This model was developed by To the Point and used in the DTech *Meta Analysis on Smart Grid Communications* (2012). It can also be found in the *IEEE PES Constructive Engagement toolkit* [http://smartgrid.ieee.org/best-and-next-practices/summits-in-context](http://smartgrid.ieee.org/best-and-next-practices/summits-in-context).

The model organizes common and novel communication vehicles into logical groupings based on their suitability and potential for one-way versus interactive exchange. While a selection of examples is noted below, the structure will easily allow more to be added.

1. **Account contact** represents the standard one-way mechanisms that utilities use for administrative and transactional approaches. These are excellent for notices, announcements, and promos to drive people to places for targeted deeper information.

Examples: The 90-60-30 day timing of notification letters to the *bill payer* about the meter change out has been used by many utilities including SDG&E, ComEd, and NVEnergy. Leaving a door hanger after installation also is a good practice, followed shortly thereafter with mailed collateral promoting an immediate benefit. SMUD learned that simple is better here. More elaborate and costly door hangers were not persuasive as it was not possible to know which messages would resonate with each household and most people didn’t study their door hangers. From a marketing perspective, Duke
Energy mailed information to customers several weeks after the meter was certified to promote the immediate benefit of being able to access daily usage information.

2. **Direct contact** uses the customer service and field organizations already in place to not only impart information but to also listen to customers and learn what these individuals care about. They can reach out proactively or receive in-bound requests for info. Training can include scripts to draw out what the household cares about.

Examples: The simple “I’m sorry you have a problem. Let’s see how we can help you fix it,” should be the default response. (To say, “no, you don’t really have a problem with your meter” even if it’s true, just infuriates the customer and produces devoted opponents). Austin Energy, PPL, Vermont Electric Coop, ComEd, SRP are among the many organizations who found this attitude effective, even when there were pilot or deployment glitches. SDG&E took this the extra mile by proactively running reports to see who had slow analog meters and would experience a noticeable increase in their bill. They contacted those customers before the first new bill was mailed and sent a team of retired customer support people to explain the situation (and implications of a more accurate meter) to the family.

SDG&E, Duke Energy and FPL “ping” customer smart meters after storm restoration efforts to identify any outstanding outages and quicken restoration efforts. SDG&E also uses solar/battery generator trucks to provide mobile charging stations to allow residents to re-charge their phones and stay in touch. They text stakeholders about what is happening during emergencies so there are more informed leaders throughout the community.

3. **Online channels.** While everyone has a website and we’re seeing lots of FB, Twitter, Green Button, and portals being deployed, not all are equally effective. Customers choose to look at site, read, tweet, download data, or respond. These are most valuable if info is shared and managed as two-way channels. Establishing news alerts or leveraging the critical mass of partner groups’ social networks is recommended before, during, and after deployment. Message-based services like Twitter are especially valuable to communicate storm outage and recovery information and provide an opportunity to collect mobile phone numbers.

Examples: Many utilities are devoting resources and dedicated personnel to this arena. The most effective programs such as ComEd, SMECO, and SDG&E match dedicated tech savvy staff with access to experienced personnel. Blue Ridge Electric Membership Corp. has found they can capture emails and phone numbers quite effectively when people want to sign up for storm restoration information. *Multiple members of the family, not just the bill payer, are likely to enroll for this.* Georgia Power and SRP have developed outstanding interactive tools that help *decision-makers* research the dynamic pricing (and prepay) options that fit their preferences and that are supplemented by good customer service and video testimonials.

Duke Energy has integrated their social media tools to promote smart grid benefits to its customers. This Tweet, for instance, promotes the benefits of self-healing technology installed on the power grid
while also linking to a video demonstration: TWEET: Nearly 22,000 Duke Energy Ohio customers have avoided power outages thanks to the smart grid. Here's how [http://youtu.be/3BF02P9jrKU](http://youtu.be/3BF02P9jrKU)

4. **Program channels**—Existing energy efficiency programs run by utility teams, third party vendors, weatherization, and audit teams can incorporate smart grid content to increase their value and longevity through complementary tools and content.

   - **Vision**—Explaining long-term smart grid goals make effective connections with the community, though it’s important to distinguish aspirational goals from immediate Day 1 benefits. The vision can be delivered through videos, inspirational presentations, and written narratives and shared on websites and events. **Examples: Hydro One, National Grid, OG+E, Green Mountain Power are among those with good vision videos they use in a variety of situations.**

   - **Integrated content**—It’s all electricity to the customer and the distinctions among energy efficiency, DR, smart grid, etc. are often lost on the public. One could argue that making the digital meter itself such a point of promotional focus has had unintended negative consequences. **Examples: Con Edison does an excellent job of weaving the smart grid story into their other initiatives throughout their website and newsletters. And in Duke Energy 2013 Sustainability report, sharing how the company “pinged” smart meters in Ohio to improve outage restoration after the summer derecho storm that hit the Midwest was featured in the report’s “reliable power” section, not its update on grid modernization initiatives.**

   - **Demo centers**—Allow people to see the smart grid in action alongside energy efficiency devices/practices and ask questions. Ideally these exhibits can be designed in the consumer’s context, i.e. devices within a house or mobile home. They can show distribution automation elements that people could notice if they know what to look for. Understanding something that is normally hidden in plain sight can be a point of pride. **Examples: Duke Energy has created the Envision Center and Reliant Energy has a mobile home program that brings smart grid and energy efficiency devices to places where the people are throughout their territory.**

   - **Native and multi-lingual communities**—Making this connection part of the corporate culture through translated materials and special programs is rare and can be improved in many companies. Ethnic chambers of commerce, available in some areas, can utilities help reach underserved small businesses. **Examples: Hydro One has a large native American population living in remote areas of the province. They make a special effort to reach out. SRP has program materials translated for their customers who are more comfortable conducting business in Spanish.**
5. **Constructive engagement**—Build relationships and develop trusted energy advisors and champions from both the utility and community organizations. If educated and empowered, all employees are potential champions for SG. Vehicles range from large-scale events reaching hundreds of civic and business leaders at a single venue to personalized face-to-face interactions with residents.

   a) **Charitable support**—Encouraging employees to volunteer, contribute, and serve on local non-profit boards builds strong connections with their neighbors. Examples: Con Edison and SRP are among the utilities that encourage their employees to volunteer at local charities and provide financial support.

   b) **Community events**—Participating in events organized by other groups gives marketing people direct contact with consumers and provides valuable insights to help interpret formal research data. It also makes them a known presence in the community. Examples: SRP employees set up booths at 45 local events per year. Guelph Hydro gives out reusable grocery bags in the malls and has energy ambassadors who speak to parents waiting for their kids at hockey practice. Hydro One shows their vision video at tractor pulls and regular town hall meetings.

   c) **Town meetings**—Articulating the vision and answering questions can be brought to local meetings of various scales. In some locations community meetings may be disrupted by small groups of protesters who travel from meeting to meeting. Restructuring the Q&A format to allow more personalized attention to the full range of resident concerns can alleviate this problem. Examples: BGE and Fort Collins Utility found their town meetings were being disrupted by agitators. They switched to an expert table format so individual families could ask their questions. Glendale Power and Water had good luck with “coffee in the park” sessions to explain their smart grid plans.

   d) **Community summits/initiatives**—Summits bring disparate residents together with stakeholders (regulators, advocates, community organizations, and utilities) in a structured methodology to show how SG can serve the community’s goals. Ideally activities proposed at the summit are on-going and leadership is shared with individuals and partner groups from the community. Example: National Grid underwrote a sustainability summit for 300 civic, business leaders, and residents; co-hosted with the City of Worcester to show how smart grid could support the community’s aspirations and build support for their 15,000 household pilot.

   e) **One-on-one customer interaction**—Meeting with concerned customers either by phone or in person at their homes strengthens relationships and builds trust. This approach is very manual and takes time and effort, however; it can sometimes be the most effective way to address customer concerns and debunk myths. Example: Duke Energy has a rapid response team that includes technical experts who
work directly with customers who request to “opt out” of receiving a smart meter or refuse to have one installed. This approach has helped the company keep their smart meter deployment on track while avoiding a groundswell of anti-smart meter activity.

6. **Partners**—Energy literacy workshops, advisory groups, and grants for community-based organizations will build trust, empower third party allies, and extend word-of-mouth support. The loss of direct control over messaging will be offset by varied and trusted partners who understand and can communicate how SG can help their respective constituents in their language. Creative solutions for how to leverage new technologies will often come from CBOs. **Examples:** SDG&E had the Green Partner Plan where they gave small grants to CBOs to support energy literacy efforts for their constituents. Pepco hosted an Energy Literacy Workshop for CBOs that was supported by the cross-stakeholder group that managed the PowerCentsDC pilot to extend the lessons learned from the pilot and share tools that were developed.

7. **Schools and faith-based organizations**—There are several energy literacy curricula and programs that have been extremely well-received by teachers, students, and parents. Critical to success is getting local school officials and congregations involved. School-based programs (K-12 and university) are likely to be proposed at summit events. **Examples:** Silver Spring Networks developed teaching materials that were used in middle and high schools in Ohio and Oklahoma and collaborated on eco-justice programs with the National Council of Churches of Christ. The Climate & Energy Project in Kansas effectively reaches school children and faith-based groups in a region not generally focused on SG issues.

8. **Press office**—Educating the press about the principles involved in delivering a reliable supply of electricity needs to be balanced with their need to maintain an independent voice and can be improved in many regions. The ideal time to forge the relationships is when skies are calm, electricity is flowing, and controversies are non-existent. **Examples:** FPL emphasizes reliability and affordability in their editorial messaging. A command center during emergency events texts the latest updates to “message team” members embedded throughout the recovery efforts so everyone is current with the most accurate status information.

9. **Media**—Participating in summits, workshops, and hearing from independent third parties who are knowledgeable allows press, broadcasters, and bloggers to feel the groundswell of support and watch utilities collaborate with their customers. The community leaders who participate in summits are excellent sources and local sustainability projects provide positive press hooks. Enthusiastic customers can be a powerful and positive presence on blogs, especially when misinformation is being presented. **Examples:** OG&E has a social media outreach program where interested customers receive special training so they can post on message boards independently. That relationship is disclosed and is transparent. In Naperville, IL the
president of a local homeowners’ association wrote an Op Ed piece challenging the legitimacy of the anti-meter activists in a way that the utility could not have done.

10. Brand awareness—Inventive and compelling promotional campaigns can present issues from the customers’ perspectives. While TV and radio spots are great when affordable simple, inexpensive newsletters and other low-cost tactics have been very successful in creating strong bonds as well. Examples: In competitive markets like Texas, comprehensive and clever integrated marketing campaigns from Reliant and Centerpoint are common. BC Hydro and EPB use TV spots to build brand awareness rather than to communicate about SG specifically (which can be problematic give the diversity of emotional reactions and motivations.) Both large utilities like Con Edison in NY and Tri-State EMC, a small coop in GA, have found newsletters to be an effective vehicle.