Smart Energy Customer Engagement
Success Stories
December 12, 2017
Today’s Presenters

Nathan Shannon
Deputy Director
Smart Energy Consumer Collaborative

Uzma Noormohamed
Program Analyst
ISEIF

James Eber
Manager of DR & Dynamic Pricing
ComEd

Timothy Graves
Sr. Marketing Strategist, B2B
PG&E
• Introduction & SECC Case Studies
• ISEIF: Building a Unique Model for Consumer Engagement
• ComEd: A Next-Generation Digital Platform for Consumers
• PG&E: A Proactive Approach to Lowering Energy Costs for SMBs
• Question & Answer Session
SECC Customer Engagement Success Stories

SMART ENERGY CUSTOMER ENGAGEMENT SUCCESS STORIES

ISETF
Illinois Science & Energy Innovation Foundation

Background
The 2011 legislation mandating weatherization services to eligible electric and natural gas utilities was a catalyst for customer engagement initiatives. In response, the Illinois Science & Energy Innovation Foundation was formed to serve as a neutral conduit for businesses, especially small- and medium-size enterprises, to help them navigate the complex operational, regulatory, and financial landscape of energy-efficiency measures. This approach has yielded a successful model for customer engagement, resulting in significant energy savings.

Innovating in grid modernization
Through the Grid Modernization Act passed the Illinois Commerce Commission and the Illinois General Assembly, the State of Illinois has been able to make significant advances in grid modernization, expanding its capacity to deliver clean, reliable, and affordable energy to customers. The Energy Innovation Phasing study, conducted by the Illinois Science & Energy Innovation Foundation, identified a variety of opportunities that could be leveraged to support grid modernization efforts and help customers achieve their energy goals.

Value of third party education arm
Illinois Science & Energy Innovation Foundation

About Commonwealth Edison
Commonwealth Edison Company, a provider of electrical energy and other energy-related products and services to more than 4 million customers in northern Illinois, has made significant progress in leveraging the value of its customer base to support grid modernization efforts. The Illinois Science & Energy Innovation Foundation has worked closely with Commonwealth Edison to develop a comprehensive customer engagement program that leverages the power of its intellectual capital and operational expertise.

Evolving to meet customer needs
The evolution of the digital economy has transformed the way customers and businesses interact, offering new opportunities to engage with customers in their environment and to deliver personalized, relevant, and valuable information. By leveraging the power of digital technology and data analytics, Commonwealth Edison has been able to identify new opportunities to engage with customers and improve their energy efficiency.

Identifying cost savings
Programs like REAP (Reinventing Electric Applications) and the Illinois Energy Efficiency Program have been instrumental in driving cost savings by encouraging customers to adopt energy-efficient practices. These programs have helped customers save money while reducing their energy consumption.

ComEd Marketplace
A Next-Generation Digital Platform for Consumers

Program at a Glance
ComEd launched an innovative program in October 2018 to empower customers to take control of their energy consumption. Since the launch, customers have been able to choose from over 350 energy options, saving them an average of $200 per year on their energy bills. The program offers real-time energy insights, enabling customers to make informed decisions about their energy usage.

Featured Success Stories

1. Illinois Science & Energy Innovation Foundation
   - Innovative model for customer engagement
   - Significant energy savings

2. Commonwealth Edison
   - Customer engagement program
   - Grid modernization initiatives
   - Cost savings

3. ComEd Marketplace
   - Next-generation digital platform
   - Real-time energy insights
   - Cost-effective energy options

Program results
Since the launch of the program, customers have been able to take control of their energy consumption, leading to substantial cost savings and increased energy efficiency.

Smart Energy Consumer Collaborative
Additional Customer Engagement Case Studies

www.SmartEnergyCC.org
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<tbody>
<tr>
<td>Uzma Noormohamed</td>
<td><strong>Program Analyst at ISEIF</strong></td>
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<td></td>
<td>• Develops and monitors grant making, funding and evaluation strategies</td>
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<td>• Coordinates ISEIF’s grantee network of nonprofits, universities, and</td>
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<td>governments to advance shared goals of increasing engagement around energy</td>
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<td>• Previous work in the fields of financial services for underbanked</td>
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<td>customers, sustainability education and public policy</td>
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<td>• Holds a BA in Philosophy from DePaul University and is completing an MA</td>
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<td>in Public Policy and Administration from Northwestern University</td>
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SMART GRID CONSUMER ENGAGEMENT IN ILLINOIS

ISEIF’S FUNDING MODEL AND COMMUNITY OF PRACTICE

UZMA NOORMOHAMED
@ISEIFFOUNDATION
ILLINOIS’ SMART GRID LAW INVESTS IN ECONOMIC & EDUCATIONAL INFRASTRUCTURE

• Energy Infrastructure Modernization Act or Smart Grid Law passed in 2011. Authorized $3.2 billion smart grid investment by state utilities Ameren Illinois and ComEd

• The law also established two funds
  • MARKET STIMULATION: A $22 million venture fund for early-stage, energy and clean tech startups
  • EDUCATION: A $50 million literacy and education fund for raising awareness of smart grid, smart meter, and AMI enabled technologies, 30% of which must reach low-income, senior, and hard-to-reach populations
ABOUT ISEIF

• Private, nonprofit, grantmaking organization
  • 2 annual grant cycles, $5 million in funding per year
  • Funds transferred by ComEd and Ameren Illinois on annual basis

• Management of grantmaking process
  • Invite proposals, make recommendations, cultivate new grantees
  • Review process includes a peer committee process and approvals from Board of Directors

• Coordinate grantee cohort – “community of practice”

• Maintain communications with select utility departments
TRADITIONAL UTILITY-COMMUNITY PARTNERSHIPS

Utility

Community Partners

- Community Development Corps
- Municipal Partners
- Consumer Education NFPs

Community Members

- Program Specific Education
- Utility (co)branded marketing materials
- Utility program specific actions
- Dedicated community events

• Funding
• Training
• Marketing Materials
ISEIF FUNDED ENGAGEMENT PROGRAMS

Community Partners

- Community Development Corps
- Municipal Partners
- Consumer Education NFPs

Community Members

- Self-defined context
- Self-generated engagement plan
- Messaging customized to context
- No utility branding

- Energy literacy modules inserted into existing financial education, social services, homeownership, health, faith-based etc.
- Train the trainer models for groups such as real estate professionals, green builders, community organizers
- Action items include but not limited to utility programs
COMMUNITIES OF PRACTICE

- Cohort comes together in an identified area of expertise
- Share learnings from engagement activity
- Learn from each other’s best practices
- Iterate to strengthen programs
- Non-competitive
3 BROAD STRATEGIES

**Grassroots Outreach**
- Identifying influencers
- Highly Conversational
- Deep interactions

**Culturally Appropriate Messaging**
- The community generates how to package smart meters, how to create relevancy, which images to use

**Inserting Smart Grid Module**
- Finding intersecting conversations
SMART GRID BRINGS VALUE TO CONSUMERS. HOW MUCH DEPENDS ON HOW PEOPLE RESPOND

- Adoption of programs, technology, and behavior
- Demand response and time varying rates
- Fundamental shift from passive to active electricity consumption
- Engagement for renters and those with split incentives
- Smart technologies purchasing decisions
- Basic literacy around energy topics, including efficiency and conservation, and leading to smart grid and meters
## WHAT WE FUND

### Baseline of grassroots outreach is funded annually

- Community, Faith-based

### STEM and curriculum for electricity education in schools and museums

- Preference for interactive and maker oriented
- Teacher engagement and paid professional development

### Pilots

- Engagement in public housing developments
- Smart home solutions for seniors aging in place
- Flexible payment options for customers struggling to pay bills on time

### Media and communications tools

- Humorous and approachable campaigns on social media and TV
- Consumer facing website
- Midwest Energy News

### Small grants program

- Connecting block clubs, neighborhood organizations, community based organizations with no smart grid knowledge to outreach organizations, and compensating the small organizations for time and event organization
New Years Fai Chun were passed out at the Chinese New Years Parade in Chicago’s Chinatown. Traditionally, the Fai Chun is for good luck and prosperity. The CASL Fai Chun incorporated energy savings and the smart grid graphic into this overall message about prosperity.
Sustainability is not foreign to the reality of African-American communities and other communities of color.

Messaging and images focused around innovation and invention in the African-American community. The goal was to make sustainability seem more familiar and encourage community ownership of sustainable practices rather than continuing the perception of sustainability as something other communities do.
Go where people are gathered

Are these all you see on state highways as you drive around?

In small towns and rural areas, organizers from Elevate Energy go to the local Walmart and offer a lunch-and-learn to their employees in the break room.
ELEVATE ENERGY: SMALL-TOWN COMPETITION BETWEEN VIRDEN, MASON CITY AND PETERSBURG
FAITH IN PLACE

• Founded out of the idea that religious organizing around environmental issues should foster personal and collective transformation

• Outreach staff conduct energy workshops and are trusted allies in their faith local communities
University of Illinois at Urbana-Champaign's Illinois Smart Meter Awareness, Research, and Technology (iSMART) pilot addresses the potential to bring down energy costs in public housing buildings. iSMART is a tailored educational intervention and feedback research project for low-income senior and disabled consumers living in public housing throughout Illinois. Groups of residents and housing authority staff are participating in graduating levels of energy efficiency and smart grid education, coupled with real-time feedback provided by the installation of smart meters and associated smart meter technology.
Students learn how energy is measured in their home, and how the smart grid and smart meters can help energy companies and the energy users monitor energy use which in turns helps save money.

- Professional development for teachers to become a Certified Smart Grid Educator
- Stipend provided for attending and hosting interactive displays
- Lessons correlated with Next Generation Science Standards

Teaches students (and adults) about the production, distribution, and use of energy from macro and micro standpoints.
SMART GRID FOR SCHOOLS K-12
STATEWIDE CURRICULUM
VALUE OF THIRD PARTY FUNDING ARM...

• Outreach is laborious
• Risk avoidance
• Prototype tech
• Extended reach into communities
• Higher enrollment rates

To utilities

• Program identity
• Strengthen connection
• Focus on human response
• Candor

To community organizations

• Trusted messengers
• Accessible
• Translated, contextual
• Vendor neutral

To people

• Sharing information
• Sharing networks
• Collaborating on education programs

To the community of practice
CONSUMER ENGAGEMENT SUCCESS

• $20 million in funding to energy literacy programs statewide
• 62% of funds applied to low-income and senior populations
• Over 5,000 statewide events
• Reached over 1.8 million people through outreach events
• Educated 35,000 schoolchildren and parents through curriculum
• Geographic split: 78% urban areas, 22% rural areas
80 ENERGY LITERACY / SMART GRID GRANTS IN 3 YEARS

Municipal Education

Universities & Community Colleges

Youth STEM Education

Community Outreach

Research & Innovation

Museums

Media Engagement

Small Grants

Help Answers.org
### Speaker #2

**Name**

James Eber

**Background**

- Manager of DR & Dynamic Pricing at ComEd
  - Responsible for managing ComEd's portfolio of demand response products
  - Also manages the Residential Real Time Pricing Program, AMI Customer Applications Pilot, and Energy Data Services
  - Twenty years of experience in the design, operation, and management of customer-related utility programs
  - Has been fully engaged in demand response products since 1997, and has managed the ComEd portfolio of demand response products since 1999
  - Bachelor of Science in Mechanical Engineering degree from Bradley University
Gifts for you. Gifts for your family. Gifts for your home. 

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Shop Top Gifts

FEATURED ENERGY-SAVING PRODUCTS
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| **Timothy Graves** | **Senior Marketing Strategist, B2B at PG&E**  
  • Created and executed multiple strategies for PG&E’s Small and Medium business audience segments  
  • Helped to drive advancements in digital and mobile communication  
  • Previously worked on business and marketing strategy for the wireless industry for over six years |
Contents

• About Us
• Background
• Approach
• Creative Examples
• Results
• Looking ahead
About Us

Pacific Gas and Electric Company

• One of the largest combined natural gas and electric energy companies in the United States.
• Based in San Francisco.
• Provides natural gas and electric service to approximately 16 million in northern and central California.
• 400,000 Small & Medium Businesses.

Who we are

• Lindsay Nester: Marketing Strategy Manager, B2B
• Timothy Graves: Senior Marketing Strategist, B2B
Most customers don’t know they can be saving…

- Small and medium businesses perceive that their electric rates are increasing, and feel there are no rate plan options for them to choose.
- They have options – so we analyzed nearly all our SMB rates for better plans.
- We found approximately 12,000 SMB customers who could save significantly by changing rates.
A proactive multi-channel outreach strategy to top savers

Phase 1: Personal Outreach
• Phone or in person outreach to top saving customers (>=$4K).
• To both assigned and unassigned SMB accounts.

Phase 2: Email and Letters
• Direct email and letters to customers identified to save.
Best Rate Campaign: Creative

Letter

Save up to $9,999.99 by switching to the rate plan that’s best for your business.

John Sample
123 Main St.
San Francisco, CA 94109

Dear John Sample,

We’ve recently taken a look at your rate plan for Service Agreement ID (SAID), and I’m glad to tell you that our rate analysis has shown your business could be saving up to $9,999.99 a year on energy costs.

Here at PC&G, we have a variety of rate plans for businesses, and our rate analysis has identified a plan that could be more beneficial for your business. You’ll see real savings when you switch to a new rate plan.

Call us today at 1-888-999-9999 so I can help you choose the most appropriate plan for your needs.

Regards,

Customer Relationship Manager

Together, Building a Better California

Email

Save up to $9,999.99 by switching to the rate plan that’s best for your business.

Dear [Full Name],

We’ve recently taken a look at your rate plan for Service Agreement ID (SAID), and we’re glad to tell you that our analysis has shown your business could be saving up to [Savings] a year on your energy costs.

• There’s another plan that may be more appropriate for your company.
• If your business has more than one location, check those locations for better rates, too.
• Just log into your online account and see your rate analysis.

Contact us today so we can help you make this move or answer any questions you may have.

Regrets,

Maril Wright
Director, Pricing Products
Pacific Gas and Electric Company
Results exceeded expectations

2016 Results

- Over 5% campaign response rate — resulting in hundreds of favorable customer rate changes.
- Over $1 million of annual estimated customer bill savings.
- Over 25% open rate on email, well above the 17% average industry open rates among small businesses.
Looking Ahead: 2017 & 2018 Enhancements

Make it easier for the SMB’s

• Customers can now respond to the rate change emails with one click.
• Using a “Remind Me Later” option for customers who need more time.
• Shorter copy, more mobile friendly.

Go bigger with awareness

• Incorporate messaging of online rate analysis options into other creatives.
  • Newsletters
  • Online advertising
• Expand the Best Rate target audience.

Are You Eligible to Lower Your Bill?

Use this simple chart to find out how much you are to save.
Thank you!

Timothy Graves, Lindsay Nester
Questions?