BECC 2013

Raising the Bar on Customer Experience
Increased Engagement through Multi-Channel Marketing

Erik Olsen
Pacific Gas and Electric Company
Part of statewide plan in California to reduce demand peaks

Electric rates vary by time of day

SMB customers begin transitioning to these rates in 2012
The Market Challenge – SMB to TVP*

2012
210,000 Service Agreements move to time-of-use

2013
110,000 Service Agreements move to time-of-use

2014
250,000 Service Agreements move to Peak Day Pricing (Critical Peak Pricing)

2015
110,000 Service Agreements move to Peak Day Pricing (Critical Peak Pricing)

How do you educate, engage and activate 330,000 customers?

*Small and Medium-Sized Business Customers to Time Varying Pricing
• Additional “Event Day” electricity conservation incentives
• 9-15 days/year
• Substantial credits toward electricity use on other days
Step One: Understand Your Customers

Their Reality
- Cash and time starved; budget focused
- Frequently confused by their utility bills or disengaged
- Unable to adjust energy usage due to lack of control (rent vs. own) or the demands of their businesses
- A difficult economy

Their Needs
- Sense of control
- Customized offerings, pricing and service
- Simplicity, transparency and fairness
- Feeling valued as a business customer
- Solutions-oriented interactions
Step 2: Test and Learn Messaging – and the Customer Journey

Key message research insights

A benefit positioning is seen as “spin”, which creates suspicion and resentment

“Mandatory” or “required” is harsh and reinforces SMB’s lack of control

Implications

Don’t “sell” them on the rate change via a benefit; tell it honestly and straight

“All Californians will be moving” reinforces ‘we’re all in this together’

Current state

Not Aware

Anxious and Not In Control

What occurs when they hear about TVP

Acceptance and Action

Transition date
From Education to Engagement
Step 2: Multi-Channel Outreach – Test and Learn

“Tools” Letter

Custom Rate Comparison

Welcome Kit

Time for Business mobile tour
PG&E can partner with you to help you save.

**Video-In-Banner and Pre-Roll**

**Display/Banner Ads**

**Videos and Web-Based Educational Tools**
Step 3: Measure Results – Time for Business Tour

**Timeframe:** April-June 2013

### EVENT ACTIVITY

- **400+**
  - My Energy sign-ups/log-ins
- **~415**
  - One-on-One conversations with a PG&E rep*
- **200+**
  - Business Energy Checkup walk-throughs
- **~120**
  - Follow-up appointments made to speak with a PG&E rep after the event*
- **318 (30x)**
  - Higher Energy Advisor e-newsletter enrollment requests than the monthly average
- **138**
  - On-Bill Financing applications received during campaign vs. 67 total applications during the same time period in 2012

### INTENT TO USE / USAGE

<table>
<thead>
<tr>
<th>Online Tools</th>
<th>PG&amp;E Energy Efficiency tips</th>
<th>Additional Resources</th>
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</thead>
<tbody>
<tr>
<td>My Energy</td>
<td></td>
<td></td>
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<tr>
<td>Non-Attendees</td>
<td>27% 27%</td>
<td>45% 50%</td>
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<tr>
<td>Attendees</td>
<td>46% 60%</td>
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<tr>
<td>Business Energy Checkup</td>
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<tr>
<td>Non-Attendees</td>
<td>12% 37%</td>
<td>30% 45%</td>
</tr>
<tr>
<td>Attendees</td>
<td>39% 67%</td>
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</tbody>
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Attendees have on avg. **16%** higher usage of PG&E online tools

Attendees have on avg. **21%** higher usage of PG&E savings resources
Measure Results: Digital Media

- Campaign page traffic grew in each month into the summer, with lower bounce rates
- Money-Back Tool visits started slow but ramped up through digital media optimizations
- eNewsletter open rates range between 16-24%
- Customers who have proactively signed up through PG&E’s sweepstakes, experiential tour or TOU webpages generally show higher engagement
Steps to Engagement

Step 1: Understand your customers
Step 2: Test and learn
Step 3: Measure results
Step 4: Repeat
Thank you

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Current Communication Architecture

1. Time Matters
   Lay the foundation for future time-varying pricing outreach by announcing the upcoming rate changes to customers, explaining the features of their new rate and what it means for them.

2. Getting Ready
   Educate customers on the initial actions they can take to plan for an upcoming rate transition like signing up for My Energy and learning about energy use patterns. Introduces energy management solutions and tools like energy assessments, to help customers manage their energy use and reduce annual bills.

3. Customized Support
   Encourage engagement with a customer's personal usage information.

4. Summer/Event Season Prep
   Ensure customers’ awareness of peak summer rates, drive engagement with online analysis tools, encourage energy efficiency upgrades, and adoption of energy-saving behavior and/or technologies in their business.

5. How Did I Do?
   Prompt customers to revisit their summer bills and stay engaged with their energy use.