

Marketing & Outreach

Background

The Marketing & Outreach features available in ServTraq enable agencies to generate leads based on program needs. All outlined features allow users to export the working list for Marketing and Outreach purposes. Users can also use the Contact Entry feature to track Outreach efforts or generate mail-out envelopes or labels.

- **Post-Step:** Customer Contact

1.1. LIHEAP

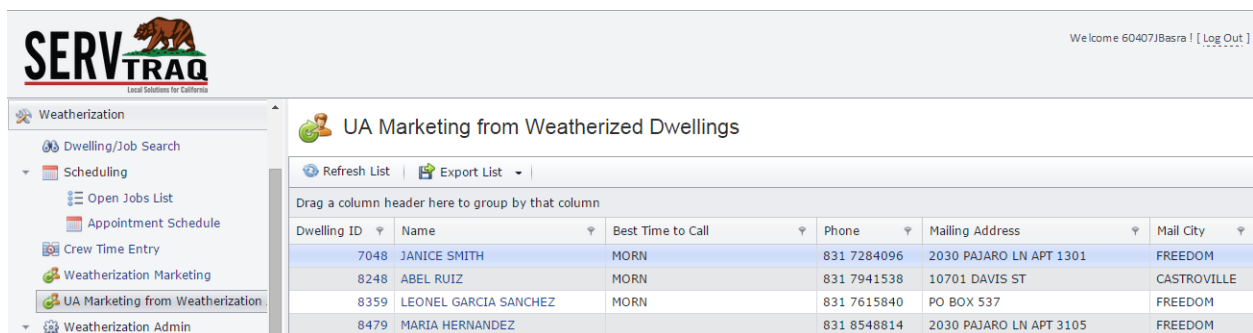
1.1.1. UA Marketing from Weatherized Dwellings

Background: The **UA Marketing from Weatherized Dwellings** feature allows users to view a list of open weatherization jobs within the last 180 days, linked to customers that have not been benefited for payment assistance under the current program year.

Tips & Tricks:

A record is automatically removed from the list if:

- A utility assistance application is added to a customer on the list
- No action was taken after the 180th day on the list



Dwelling ID	Name	Best Time to Call	Phone	Mailing Address	Mail City
7048	JANICE SMITH	MORN	831 7284096	2030 PAJARO LN APT 1301	FREEDOM
8248	ABEL RUIZ	MORN	831 7941538	10701 DAVIS ST	CASTROVILLE
8359	LEONEL GARCIA SANCHEZ	MORN	831 7615840	PO BOX 537	FREEDOM
8479	MARIA HERNANDEZ		831 8548814	2030 PAJARO LN APT 3105	FREEDOM

1.1.2. WX Marketing

Background: The **Weatherization Marketing** feature allows users to view a list of eligible payment assistance customers not previously weatherized by your agency (dwelling address was not found in the database).

Tips & Tricks:

A record is automatically removed from the list if:

- A weatherization job for the dwelling address is added
- No action was taken after the 86th day on the list

Days	Intake Date	LIWP Census Tract Eligible	Name	Phone	Mailing Address	Mail City
85	07/22/2015		AMY POWELL	831 7943025	1598 HUGHES WAY	SALINAS
85	07/22/2015		ARTURO LOSOYA	831 7554561	1624 EL DORADO DR	SALINAS
85	07/22/2015		COURTNEY TOVAR	415 6358631	2161 WHITMAN WAY APT 5	SAN BRUNO

Note: This feature is contingent on the WSAG/POW submitted?” checkbox located in the UA data entry module. If the checkbox is left unmarked, ServTraq will run a search on the dwelling address to determine if the dwelling has previously been weatherized. If a match is not found, the customer’s information will be added to the list for Weatherization Marketing after 14 days following the application entry date.

1.2. LIWP

1.2.1. WX Marketing “LIWP Eligible filter” Enabled

Background: The **Weatherization Marketing** with the “**LIWP Eligible**” filter enabled allows users to view a list of eligible payment assistance customers not previously weatherized by your agency where the dwelling address was not found in the database and it fall within an eligible DAC zone.

Tips & Tricks:

A record is automatically removed from the list if:

- A weatherization job for the dwelling address is added
- No action was taken after the 86th day on the list

Days	Intake Date	LIWP Census Tract Eligible	Name	Phone	Mailing Address	Mail City
85	07/22/2015		(Select All)	943025	1598 HUGHES WAY	SALINAS
85	07/22/2015		<input checked="" type="checkbox"/> LIWP Census Tract Eligible	554561	1624 EL DORADO DR	SALINAS
85	07/22/2015		<input type="checkbox"/> LIWP Census Tract Ineligible	358631	2161 WHITMAN WAY APT 5	SAN BRUNO
85	07/22/2015		<input type="checkbox"/> LIWP Census Tract Unknown	376317	72 N PEARL ST	SALINAS
85	07/22/2015			400145	8887 HOLLY HILL DR APT B	SALINAS
85	07/22/2015			316938	1700 EL CAMINO REAL SPC 19 10	SOUTH SAN FRANCISCO
85	07/22/2015			380936	903 OCEANA BLVD UNIT 106	PACIFICA
85	07/22/2015		MARIA ROBINSON	831 8698204	10603 AXTELL ST UNIT 137G	CASTROVILLE

Note: This feature is contingent on the WSAG/POW submitted?” checkbox and US Census Tract number retrieval located in the UA data entry module. If the checkbox is left unmarked, ServTraq will run a search on the dwelling address to determine if the dwelling has previously been weatherized. If a match is not found, the customer’s information will be added to the list for Weatherization Marketing after 14 days following the application entry date.

POS Address

Line 1:	<input type="text" value="730"/>	<input type="text" value="WILLIAMS"/>	<input type="text" value="ROAD"/>
	Address #	Address Street	Street Type
Line 2:	<input type="text" value="APARTMENT"/>	<input type="text" value="175"/>	
	Building Type	Unit Number	
Line 3:	<input type="text" value="93905"/>	<input type="text" value="SALINAS"/>	<input type="text" value="MONTEREY"/>
	Zip Code	City	County
			<input type="text" value="CA"/>
			State
US Census Tract:	<input type="text" value="6053010606"/>	<input type="button" value="Q"/>	<input checked="" type="checkbox"/>


1.2.2. LIWP Eligible Wxd Dwellings

Background: The **LIWP Weatherized Dwelling** list previously weatherized dwellings under the LIHEAP or other agency contracts that fall within an eligible DAC zone.

Tips & Tricks:

A record is automatically removed from the list if:

- A weatherization job for the dwelling address is added


Welcome 60407JB

HEAP

Weatherization

- Dwelling/Job Search
- Scheduling
- Crew Time Entry
- Weatherization Marketing
- UA Marketing from Weatherization Jobs
- Weatherization Admin
- CSD Bucket Reporting
- LIIE Refrigerator Program
- LIWP Program
 - LIHEAP Measures w/LIWP Equivalent
 - LIWP CIR Calculator
 - LIWP Eligible Weatherized Dwellings

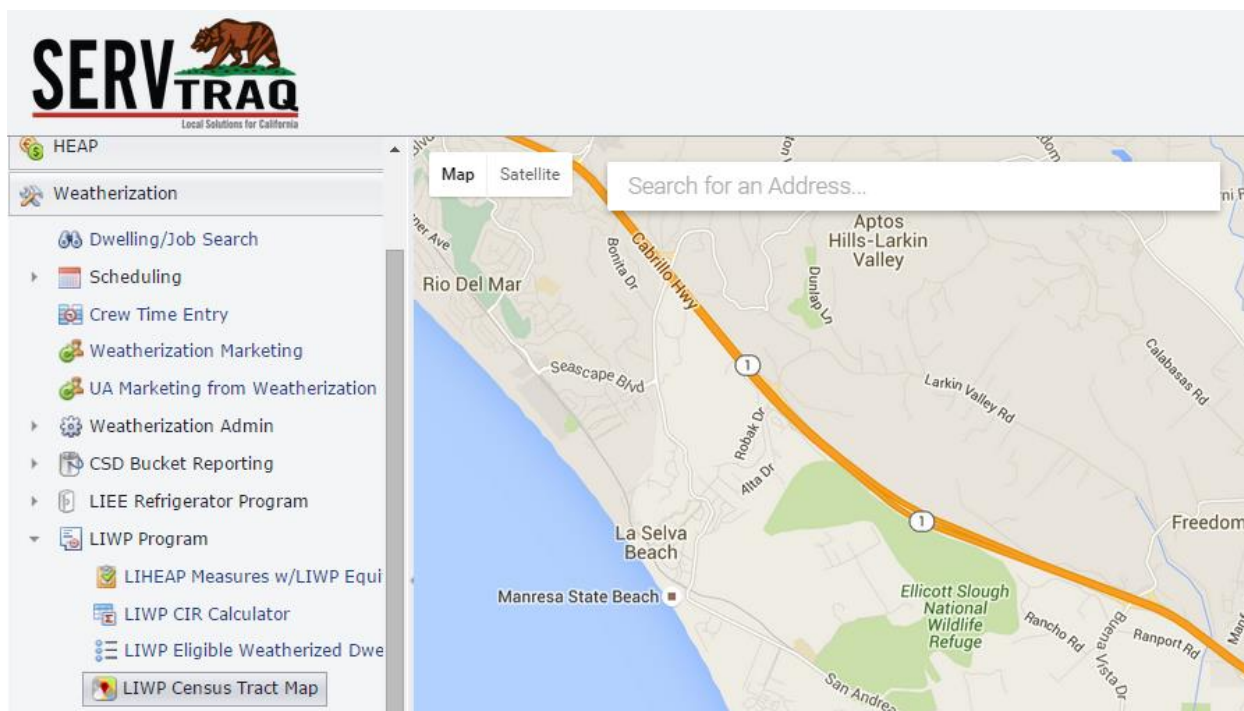
LIWP Census Tract Eligible Previously Weatherized Dwellings

Job ID	Dwelling ID	Job Completed Date	Job Type	Programs	Census Tract
12250	6640	2/7/2006	LIIE REFRIGERATOR REPLACE	PGEREFRI06	6053000502
15048	8926	2/22/2007	LIIE REFRIGERATOR REPLACE	LIHEAP05,PGEREFRI07	6053000502
8979	8931	3/7/2005	INITIAL WEATHERIZATION	LIHEAP05	6053000502
11561	9026	8/10/2005	INITIAL WEATHERIZATION	ECIPHCS05,LIHEAP05,PGE	6053000502
9263	9109	4/20/2005	ECIP HEATING/COOLING ONLY	ECIPHCS05,LIHEAP05	6053000502
13248	9395	5/26/2006	LIIE REFRIGERATOR REPLACE	LIHEAP05,PGEREFRI06	6053000502
9943	9538	9/12/2005	INITIAL WEATHERIZATION	LIHEAP05	6053000502

Note: ServTraq ran a one-time query to identify previously weatherized dwellings that fall within a DAC zone. Agencies are now responsible to look up Census Tract eligibility.

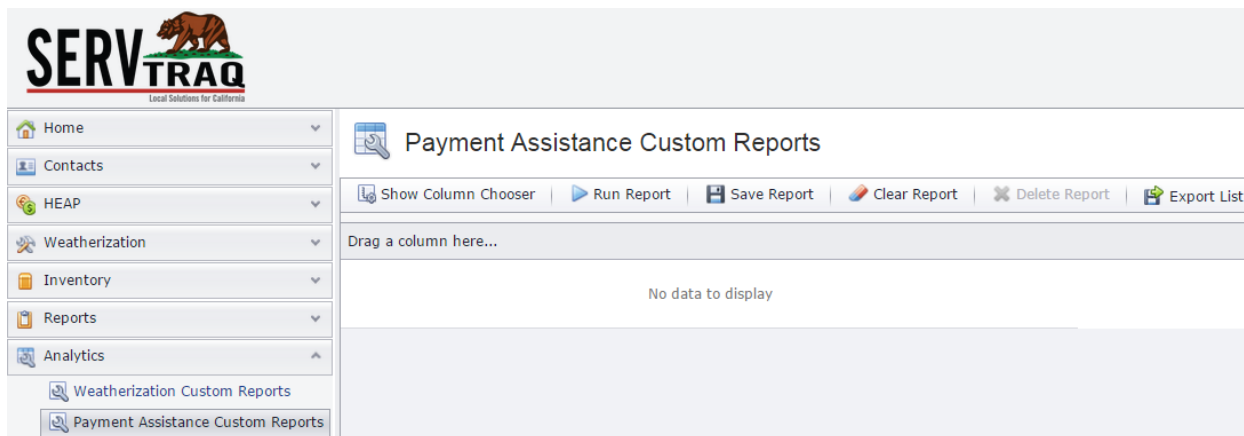
1.2.3. LIWP Census Tract Map

Background: The **LIWP Census Tract Map** shows previously weatherized dwellings that fall within your agency's DAC Zone. The purpose of this feature is to view LIWP (location) eligible dwellings. This feature also enables users to search by address to identify if it falls in a DAC zone.



1.3. Analytics-Custom Reports

Background: The **Analytics Custom Reports** allows users to create a custom Weatherization or Payment Assistant report using the output fields and filters available. This feature is multipurpose, for Marketing and Outreach, this feature enables agencies to target previously served UA customers.



Report Criteria

Fields

Available Fields:

- ☐ TotalHouseholdCount
- ☐ MailAddress
- ☐ MailCity
- ☐ MailZipCode
- ☐ MailCounty
- ☐ ServiceAddress
- ☐ ServiceCity
- ☐ ServiceZipCode
- ☐ ServiceCounty

Selected Fields:

- ☐ FirstName
- ☐ LastName
- ☐ SSN
- ☐ DateOfBirth
- ☐ EmailAddress

Programs

Available Programs:

- ☐ HEAP 2011
- ☐ HEAP 2011 SAN MATEO
- ☐ HEAP 2012
- ☐ HEAP 2012 SAN MATEO
- ☐ HEAP 2013
- ☐ HEAP 2013 SAN MATEO
- ☐ HEAP 2014
- ☐ LIHEAP 2005
- ☐ LIHEAP 2006

Selected Fields:

- ☐ FAST TRACK 2015
- ☐ HEAP 2015

Additional Resources

Related Videos: <https://servtraq.freshdesk.com/solution/articles/4000047269>

- *Marketing & Outreach Tools*
- *Custom Reports*

ServTraq Support: Support@ServTraq.com