

Checklist for Implementing an Occupant Engagement Campaign

Use this checklist as a guideline for implementing an occupant engagement campaign.

Phase One: Research

- Identify the behavior you are looking to achieve.
- Become familiar with the audience in question—their values, socioeconomic factors, and elements of their everyday lives.
- Identify opportunities and barriers based on this knowledge.
- Identify champions who can help promote the desired behavior. This will encourage collective action.
- Consider the long term and consult our report to identify at least two strategies

Phase Two: Communications

- Frame messaging around the desired behavior that focuses on the uniqueness of your audience but that also recognizes the five tendencies we all have:
 - Propensity for self-interest**
“A message urging people to conserve water...may be more effective if it emphasizes that there might not be enough water left for their children, grandchildren, nephews, nieces, and cousins.”
 - Motivation for relative rather than absolute status**
“Status desires motivate people to buy green products, particularly when someone is around to see it.”
 - Proclivity to unconsciously copy others**
“Hotel cards imploring guests to reuse towels could indicate the prevalence of this behavior, which might trigger others to do likewise.”
 - Predisposition to be shortsighted**
“It is a mistake to emphasize the unpredictability of the environment when trying to motivate people to care about the environment and the future.”
 - Proneness to disregard impalpable concerns**
“People may be more responsive to environmental threats that they can feel, hear, smell, touch, or see.”
- Use positive, simple, and direct communication to market the desired behavior.

Phase Three: Feedback and Monitoring

- Monitor results to gauge whether or not the strategies are effective.
- Provide feedback and get feedback: share progress (and setbacks) with occupants and ask for their thoughts. It’s possible that a previously hidden barrier will be revealed.
- Refine strategies based on feedback and results, and incorporate tactics that address any newly revealed barriers.
- Repeat these last three steps with some regularity. Response to feedback diminishes over time, so continued efforts toward education and outreach will need to be employed.