



# Best ME&O Practices to Consider for Default TOU

CPUC En Banc

February 4, 2016

Judith Schwartz, To the Point

# Principles for Effective Customer Engagement

1. Tone from the Top
2. Inspiring long-term vision
3. Interactive exchanges with customers
4. Co-design methodologies
5. Stakeholder participation
6. Community partnerships
7. Brand promise over style guidelines
8. Portfolio of options
9. Coach and advise
10. Meet people where they are
11. Reflect customer priorities
12. Encourage youth

Source: DOE Working Group, IEEE Customer Engagement Workshop, multiple case studies



“People don’t want natural gas and electricity. They want hot showers and cold beer.”

Amory Lovins

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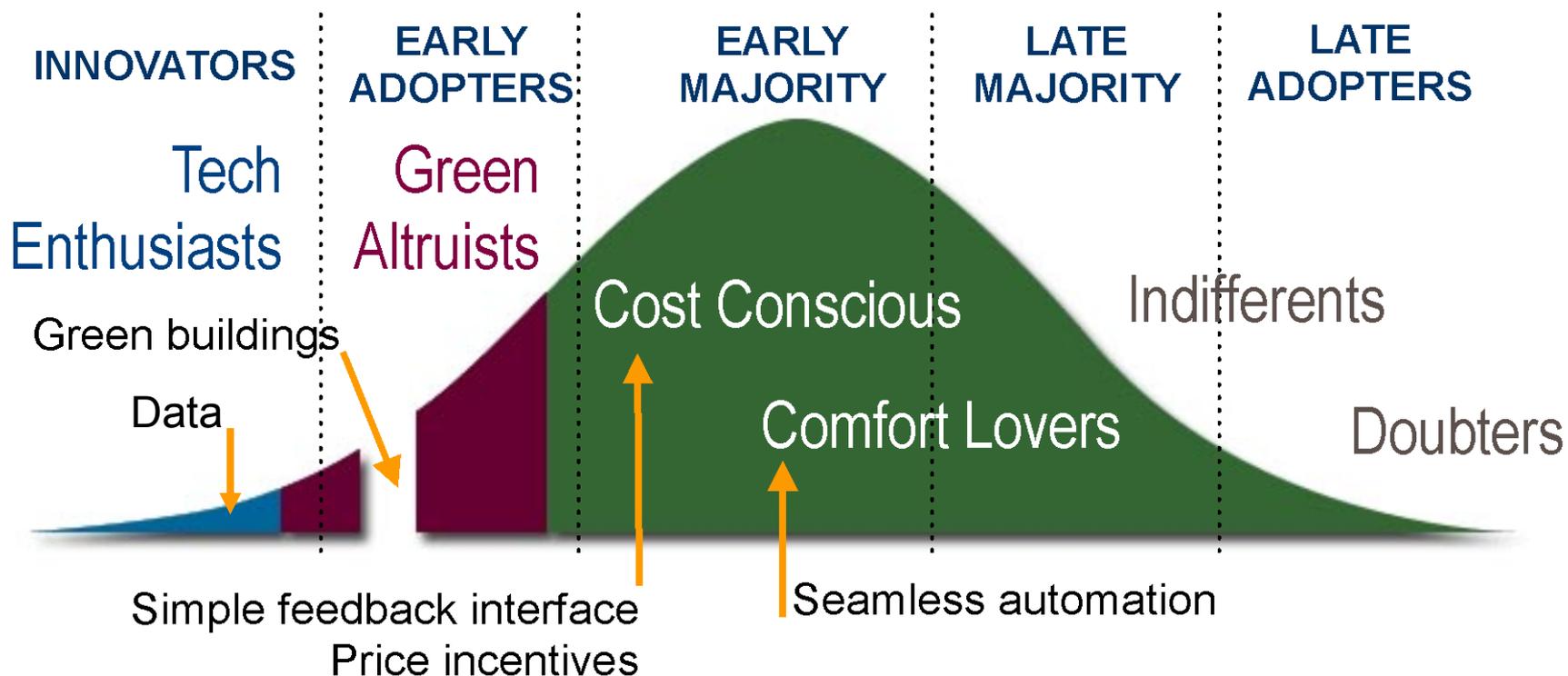


# Strengthen Community Relationships

**nationalgrid**  
HERE WITH YOU. HERE FOR YOU.

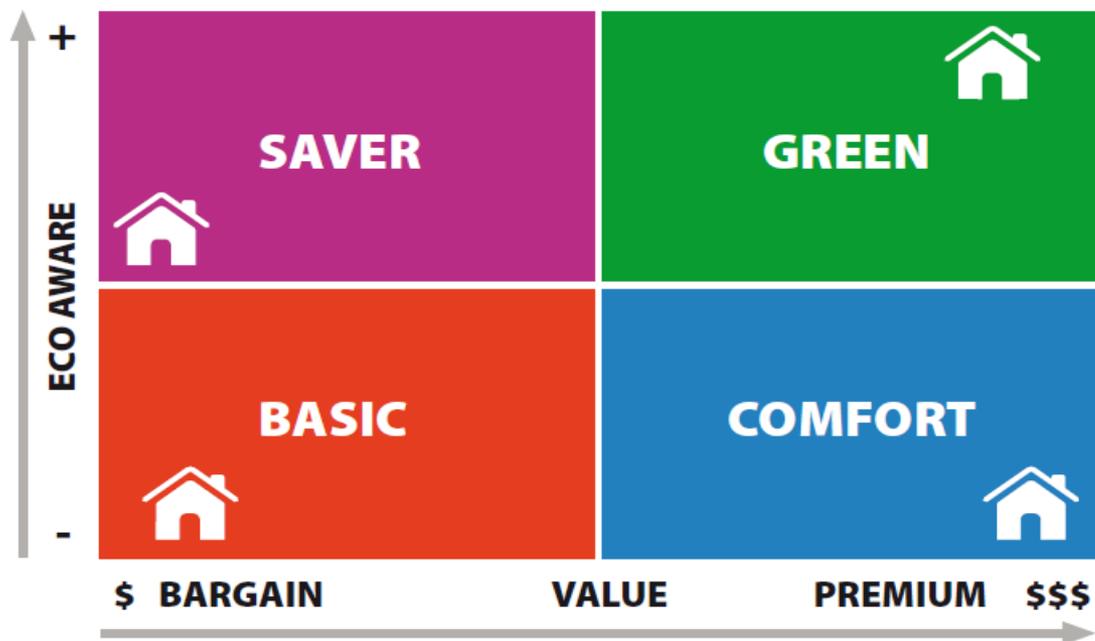


# Energy Worldviews Are Relevant



Diffusion of Innovations: Everett Rodgers  
 Crossing the Chasm: Geoffrey Moore  
 Worldview triggers: Judith Schwartz

# Simple Choices and Bundles



Explored in IEE White Paper on Smart Meter Costs & Benefits, based on idea from SCE  
 Concept validated by research from Accenture and SGCC

# Alternative Engagement Paths

## Customer Engagement

						
		PASSIVE	ACTIVE	SET & FORGET	UTILITY AUTOMATION	ENERGY PARTNERS
Customer Segments	BASIC	●	●			
	COMFORT	●	●	●	●	●
	SAVER		●	●	●	●
	GREEN		●	●	●	●



# Self-selection Tools and Advice

## Avoid even perception of coercion



### TIME-OF-DAY PRICE PLAN OPTIONS

#### EZ-3

LOW OFF-PEAK PRICES

Save money when you limit energy use weekdays from 3 to 6 p.m. or 4 to 7 p.m. All other hours are priced lower.

#### TIME-OF-USE

LOWER OFF-PEAK PRICES

Shift energy use during 7 to 8 weekday hours then get lower prices all other hours.

#### ELECTRIC VEHICLE

SUPER OFF-PEAK PRICES FOR CHARGING

Take advantage of everyday lower super off-peak prices for overnight electric vehicle charging.

#### RESIDENTIAL DEMAND PILOT

MORE OPPORTUNITIES TO SAVE

Avoid using major appliances at the same time 7 to 8 weekday hours and save with our lowest energy prices.

### MORE PRICE PLAN OPTIONS

#### BASIC

Energy is priced the same no matter when you use it.

#### M-POWER

Prepay for electricity and monitor energy use with an in-home display unit.

### CUSTOMER GENERATION

The price plan if you use solar or another method to produce some of your own energy.

**Residential Rate Advisor**

Less Important | More Important

Overall Price

Consistency in Your Bill

Environmentally Conscious

Ability To Control Electric Usage

back | next

Relove to learn more about your recommended rate:

**Nights & Weekends** (TOU\_REO-S)

**Standard Service** (Residential Service)

**Budget Bill**

**FlatBill** (Flat S)

**Green Energy**

months. Learn More



**Residential Rate Advisor**

Are you willing to shift when you use electricity away from peak demand times in order to reduce your bill?

Yes  No

back

Click to learn more about your recommended rate:

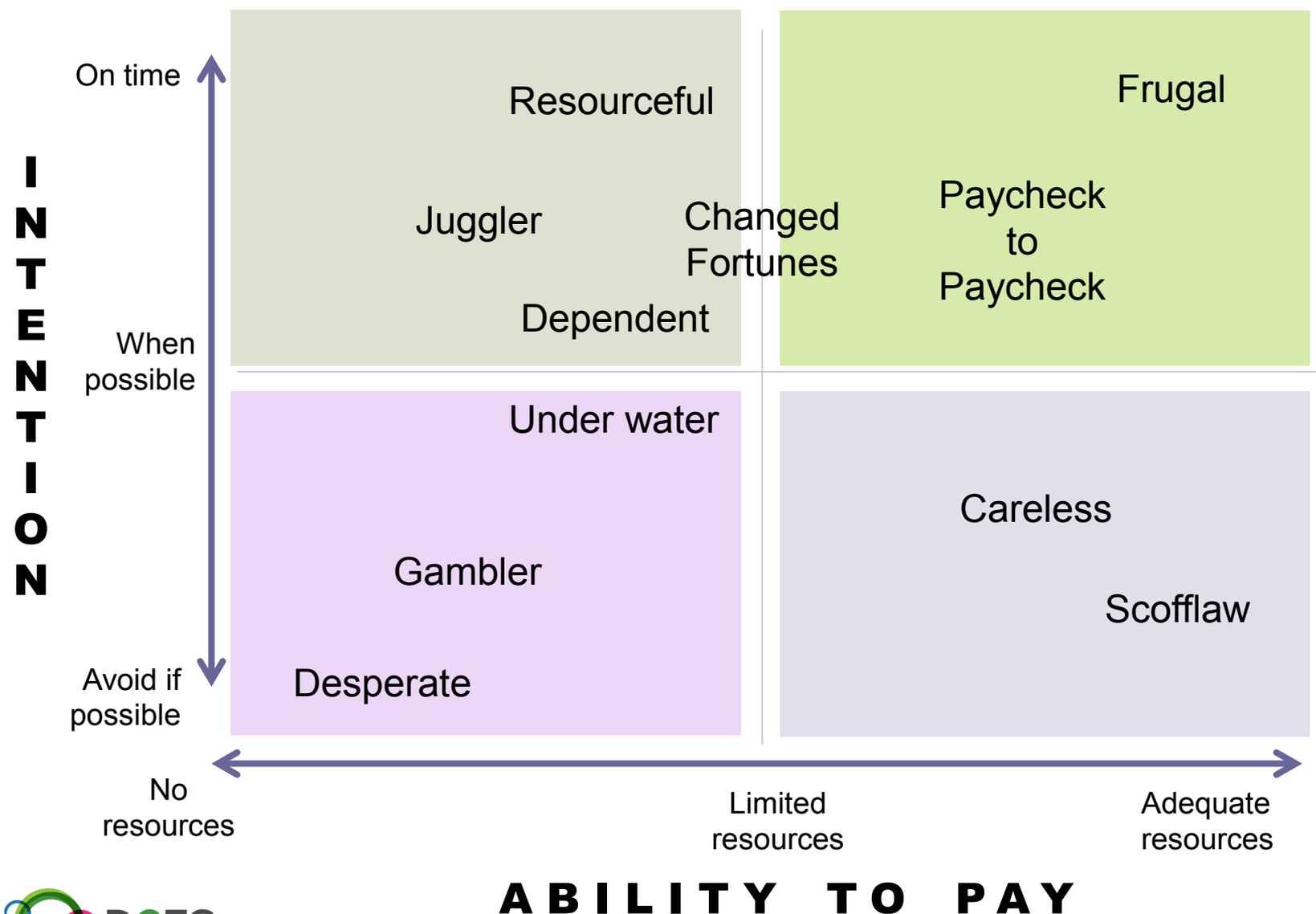
**Nights & Weekends**

**Standard Service**

**Smart Usage**

**FlatBill**

# Low Income: Ability vs Intention to Pay

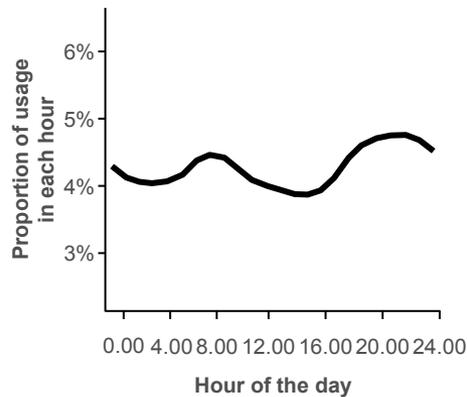


# Low Income Segments

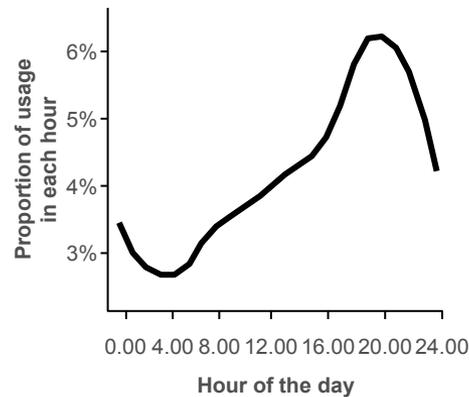


# Proactively Use Analytics to Inform Outreach

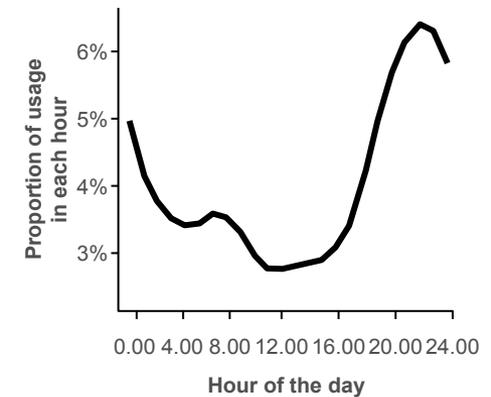
## Steady Eddies



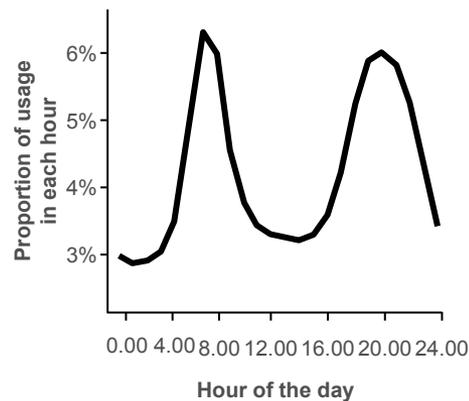
## Evening Peakers



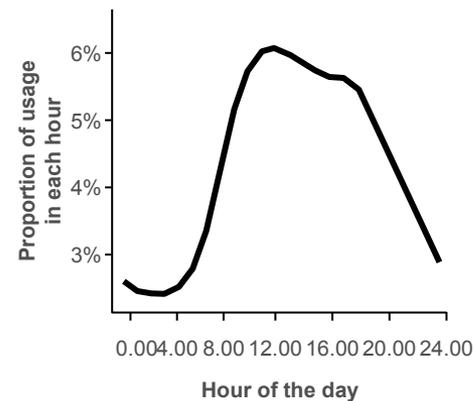
## Night Owls



## Twin Peaks



## Daytimers



to the point ❖



Judith Schwartz is an entrepreneur, marketing strategist, and communications professional on the forefront of sustainability issues, the Smart Grid, alternative energy, and the digital home. Her Silicon Valley-based firm, To the Point, designs human-centered strategies, conducts research and meta-analysis, creates narratives and messaging, facilitates cross-stakeholder conversations, and develops communications and outreach prototypes. She is also a Commissioner on the Palo Alto Utility Advisory Commission.

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