



ADVANCED METER COMMUNICATIONS BLUEPRINT

A Phased Approach

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EUGENE WATER & ELECTRIC BOARD

Advanced Meter Communications Blueprint

CONTENTS

Purpose.....2

Overarching Goals.....2

Communications Principles.....2-3

Messaging Themes.....3

Three Phase Strategy.....4-5

Mitigating Risks and Challenges.....6

Target Audiences.....6

Toolbox and Tactics.....6

Educating and Engaging Employees.....7

Attachment 1: Advanced Meter Communications Strategy Graphic

PURPOSE

This blueprint will provide clear guidance for developing a comprehensive advanced meter communication strategy aimed at informing, educating and engaging Eugene Water & Electric Board customers, employees and other stakeholders.

While the principles and overarching goals embodied in the plan will remain in place throughout the next several years, implementation of this plan will require flexibility with the planned and applied tactics. It is a living document that will be modified as needed.

OVERARCHING GOALS

The successful and widespread deployment of advanced meters is key to achieving the Board-adopted 10-year Strategic Priorities, particularly the two major objectives of emergency preparedness/disaster recovery and effectively managing our electric generating resources.

Because successful advanced meter deployment is a foundational aspect of achieving those strategic objectives, the overall communication strategy must support and promote the following goals:

- Enhance customer trust and confidence
- Increase awareness about advanced meter deployment and benefits, and prepare customers and stakeholders for installation of advanced meters
- Remain responsive to the Board of Commissioners' directives regarding customer choice and control
- Educate customers about advanced meter benefits, including products and services that can help save money and energy, reduce carbon emissions and enable future technology advancements
- Manage customer expectations (i.e., don't overpromise) and clarify which services will be available to customers at each stage of the transition to new technology
- Provide transparent, factual, consistent and timely information to customers and employees.

COMMUNICATION PRINCIPLES

Utilities that have successfully deployed advanced meters share a single trait: Early, ongoing and consistent two-way communication with customers. To accomplish a successful deployment, staff will adhere to the strategic goals of the communication plan listed above (customer confidence, responsiveness and transparency). A comprehensive communication strategy will reflect the following principles:

Proactive: Staff will communicate early and often. Customers will receive advance notice of meter replacements whenever feasible, information about benefits and customer choice, and clear opt-out instructions.

Customer-centric: Staff should communicate using the means that individual customers prefer: Using multiple channels and providing simple, straightforward language and practical information focused on the benefits. In a nutshell, staff should offer the right information to the right customers through the right channels at the right times.

Respectful: We recognize that many customers are not concerned about advanced meters, but some do have concerns. Regardless of customer position or feelings, all communication will be respectful, courteous, and deferential to a customer's choices.

Informational: It is not our role to "sell" advanced meters or attempt to otherwise persuade customers who choose to opt out. Our messages will be informative and shaped around benefits and the average customer, not focused on communicating with a vocal minority.

Consistent: Representatives from several areas of the utility, including Operations, Customer Service, Communications, Management and Commissioners, will have opportunities to interact with customers about advanced meters. We must speak with a unified, consistent and accurate voice.

Flexible: Throughout the advanced meter deployment, staff should expect and accommodate continual process and communication improvements.

MESSAGING THEMES

Staff will develop a full suite of messages for use throughout the deployment process using a variety of tools and channels. Overarching messages will include the following themes:

Reliability and outage/leak detection – These are key benefits identified by customers.

Resiliency – Mass deployment of smart meters will assist with community resilience and disaster recovery.

Carbon reduction goals – A flexible, low-carbon power portfolio relies on the community's ability to synchronize supply and demand.

Affordability – Community-wide deployment of advanced meter technology is good for the bottom line, both for customers and the utility.

Customer choice – All customer participation will be voluntary and the opt-out process will be simple and straightforward.

THREE-PHASE STRATEGY

Given the challenges of replacing approximately 93,000 electric meters and 61,000 water meters, EWEB will implement a three-phase communication strategy: Early Awareness/Education; Supporting Meter Installation; and Marketing of Services.

The tasks and tactics within these phases may run concurrently, overlapping across multiple phases to accommodate the planned multi-year deployment of advanced meters.

Communications staff will need to focus on where each customer is within the deployment process, not necessarily on EWEB's operational tempo and schedule.

While each phase will have its discrete set of goals, key messages, FAQs, tactics, and associated budget and timeline, staff will maintain these core communication objectives:

- Communicate the benefits of advanced meter deployment with customers and employees
- Make clear that customer choice and control will continue under the new implementation strategy
- Make it easy for customers (account holders) who do not want the benefits of advanced meters to simply contact EWEB Customer Service to have the meters' communication features turned off, as they have been able to do since advanced meters became available
- Mitigate misinformation or misunderstanding of advanced metering with factual, accurate and easy-to-find information

Phase One: Early Awareness/Education

An introductory, wide-reaching effort to inform customers, employees and community members about advanced meter deployment and benefits.

Objectives during this phase would be to:

1. Explain why EWEB is making this investment, with a focus on customer benefits
2. Educate customers about the deployment of the new metering system
3. Educate employees, with a strong focus on those who have direct customer contact, so they can fully and effectively discuss the benefits and specifics of the deployment with customers
4. Educate and engage public officials, media, and others who can support the deployment process
5. Educate and engage opinion leaders and authoritative advocates

Phase Two: Supporting Meter Deployment

Targeted customer outreach based on deployment timelines. Communications in this phase will be focused on the actual meter installation.

Objectives during this phase would be to:

1. Conduct outreach and notification about meter installation to affected customers on a rolling basis
2. Ensure that customers understand the installation process
3. Reinforce information about the benefits of advanced meters to customers, along with clear, simple instructions for opting out, including a confirmation of a customer's opt-out choice
4. Provide multi-channel communications that minimize confusion by anticipating and answering common questions before customers ask them

Phase Two will include sub-phases that recognize the "before, during and after" benchmarks of deployment.

Tactics and tools are yet to be developed, and could include:

Before

- Direct mail sent a minimum of two weeks prior to an advanced meter being installed
- Direct mail followed by a phone call one week ahead of installation

During

- A meter technician knocking on each door prior to installation and making contact with any occupants

After

- A door hanger that provides information about the benefits of the advanced meter and information about how to find answers to questions

Messages will include information about:

1. The benefits of advanced meters
2. EWEB's policies on customer choice and control and simple opt-out instructions

Phase Three: Marketing of Services

Keeping in mind that we need to manage expectations, staff should also prepare to market new services and pricing plans that advanced meters will make possible. This will be an ongoing, multi-year effort. Some new services will depend on a new Customer Information System that is currently in the planning stages.

MITIGATING RISKS AND CHALLENGES

Careful coordination between communications and operations during the deployment phases will go a long way in a smooth implementation. Communications and operations plans and work will need to be aligned so that we provide customers with accurate expectations and then meet or exceed those expectations. Communications and implementation teams will be fully prepared to anticipate and respond rapidly to situations that could affect customers, customer confidence and trust, stakeholders or the community during the deployment period.

Potential scenarios for planning and risk mitigation will include privacy, security and health concerns; equipment failure; unintended damage to property or structures during installation; and customer objections when installers are on-site. Installers, as a general rule, will be trained to acknowledge any customer objections in a courteous and respectful manner, and will have the latitude to move on to the next installation without installing an advanced meter.

The comprehensive Advanced Meter Communication Plan will identify risk scenarios and potential issues that may arise during meter deployment and installation of the meters, as well as specific strategies, tactics and messages to address each scenario.

TARGET AUDIENCES

The primary audience is EWEB's electric and water customers. Most of the tools and tactics that will be developed for this plan are intended for use with customers. There are sub-groups within the general customer population that should receive additional, targeted outreach: Renters, landlords, limited income and other vulnerable communities (English as a Second Language, seniors, etc.). However, the plan also will attempt to raise awareness among the following audiences, or groups:

- Community influencers/decision makers
- Civic/social/business groups
- Employees

TOOLBOX AND TACTICS

A number of tools will be used to help inform customers, employees and other interested parties throughout the phased communication strategy:

- Integrated Digital Strategy (website, social media and e-marketing)
- Collateral Materials (brochures & bill inserts, direct mail, fact sheets, door hangers)
- One-on-One Interaction (employee communications and training, tools to support frontline staff in customer engagements)
- Traditional News Media (news releases, interviews, editorials)
- Speaker's Bureau and Community Presentations

Anticipating Customer Questions

Staff will develop a multi-faceted set of messages and communication tools addressing a full range of topics.

Educating and Engaging Employees

Consistent with the lessons learned from numerous utilities about the importance of educating employees prior to engaging customers and implementing advanced meters, the goal of this program will be to provide EWEB employees with information and training to skillfully respond to customer questions and concerns.

We realize the importance of empowering our staff to disseminate accurate information and respond to customer concerns and misinformation. Our approach will include providing in-person training, detailed FAQs, and a central information resource (on the staff Intranet) for all employees.

Advanced Meter Communications Blueprint

A blueprint of principle-based strategies, approaches, tools and tactics that staff will follow before, during and after deployment of advanced meters. While the principles and overarching goals will remain in place throughout several years, the plan itself will require flexibility with the planned and applied tactics.

AUDIENCE

While we will develop strategies and tools for communicating with all customer segments, the bulk of our efforts will be geared toward the average customer who has little-to-no awareness of smart meter benefits, products and services.

Opt-out	Average Customer	Champion
<p>Recognize differing opinions & don't try to convince otherwise</p> <p>Make opting out easy and clearly communicate how to do so</p>	<p>Provide the right information to the right customer at the right time. We will use language that is easy to understand and delivered in a channel that is preferred by the target audience.</p>	<p>Provide early adopters with information & tools they can share within their circle of influence.</p>

A Phased Approach

The tasks and tactics within these phases may run concurrently and across multiple phases to reflect the planned multi-year deployment of advanced meters. A primary driver of success will be to remember to place the customer the center of our communications efforts. Staff will need to focus on where the customer is within the deployment process, not necessarily on EWEB's operational schedule.

Phase 1: Early Awareness

An introductory, wide-reaching effort to inform customers, employees, and community members about advanced meter rollouts and overall benefits.

Phase 2: Support Meter Installation

Pre-deployment ● Deployment ● Post-Deployment

Targeted customer outreach by installation community and/or geographic areas. Communications in this phase will be focused on the actual meter installation.

Phase 3: Marketing Products & Services

Keeping in mind that we need to manage expectations, staff should also prepare to market new services and pricing plans that advanced meters will make possible. This will be an ongoing, multi-year effort.

It is crucial that communications and operations remain aligned during all phases. Staff must ensure that the practical and operational deployment of advanced meters aligns with the information communicated to customers. This will build customer confidence by delivering an experience that meets expectations. Using a phased approach and checking in on a routine basis will help prevent missteps that could imperil success.



The Toolbox

Integrated Digital Strategy
Providing clear messages & engaging in two-way dialogue



General Collateral
Can stand alone, but goes together



Deployment Collateral
Sets expectations and delivers on them



One-on-One Interaction
Speaking with a unified voice, but framing messages to best fit audience needs, concerns and interests



Provide staff in atrium, on phones and in the field with tools & training to support thoughtful & intentional customer engagement & education.

Speaking Engagements
Keeping community influencers up-to-speed



Traditional Media
Providing members of the media with timely, accurate information.

