

# Thought Leaders Speak Out 2023

ENGAGING CUSTOMERS WITH TECHNOLOGY

## Key Takeaways: Using Technology to Accelerate LMI Customer Participation in Energy Assistance and Support Programs

Fireside Chat with National Grid and Oracle Energy and Water  
(February 2023)

The Institute for Electric Innovation's *Thought Leaders Speak Out 2023: Engaging Customers with Technology* series brings electric company executives with customer responsibilities to share lessons learned and the results of successful customer engagement strategies.

The tenth dialogue of the series focused on how National Grid is working with Oracle Energy and Water to leverage data analytics and behavioral science to identify, engage, and streamline the enrollment process for energy assistance programs.

Adam Cooper of IEI provided welcome and closing remarks, and Mary Kipp of Puget Sound Energy moderated the discussion. Key takeaways are summarized and highlighted below.

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

**Providing low-to-moderate income (LMI) customers holistic energy assistance and energy management programs.**

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National Grid describes the many programs and solutions available to LMI customers through their Winter Customer Savings Initiative, including managing bills through balance billing, discount rates and payment plans; controlling usage through actionable tips, energy efficient technology and weatherization; and, connecting customers with third-party payment assistance programs.

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National Grid discusses recent changes to increase income eligibility to 80% of average median income for certain energy efficiency programs to reach moderate income customers. National Grid's communication strategy includes messaging to address stigmas and psychological barriers commonly held by customers accessing support programs for the first time.

### **Using technology, data, and behavioral science to identify and engage customers.**

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Oracle emphasizes the importance of layering various data sets to identify income-eligible customers. Oracle's solutions allow electric companies to proactively engage customers by predicting customers heading into financial struggles and offering personalized recommendations on which programs they are eligible to enroll in and most beneficial to them.

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National Grid describes the fluidity of LMI customer segments and the importance of constantly re-evaluating and updating customer information systems given changing life circumstances that shift some customers in and out of the LMI population.

### **Creating a proactive, streamlined, dignified customer journey toward affordable energy bills.**

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Oracle details its pilot project with National Grid to offer customers a one-stop, mobile first digital experience to access energy assistance. Oracle's Affordability Alert uses predictive analytics to alert customers ahead of high energy bills and proactively engage customers by offering personalized recommendations on energy assistance programs through National Grid's Savings Hub.

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Oracle explains the importance of simplifying the enrollment process for customers. Oracle's web tool takes customers to authenticated web experiences without customers having to log in. Based on a few questions, such as customers' household income and size, eligible assistance programs are recommended to customers in the order of bill saving impact.

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National Grid explains that one goal of the pilot is to provide customers different pathways to demonstrate value quickly. The intent is to earn the right to continuously engage and provide incremental offerings to customers.

## Closing Remarks

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National Grid explains how the same approach and technology solutions can be used to engage customers beyond energy efficiency programs as National Grid's program focus areas shift from reducing energy consumption to decarbonization.

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Oracle discusses using data and technology to streamline energy assistance applications as the next step to scale up the adoption of affordability programs. The goal is to build a shared platform among electric companies, federal and local agencies, and other stakeholders so that customers can enter the required information once and apply for all available assistance programs.

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IEI summarizes the benefit of using data and technology to assist LMI customers. Using technology and data to identify, engage, and make the energy assistance enrollment process easy for customers is crucial. Personalized and proactive engagement and understanding customers' unique circumstances are also important to offer customers assistance that best fits their needs and help them stay involved in the energy management journey.