

Thought Leaders Speak Out 2021

ENGAGING CUSTOMERS WITH TECHNOLOGY

Key Takeaways: Leveraging Digital Communications and Online Tools to Support Customers Transitioning to New Rates

A Fireside Chat with PG&E and Oracle (May 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 second dialogue of the series focused on technology and online tools to improve the customer experience when transitioning onto PG&E's new time-of-use (TOU) rate plans and featured a discussion between Laurie Giammona of Pacific Gas & Electric Company and Vanessa Richter of Oracle Utilities Opower. Over the next 24 months, PG&E will be transitioning 2.5 million residential customers, approximately 45%, to TOU rates as the standard offering. Lisa Wood of IEI moderated the discussion, Lisa Grow of Idaho Power provided opening remarks, and Brett Carter of Xcel Energy provided closing remarks. Key takeaways are summarized and highlighted below.

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

[Watch the Opening Remarks Here](#)

PG&E is helping customers transition onto the new rates using web-based tools that help customers understand how Time-of-Use rates work and the potential bill impacts.

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

Description: PG&E describes the work with the California Public Utilities Commission and a pilot to determine the best path for engaging residential customers in the rate transition journey. PG&E positions this as an opportunity for customer choice and provides rate modeling tools for customers.

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

Description: PG&E begins the journey of defaulting residential customers to time of use rates by sending initial outreach via mail and email 90 days prior to the transition. So far, the engagement rate is very high and only about 9% of customers are opting out. Bill protection for the first 12 months on the new rates is providing customers with a unique opportunity to engage with PG&E's tools for modeling their energy usage.

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

Description: Oracle describes how the PG&E rate comparison tool helps customers understand their bill under a TOU rate relative to current energy usage behavior and guides customers through future energy usage scenarios that include behavioral changes and major energy purchases (e.g., EVs, smart thermostats, rooftop solar).

Customers focus on price first and carbon second. PG&E is using personalized, digital communications to help customers make informed energy use decisions and nudging them to take the next best action.

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

Description: PG&E explains that customers respond best to communication that initially focuses on price and follows up on climate and carbon impacts. Customers care first about the cost implications but become more engaged with climate impacts through ‘gamification’ techniques. Customer also value bill protection.

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

Description: Oracle uses data analytics to engage PG&E customers where they are in their customer journey and personalize the next best action for each customer.

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

Description: Oracle describes their philosophy for coaching customer behavior with easy to access, personalized, and nuanced communication to help them understand how their energy impacts their bill, the community, and the grid and next best actions.

PG&E is using technology effectively to engage and support their customers.

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

Description: PG&E explains that there is a high degree of customer engagement and satisfaction with the TOU rates.

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

Description: Oracle discusses PG&E’s role as a trusted energy advisor and notes some of the key customer engagement success metrics including email open rates of 40-60% and more than 2.4 million visitors returning to PG&E’s web tools.

Closing Remarks

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

Description: Xcel summarizes that critical role that technology is playing in driving customers from awareness to engagement to action. More than 929,000 of PG&E’s customers have completed Opower home energy checkups, a first step to engaging customers on the PG&E website. Xcel will also be transitioning its residential customers onto time of use rates over the next few years.