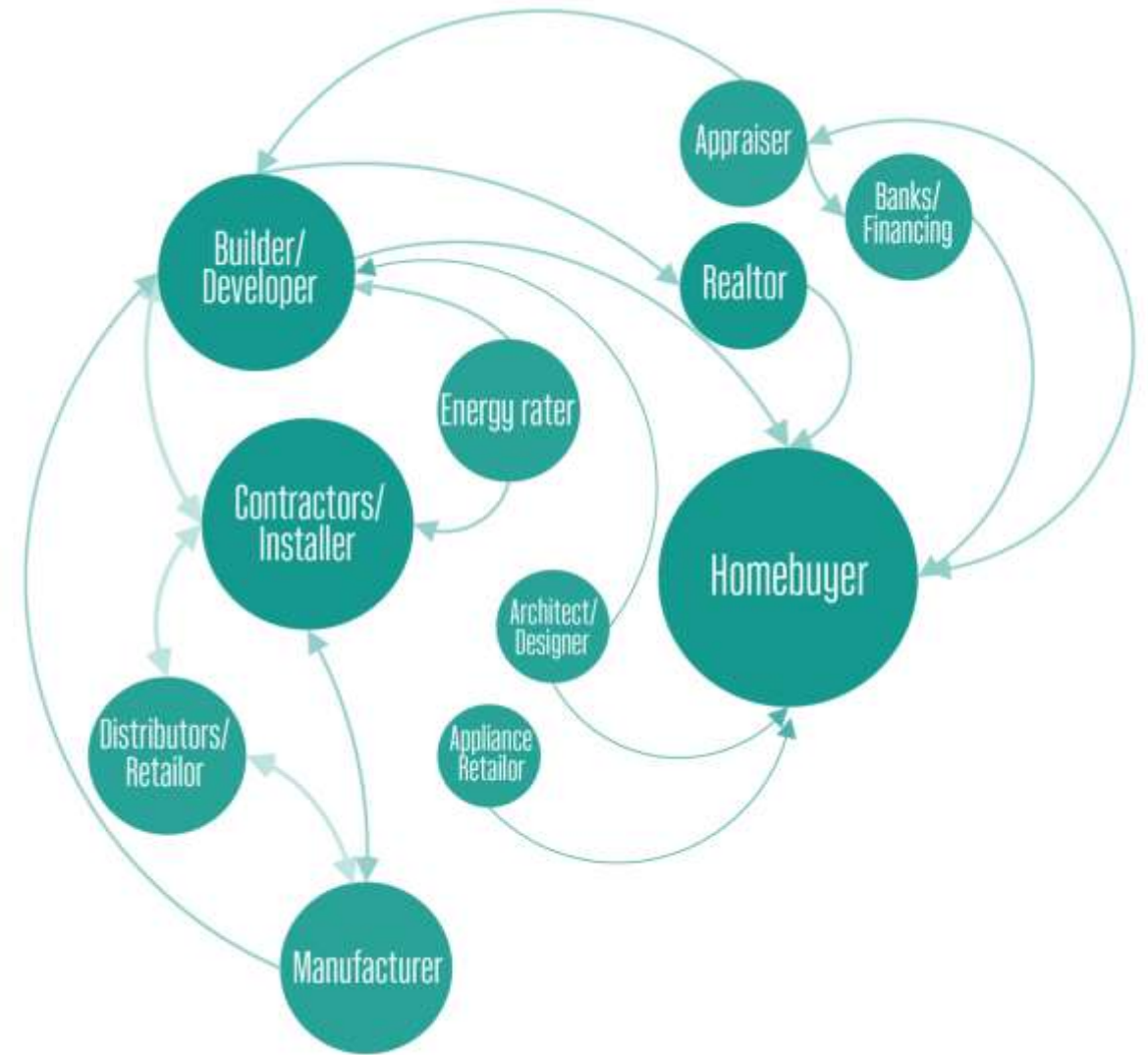
What market actors know

Their trusted sources and channels of information

How they make decisions



# Who are the key market actors?

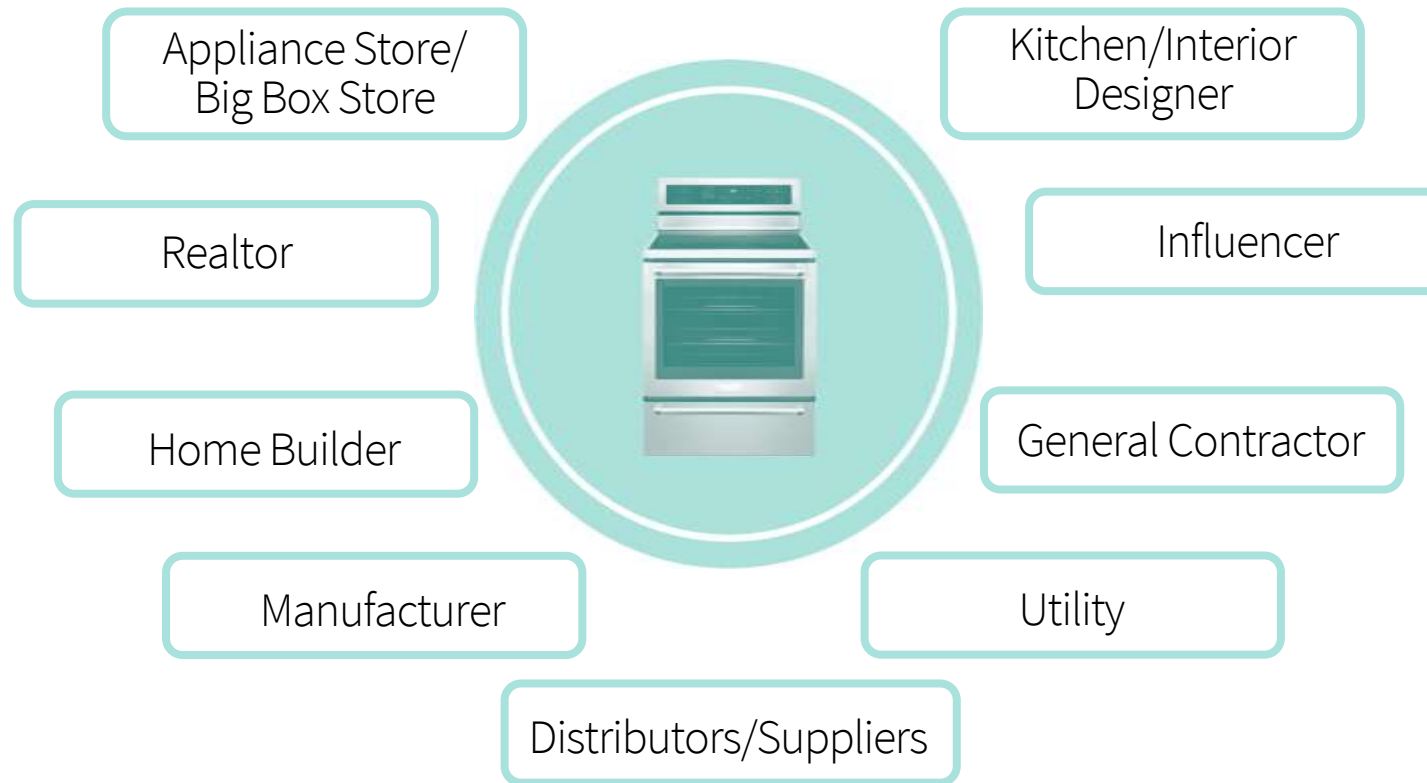


# HVAC Market Actors

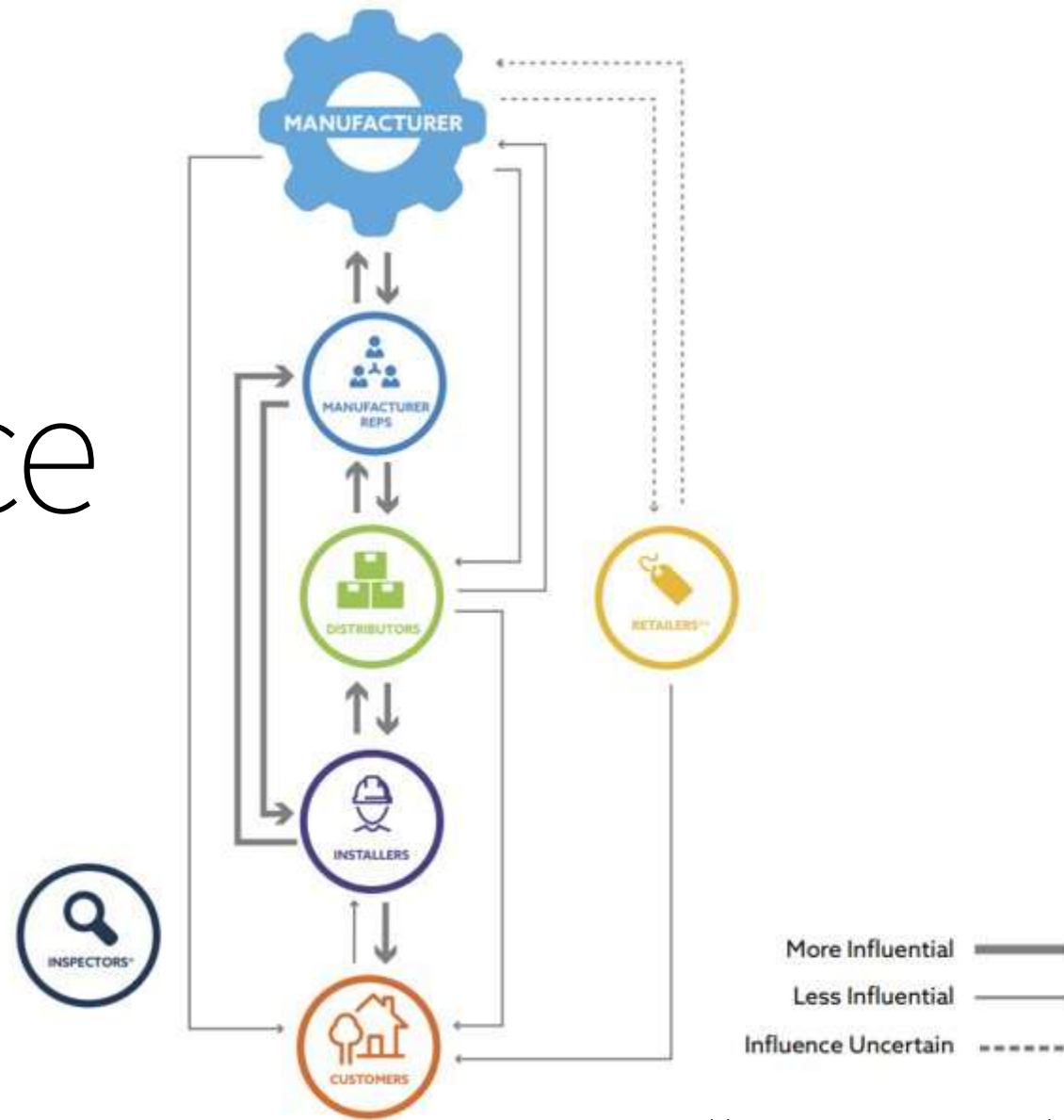




# Market ecosystems vary by appliance

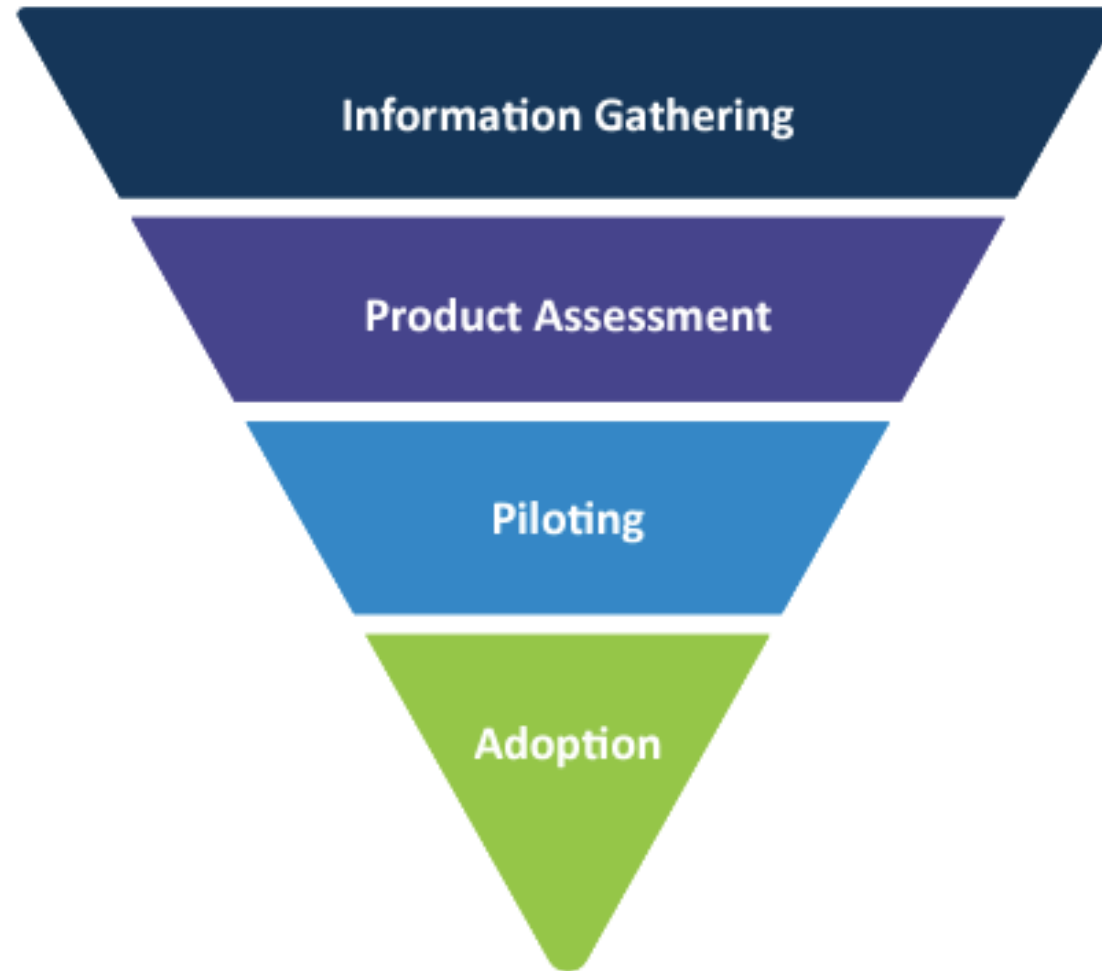


# How does information and influence flow?



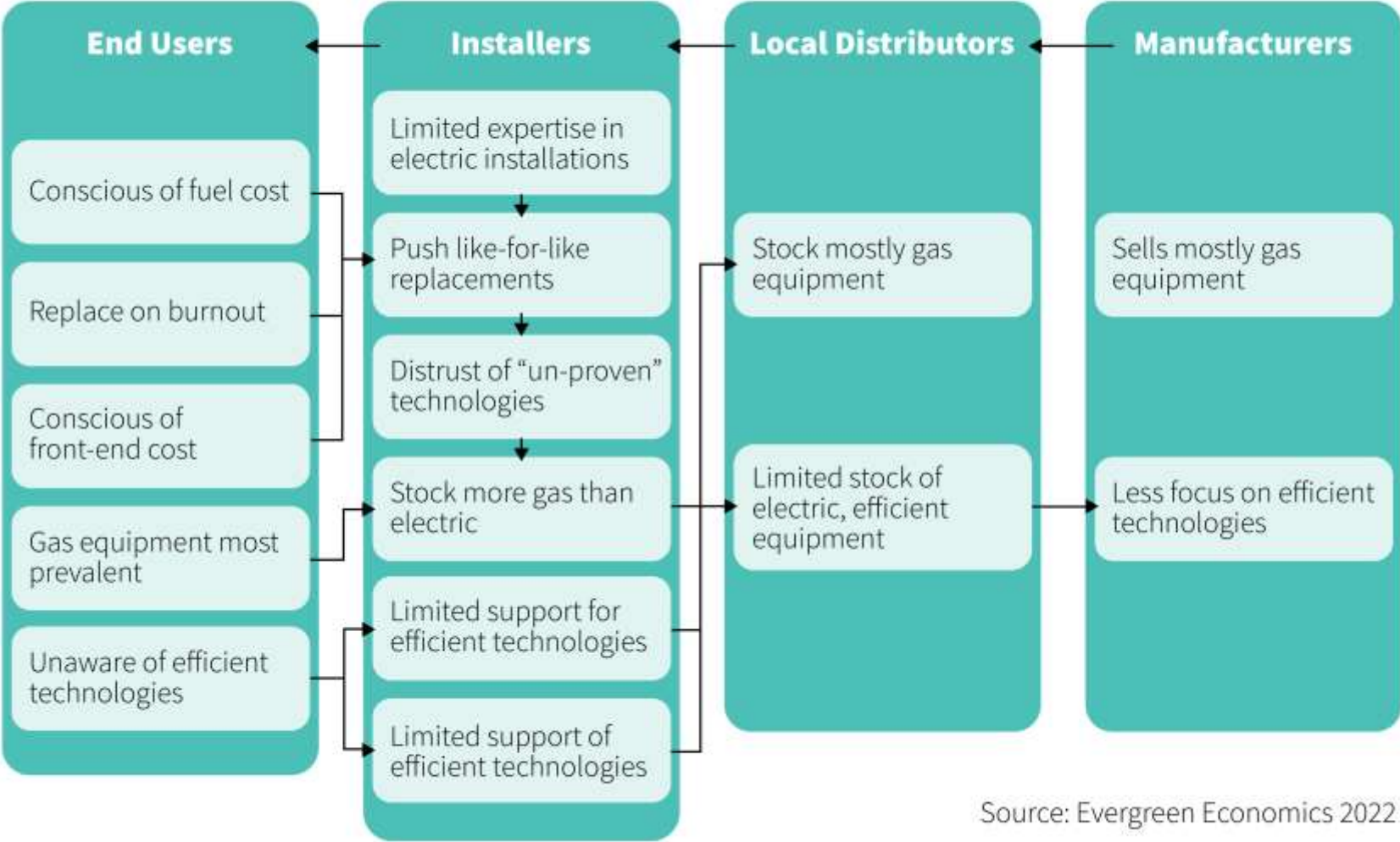
Source: NEEA Gas Tankless Water Heater Combined Research Report 2020

# How are decisions made?



Source: NEEA Gas Tankless Water Heater Combined Research Report 2020

# Water heating market actor decision processes



Source: Evergreen Economics 2022

# Holistic Program Designs



# Customers

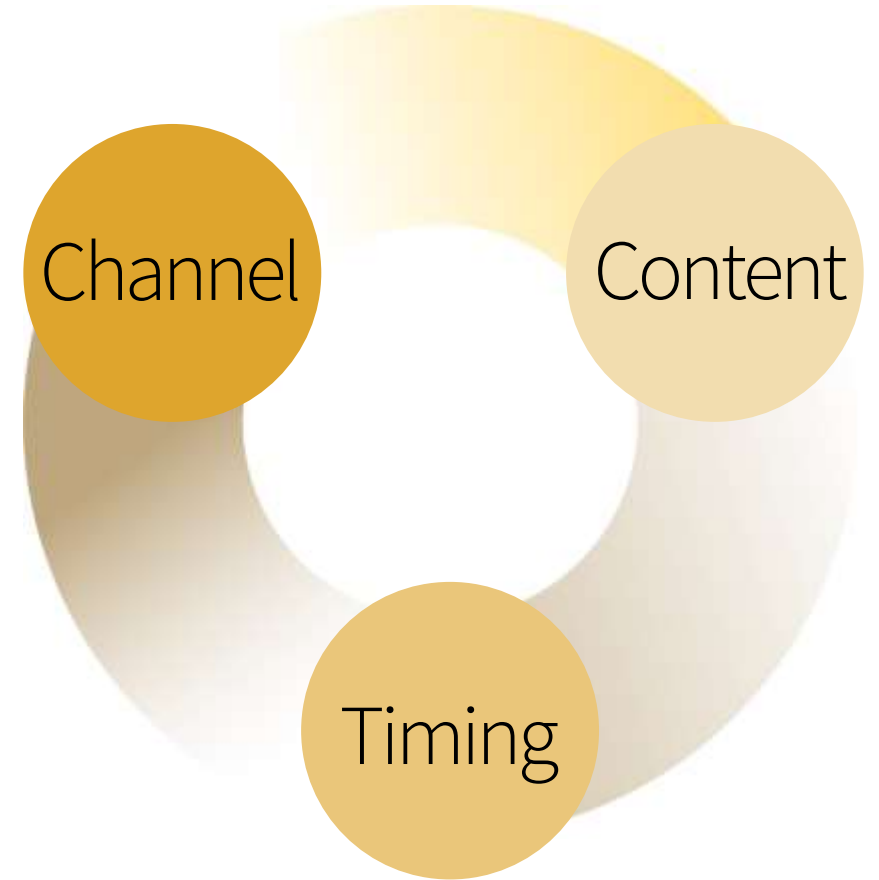
*Build design considerations into*

Content

Messaging

Timing

Channel(s) and Messenger(s)



# Content

**The level of detail needed in content varies.**

The amount and type of information a customer will need to understand the benefits, impacts and operation requirements of a new appliance or product varies significantly across customers and **is correlated with their interest in the project process overall.**



# Timing & messaging

**Ongoing communication including multiple touchpoints is necessary** to raise customer awareness and their level of understanding of new technologies.

Messaging can be broken into three somewhat distinct categories:

**Priming messages**

**Situation specific**

**Operational information**





# Consistency within and across communication channels

Different customers may put more trust in different actors, so it is important that the information they receive is consistent across all engagements, and that **any new information confirms or builds upon the messages that they have already received.**



# Market Actors

*Build design considerations into*

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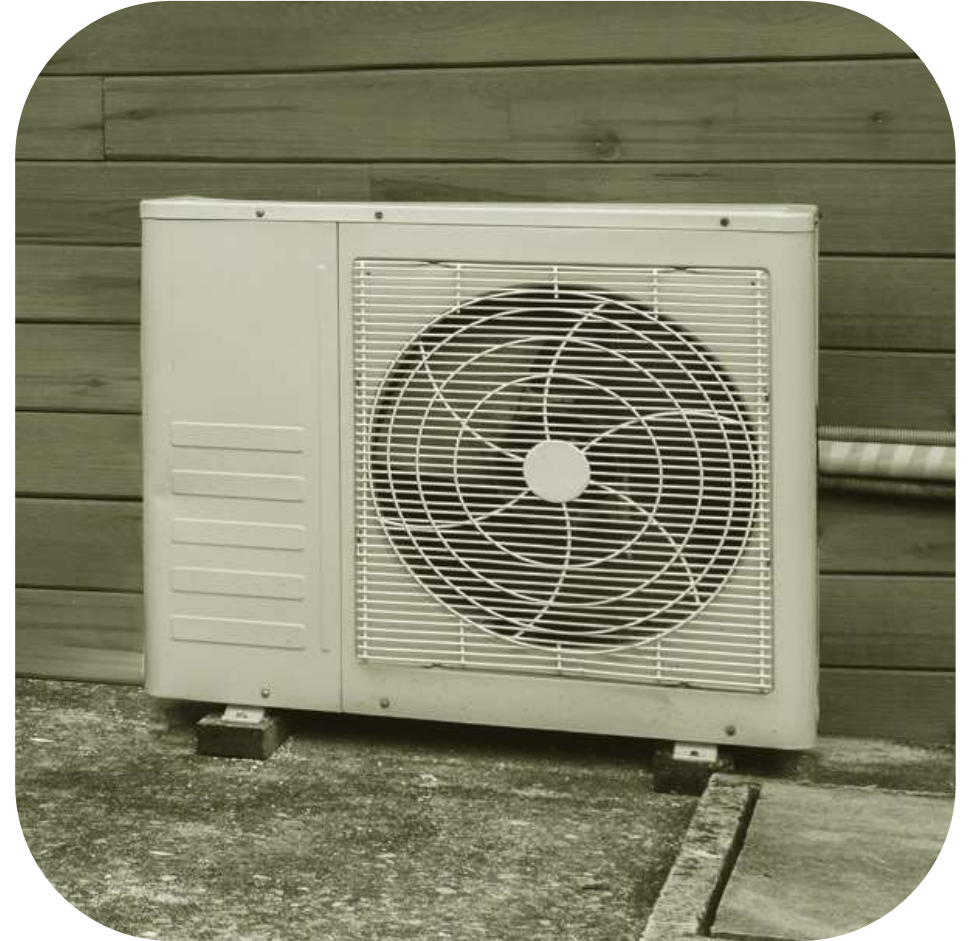
# Content

Content (training or otherwise) created for contractors needs to address:

The problem the product solves for the customer

The implications of incorporating the product into their sales portfolio

Whether the manufacturer back-ups their product



# Timing, channels & messengers

Manufacturer reps

Annual meetings, ad-Hoc check ins, distributor  
table days, trainings

Distributors and installers

Trainings, roundtables, trade organizations



# Tests and pilots

Don't guess – test!

Lived experience > training

An opportunity to course correct



# Questions?

We've Got Answers

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