

Thought Leaders Speak Out 2021

ENGAGING CUSTOMERS WITH TECHNOLOGY

Key Takeaways: Using Data Science to Rethink Customer Programs: PGE Peak Time Rebate Program

A Fireside Chat with PGE and E Source (June 2021)

The Institute for Electric Innovation's *Thought Leaders Speak Out 2021: Engaging Customers with Technology* series brings together electric company executives with customer responsibilities to share lessons learned and the results of successful customer engagement strategies.

The third dialogue of the series focused on applying data science to target and strategically engage individual customers in Portland General Electric's (PGE's) Peak Time Rebate program and features a discussion between John McFarland of PGE and Ted Schultz of E Source Data Science. Since launching the program at scale in 2019, PGE has enrolled nearly 100,000 customers - about 12% of PGE's residential customers. Bob Rowe of NorthWestern Energy moderated the discussion, Lisa Wood of IEI provided opening remarks, and Mary Kipp of Puget Sound Energy provided closing remarks. Key takeaways are summarized and highlighted below.

[Click Here for the Agenda and Speaker Bios](#)

[Watch the Opening Remarks Here](#)

Data science helps PGE identify and engage the best customers for the PTR program.

 [Video Clip Here](#) (2 minutes)

Description: PGE explains why a new approach that evaluates individual customer energy and behavioral profiles was needed to scale the PTR program to be a predictable resource.

 [Video Clip Here](#) (2 minutes)

Description: E Source shares their process that helps electric companies take advantage of data science: unlocking AMI data to build a virtual profile on every customer, analyzing individual profiles to target the best customers, and improving targeting accuracy with a constant and quick feedback loop of results.

 [Video Clip Here](#) (1.5 minutes)

Description: PGE discusses how approximately 15% of the customers enrolled in the PTR program provide 60% of the load reduction. Customer satisfaction scores are significantly higher for those that are more engaged in the program.

 [Video Clip Here](#) (2.5 minutes)

Description: Using data science, load shifting/reduction per customer increased by 50% and load predictability narrowed from +/- 50% to +/- 10%. Load forecasters now count on the PTR program as a reliable resource.

Customers that engage in PTR prefer digital communication.

 [Video Clip Here](#) (1 minute)

Description: PGE highlights how they digitally communicate with customers to deliver precise feedback on their participation within 24 hours of a demand response event.

 [Video Clip Here](#) (1.5 minutes)

Description: PGE and E Source discuss the characteristics of the most engaged customers within the PTR program. These customers tend to be single family homeowners or renters, prefer to engage digitally with electric companies, and prefer to be in control of their energy management.

Smart meter data and cross functional collaboration are vital to delivering successful customer programs.

 [Video Clip Here](#) (0.5 minutes)

Description: PGE highlights how the PTR program uses smart meter data to drive new customer benefits.

 [Video Clip Here](#) (1 minute)

Description: E Source highlights one barrier to using data science is sorting through the massive amounts of smart meter data to get results quickly.

 [Video Clip Here](#) (1.5 minutes)

Description: PGE describes the value of listening to the customer first then aligning internally with operations and IT divisions to build a cost-effective solution that yields above average results.

Electric companies are using data science to design integrated energy solutions that meet future customer demands.

 [Video Clip Here](#) (1.5 minutes)

Description: PGE thinks ahead about reframing value for customers and enabling hard dollar savings. Data science enables PGE to get out of pilot mode and scale flexible load programs quickly.

 [Video Clip Here](#) (1 minute)

Description: E Source shares how data science can help electric companies zero in on individual value propositions for every customer, leading to a range of personalized programs in the future.

 [Video Clip Here](#) (1 minute)

Description: E Source points out the need to explore applications of data science for small and medium business customers.

Closing Remarks

 [Video Clip Here](#) (1.5 minutes)

Description: NorthWestern Energy highlights PGE's ability to quickly scale the PTR program from pilot stage while providing quality results to ensure demand response can be a dependable resource with the use of data science.

 [Video Clip Here](#) (1 minute)

Description: Puget Sound Energy summarizes that PGE's Peak Time Rebate program is showcasing the true power of smart meters by using data science to deliver operational results while making customers happier.