

Thought Leaders Speak Out 2024

ENGAGING CUSTOMERS WITH TECHNOLOGY

Key Takeaways: TOU Implementation & Customer Education in the 'Show-Me' State

A Fireside Chat with Evergy and Oracle Energy and Water
(February 2024)

The Institute for Electric Innovation's *Thought Leaders Speak Out 2024: 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.

This dialogue focused on leveraging technology to build customer awareness of time-of-use (TOU) benefits through a multi-channel and multi-tool education campaign and featured a discussion between Chuck Caisley and Katie McDonald of Evergy and Vanessa Richter of Oracle Energy and Water. Adam Cooper of IEI provided welcome remarks, and Mary Kipp of Puget Sound Energy moderated the discussion. Key takeaways are summarized and highlighted below.

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

[Watch Puget Sound Energy's Opening Remarks Here](#)

Multi-channel and multi-tool engagement approach to meet customers where they are.

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Evergy shares three key factors that enabled them to transition their residential customers to TOU rates in less than one year: forming a cross functional team to prioritize TOU and align workstreams, reconfiguring tools and learnings from past pilots, and initiating their awareness campaign only after reconfigured rate comparisons tools were available, thus increasing customer understanding and reducing the anxiety that comes from mandatory TOU.

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Evergy details the importance of not surprising customers and giving customers agency and ownership over TOU choices. Evergy's educational campaign was designed to raise customer awareness, blunt dissatisfaction, and motivate customers to pre-enroll in their preferred TOU rate ahead of the default deadline.

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Oracle emphasizes the advantages of Evergy's digital-first, multi-channel approach to meet customers where they are (based on their known communication preferences) and guide customers to online tools (e.g., QR codes on paper home energy reports and bill statements). Once engaged, Evergy prioritized a frictionless experience for customers by reducing the steps to select their preferred TOU rate.

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Oracle explains customers like to be informed and do not like surprises. Providing customers personalized information on the bill impacts of TOU rates through channel of their preference is key to helping customers make informed decisions and ensuring customers have sense of agency and choice over their energy use.

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Evergy elaborates on the specific marketing campaign they developed for vulnerable customer groups, including all-electric, income eligible, and non-digital customers. In addition to direct mail, Evergy partnered with community agencies and organized in-person events to ensure no customers were left behind.

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Oracle states that electric companies should prepare for an impact on customer satisfaction during the TOU transition but not shy away from communicating with customers for fear of negative responses. Customers are looking for more communication, and personalized and applicable communication are key to building awareness and adding value throughout customers' journey.

Leveraging digital tools to deliver personalized energy and bill insights.

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Evergy describes the customer education process required for a successful TOU transition. Having digital interactive tools in place is essential for customers to better understand and for call center representatives to clearly communicate the implications of rate change on customer bills.

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Evergy's digital first campaign encouraged customers to use Opower's rate comparison tools and choose the rate that would work best for them. As a result, 30% of customers pre-enrolled in TOU rates compared to the industry average of 3-4% and 94% of customers were aware of TOU rates before the default TOU deadline.

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Oracle emphasizes the importance of continued customer engagement. Following the TOU transition, Evergy is sending customers a weekly energy usage report with personalized insights to encourage customers to shift energy usage to off-peak hours.