



Answers to Submitted Questions for RFP for Paid Media and Marketing Services (posted on March 23, 2026)

The questions below were submitted during the open question period, which ended on March 18, 2026. No duplicates have been removed and no edits were made. The questions are grouped by submitter (not by topic) and numbered in one continuous list. Some answers refer to questions previously answered.

1. What is the primary objective? (e.g., Brand awareness, lead generation, or direct conversions/sales?)

Depending on the product, program, or offering, the objective could be any of these. Overall, brand awareness is important.

2. What is the specific Call to Action (CTA)? (What is the one thing we want the user to do immediately after seeing the ad?)

This will vary based on the product, program, or offering. Generally, for digital ads, the goal is click-throughs to our respective websites.

3. What are the key conversion actions? Engagement Clicks: Are we measuring social interactions and time-on-site? Lead Generation: Are we looking for form fills, newsletter sign-ups, or "Contact Us" requests? Purchase/Transaction: Is there a direct financial transaction (like a Green Liberty Bond purchase) or a loan application?

Yes, KPIs could include any and all of the items suggested above as conversion actions. Each product, program, or offering could have its own conversion point. The Green Bank team and the selected contractor will work together to determine these.

4. Who is the primary audience? (e.g., Residential homeowners, commercial building owners, specialized contractors, or institutional investors?)

Each product, program, or offering has a specific primary audience. This could be all of the segments listed in this question and potentially others as well. For example, Smart-E is a residential loan product and would not be promoted to commercial property owners.



5. What are the audience sub-segments? (Are we targeting specific demographics, geographic areas within Connecticut, or behavioral interests like "renewable energy"?)

Each product, program, or offering might have sub-segments based on what is being promoted. This could be specific demographics, geographies within Connecticut, or behavioral drivers. The Green Bank does have a goal of reaching distressed communities. The Green Bank team and the selected contractor will work together to determine these.

6. What is the desired impact? (Beyond clicks, what is the long-term goal? e.g., Reducing the energy burden on low-income families or hitting a specific megawatt target for energy storage.)

Brand awareness for the master brand and increased awareness of the products, programs, and offerings that the Green Bank provides to Connecticut stakeholders. The long-term goals could vary by product, program, or offering. For Energy Storage Solutions, deployment targets are established.

7. How will success be measured? (What are the Key Performance Indicators (KPIs) that define a "successful" campaign for the Green Bank?)

Impressions, clicks/click-through-rate, and conversion (which can be defined by the Green Bank team and the selected contractor). Conversions can include contact form submissions. Additionally, each product, program, or offering might have separate goals that would define success.

8. What is the "Click-Through" destination? (Should the audience be directed to a specific program landing page, a calculator tool, or a third-party application portal?)

The "click-through" destination will depend on the product, program, or offering being advertised. This will most likely be a landing page or form on one of our websites (ctgreenbank.com or energystoragect.com).

9. What creative assets are required to drive these clicks? (Do we need short-form video for engagement or search-based text ads for lead generation?)

The selected contractor would help define the approach and the creative assets needed to properly promote the specific products, programs, or offerings. We have used short-form video, static graphics, and text ads in the past.



10. Under Preferred Qualifications, the RFP says, "A Connecticut location is strongly preferred." We were hoping you could elaborate on whether that is required, and what your main goal is regarding that preference?

While we are not required to select an agency located in Connecticut, as a quasi-public entity, the Green Bank strives to work with Connecticut firms when possible. We will score and weigh proposals from in-state vendors more favorably (in the location criteria) and points will decrease for vendors further away.

11. Does the Green Bank envision the selected contractor serving primarily as a strategic marketing partner responsible for campaign strategy and execution, or primarily as a media planning and placement vendor?

We are seeking a strategic marketing partner responsible for campaign strategy and execution related to paid digital marketing and paid media.

12. Could you provide additional context on the internal marketing resources at the Green Bank and which responsibilities will remain internal versus those expected from the selected contractor?

Please see the Scope of Services section in the RFP for a breakdown of tasks expected from the contractor. The Green Bank has a marketing team that will provide assistance and support on the messaging and goals for each product, program, and offering. The selected contractor is a strategic marketing partner responsible for campaign strategy and execution related to paid digital marketing and paid media.

13. The RFP notes collaboration with an external graphic designer and potentially other vendors. Could you clarify the anticipated division of responsibilities between these partners and the selected contractor?

As an extension of the Green Bank's internal team, the graphic designer can act as an advisor or provide a more hands-on design role regarding campaign creative. The scope and division of the responsibilities will depend on the capacities, abilities, and experience of the vendor. This can be determined between the Green Bank, the selected consultant and the designer.

14. How does the Green Bank define success for marketing campaigns (e.g., program participation, qualified leads, contractor engagement, market awareness, or adoption of



clean energy solutions), and what key performance indicators will be used to evaluate the effectiveness of the selected contractor?

See questions 6, 7, and 8. Generally, qualified leads, market awareness, and conversions (form completions, etc.) are the primary KPIs.

15. Does the Green Bank anticipate prioritizing specific programs, solution lines, or audience segments during the upcoming planning period, or should all programs be assumed to have equal emphasis within the marketing strategy?

All programs should receive equal emphasis in the marketing strategy, however, it is likely that different tactics will be used for each program, product, or offering. This could also mean separate budget lines.

16. Which paid media channels have been utilized historically (e.g., paid search, social media, programmatic display, connected TV, native advertising), and have any channels proven particularly effective in reaching your target audiences?

We have used paid search, paid social, programmatic display, CTV, native advertising, OOH, and print/local news outlets. Depending on the program, product, or offering some channels have shown more success than others. Specific details would be discussed with selected contractor.

17. The RFP references both the Green Bank master brand and the Energy Storage Solutions program. Should the selected contractor expect to develop and manage strategy and media execution for both initiatives, and how closely are the two marketing efforts coordinated?

Yes. Energy Storage Solutions should be treated as a separate initiative. The Green Bank oversees marketing for that program; efforts are coordinated but separate.

18. The RFP notes a preference for familiarity with the Connecticut market and relationships with local media outlets. Could you elaborate on how important prior Connecticut market experience will be in the evaluation process? Is broader experience within other New England states also interesting?

We strive to work with Connecticut-based organizations when possible. Since we only operate in Connecticut, knowledge of and familiarity with this state and its markets and outlets is very



important. Experience in other states or areas could be relevant to show the contractor's past/current customers and skills. If the question is asking if the Green Bank has interest in running campaigns outside Connecticut, no.

19. What was the approximate annual paid media for the most recent fiscal year (FY25)?

For the current fiscal year (FY26), the projected annual budget is approximately \$500,000. Budgets for FY27 will be established in the coming months and this RFP will help inform this process.

20. Can you an approximate ratio for how the annual media spend will be split between the Green Bank master brand and the Energy Storage Solutions program?

There is no ratio. For FY26, the projected Energy Storage Solutions spend was roughly \$100,000. Budgets for FY27 will be established in the coming months.

21. Should the Energy Storage Solutions strategy and budget be presented as a fully separate line item within the proposal, or integrated into the overall plan?

Fully separate.

22. Does the Green Bank have existing audience research that will be shared during the kickoff/discovery phase?

Yes.

23. What does success look like for the Green Bank in this engagement? Are there specific KPIs, conversion targets, or program enrollment goals that campaigns should be built around?

See questions #6, 7, and 8.

24. Can you describe Green Bank's current marketing team structure?



The Green Bank's marketing, communications, and outreach team is comprised of seven employees. For this engagement, the contractor would have the most interaction with the marketing and comms side of the team, which consists of a director, a senior associate, and an associate. These three are responsible for paid media, website, email marketing, social media, sponsorships, public relations, events, and other related content.

25. Will the graphic designer referenced in the RFP be producing campaign creative assets, or is the contractor expected to develop all creative independently?

See question #13.

26. Are there other vendors or partners (PR, web development, CRM) that the selected contractor would need to coordinate with?

No.

27. Does the Green Bank have conversion tracking properly configured on ctgreenbank.com and energystoragect.com, or should the contractor anticipate an analytics/tracking audit as part of Phase 1?

Tracking is currently in place, however, a selected contractor should verify it meets their needs.

28. Can you share the relative weighting for the evaluation criteria in the selection process?

Description of approach, creative capabilities, and proposed strategy will be weighted higher than other scoring criteria which include vendor background/team, references/body of work, location, green energy experience, corporate background, media/ad buying relationships, and pricing. All of these areas are important and the prioritizing/weighting difference is minor.

29. While we understand a budget for the upcoming fiscal year has not been established, could you provide the historical annual media spend for the previous 1-2 fiscal years? This will help us right-size our proposed strategy and resource allocation.

See questions #19 and 20.

30. For the pricing requirement regarding Phase 3 (Executing Plan and Strategy) on a sliding scale, do you have preferred spend tiers you would like us to model (e.g., \$250k, \$500k, \$1M+), or should we define those tiers ourselves?

See questions #19 and 20. The contractor should define those tiers based on their proposed approach.

31. Will the budget for the Energy Storage Solutions (ESS) program be determined concurrently, or does it operate on a predetermined allocation since it is funded by electric ratepayers?

The budget for Energy Storage Solutions will be determined in the same timeline as general Green Bank budgeting. It is not predetermined.

32. Does the Green Bank have specific outreach goals or dedicated budget carve-outs for reaching multicultural, Hispanic, or non-English speaking communities within Connecticut?

The Green Bank has a goal of reaching distressed communities, however, we do not have specific budget carve-outs.

33. You mentioned a brand redesign and relaunch in January 2023. Can the chosen contractor expect access to detailed audience personas or market research that was developed during that rebrand?

Yes, the Green Bank will work with the selected contractor to understand existing research or data.

34. Could you clarify the exact division of labor between the chosen contractor and your existing external graphic designer? Specifically, will the external designer provide foundational static assets that we will then adapt and animate, or are we expected to handle net-new creative ideation and execution?

See question #13. Yes, the designer can provide static assets for selected contractor to adapt and animate. The expectations will be set based on what the selected contractor can do and how best to use all of the professional expertise available.

35. How much of the necessary creative assets (b-roll, photography, voiceovers) currently exist in the Green Bank's library versus needing to be produced from scratch?

Campaigns are currently in-market and many creative assets already exist. If the vendor is suggesting new assets, the vendor should suggest how these will be produced. Does the vendor have capacity to do this or not? Proposals should include these options.

36. Beyond general brand and program awareness, what are the primary Key Performance Indicators (KPIs) you will use to define the success of this contractor? (e.g., lead generation, application submissions for loans, website dwell time, etc.)

See questions 6, 7, 8, and 14. For certain programs, products, or offerings direct application submissions or leads could be part of the KPIs.

37. Is there an incumbent agency currently handling media buying and marketing services, or is this RFP intended to consolidate previously disparate efforts?

There is an incumbent agency. The Green Bank runs this competitive RFP process every three years to evaluate options, strategies, and pricing.

38. Because ESS is administered by the Green Bank alongside Eversource and UI, what does the approval process look like for ESS marketing campaigns? Should we anticipate longer lead times for creative and media plan approvals due to multi-party stakeholder reviews?

Energy Storage Solutions approval process does require slightly longer lead times due to multi-party stakeholder reviews. This process is led by the Green Bank team.

39. Assuming a transition from your current media buying workflows or existing agency partners, what is your anticipated timeline and preferred process for onboarding the new contractor to ensure no disruption to in-market campaigns?

We would anticipate that a disruption is likely during the onboarding of a new contractor due to the learning curve on both sides. Being out of marketing for a portion of the summer is realistic, assuming a new contractor and the related Professional Services Agreement (PSA) would be



executed to start on July 1. We would expect to be in-market by early fall if campaigns are paused.

40. The RFP notes a strong preference for a Connecticut location. For evaluating proposals from national or regional firms with extensive localized media-buying expertise, how heavily will the physical location of the agency be weighted against overall market leverage, capabilities, and cost-efficiency?

See questions #18 and #28.

41. As you look to establish this new 12-18 month strategy, what are the primary gaps, bottlenecks, or unrealized opportunities in your current media and marketing efforts that you are most eager for this new partnership to solve?

While there are always ways to improve on our current strategy, the Green Bank runs this competitive RFP process every three years to evaluate options, strategies, and pricing. There are no gaps or bottlenecks driving this process.

42. What is the primary objective of the campaign?

See questions #1, 3, 6, and 7.

43. What specific user action should advertising drive?

See questions #3, 6, and 7.

44. How will campaign success be measured?

See questions #6, 7, 8, and 14.

45. What result volume is desired?

Contractor proposals should suggest the volume that they can realistically provide.



46. Is there an approved marketing budget?

See questions #19 and 20. As stated in the RFP, we anticipate using proposals submitted to help us determine our spend, so providing cost estimates and ranges is helpful as we compare proposals.

47. If not, can a general budget range be provided?

See questions #19 and 20.

48. Is media spend separate from agency fees?

Yes. Please break out agency fees separately from media spend.

49. Which channels are mandatory versus recommended?

There are no mandatory channels. Contractor should propose solutions. See question #16.

50. What historical performance data exists?

Performance data related to impressions, CTR, conversions, etc., exist. Selected contractor will get access to historical performance data

51. Are landing pages, analytics tracking, and creative assets already in place?

Yes, however, contractors should feel free to propose solutions or new approaches, not simply rerun what currently exists.

52. Is the 2023 brand hierarchy document available as background for preparing this proposal?

If you review the Green Bank website, you will see the brand hierarchy in execution.



53. Does the company intend to invest in raising its profile beyond the state of CT (say, into the Tri-State area?) or are we maintaining the state border as a geofence for this project?

All paid media should be focused within Connecticut.

54. Have you done any recent stakeholder mapping to inform marketing plans to date, or would that need to be included in this scope?

Yes, we have some research that can be shared. Do not include stakeholder mapping or research in the scope of this RFP.

55. How do you see federal EPA policy affecting your work in the coming months/years?

For purposes of this RFP, contractors should not anticipate federal changes impacting our existing programs, products, or offerings.

56. How happy are you with the present state of your website? (scale of 1 to 10, 1 being unhappy/dissatisfied and 10 being very happy/satisfied)

7.5. As per the RFP, contractor proposals should consider offering input on development or improvement of landing page environments. However, website redesign should not be considered as part of this scope.

57. How many social media channels do you presently maintain, and which ones?

LinkedIn, Facebook, Instagram.

58. Do you presently collect customer testimonials in a systematic way, and is that data available to inform content creation?

Yes, for some programs, products, and offerings.

59. Do you have any archived video assets available for editing and production?



Yes.

60. What is the approval process like, in other words how many levels of review and input does content need to go through before it can be scheduled for posting or release?

Generally, content is reviewed and approved by marketing, appropriate program team, and legal. (three levels)

61. Is the client prepared to schedule weekly work-in-progress meetings with the selected marketing firm, and if so, will the ones to approve content be available in those meetings?

Yes, we are prepared to meet with the contractor. Cadence and frequency of meetings would be determined by the contractor and the Green Bank team. For example, onboarding a new contractor would likely require more frequent meetings, which could decrease over time. These meetings would be with the marketing team.

62. Do you have any content guidelines or constraints from a risk management point of view that you can share?

Yes, this would be shared with the selected contractor during onboarding.

63. Does the Bank have any ad formats, platforms or publisher partnerships it has found valuable from past campaigns that it would like to continue with ongoing advertising?

Yes, however, the Green Bank is open to proposed suggestions from responding firms. Ads have been run in many formats and across platforms, and success varies among programs, products, and offerings. See also question #16.

64. Does the Bank envision newsletter list growth as a part of the contractor's scope?

The Green Bank is not opposed to newsletter growth if this is a suggested approach of the selected contractor, however, it was not envisioned or called out in the RFP.



65. Does the Bank need the contractor to build and code effort landing pages or will contractor be supporting Bank staff in that regard.

Building landing pages would most likely be completed by Green Bank staff and not the selected contractor.

66. The RFP states “A Connecticut location is strongly preferred”. Can the Bank clarify how this aspect will be weighted in evaluating RFP responses and if out of state contractors are discouraged from applying?

See questions #18 and #28.

67. What’s driving your search for a new agency?

The Green Bank runs a competitive RFP process every three years to evaluate options, strategies, and pricing. An incumbent agency exists and they are able to participate in this process.

68. What are your brand’s biggest challenges?

Cutting through the noise and getting attention of various stakeholders, including many target niche markets, to inform and educate them about the programs, products, and offerings that the Green Bank provides.

69. Are you looking to evolve the brand messaging and/or identity, or should campaign stay within the current brand standards (tagline, marks, etc.)? Are there specific guardrails of what cannot be changed?

We are not specifically planning on changing standards or identity. We are open to brand messaging changes that might resonate more strongly with our targeted segments.

70. What does success look like in 12 months?

See questions #6, 7, and 8. The creation of a strategic partnership between the Green Bank and the selected contractor, and a strong working relationship that supports our goals.



71. How would you prioritize your key audiences?

See questions #4, 5, and 15.

72. Have you conducted any recent audience research the agency can leverage?

Yes.

73. Will agency have access to website analytics and any CRM data (if applicable)?

Yes.

74. Are there existing digital benchmarks or historical campaign performance data we can review? (CTR, conversion rate, channel performance, geographic response etc.)

Yes, this would be shared with the selected contractor.

75. What constitutes a “conversion” for each campaign? (e.g., Contact us submit)

Form submission is one of the key conversion points. This could be different depending on the program, product, or offering. For example, when a Green Liberty Note offering is open, the conversion would be driving traffic to offering page where people can invest.

76. How do you currently measure marketing performance across channels (e.g., attribution model, dashboards, reporting cadence, KPIs)?

See questions #6, 7, 8, and 14 on performance and KPIs. On reporting cadence, currently the Green Bank has access to real-time dashboards and receives monthly reports from the agency.

77. What KPIs do you intend to measure to define success for this initiative? Are there specific goals you can share?

See questions #6, 7, 8 and 14 on KPIs.



78. How would you prioritize your solutions lines (e.g., Home, Building, Investment, Contractor, Community) and associated products?

See question #15. For some solutions, paid media may be a more obvious tool to reach the intended audience (such as home or building owners, or potential investors). Other programs, products, and offerings might not benefit as directly from paid media. The Green Bank team will work with the selected contractor to determine priority.

79. How does Green Bank envision responsibilities being split between internal teams, external partners, and the selected agency (e.g., strategy, creative, execution, analytics)?

The selected agency is responsible for working with the Green Bank on strategy, and interacting with the graphic designer on creative (see questions #13 and 34 related to graphic designer). The agency owns execution, analytics, and reporting on the campaigns.

80. Are there specific channels (e.g., broadcast, OOH, print) that Green Bank expects to be included regardless of budget level?

See question #16 on channels that have been used previously. We have no set-in-stone channels that must be used. Contractors should propose what they suggest.

81. Are there any state, regulatory, or procurement-related constraints that may impact media buying, vendor selection, or campaign execution?

Selected contractor must be able to complete the forms included in the RFP.

82. How flexible should the annual media plan be in adapting to new programs, funding changes, or policy shifts throughout the fiscal year?

It's good to be flexible, but hard to define a degree of flexibility or level of unpredictable beyond our control. Reallocating budget lines is possible when needed. We do not currently anticipate new programs that will require paid media support.

83. Is there a desired in-market date for campaigns? Are there any key seasonal or investment cycle dates agencies should prioritize?



There are some seasonal considerations (for example, heating ads in the winter and cooling ads in the summer). There are also dates/months when investment offerings would be live.

84. Are there dedicated budgets for brand and solutions lines/products, or can that be fluid based on performance?

Specific program, products, or offerings will have dedicated budget allocations. There is some flexibility during the year between the master brand and specific lines based on performance and need.

85. As Connecticut Green Bank evaluates proposals to help inform budgeting, are there preliminary investment ranges under consideration (e.g., \$250K, \$500K, \$1M+) that agencies should plan against?

See questions #19 and 20.

86. The RFP references a 12–18 month strategy and advertising calendar. Should the proposal assume a 12-month calendar aligned to the Green Bank's fiscal year (July 1/June 30), or is a rolling 18-month plan preferred?

Aligning to the fiscal year (July 1 – June 30) is preferred.

87. How does the Green Bank currently prioritize its five solution lines — Home, Building, Investment, Contractor, and Community Solutions — for paid media? Are any of these considered higher priority for the upcoming fiscal year?

See questions #15 and 58 on priority.

88. Is there any seasonality to when these product lines are promoted?

There are seasonality considerations for programs, products, and offerings for homeowners in particular. For example, campaigns related to HVAC could focus on heating in the winter and cooling in the summer.



89. Are there specific products or programs (e.g., Smart-E Loan, C-PACE, Solar PPA, Green Liberty Investments) that are underperforming or that the Green Bank is looking to aggressively grow in FY2026–27?

No underperforming products or programs, however, we are anticipating growth in Green Liberty investment offerings.

90. The RFP mentions a separate strategy for Energy Storage Solutions, which has its own branding and budget. Will the selected contractor manage both the Green Bank brand and Energy Storage Solutions campaigns simultaneously, or will these be treated as two separate scopes of work with separate contracts?

Yes, the selected contractor would manage both simultaneously under one contract with the same staff at the Green Bank. The budgets are separate.

91. With the new performance-based incentive structure for Energy Storage Solutions launching April 1, 2026, is there an immediate need for a campaign to educate contractors and customers on the changes? If so, does this fall within the scope of this RFP?

Yes, this would fall within the scope of this RFP since paid media can support this need. Contractor education is already underway and might not be well served by paid media, however, the messaging and education needed for customers could be a good use.

92. Does the Green Bank have any planned new product launches or program expansions in FY2026–27 that the selected agency should be prepared to support?

Currently, there are no new products planned that would impact this RFP. There are plans to expand our Green Liberty investment offerings, which are already part of the scope of the RFP.

93. What is the Green Bank's current stance on non-digital media (radio, OTT/streaming, out-of-home, print)? Is this a meaningful part of the expected strategy, or is it secondary to digital?

See question #16 on channels. We value a mix of channels, understanding that each program, product, or offering might benefit differently from the audiences reached by a certain channel. This mix is a meaningful part of the strategy and the contractor's role.



94. Does the Green Bank have existing audience personas or segmentation data for each solution line (homeowners, building owners, contractors, municipalities, investors)? If so, will this be shared during the Phase 1 kickoff? o Is the primary focus consumer or business audience?

Yes, we have insights that would be shared during Phase 1.

95. Which geographic areas within Connecticut are the highest priority for paid media targeting — statewide, urban centers (Hartford, Bridgeport, New Haven), or specific underserved communities?

The Green Bank has a commitment to reaching underserved communities and may run specific campaigns to attain this purpose. In general, our campaigns have a statewide scope.

96. Does the Green Bank have CRM or customer data that could be used for remarketing, lookalike audiences, or suppression lists in paid campaigns?

Yes.

97. While the RFP states the budget has not been established, can the Green Bank share a historical spend range for paid media and marketing services in prior fiscal years to help us calibrate our recommendations?

See questions #19 and 20.

98. Can you share lessons learned from past campaigns or media tests?

Yes, with the selected contractor during onboarding.

99. Is the Green Bank open to a tiered proposal (e.g., Base, Growth, and Full-Scale options) so they can see what different investment levels would yield in terms of reach, frequency, and program outcomes?

Yes, absolutely open to tiered proposals with different investment levels and outcome.

100. What is the working relationship model between the selected agency and the Green Bank's external graphic designer? Who owns the creative brief, and who has final approval authority?

See questions #13 and 34. The agency would own the brief. Final approval rests with the Green Bank team.

101. Does the Green Bank have a library of existing creative assets (photography, video, animations, copy) that the selected agency can leverage, or will most creative need to be developed from scratch?

Yes, there are existing assets. Some new creative needs might arise based on the contractor's approach.

102. What digital advertising platforms has the Green Bank used historically (Google Ads, Meta, LinkedIn, programmatic display, YouTube, etc.)? Were any platforms notably more effective or less effective?

See question #16 and 93 on channels.

103. Does the Green Bank currently have Google Analytics, Google Tag Manager, or any other analytics/tracking infrastructure in place? Will the selected agency have access to these accounts?

Yes, we have Google Analytics. Yes, the selected agency will have access to any/all platforms as needed.

104. The RFP mentions SEO and AIO (AI Optimization) as a plus. Is there an expectation that the selected agency will conduct a full SEO audit and implement ongoing SEO improvements, or is this more of an advisory role?

No expectation of a full SEO audit. Advisory role is an appreciated plus.



105. Is the Green Bank's website on a CMS platform (e.g., WordPress) that allows the selected agency to make or recommend landing page changes, or does all web work go through an internal or separate web team?

Yes, both websites are on Wordpress. Yes, selected agency can and should feel free to suggest recommendations on landing page changes. Web work generally runs through internal team.

106. Are there any existing marketing automation tools or CRM platforms (e.g., HubSpot, Salesforce, Mailchimp) that paid media campaigns should integrate with for lead capture and nurturing?

The Green Bank uses Salesforce.

107. What are the Green Bank's primary KPIs for paid media success? Are they focused on awareness (impressions, reach), engagement (clicks, time on site), or conversion (loan applications, program inquiries, contractor sign-ups)?

See questions #6, 7, 8, and 14. This question outlines the marketing funnel well, so yes, each element (awareness, engagement, and conversion) is important and should be part of the strategy.

108. Does the Green Bank have existing benchmarks or targets from prior campaigns that the selected agency should aim to meet or beat?

Yes, this can be shared with the selected agency.

109. How frequently does the Green Bank expect performance reports, and in what format? Is there a preference for live dashboards vs. monthly PDF/slide reports?

The Green Bank anticipates at least monthly reporting on performance. Live dashboards are excellent too.

110. Are there specific program-level conversion metrics the Green Bank tracks internally (e.g., number of Smart-E Loan applications, C-PACE inquiries) that paid media performance should be tied to?



The Green Bank does track specific targets for each program, product, and offering (i.e., Smart-E loans, C-PACE inquiries) so tying performance to conversions is preferable, however, this is not always clear and possible.

111. How large is the Green Bank's internal marketing team, and what functions do they handle in-house (e.g., social media, PR, email marketing, web)?

See question #24.

112. How do you prefer to conduct meetings- i.e. in person, remote, combo- and at what cadence?

The marketing team prefers a mix of in-person and remote meetings. Cadence can be determined, however, at least monthly makes sense but could be more frequent or as needed.

113. The RFP states a Connecticut location is strongly preferred. Can the Green Bank clarify how much weight this carries in the evaluation, and whether agencies with deep Connecticut market knowledge, but offices outside the state will be considered?

See questions 18 and 28. Yes, agencies outside Connecticut will be considered; show your deep Connecticut market knowledge.

114. What are the weighted evaluation criteria the Green Bank will use to score proposals (e.g., experience, strategy, pricing, CT market knowledge, team qualifications)?

See question 28.

115. How many agencies are expected to be shortlisted for interviews, and what will the interview format look like (in-person, virtual, presentation-based)?

The shortlist depends on the number of proposal submissions, however, interviewing the top 3-5 makes sense. This would be virtual, unless contractor wants to come in-person. Contractor can determine the format, but it would be a discussion based on the submitted proposal.



116. The RFP mentions the possibility of selecting more than one contractor. Is the Green Bank considering splitting scope across multiple vendors (e.g., one for digital, one for traditional media), and if so, how would that be structured?

Splitting the scope is possible, depending on the proposals received and the strengths of the responding agencies. However, it's not ideal and is mentioned only as an option in case that flexibility is needed.

117. Does the Green Bank currently have an agency of record or incumbent vendor providing any of the services outlined in this RFP? If so, is that vendor eligible to re-bid?

Yes, there is an incumbent vendor currently providing these services and they are eligible to submit a proposal through this RFP.

118. What were the primary reasons for issuing this RFP at this time — is it a routine competitive review, a desire for new capabilities, a budget restructure, or a change in strategic direction?

This is a routine competitive review.

119. Are there past campaign results, media plans, or performance data from prior engagements that the Green Bank would be willing to share with shortlisted agencies to inform the proposal?

We generally don't share this with shortlisted agencies, however, we could consider it.