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Manual for Solar Energy Campaigns

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Version June 4th 2001

1 Introduction

1.1 Goal

Up to three years ago, thermic solar heating equipment was rather complicated to install, because it consisted of numerous components.

Nowadays, compact installations are available on the market, and these systems include storage, plumbing, solar collectors and controls.

Compact Solar heating equipment in single-family homes is easy to install and provides ecological heating at a cost-competitive basis. Nevertheless, many people expect additional expenses for solar energy equipment. Still, the most convenient solution is to replace a defective boiler with a conventional one. In order to install solar heating equipment, additional effort is required. In some cases, the owner of the house has to get permission and find out about possible subventions.

Without additional expense and effort, more home owners would be interested in using solar energy. At that point, solar energy campaigns can be initiated to provide some help.

Especially in urban regions, there is the possibility for energy service providers or building cooperations to promote solar energy technology. For the successful realisation of a project, the SSES (Swiss company of solar energy) can be consulted for support. The SSES provides its know-how from its long-time experience. Some tips, suggestions and tested proposals for activities are collected in this manual. This know-how was gained by projects realised earlier in Switzerland and abroad, and by conversation with competent solar energy experts.

1.2 IEA Task24

The idea of using knowledge gained in earlier solar energy campaigns is realised worldwide by the International Energy Agency (IEA). Up to now, five countries have become members of the project "Solar Heating and Cooling Task 24 Solar Procurement": The Netherlands, Denmark, Sweden, Switzerland and Canada. Additional countries like Belgium, Finland, and possibly Germany will take part later. The project is limited to five years and will end in March 2003. The main goal of the Task 24 is to enlarge the worldwide solar market and, as a consequence, to reduce the total system costs.

In Switzerland, the SSES organises the activities on behalf of the "Bundesamtes für Energie". The present manual is a result of the Swiss cooperation in the Task 24.

1.3 Purpose

This manual was prepared as a guide for potential organisers to provide useful information for the organisation of new solar energy projects. It contains information, actual activity proposals and different scenarios to help potential organisers to plan and realise solar energy campaigns. They can profit from the know-how of many projects from several specialists in the field. This manual is not meant to be complete, but it should provide possibilities, and information.

Most topics are only described on the surface. The guidelines are intended to provide ideas. For more detailed information on specific subjects, references are given in this manual that help to develop and elaborate own ideas.

The appendix of this manual provides several forms as practical guidelines. These forms can be used and amended for own purposes.

This manual should be useful for all interested project groups, especially for energy service providers, building partnerships, property owners, and communities, who would like to profile themselves as sustainable and ecologically progressive organisations.

2 General Concept

2.1 Organisation

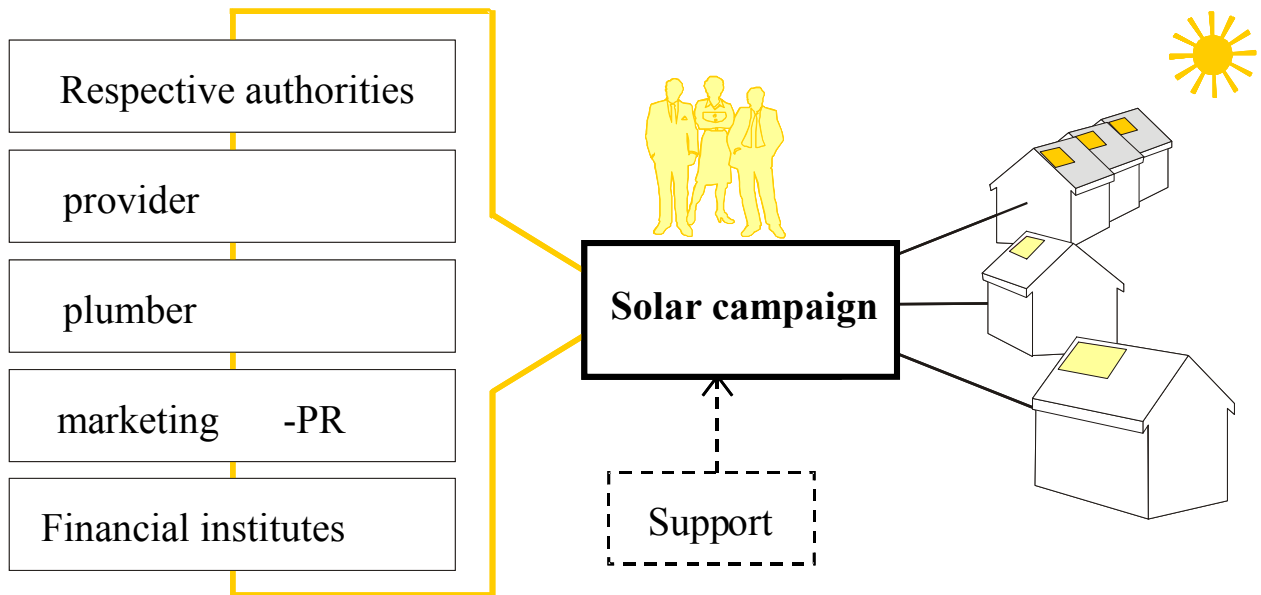


Figure 1: Concept solar campaign

The organiser connects and coordinates the two parties involved with a solar energy campaign and provides the support. On one side, there are the system suppliers, plumbers, official administration and financial institutes, on the other side the home-owners (customers) who are interested in solar energy installation.

The goal of this manual is to support temporarily limited solar energy campaigns. These campaigns should lead to a lasting growth of the solar energy market. Such campaigns should also support the implementation of market structures for solar energy products and accordingly stimulate the respective market. The advantage for the customer is obvious; he/she can profit from lower prices. The energy service provider as organizer and coordinator is the central point of contact and therefore minimises the administrative overhead for all parties.

The project is organised in 7 phases: Initialisation (kick-off), preparation, supporting activities, marketing, sales, realisation and post activities. These phases are described in the next section. During the whole project, the system supplier and the plumber are the main points of contact for the customer.

2.2 Three Support Levels

This section describes the activities of the different project partners based on three different levels of support. It serves as a quick overview of solar energy campaigns. Nevertheless, the organiser can select and re-arrange the single tasks to provide the best model for the given requirements. The three service levels “light”, “standard” and “maxi” are described in this manual and estimated costs for these three levels are provided in chapter 2.4 Finance.

2.2.1 Participants’ Responsibilities

This section describes the responsibilities of the different parties involved. In general, the “standard” service level is described. Where necessary, further explanations about the other service levels are given.

2.2.1.1 Support's Responsibilities

The support is provided by solar energy experts who know their regional markets. Their main task is to promote the sales of solar energy equipment and support organisations which are willing to prepare and realise solar energy campaigns. At the same time, they themselves initiate solar energy campaigns and provide support to interested organisers with the realisation of the campaign (also based on this manual). The consulting covers aspects like financing, marketing & organisation as well as technical aspects; the support also helps to find financial sources. The supporters are also an important source of proven know-how. The supporter is in contact with the respective consortia of plumbers and system suppliers.

The supporter can also act as a mediator in case of differences between the parties. After a solar energy campaign is over, the supporter and the organiser together evaluate the success of the campaign and the customer satisfaction. The evaluation can also include the quality and actual functionality of the system. The problems and difficulties of every project are evaluated to improve future projects.

Until the end of the IEA project, probably in the end of 2003, the support is free of cost. After the end of the project, the direct support tasks (consulting, coaching, etc.) must be paid by the organiser.

2.2.1.2 Organiser's Responsibilities

Start

A solar energy campaign can be initiated by communities, companies, or other organisations interested in solar energy. At the start of a solar energy campaign, an organiser needs to be chosen.

Motivation of the Organiser: The motivation and aims of the organizing party can be manifold. A solar energy campaign can improve the image of a company and bring new customers. The company is perceived as progressive and aware of ecological problems. A solar energy campaign can also directly or indirectly lead to additional commissions. Customers can be bound firmly and for a longer period of time to a company. In many regions there are official promotional regulations for sustainable energy sources. This manual is a good basis and helps to implement such regulations.

Project Management

A solar energy campaign is a project of the realising organisation. For that organisation, it is important to integrate the campaign into its own structure. The project manager needs to coordinate the different tasks and responsibilities. She/he controls the project progress and makes sure that the goals are reached. If there are too few interested customers after the first marketing activities, the project management plans must exist for additional marketing.

Especially in solar energy campaigns, numerous presentations are necessary. Many people must be convinced, as a lot of different partners have to accept and support the project. These tasks come as additional work to the normal project management tasks.

Further literature on „Projekt-Management“ is available at the end of the document.

Preparations

First of all, the organiser has to investigate the financing. Details about that can be found in section 2.4 Financing. There are also some detailed cost estimates. Depending on the situation, the single items can be re-arranged to calculate an individual budget. To get estimates about the possible volume, market research must be done. The potential customers should be classified into separate market segments in order to reduce the probability of over-extension of direct mailing actions. Some recommendations can be found in section 3 Marketing.

After that, suitable plumbers must be found. The plumber installs the system at the customer site and is also responsible for the system service. But the organiser is the publicly visible actor. His name is connected to the solar energy campaign. The organiser controls the quality of the equipment and the services. For that, a quality assurance (QA) system must be established. E.g. the plumbers must be chosen carefully in order to ensure the customers' satisfaction. The process of the selection of plumbers and system suppliers is described in detail in section 2.3 Einbindung der Marktpartner.

Supporting Activities

To install solar equipment, changes at the building site may be necessary. In many communities a building permit is required for such changes. It is important to communicate with the responsible authorities to standardise the process for those building permits. Sometimes it might be possible to omit them; it's important to find a process for solutions in difficult cases.

Necessary documents should be prepared in advance of the solar energy campaign start in order to provide an optimal customer service. It is also important to plan the processes and responsibilities thoroughly. The organiser must control and monitor the individual tasks, and must know the actual status of each installation. The organiser should establish a customer file, and prepare checklists for the plumber which can be used to collect the customer specific data at the customer's site.

Examples of checklists and customer files are available in the appendix.

In this phase, the organiser can start to produce a communication concept. The contents and argumentation of this concept can be found in section 3.2.1. Communication concept.

The organiser can offer training seminars for the plumbers to support them in their professional approach to customers. Technical topics can be system-specific installation procedures. Other topics could be marketing and sales seminars.

The „light“ support level does not contain seminars. Every participant is responsible for the acquisition of his/her own know-how. In the “maxi” level, corresponding training should always be organised to better deal with the customers.

Marketing

The central job of the organiser is to deal with the marketing tasks of the campaign. Well targeted marketing addresses the potential customer groups.

This is a crucial task for the success of the whole campaign. The presentation must be professional and needs to convince the customer. Ideas and tools for the marketing can be found in chapter 3 Marketing. From there, the organiser can choose optimal tools for the given campaign. Marketing activities such as events and exhibitions should be jointly organised with the system suppliers and plumbers.

For all three service levels, a central point-of-contact should organise, coordinate and control all marketing activities, though of course it is always important to integrate all partners in order to keep them informed.

Sales

After the start of the marketing campaign, the first customers show up. Their first point-of-contact is the organiser, who should be able to answer the first questions. If the organiser can provide energy consulting, he can offer a complete customer service. Any consulting in direct relation with the solar energy campaign should be free of cost, but additional services can be billed.

After this first phase, the interested customers are transferred to the respective plumber. The plumber creates a customer file to have an organisational tool for all customer contacts. In the first meeting at the customer's site, it is important to bring the customer, the plumber, and the organiser together, because this shows the customer that the organiser is the general contractor and guarantees the success of the project.

In the „light“ level, interested customers deal directly with the plumber. The goal of the campaign is to gain customers who are interested in solar energy. In the “maxi” level, the joint presentation of the organiser and plumber is important. Both of them participate in the first meeting at the customer's site. The plumber is the technical expert who is responsible for the installation of the solar energy system, while the organiser provides the free energy consulting.

Realisation

When the contract is signed by the plumber and the customer, the plumber starts to install the system. The organiser is responsible for the contacts with the authorities and for the acquisition of building permits, where necessary. The organiser is also responsible for the application for possible subsidy on behalf of the customer. For that purpose, the agreement of the customer is required.

An example of such an agreement is available in the appendix.

After the system is installed, the plumber instructs the customer how to manage it. For this instruction the organiser might participate in order to support the plumber and to finalize the project with the customer. But it is also possible that

the organiser has the final conversation with the customer over the phone. In this case the plumber passes copies of the final acceptance documents to the organiser.

For the „light“ support level, the plumber is solely responsible for the sale, the instruction and realisation of the system.

In the „maxi“ service level, some responsibilities of the plumber are taken over by the organiser. As energy consultant, she/he acquires the customer data at the customer's site and is responsible for possibly required building permits. From that, the plumber prepares an offer. The plumber installs the system and instructs the customer. An agent of the organiser prepares the acceptance protocol together with the customer, and the customer takes over the system. The plumber bills the customer with the net amount. The system of this net amount invoice is explained in the next section. The subsidies are passed by the organiser to the plumber, while the organiser gets these from the issuing authorities.

An option is to make the system supplier responsible for the customer instruction and the system service.

After six months' operation of the system, an agent of the organiser contacts the customer again to see if he is satisfied. This division of responsibilities is described in table 1: Overview of the support levels.

Post Activities

According to the sample process in figure 2, after the realisation phase, comes the post activities phase. This phase is described in detail in section 3.4 "Post Activities"

2.2.1.3 Duties of the plumber

The "plumber" in this manual is actually a role concept that comprises all professions that carry out the respective jobs. The "plumber" is the contractor of a work contract with all the respective legal rights and duties.

The plumber is the sole, general contractor for the customer. As general contractor he is responsible to coordinate and organise all tasks related to the installation of the system. Together with an agent of the organiser, he visits interested customers. There, he acquires all necessary customer data to provide an offer.

A checklist to acquire the customer data is available in the appendix.

The plumber and the customer together organise the time and process of the installation. If necessary, the plumber gets the building permit from the proper

authorities. After the process of installation is over, the installer instructs the customer about the function. Moreover, the plumber is responsible for guarantee services, whereas the organiser has no further responsibilities.

It is rather important how the invoice is created. If subsidies are available, the invoice should contain the net and the plumber requires this sum of the responsible organisation.

An Example for an assignment is available in the appendix.

The plumber acts as a primary financial source of the subsidies. The following table explains the “net”

= gross sum: total construction and installation costs

./. subsidies

= net: total charged to client

Figure 2: Definition net

The goal of a solar campaign is to develop a lasting solar market. The connection between organiser and plumber should help the plumber to gain knowledge about the selling of solar installations. Special arguments are often necessary. More information is available in chapter 3.2 Communication.

2.2.1.4 Duties of the provider

The provider is an important partner of the plumber, he can provide special knowledge and experience. The provider has no direct contact with the customer. He delivers the equipment and teaches the installer how to operate it. Furthermore, the provider has to guarantee that there are replacement parts and that service is provided.

2.2.2 Changes of models

Up to now, the functions of the different partners have been described. In reality, there can be changes in duties. In the following part, possible changes are described.

Provider acts as plumber

This is possible if the provider is located close to the customer and if he has access to qualified workers who are capable of installing the equipment.

Basically, it should not be the function of the provider to replace the plumber. There can be a competition between them which influences the relationship in a negative way. If we intend to make the solar market grow, it is better to follow the three step model.

Duties of the organiser can be transferred to third parties

Tasks of the organiser are sometimes passed to external organisations, for example to supporters of energy. Through this, the know-how of such groups is integrated in the campaign. Temporary resources are available for a certain time, and it will not be necessary to engage additional workers.

2.3 Integration of partners

In order to realise a solar campaign, cooperation is necessary. The participants have to guarantee for the quality of the installation. To create a satisfactory relationship, every participant must know his duties. These duties are available in chapter 2.2.1.1 Tasks of the partners of the market during the solar campaign. There is an Excel-file available in the appendix which provides information to choose the best participants. The advertisement can be realised together with the professional organisations, which help to reach a greater acceptance.

More literature on the topic of „Cooperation“ is available in chapter further literature

The following part deals with prices fixed by plumbers and providers. This is a very important point, because differences here could produce negative effects in the cooperation of the partners. To prevent this, communication should always be clear.

Prices

The most important participant of the solar campaign is the customer. The price of an installation has to be fixed before the action starts. Similar installations should have similar prices which should be fixed at the beginning. Additional services can be paid. Also the type of installation must be clear.

Plumber

The plumber must be selected in a fair process. All who are interested are allowed to apply, and participants should be chosen after a prequalification. The criteria must be fixed in the advertising. The following table shows possible criteria for the prequalification:

- Guaranty of services
- Teaching of the system
- General contractor
- Solar profi
- Regional allocation

provider

The same selection procedure can be implemented to choose providers. Like that, quality standards are ensured, and prices can be fixed.

The following table shows possible criteria:

- Law requirements
- Teaching of Systems
- Service garanty
- Test of Systems
- Factor of price and performance
- Energy savings
- Guaranty of services
- Integration of traditional heating sources

The criteria of the selection process have to be transparent from the beginning, and the number of participating partners should be limited.

It is not recommendable to choose only one provider. The risks and problems are obvious:

- Delivery difficulties of the provider
- Unsatisfactory relationship with the plumber
- Lack of quality of installations
- Financial problems of the provider

2.4 Finance

In the following chapter, three financial aspects are analysed. At first, there is a cost estimate which gives an overview for an interested organiser. These are divided into three models: “light”, “standard”, and “maxi”. The second part contains possibilities for raising funds. Finally, there is information about subsidies.

2.4.1 Estimate of costs

Up to now, this table exists only for Switzerland. We dispense with a reproduction at this place.

2.4.2 Financial sources

Financial sources can be very different. It is important to fix them before the process starts.

A marketing budget of the organiser is one possibility of a financial source. Sometimes, campaigns have to be carried out because of an order of law. In that case, there is a possibility to get money from energy-foundations.

Other possible partners are communities. These communities can provide advice or money, and the campaign reaches a higher acceptance.

The organiser can also act as a primary financial source. He pays all services and costs and pays commission with the other participants. These commissions are fixed in advance and are dependent upon the installations sold. The organiser is responsible for the risks of loss.

In many parts of Switzerland, there are energy and environmental foundations. In some cases, the respective institutions are willing to support the campaign.

2.4.3 Subsidies

The subsidies of the solar campaign are a critical point. Nevertheless, they are often overestimated. The fixed duration of the campaign together with the subsidies animate the customer to participate. The crucial point is a successful combination of subsidies and services.

2.5 Positive results of solar campaigns

A solar campaign can also be organised without the present manual. In the following chapter, the positive effects of a solar campaign are described generally, and also the specific aspect in using this manual.

Positive points

Campaigns are limited in space and time. This is a very important point to make decisions easier for the customer. Experience shows that, after a campaign had stopped, the number of sold products decreases at the moment, but stagnates afterwards at a higher level.

The great advantage of the manual is that previous successful campaigns can help to plan future ones. The risk of basic mistakes is highly reduced, and the campaign has a solid foundation. Nevertheless, it is the responsibility of the organiser to develop his own ideas out of this basic knowledge.

Problems

The complex structures of the market have to be considered. The organiser is neither capable of installing nor of producing the equipment. This always causes a cooperation with partners who do not have the same ideas. It takes time and expense to make the necessary preparations.

Chances

The main reason for the organiser to participate, is to profile himself as sustainable and ecologically progressive. With an optimal conversation, the organisation can reach considerable improvement of image. Contacts with new customers are possible. The gained know-how can possibly be needed to enlarge the range of products or services.

The users of the manual can profit from the experience of previous campaigns and can save time and money.

Dangers

Communication is one of the most important points of a solar campaign. If customers experience the campaign as unprofessional, it is nearly impossible to change this first impression. The loss of image to all participants would be considerable. If an installation is unsatisfactory, it is not only the plumber who is involved, but also the organiser.

Excursion: Problems of realised campaigns

To create this manual, various realised campaigns have been analysed. Certain problems could be fixed:

- Accepting only one provider, can cause great dependence. If the provider is not able to deliver, it could stop the whole campaign.
- If there is no prequalification to choose plumbers and providers,

quality standards cannot be guaranteed.

- If the members of the campaign are not enthusiastic, It has a negative influence on the reliability of the campaign.
- Providers should not have to incur costs in order to participate, otherwise, this would be a barrier and would exclude some of them from the very beginning.
- Unprofessional communication reduces the success of the campaign.
- If the integration of plumbers and providers is not satisfactory, the identification with the campaign is lost and the engagement is reduced.

2.6 Legal aspects

In the following chapter, legal aspects are shown which can influence a solar campaign. Critical points are described.

The chapter is based on the law of Switzerland, it must be suited to the respective country.

2.6.1 Contract law

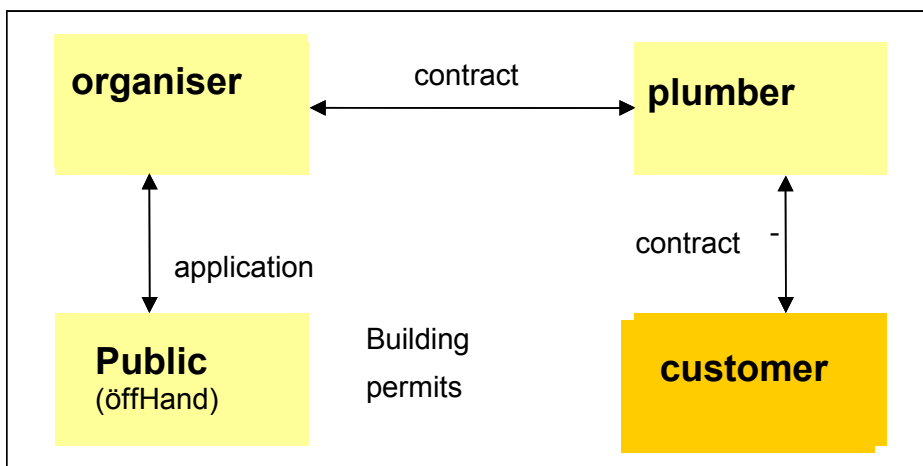


Figure 3: Connections in contract law

3 Marketing

3.1 Analyse of the market/possible customers

The possibilities of renewable energy sources, especially for solar energy, are not doubted. The demand for the “free heat” of the sun will increase in the future. Customers are confused by environmental problems such as CO². Moreover, the dependence of non-renewable energy sources like oil can be reduced.

In order to fix the range of the action, it is necessary to analyse the market. The organiser of the campaign can decide himself how detailed the analysis is. First of all, it is necessary to decide about the geographical area which should be involved. Normally, if energy services are included, this will be the power supply area, sometimes also communities.

Possible questions:

- What is the number of buildings in the area?
- How many are residential buildings? How many of the residential buildings are one- or two-family-homes?
- How many of the buildings are public?
- How many of the buildings are industrial? What is the number of industrial buildings?

Knowing these numbers, we can estimate the potential range. Nevertheless, there are further points which have to be considered:

- How many buildings cannot be heated by solar energy?
- How many buildings are already in possession of solar equipment?
- What is the number of owners, what of renters?
- How much solar equipment already exists compared to the number of installations in Switzerland?

The structure of ownership and the specific problems with rented buildings must be analysed. After that, important knowledge is gained for further communication. As owners of buildings, the following types are important:

- Privat persons
- Building or real estate agencies
- Construction cooperatives
- Pension funds
- Foundations, organisations
- Public section

There are other professional groups which decide about the energy source:

- Architects
- Engineers
- Plumbers
- Energy advisers
- Professional organisations
- General contractors

With these results, modest goals, which are possible to reach, can be fixed.

An overview shows the general types of buildings and their possibilities:

	One- and two-family-homes	More-family-homes	Hotels, hospitals, institutions	Industrial establishments
Number of buildings	big	medium	small	small
Medium surface of roof	small	medium	big	big
Decision target	Owner of houses, (often = dwellers)	Pension funds, construction cooperatives	Owner of hotels, public offices	Head of the firm
Decision time	short	medium	long	medium
Motivation	Give a sign	Loyal renters, Image	Image, political sign	Image
purpose	Heating of water	Heating of water, preheating	Integration of other energy sources	Heating of water, integration of other energy sources
Potential	big	small	medium	medium

table 1: Types of buildings and potential

3.2 Communication

Before the campaign starts, the local and regional professional organisations of the involved workers have to be informed. More information is available in chapter 3.3 Integration of the participants.

3.2.1 Communication concept

To ensure that the campaign is perceived by the population, a communication concept is necessary. The following points are important:

Message of the action

Three components of a message are important: rational, emotional and moral. A solar campaign often contains emotional or moral messages. Environmental topics and innovation are the main subjects.

Considering the structure of the message, three questions are important: Do we leave the final conclusion to the customer? Do we just mention the positive arguments? Do we mention the strongest argument at the end or at the beginning?

Generally, the message should be short. Concerning printed messages, typography and layout are crucial, in radio commercials, the modulation of the moderator is important.

Media

- Channels of communication:
 - influence of charismatic people
 - important personalities take part
 - References from satisfied customers
- channels of communication without communication media:
 - printed media: specialised papers, journals
 - electronic media: radio, television
 - public media: placards, advertises in busses/trams

Coordination of the communication process

Public communication should be clear and be perceived as a closed unit. Therefore, the coordination of different media and the time and length of the action must be fixed.

3.2.2 Kick-Off events

A so-called „kick-off-event“ serves as a starting point for a campaign. Local or national politicians or prominent people of the region can be engaged as messengers of the campaign. Identification is easier for the customer, and the presence of media is higher.

Good points	Bad points
Clear, understandable messages	Technical Details
Importance of renewable energy	Mentioning the amount of saved energy
Professional installation	Mentioning financial aspects
Limits of time and amount of the campaign	
Gain of image of the owner of the house	
To take a shower with sun heated water is exciting	

table 2: Contents of communication

3.2.3 Direct-Mailing

Immediately after the start of the campaign and integration of the media, letters and brochures should be sent to possible customers. At that point, the campaign is still present, and a greater number of interested customers can be expected to take part.

Letters to customers are more effective if the customer is directly addressed. Frequently, personal letters are sent together with standard brochures. Even more effective are versions with the brochure integrated in the personal letter.

An example of a response card is available in the appendix.

To make things easier for the customer, the address should be printed on the response letter. The postage must be paid by the organiser. The response talon should not be a final announcement, but only an expression of interest. There should be a customer file for each interested party. After collecting data about her/him, the next contact can be a phone call. This contact is a possibility to gain necessary information to prepare an offer. This second inquiry should take place in the first few days after the return of the customer's response. An appointment is now fixed by the customer, the organiser, and the selected plumber.

3.2.4 Additional measures

Presence of media during the campaign is important. The attainment of the 50% threshold of installations can be an occasion to invite the mass media. Specific articles in journals about solar energy which address craftsmen, home owners, plumbers, and other people involved in solar campaigns help to make the campaign more popular.

Further possibilities to reach popularity are mentioned in the following part. It must be considered that all these measures cause additional costs and are only possible for large campaigns.

- Information at commercial events together with plumbers
- Information weekends
- Mobile stands (busses) to organise decentral actions
- Advertisements in busses/trams

The experience of previous campaigns has shown that communication is an important aspect for a successful organisation. Customers must notice the

campaign and must trust in the participants of the action.

Links to further literature about marketing and communication are available at the end of the manual.

3.3 Selling

The first contact to the customer is essential. At this meeting, a member of the organiser and the respective plumber should be present. The organiser guarantees that a correct offer is prepared. The plumber is responsible for the technical aspects.

Another important point is the fixation of costs. The customer is more likely to accept the offer if he knows the real costs. The subsidies of communities can be calculated in advance.

Concerning the customer, other reasons are important as well. She/he has to know about advantages of solar equipment compared with common gas- oil- or electro-boilers. In the following part, some arguments for solar energy are explained:

- Solar energy is an everlasting source
- Solar equipment does not produce pollution and CO₂
- Solar installations use indigenous energy
- Partly, solar equipment is produced in the own country
- Solar energy leads to less dependence on foreign countries
- Solar energy is always provided, also in case of a crisis

A solar campaign can also be combined with an installation of a new boiler. The plumber has the possibility to get additional business. For example, he can install a new boiler, which is often necessary. A low-price combination of both parts can be economically useful to both parties.

Links to further literature about selling of solar energy is available at the end of the manual.

3.4 Further work

After the equipment is installed successfully, it is important to define an end point

of the campaign. This can be a meeting of customer, organiser and plumber, a control of function and installation and a final conversation with the handing over of guaranty certificates.

An analysis of the satisfaction of customers is recommendable, it should take place at half a year up to one year after the installation. If there are bad results, it is necessary to communicate with unsatisfied customers to avoid a loss of image for the whole campaign.

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I. Example of an answer-card for direct-mailing

Logo	 A Nicht frankieren Geschäftsantwortsendung 
Slogan	<i>Adresse des Aktionsträgers</i>

Slogan	Name _____ Vorname _____ Adresse _____ PLZ/Ort _____ Telefon _____
<input type="checkbox"/> Ich interessiere mich für eine Solaranlage <input type="checkbox"/> Für ein Einfamilienhaus <input type="checkbox"/> Für ein Zweifamilienhaus <input type="checkbox"/> Für ein Mehrfamilienhaus <input type="checkbox"/> Ich interessiere mich für eine Energieberatung <input type="checkbox"/> Ich interessiere mich für andere Dienstleistungen ihrer Unternehmung	<i>(Angaben wenn möglich vorgedruckt)</i>
	Logo

II. Dossier for the organiser

Name of owner		Number of order.
address		Number of project.

task	activity	Date.	Who	notes
	Contact with customer			
1	First contact with answer card or phone call			
2	First date organised			
3	Contact with plumber			
4	Visit date:			
5	Organising of a building permit			
6	Final contract:			
7	Contract signed and received:			
8	Plumber confirms the contract			
	end			
1	Instruction of the customer by the plumber			
2	Handing over protocol			
3	Documents of plumber received			
4	Subsidies paid			

III. Dossier for the plumber

Name of the owner		Number of order
address		Number of project

task	activity	date	who	notes
	Contact with customer			
1	First contact with answer-card or phone call			
2	First date organised			
3	Contact with plumber			
4	Visit date			
5	Final contract:			
6	Contract signed and received:			
7	Plumber confirms the contract			
	subsidies			
1	inquiry for subsidies			
2	Subsidies received from the community			
3	Subsidies paid back to the plumber			
	Installation			
1	Date of installation			
2	Instruction of the customer by the plumber			
3	Inspection			
4	Documents of plumber received			

IV. Beispiel einer Abtretungserklärung

Die im Zusammenhang mit dem nachstehend erwähnten Bauvorhaben zur Auszahlung gelangenden Förderbeiträge von Kanton und Gemeinde in der nachstehend genannten Höhe werden von der Bauherrschaft/vom Gesuchsteller an *[Name des Aktionsträgers]* abgetreten.

Die Bauherrschaft erhält vom Werkvertragspartner eine Nettorechnung, welche den Gesamtbetrag abzüglich der Förderbeiträge umfasst.

Der/die *[Name des Aktionsträgers]* vergütet die gesamten Förderbeiträge an den Werkvertragspartner weiter. Die Auszahlung der Beiträge erfolgt *[nach Abnahme der Anlage]* *[nach Zahlungseingang beim Aktionsträger]*

Beitragshöhe: _____

	Name, Adresse und Ansprechsperson	Unterschrift
Gesuchsteller	_____ _____	_____
Aktionsträger	_____ _____	_____
Werkvertrags- Partner	_____ _____	_____