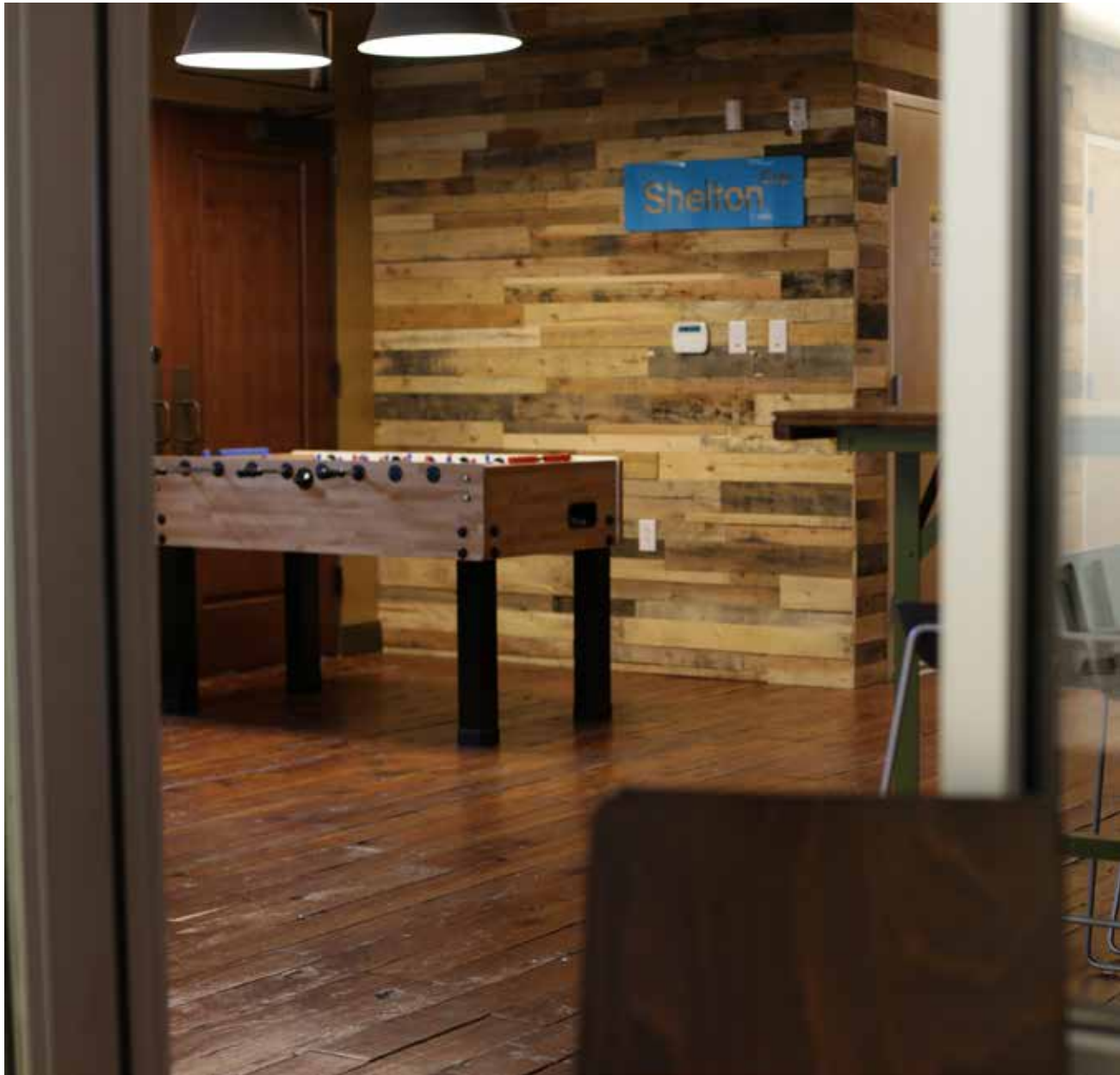


# Orientation Guide



## Welcome to Shelton Group

You may have noticed this is printed on double-sided, recycled paper. Nearly everything here is recycled, recyclable, repurposed or otherwise sustainable. We're experts at this stuff, and soon, you will be too. We'll show you how to get there, but first, let's get you set up for success.

## JJ's 1st Week

Monday



Tuesday



Wednesday



Thursday

## First Week Survival

It's your first week, so relax. The insanity won't start for at least another day.

Here are a few things to help you out along the way. This is your go-to book. It includes a brief history and a basic rundown of how we do things at Shelton Group. It makes for a good read if you need a break from all the other paperwork you're currently filling out.

Friday



## Go Green Without Going Crazy

Hugging trees is not in your job description, and it won't get you a raise. Birkenstocks are not part of our dress code. (Actually, we don't have a dress code.) We aren't all Al Gore worshippers. We aren't all hybrid drivers.

We are all about great communication and how consumers really think when it comes to energy and the environment.

We're also the best at leveraging a company's sustainability commitment for a market advantage. That's all.



## Overview

### WE ARE ...

The nation's leading marketing communications agency focused exclusively on energy and the environment. We're the agency that companies turn to to tell their sustainability stories.

### OUR VISION (memorize this)

Every home and building is energy responsible, and sustainability is ordinary.

### OUR PURPOSE (and this)

Create a market advantage for the organizations that are creating that responsible, sustainable future we envision.

### HOW WE DO IT (this too)

1. We tell corporate sustainability stories that inspire brand affinity.
2. We drive sales of products and services that are inherently more sustainable/energy efficient via product marketing efforts.
3. We create movements, shifting public sentiment and social norming related to energy responsibility and sustainability.

## Shelton Colors

Leadership

Clarity

Sustainability

Research

Innovation

Originality

Really, we just like them because they're colorful.

## Our Approach: It all starts with research

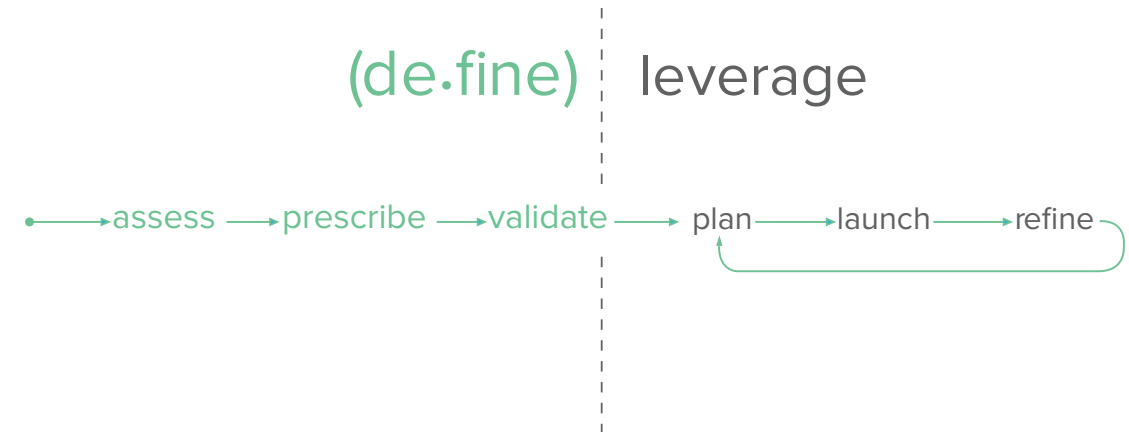
Since 2005, our proprietary Pulse™ studies have formed the foundation for our understanding of consumer and business decision-maker drivers and behaviors related to energy consumption, product selection, brand loyalty and corporate social responsibility (CSR). From our Pulse data, we've defined distinct consumer segments that we know inside and out. You'll hear us talk about True Believers and Cautious Conservatives, Concerned Parents and Working Class Realists. We know exactly what messaging will resonate with each segment, raise their awareness and move them to action.

This leads to bold creative. Creative that takes chances. Creative that prompts real behavior change that lives beyond each campaign.



## Our Process

Using our Define•Leverage process, we help our clients create actionable plans that connect with the right audience at the right time with the right messages or offerings. It allows us to gain a clear understanding of the objectives, barriers and opportunities for successful internal engagement before we begin the research from which we'll build insight/behavior change models. From there, we'll develop a complete communications plan that includes strategies, tactics, an engagement map and creative concepts.



## Our Services

### RESEARCH

Our Pulse research studies are the springboard for designing custom secondary, quantitative and qualitative research. We can quickly zero in on a specific market to identify a company's best prospects, discover what matters to them, and identify messages or offerings that will resonate.

### STRATEGY

We connect the dots from our research-based insights to brand positioning approaches, product and service recommendations, and comprehensive marketing plans. Our approach to crafting strategy centers on addressing ...

- The “Who”: Who is the best target?
- The “Why”: Why they will or won't engage
- The “How”: What kinds of messaging via which vehicles

### CREATIVE

We're storytellers at heart, and in our business, that means we create connections between ideas and behaviors, between organizations and their audiences, between consumers and the planet we all call home.

Our team of designers, videographers and copywriters blends imagination and technical skill with strategy and insights to create brand identities and digital, video and print campaigns. The fruits of our labors are emotionally compelling campaigns that ring true with the audience's values and drivers.

## Our Values

### BE CURIOUS

**We value creative problem solving.**

- We are strategic thinkers – we figure stuff out for our clients and for ourselves.
- We ask “what if” and invent unexpected products and solutions to achieve goals.
- We are inquisitive, digging to find deeper drivers and opportunities.
- We are smart, creating solutions that are unexpected and unconventional.

**We value communicating openly & effectively.**

- We start with a question, not a conclusion.
- We are collaborative across the agency and with our clients. We really listen to other opinions and feedback and create better solutions because of it.
- We solicit and respect differences of opinion.



## Our Values

### BE COURAGEOUS

**We value communicating openly & effectively.** *(Obviously, this one's important.)*

- We praise openly, early and often. We admonish in private, after seeking understanding.
- We say what we mean and we say what we see, even if it means a do-over or resetting expectations with a client.
- We are compelling storytellers – from the way we communicate research insights and platform rationales to how we deliver conference presentations and execute creative work.
- While we rely on individual talents, we create the best results as a team.

**We value doing the right thing.**

- We resolve situations by asking, “What’s fair for everyone?”
- If we’re in doubt about the right thing to do, we ask.
- Our clients have the ultimate say ... but we always give them the benefit of our experience, and we step up to the plate for difficult conversations.

## Our Values

### BE AUTHENTIC

**We value results.**

- We are accountable – we do what we say we will and renegotiate in advance if we can’t do what we promised.
- We create results for our clients.
- We believe in numbers.

**We value commitment.**

- We constantly strive for improvement – to be better individually and collectively.
- We work hard.
- We are service-oriented.
- We take responsibility.

**We value having fun.**

- We enjoy each other’s company.
- We blow off steam together.



## Shelton Culture: Beyond Our Values

We hope you paid special attention to that last category under Be Authentic. We not only value having fun, we insist on it. Here are just a few of the ways that manifests around the office.

**Kitchen Table Lunch (KTL):** Every couple of months, the company orders in lunch for everybody. After we chow down, Suzanne holds the floor to update us on existing and prospective clients, and we often get to see some of our recent Creative work in all its glory.

**Coffee Talk:** Sort of a mini KTL held on occasional Friday mornings. Coffee, bagels and schmears provided.

**Foosball:** The table is right there at the front door, and that should tell you something. It's used whenever – for practice and pickup games – but we also have company-wide tournaments. It doesn't matter if you've never played or you think you stink at it. You'll be paired with someone who "someone" has decided is an "A" player, and anyway, it's all just for laughs.

**GeoGuesser:** Weekly rounds and occasional tournaments, usually organized by someone in Creative. We even maintain a separate Slack channel for it. Don't know what GeoGuesser is? Google it – or ask Jesse.

**Slack:** Remember how much we value communicating? This is one of our favorite ways to keep tabs with each other about work and so much else. Check out the aptly named Random channel and start racking – and serving – up the digital tacos! Earn enough and you'll be rewarded with legendary taco-centric gifs.

**The Nontraditional Thanksgiving Feast:** An annual pot-luck event held – you guessed it – around Thanksgiving. The idea is that everyone contributes something that doesn't grace the typical Thanksgiving table.

**Dipmas:** The Shelton Group winter holiday celebration is a pot-luck lunch comprising nothing but dips and chips. Any and many kinds of both. Yum.

**Game Night:** A once-in-a-while event. We meet at a volunteer host's home to play board games. Everyone brings food and drinks, hilarity ensues.

**Jigsaw Puzzles:** A relatively new spare-time activity. Stop by for a piece of the action.

**Birthdays:** We acknowledge everyone's birthday with a card signed by everyone else. A mysterious file folder will appear on your desk every so often. Do what the note says: promptly sign the card, cross out your name and pass the folder on to someone whose name is not crossed out. Do not be dismayed if people forget it's your birthday when the day finally rolls around. The card is circulated well in advance, and well, we forget.

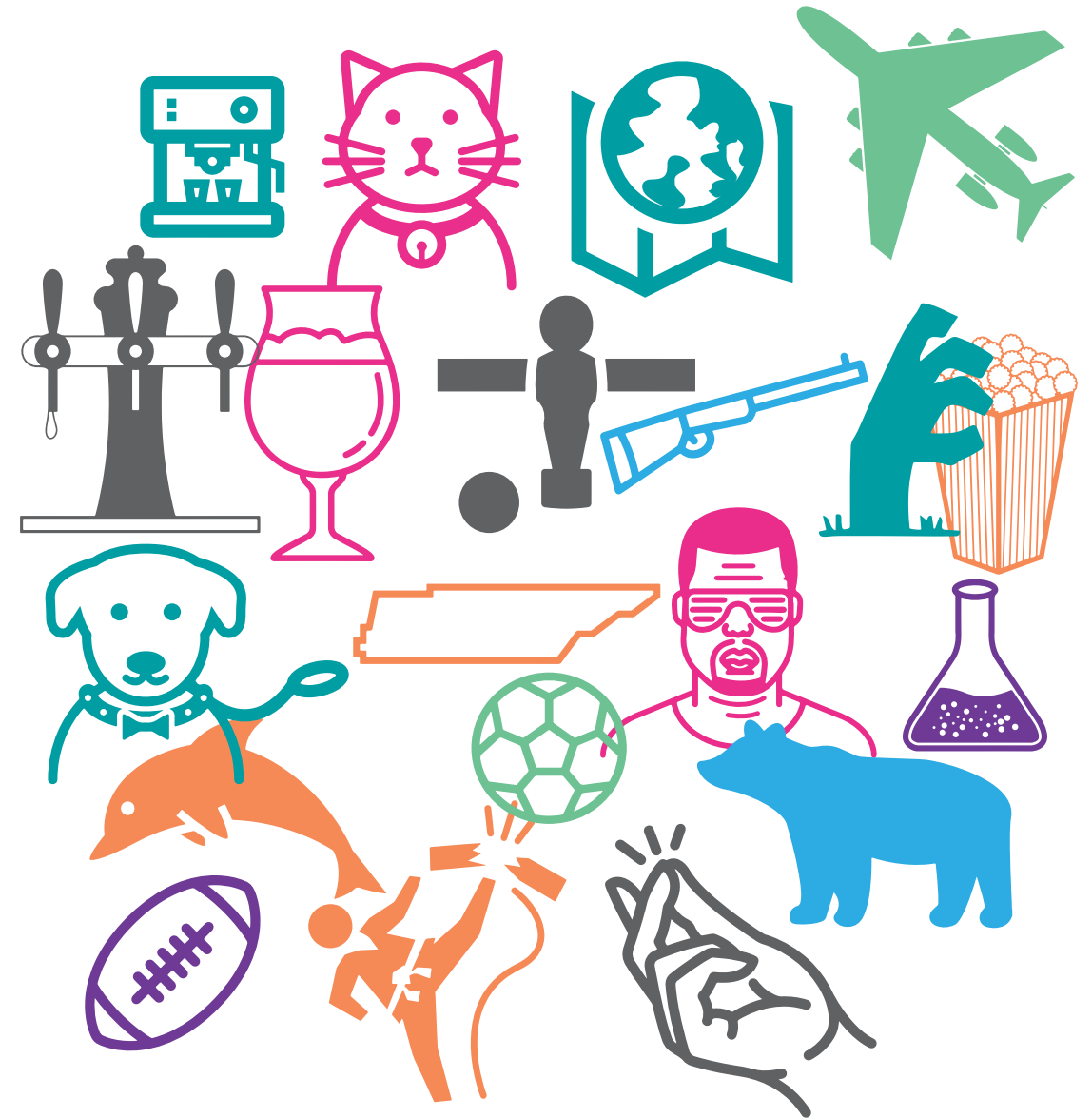
**Have a Dog?** Ours is a dog-friendly office. You can look forward to meeting Max, Thomas, Zoe, Beau and Millie – and maybe Copper. If you have a human-friendly dog of your own, you're welcome to bring him or her in for a visit.

## A list of good people to talk to:

- Teri for computer/printer issues (email is best) or work travel arrangements
- Gwen for postage and FedEx
- Gwen or Courtney for issues with entering your time
- Casey or Mike for setting up WebEx meetings
- Meghan, Martha and Sarah Beth for finding stuff, especially on the server

And ...

- Jacob about beer, Mike T. for keg requests
- Jeremy about movies and buffalo wings
- Lauren for vacation travel tips
- Lyn about science-y stuff
- Mike T about surviving the zombie apocalypse
- Becky about shooting and kicking things (remember, it's the quiet ones ...)
- Casey about sports, especially the Vols
- Virginia about treading the boards in musical comedies
- Jesse about the world of fine art plus foosball tournaments, GeoGuesser and any other contests you can dream up
- Alex about cats and Kanye
- Mike B about being a Dolphins fan from Boston
- Courtney about Asheville/what to do about black bears in your home



## Neighborhood Geography (and lunch opportunities)

The Old City is more about nightlife than daytime, so options for lunch in the immediate area are a bit limited. Here's a map of our immediate environs with lunch possibilities clearly marked.

**A:** Shelton Group (Your creativity in the kitchen is your menu, Shelton Nachos are a staple)

**B:** Old City Java (Coffee and pastries)

**C:** Good Golly Tamale (Variety of changing flavors and assortments)

**D:** Love Shack (Mike will set you up with some delicious burgers or chicken sandwiches)

**E:** Curious Dog (Good sandwiches but call in to avoid smelling like the place)

**F:** Crown and Goose (British themed gastropub)

**G:** Barley's (Pizza, salads and sandwiches)

**H:** Stock and Barrel (Delicious burgers with a bourbon selection to match)

**I:** Soccer Taco (Quick and cheap Mexican food)

**J:** Tomato Head (Pizza, sandwiches and salads)

**K:** Cafe 4 (Sandwiches, baked goods and coffee)

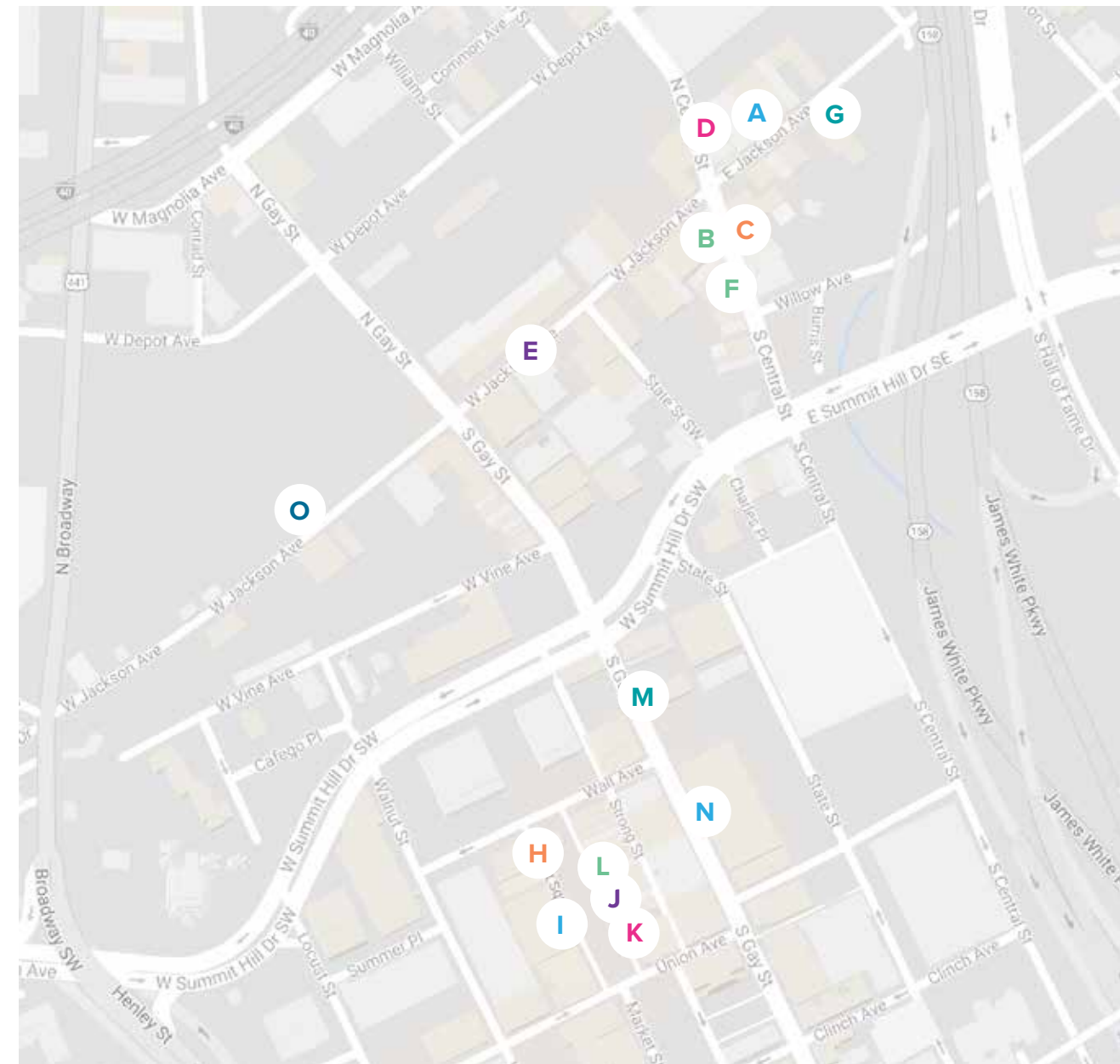
**L:** Emilia (Italian)

**M:** Chivo (Tacos and such)

**N:** Babalu (Tacos and Tapas)

**O:** Sweet P's (BBQ)

Other options not included because of map size: **Yassin's Falafel House**, **French Market**, **Frussies**



# History of Shelton Group

There's an old saying about those who forget history. I don't remember it, but it's good.

– Stephen Colbert

- The vision for Shelton Group started back in the '70s when Suzanne Shelton was in third grade. She wrote her first ad for a bake sale and performed it in front of her whole class. Okay, so it wasn't a paying client, but it was the first step to getting us where we are today. A couple years later, Suzanne got a copywriting job at an agency that closely resembled the one in Mad Men, except it was 1989 and they were still schmoozing clients at strip bars. Luckily, it didn't work out.
- Suzanne started freelancing by writing brochures for Philips/Magnavox and local TV stations. Pretty soon, she had more work than she could handle. She had to start an agency (then called The Write Stuff), just to control the workload.
- By the late '90s, Shelton Group had clients in health care, higher education, energy and copiers. And no one in the agency was over 35 years old. Can you imagine the client meetings? Suzanne and the rest of her crew were all playing in rock bands every night, while telling clients how to advertise during the day. How did these kids – with little experience – gain their clients' trust? Good old-fashioned research, strategy and creativity.
- It was research that put Shelton Group on the map. Our research opened the door to bigger clients – our creativity is what kept them. We were becoming experts in all our categories. But there were lots of experts in these categories, except for one – energy and environmental causes.
- We filled that void in the industry by becoming the only agency that specialized in energy efficiency and sustainability back in 2002. Today, lots of people are doing it, and that makes our work even more valuable. Instead of keeping our findings top secret, we share them, as well as the resulting work, with the world. So far, it's been pretty effective at attracting clients.
- We've come a long way, and we're still just getting warmed up.





## We're experts, and so are you.

Or you will be – soon. We do tons of research to find out what's going on in consumers' heads. It gives us the edge over other agencies specializing in energy and the environment. They would kill to have this kind of information, but we're going to give it to you for free.

You might want to start with the Glossary. You're bound to hear some unfamiliar terms and acronyms being bandied about the office, so we've made a list to help you know what the heck we're talking about. If you hear others you wish had been on this list, let us know so we can add it for the next person.

Meanwhile ...

*we're glad you're here!*

# SheltonSpeak

You'll soon discover that we often take deep dives, some clients are particularly buttoned-up, and sustainability should always be baked in. We touch base, huddle, perform regular brain dumps and put things in buckets. And Judith and Mike T. do it all for shiggles.

Here are some other terms you'll be hearing around the office.

<b>Awesome</b>	1) Everyone working at Shelton Group. 2) Everything we do at Shelton Group. 3) In meetings and phone conferences, everything every Shelton client does or says.
<b>Deck</b>	A set of PowerPoint slides developed for a presentation or as a report.
<b>Greenwashing</b>	Using sketchy sustainability claims to promote products or services. If you've not already seen it, the latest edition of The Seven Sins of Greenwashing should be on your reading list – you can find it online.
<b>Our wheelhouse</b>	What we do. See page 10.
<b>Resi</b>	Residential utility clients (vs. Biz).

## Alphabet Soup

<b>C&amp;I</b>	Commercial and Industrial (refers to utility customers)
<b>C&amp;P</b>	Clients and Profits platform
<b>DG</b>	Distributed Generation
<b>DOE</b>	Department of Energy
<b>DR</b>	Demand Response

<b>EE</b>	Energy Efficiency
<b>EPA</b>	Environmental Protection Agency
<b>EPD</b>	Environmental Product Declaration
<b>EV</b>	Electric Vehicle
<b>FERC</b>	Federal Energy Regulatory Commission
<b>GHGs</b>	Greenhouse Gases
<b>GWP</b>	Global Warming Potential
<b>IAQ</b>	Indoor Air Quality
<b>IOT</b>	Internet of Things
<b>IOU</b>	Investor-Owned Utility, as opposed to “muni” (city/municipality utility) or “co-op” (utility owned by members)
<b>JDP</b>	J.D. Power and Associates (utilities think very highly of them – the powerhouse of marketing information services companies. Sorry.)
<b>LCA</b>	Life Cycle Analysis
<b>LEED</b>	Leadership in Energy and Environmental Design (a green building certification)
<b>NZ/NZE</b>	Net Zero/Net Zero Energy
<b>PUC</b>	Public Utilities Commission
<b>RE</b>	Renewable Energy
<b>SMB</b>	Small and medium-sized businesses (utility customers)
<b>T&amp;D</b>	Transmission and Distribution
<b>TOU</b>	Time of Use
<b>VOCs</b>	Volatile Organic Compounds

