



# ADVANCEDmeter

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## PUBLIC WORKSHOP

### CUSTOMER OUTREACH AND CONSERVATION PLAN

OCTOBER 2010

DRAFT VERSION 10/4/10

# Agenda

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- 10:00-10:15 Welcome - Anne Smith
- 10:15-10:45 Advanced Meter Overview - Patti Wagner
- 10:45-11:30 Draft Communications & Outreach Plan
- 11:30-12:00 Break Out/Dialogue Sessions
- 12:00-1:00 Networking Lunch  
& Information/Feedback Centers
- 1:00-1:30 Feedback Summary
- 1:30-2:00 Next Steps & Closing Comments

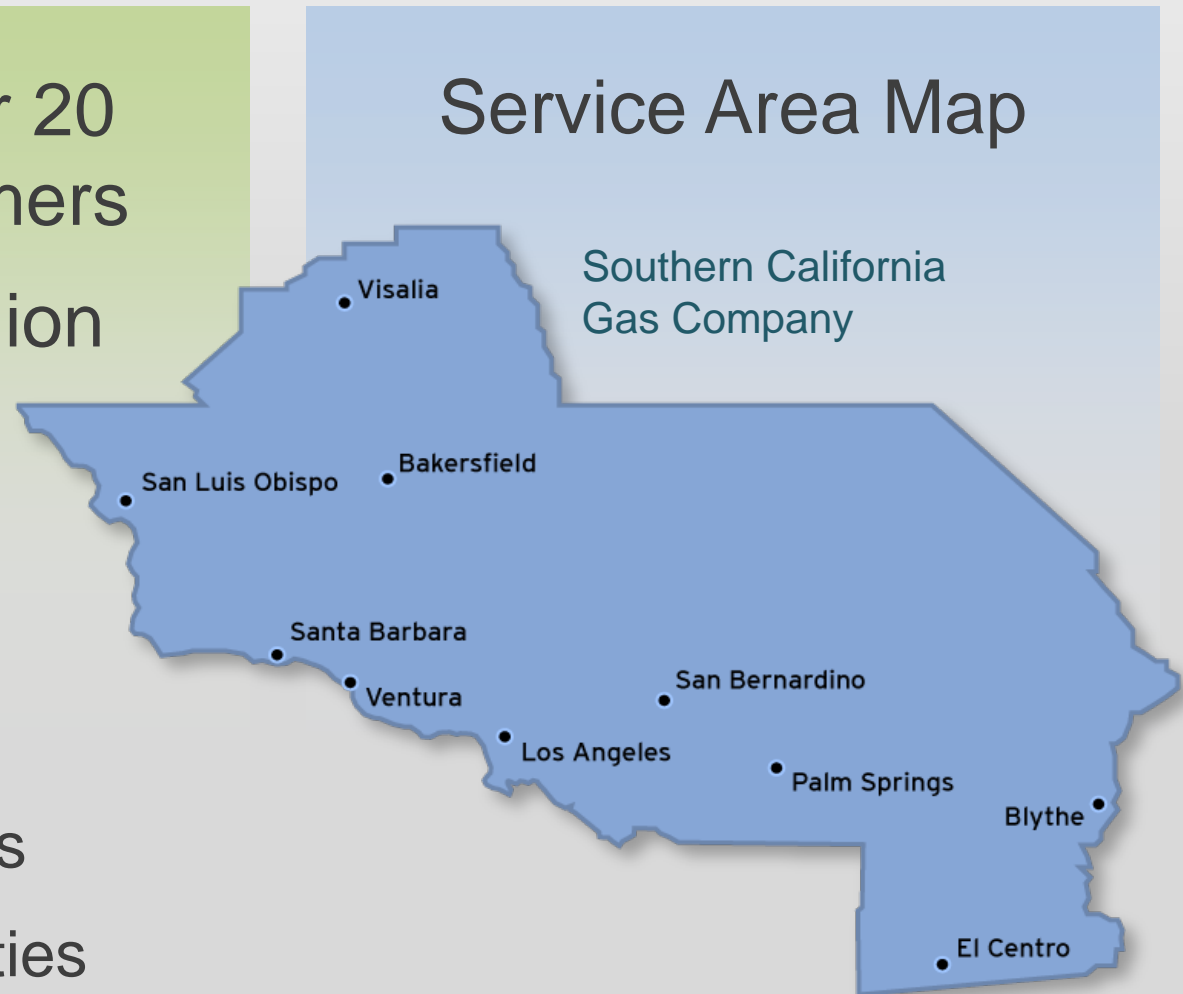
# WELCOME

**ANNE SHEN SMITH  
CHIEF OPERATING OFFICER  
SOUTHERN CALIFORNIA GAS COMPANY**

# About SoCalGas Customers

A very large, diverse group

- We serve over 20 million consumers
- Through 6 million meters
- Within 20,000 square miles:
  - 12 counties
  - 226 cities, plus
  - 250 communities



# Glad to be of Service



DRAFT VERSION 10/4/10

**ADVANCEDmeter**

# Objective & Goals

## Objective

- Gather comments about the communications and outreach plan
  - Incorporate as much feedback as possible
  - Submit a formalized plan to the California Public Utilities Commission

## Goals of our Plan

- Ongoing dialogue
- Positive customer experience
- Educate customers
- Reduce energy waste - conserve natural gas

# What to Expect Today

1

- Presentations

2

- Dialogue sessions – share your feedback and insights

3

- Networking lunch
- Information & feedback centers

4

- Feedback summary
- Next steps & closing comments

ADVANCED METER

# PROJECT OVERVIEW

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**ADVANCED**meter



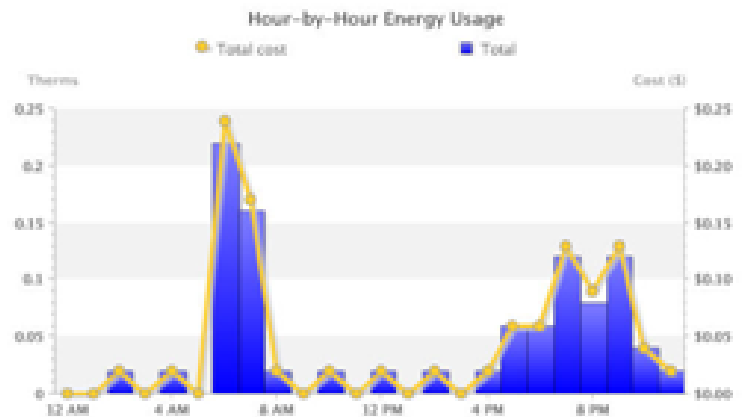
# Information: Present - Future



**Monthly Bill**

## When does my home use energy?

102 MAIN ST



Meter: Gas - 8332145010

**Hourly Information**

# Technology Progress

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Enables future  
smart  
technologies

Improves  
operational  
efficiencies

Proven technology  
throughout the world

# What is the Advanced Meter Project?

- SoCalGas will upgrade existing natural gas meters with a wireless communication device – the Advanced Meter
- Automatically reads and transmits hourly gas usage information on a “next day” basis
- Provides more frequent and detailed natural gas use information to help customers better control costs and manage gas use

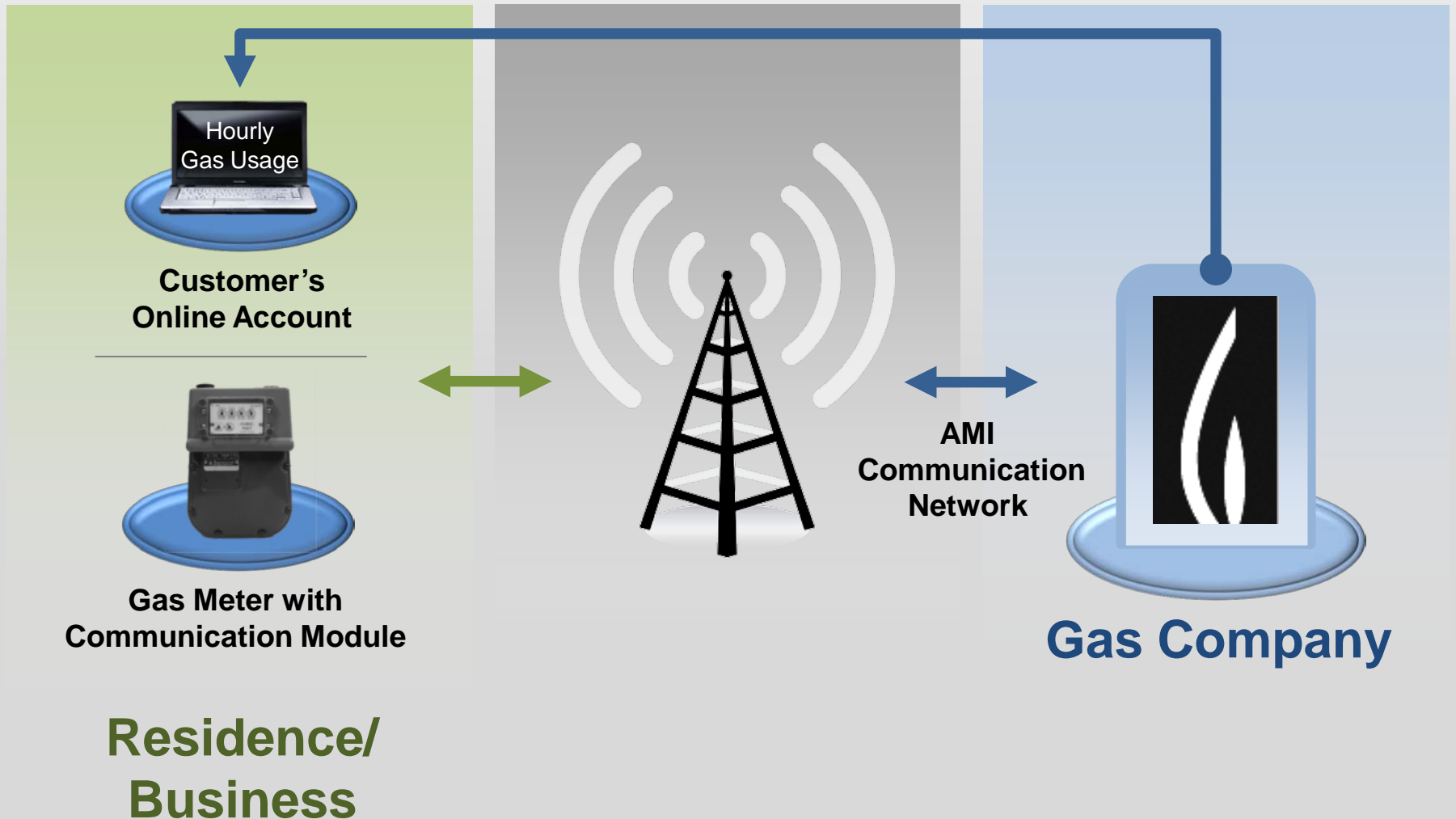


# How Does it Work?



Gas usage is still recorded in the traditional way, but it's a new wireless communication device that transmits the information electronically

# How is the information transmitted?



# Access to the information

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- Online @ [socalgas.com/myaccount](http://socalgas.com/myaccount)
- In home display

Potentially:

- Mobile apps
- Phone
- Paper
- Third party
- And more

# Installation

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**6**

Million Meters  
Up to 5 years

**<15**

Minutes to  
install

Mass installation starting in 2013

# What are the Benefits?

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**Get  
Information**



**Save  
Money**



**Help the  
Environment**



# CPUC Decision Highlights

## SoCalGas Project Approved April, 8

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### Decision states SoCalGas must:

- **Host a workshop** to present a draft plan for outreach and conservation support.
  - Specify in its **outreach strategies for all segments**, including ethnic, minority, and hard-to-reach communities and small businesses
  - Discuss specific proposals for utilizing a **competitive solicitation process for the selection of Community Based Organizations (CBO's)** with a demonstrated record of success in reaching those markets
  - Must achieve at least a **1% reduction in therms through conservation efforts**
- Submit plan to Energy Division within 60 days following the workshop

# QUESTIONS?

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UP NEXT

**Trisha Muse**  
Customer Experience  
Manager

**Lizette Verduzco**  
Stakeholder Outreach  
Manager

# THE CUSTOMER EXPERIENCE

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**ADVANCED**meter

# Guiding principles of our **Communication and Outreach Plan**

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**1**

Create a positive  
customer  
experience

**2**

Be collaborative

**3**

Promote all  
relevant services

**4**

Learn from others  
& incorporate  
feedback along  
the way

**5**

Be inclusive

**6**

Be transparent

# Built on Customer Input and Proven Practices

This plan was based on the following inputs:

Industry  
Lessons  
Learned

Our  
Customers &  
Stakeholders

Consumer  
Behavior  
Academic  
Research

This draft plan will be modified from feedback obtained  
throughout the Advanced Meter project

# 2010 Research Efforts

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- 22 customer focus groups
  - Residential (limited-income, web savvy and non-web savvy, renters, homeowners, environmentally conscious)
  - In-language groups: Spanish, Cantonese, Mandarin, Korean and Vietnamese
  - Small & medium businesses
- Online surveys with business and residential customers
- Phone Surveys scheduled for Q4 2010

# 2010 Research Highlights

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- About 70% of residential and business customers said having this type of detailed information **would help answer questions about their bill**
- About 65% of residential and 45% of business customers said it would **influence their use of natural gas**
- 93% of residential and 81% of business customers **prefer to access their information at socialgas.com**
- And about 75% of both groups would **prefer email alerts** (over other types of alerts)

# Strategy

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**1**

**Use cost-efficient mass communications to help build overall awareness**

**2**

**Supplement with tailored outreach**



# Objectives

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1

**Increase awareness**  
about the project  
prepare customers for  
the roll-out

2

**Educate** customers  
about the **benefits** and  
how it can help them

3

**Engage customers** to  
use the information so  
they can better control  
their gas costs and  
**reduce energy waste**

# Audiences and Stakeholders

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Residential  
Customers

Hard-to-  
Reach &  
Special  
Needs\*

Business  
Customers

Elected &  
Safety  
Officials

Regulators

Consumer  
Advocates

Media

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\*Hard-to-reach & special needs customers: multicultural & ethnic, rural, fixed income, disabled, seniors, small business

# Hard-to-Reach & Special Needs Proposed Outreach Approach

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- *Be as inclusive as possible of the diverse customers we serve, by providing tailored communications and outreach*
  - Use languages, channels & messaging specific to each group
  - Leverage internal resources, as well as available community resources
    - Conduct RFP for future outreach opportunities

# Potential Tactics & Channels

## Hard-to-Reach & Special Needs Customers

Audience	Potential Tactics/Channels
Customers living in rural areas	Community or faith-based organizations, sponsor local events, etc
Seniors or customers with disabilities	Disabled rights and assistance groups and organizations, senior centers, etc
Customers with low/fixed income	Community or faith-based organizations, sponsor local events, targeted advertising, etc
In-language, multi-cultural, ethnic	In-language & ethnic advertising, sponsor cultural events, community organizations, etc
Small business customers	Industry associations, chambers, industry events/meetings, e-newsletters, etc

# Three-phased Customer Experience Journey

1

Pre-Installation  
**Awareness**

2010-2017

2

During Installation  
**Prepare  
Customers**

Between 3 to 5 years

3

Post Installation  
**Educate to  
Conserve**

2013 and beyond

*Gather on-going input and feedback and refine plans*

# 1

## Pre-Installation: Awareness

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- *Use cost-efficient communication channels to promote the overall awareness of the advanced meter project*
  - Communications tactics and channels may include: broadcast, print, online advertising, SoCalGas bill package, emails, My Account, socalgas.com, social media, employees, etc.
  - Supplement mass communications with outreach efforts

# 1 Pre-Installation: **Messaging Themes**

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- What are advanced meters
- Why is SoCalGas installing advanced meters
- Benefits of advanced meters
- How you will be able to gain access to your information and use it to help you better control and manage your energy costs
- Installation timing/expectations
- Where to go if you have questions or want to learn more

## 2 During Installation: Prepare Customers

**90-30**  
Days prior

Community events/meeting &  
local governmental outreach

**30-7**  
Days prior

Direct mail letter  
and reminder

**After**  
Installation

Door hanger,  
brochure



# 2

## Installation Messaging Themes

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- Who, what, when of installation
  - Identify installers
  - What you need to do to prepare
  - Installation timing
- Set expectations regarding potential service interruptions
- Communicate quality assurance process
- Set expectations on how/when you can view your gas usage information
- Where to go if you have questions or want to learn more

# Sample Customer Communications



## ADVANCEDmeter

January 2, 2013  
Jane Doe  
123 Main Street  
Anywhere, CA 90000  
Dear Jane Doe,

In the coming weeks, Southern California Gas Company (SoCalGas®) or our authorized contractor, XYZ Meter Services Company, will be in your area to upgrade all residential and business natural gas meters with a new advanced meter wireless communications device. The device is installed on the existing gas meter and will automatically read and transmit your gas usage information to our customer service and billing center.

In the near future, you will have more frequent and detailed access to your natural gas usage information. You can sign up to receive alerts if your gas usage suddenly spikes, so you have an opportunity to better manage and control your energy costs.

### Installation is easy:

1. Meter installation takes place Monday-Saturday, 7 a.m.-8 p.m.
2. You do not need to be present, and, in most cases, there will not be an interruption to your service. The total installation process takes about 15 minutes to complete.
3. After the installation, we'll leave a door hanger to let you know your meter upgrade has been completed. A meter reader will confirm the electronic read is accurate.

### How you can help:

- Please provide safe access to your natural gas meter by clearing any obstructions and trimming any vegetation. If you have concerns such as dogs in the yard or restricted access to your meter, you can request an appointment by contacting XYZ Meter Services Company at 1-800-XXX-XXXX.
- Be sure to let other family members or tenants know about the upcoming installation so they can recognize the installer.
- Sign up to receive e-mail, text or phone alerts at [socialgas.com/myaccount](http://socialgas.com/myaccount) so we can notify you when your gas information is ready to be viewed.

Thank you for your cooperation during the installation. If you have any questions, please visit [socialgas.com](http://socialgas.com).

Sincerely,  
James Petersilla  
Director, Advanced Meter Project

Información importante acerca de su medidor de gas natural. En las próximas semanas, Southern California Gas Company, a través de nuestro instalador contratado, XYZ Meter Services Company, instalará un aparato de comunicación en el medidor existente de gas que transmitirá automáticamente información sobre su consumo de gas. El proceso tomará únicamente unos cuantos minutos. No necesita estar presente y en la mayoría de los casos, su servicio de gas no será interrumpido. No es una modernización opcional. Para más información, visite [socialgas.com/ami](http://socialgas.com/ami).

有關您天然瓦斯表的更新資訊。在未來幾周，南加州瓦斯公司，透過我們的安裝承包商，XYZ 儀表服務公司，將為您現有的瓦斯表上，安裝一個無線傳輸的裝置。來自新傳輸裝置的資訊，安裝過程只需幾分鐘。大多數的情況下，您不必在場，您的瓦斯也不會被中斷。這不是一個非選擇性的升級。欲瞭解更多詳情，請瀏覽 [socialgas.com/ami](http://socialgas.com/ami)。

Thông tin quan trọng về đồng hồ gas (khi đi theo nhiên) của quý vị. Trong những tuần tới, Southern California Gas Company, thông qua một nhà thầu gắn đồng hồ gas, XYZ Meter Services Company, sẽ gắn dụng cụ truyền tin hiệu không nổi dây trên đồng hồ gas hiện tại để truyền thông tin về việc sử dụng gas của quý vị. Quy trình này chỉ mất có vài phút. Quý vị không cần có mặt lúc gắn đồng hồ và trong hầu hết các trường hợp, dịch vụ cung cấp gas của quý vị sẽ không bị ngưng tạm thời. Đây không phải là việc nâng cấp tùy chọn. Để biết thêm thông tin, xin ghé thăm [socialgas.com/ami](http://socialgas.com/ami).

귀하의 천연가스 계량기에 대한 중요한 정보. 앞으로 몇 주 사이에, 남가주 가스회사 (Southern California Gas Company)는 계약 설치업자인 XYZ 계량기 서비스 회사를 통해 기존의 가스 계량기에다 귀하의 계스 사용 정보를 자동적으로 알려 줄 무선 장치를 설치하려고 합니다. 이 설치 작업은 불과 몇 분 정도밖에 걸리지 않습니다. 귀하께서 작업현장에 계실 필요는 없으며 대부분은 경우, 가스 서비스도 중단되지 않습니다. 이 업그레이드는 선택 사항이 아닙니다. 더 자세한 정보를 원하시면 [socialgas.com/ami](http://socialgas.com/ami)를 방문하시기 바랍니다.



## ADVANCEDmeter

### Benefits of advanced meters

**Better control your energy use and costs**  
With the advanced meter, you'll have more information about your gas usage, allowing you to better understand and manage your energy use and associated costs.

### More privacy

Because advanced meters send information electronically to SoCalGas daily, meter readers will no longer have to enter your property each month. Although, we still require access to the meter for safety and periodic maintenance.

### Find problems faster

When you view your gas information more frequently, or you sign up to receive energy alerts, you can better monitor for gas usage spikes. Sudden, unexpected increases in your gas use could be related to how you're using gas at home, or be a sign of a potential problem.

### Help the environment

With the information they provide, advanced meters can help you conserve energy, which can help preserve natural resources.

### Future smart homes and businesses

In the future, advanced meters may provide additional benefits, including sending you a notification when your bill reaches a certain amount and potentially controlling "smart appliances" at your home or business through the Internet.

### Where can I find more information?

To learn more, visit [socialgas.com](http://socialgas.com) or call:

English	1-800-427-2200
Español	1-800-342-4545
國語	1-800-427-1429
粵語	1-800-427-1420
한국어	1-800-427-0471
हिंदी	1-800-427-0478
For other languages	1-888-427-1345
Hearing Impaired (TDD)	1-800-252-0259

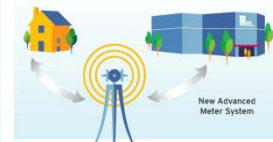
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### What are advanced meters?

Southern California Gas Company (SoCalGas®) is upgrading our system by adding an advanced metering device to all residential and business natural gas meters. Advanced meters automatically read and transmit your gas usage information to our customer service and billing center.

This technology advancement can provide you with more frequent and detailed access to your natural gas usage information, which can help identify ways better control your costs and manage your energy use.



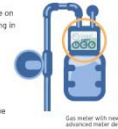
### Why advanced meters?

SoCalGas and the state have aggressively championed many energy conservation efforts. Advanced meters and the information they provide can help you save energy, help you better manage your natural gas bill, and help the environment by reducing greenhouse gases.

SoCalGas will install the advanced meter device on more than six million natural gas meters starting in 2012 through up to 2017. Visit [socialgas.com](http://socialgas.com) to view the installation schedule.

### Quality assurance

After the initial installation, meter readers will continue to manually read the meter until we confirm the electronic meter read is accurate.



### How do I view my gas information?

Once your advance meter has been installed and we have verified that the read is accurate, you can access your information in several ways. The easiest way is to sign up for My Account at [socialgas.com](http://socialgas.com). Have your latest SoCalGas bill handy.

## ADVANCEDmeter

Important information inside

U.S. POSTAGE  
 PERMIT NO. 1711

555 West Fifth Street  
Los Angeles, CA 90013

## ADVANCEDmeter

### Congratulations!

Your new advanced meter was successfully installed today, without interruption to your natural gas service. Advanced meters automatically read and transmit your gas usage information to our customer service and billing center. Advanced meters can also provide you with more details about how you're using gas and help you identify ways you can better control your gas costs and energy use.

### When and how can I see my gas usage information?

For quality assurance, we will verify that the advanced meter is reading your gas use accurately. Sign up for My Account at [socialgas.com](http://socialgas.com) so we can notify you when your information is available.

Once your gas information is being transmitted electronically, you'll be able to see your hourly usage on a "next-day" basis. You will be able to access your natural gas usage information in a variety of ways. One way is to sign up for My Account at [socialgas.com](http://socialgas.com), where you can also view and pay your bill, schedule service, request payment arrangements and more. Try it today at [socialgas.com/myaccount](http://socialgas.com/myaccount). Simply have your most recent natural gas bill handy to register.

To learn more about SoCalGas' advanced meters, visit [socialgas.com/ami](http://socialgas.com/ami).

Para español, sírvase ver el reverso

您的 advanced meter (先進瓦斯計量表) 已安裝成功。不久，您就可以經由 [socialgas.com](http://socialgas.com) 的 My Account (我的帳戶)，來查看您的瓦斯使用資訊，或瀏覽 [socialgas.com/ami](http://socialgas.com/ami) 來做更多的選擇。

Đồng hồ gas cao cấp của quý vị đã được gắn xong. Quý vị sẽ sớm có thể xem thông tin về lượng gas sử dụng qua My Account (Trang Mục của Tôi) tại [socialgas.com](http://socialgas.com), hoặc ghé thăm [socialgas.com/ami](http://socialgas.com/ami) để có thêm lựa chọn.

귀대에 신청 고급 계량기를 성공적으로 설치했습니다. 곧, [socialgas.com](http://socialgas.com)에서 내 계회 (My Account)로 가시면 귀하의 가스 사용 정보를 보실 수 있게 되며, 다른 선택사항을 원하시면 [socialgas.com/ami](http://socialgas.com/ami)를 방문하십시오.

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# Post Installation: Quality Assurance

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**ADVANCED**meter

# 3

## Post-Installation Messages

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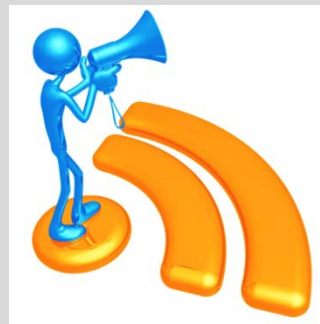
- Confirmation of installation
- Announcement: information availability
- Where to view gas usage information
- Education about how to use information to better manage and control energy costs
- Conservation messages
- Cross promote relevant program messages (i.e., energy efficiency, assistance programs, etc)

# 3 Post Installation Strategies to Conserve

**Focused**



**Leveraged**



**Innovative**



# Information and Tools to Drive Conservation



Southern  
California  
Gas Company



A Sempra Energy utility\*

Glad to be of service.®

Español | More Languages

SEARCH

FAQ

## My Account

Home

Bill Pay

Appointments

Savings Tools

Manage Accounts

Profile

### Summary

For John Q Public,

Account number: 12810259908 (my home)

Select bill account ... ▾

**Current Balance:** \$118.68 [View Bill](#)

**Date Due:** September 30, 2010 [Pay Bill](#)

**Last Payment Received:** August 28, 2010 [Account Overview](#)

**Payment Arrangement:** \$80.00 [View Arrangement](#)  
Amount due October 15, 2010 [Request Arrangement](#)

**Service Appointment(s):** September 30, 2010 [Check Status/Cancel](#)

#### I want to...

[Set-up online payments](#)

[Schedule service](#)

[Start, Stop, Move service](#)

[Find help paying my bill](#)

[Save energy](#)

[Manage my Account Profile & Notifications](#) [Preferences](#)

#### Messages and Alerts

[Your bill is ready to view/pay.](#)

[Your August gas usage alert.](#)



#### When does my home use energy? 102 MAIN ST

##### Usage Since Last Bill

- Usage-To-Date: 2 Therms
- Estimated Bill-To-Date: \$3
- Based on actual meter data, as of: 8/29/2010 --This is 6 days into your current billing cycle.
- Average Daily Expense: \$0.55/day

Go with convenience:

### GO PAPERLESS

Say goodbye to paper bills, checks and stamps when you take advantage of The Gas Company's paperless billing.

[Go Paperless now.](#)

# Information and Tools to Drive Conservation



Southern California Gas Company

A Sempra Energy utility\*

Español | More Languages

SEARCH
FAQ

*Glad to be of service.\**

## My Account

Home
Bill Pay
Appointments
Savings Tools
Manage Accounts
Profile

### Savings Tools

#### When does my home use energy?

102 MAIN ST



Hour-by-hour Energy Usage

Total Cost

Meter: Gas - 8332145010

**Save Money with Your Advanced Meter!**  
Our Appliance Tips can help you find savings on your energy use.

#### How does my home compare?

100 BAY LANE

Gas Costs 2/22/2005 to 3/22/2005

Uses Least Energy

\$125  
My Home

\$287  
Avg. Home

Uses Most Energy

Gas

**Congratulations!** Your home used less energy than most of the similar homes in your area.

#### How does my home use energy?

100 BAY LANE

Gas Costs 2/22/2005 to 3/22/2005



- Heating \$104
- Hot Water \$19
- Cooking \$2

Gas

**Control my costs!**  
Heating is your highest energy expense. Click **Find ways to save** to get specific recommendations for reducing your energy costs.  
[Update Profile](#)

#### My Home Area Network

100 MAIN ST

Current Conditions



82°

High 91° | Low 79°

Sunrise: 5:23 AM | Sunset: 7:57 PM

**Thermostat**  
Adjust your home thermostat throughout the day without sacrificing comfort.

#### How does my usage compare?

100 BAY LANE

Usage Comparison

Gas Use (Therms)



March, 2004      March, 2005

Gas Use     Carbon Use

DRAFT VERSION 10/4/10



# 3

## Information and Tools to Drive Conservation

My Bill   **Ways to Save**   Energy Profile

### Get into action and save!

Savings Goal: [10%](#)


Choose a strategy, and we'll recommend the best actions for saving money and energy.

 <b>One Choice</b>	 <b>Family Saver</b>	 <b>Weekend Warrior</b>
One change can make all the difference.  Small fixes for big results  Rebates for energy-smart choices	Learn. Play. Work together. And save!  Kid-tested activities that can save you energy  Become a sustainable family and earn points	Creative, energy-saving ideas that you can do.  Learn from local experts  Join our DIY community
<b>GET STARTED</b>	<b>GET STARTED</b>	<b>GET STARTED</b>

My Bill   **Ways to Save**   Energy Profile

Created on 7/2/2010

### Weekend Warrior

Change theme   Savings Goal: [10%](#) 

#### Build Your Action Plan

Zero in on the actions that are right for you!

Customize your action plan by adding to your Energy Profile

0 of 11 actions selected. [Refine](#)

<input type="checkbox"/> <b>Lower temperature of water heater</b> Up to <b>\$200</b> Avg. yearly savings <a href="#">More Info</a>	<input type="checkbox"/> <b>Install low flow shower heads</b> Up to <b>\$75</b> <b>REBATE</b> Avg. yearly savings <a href="#">More Info</a>	<input type="checkbox"/> <b>Insulate hot water pipes</b> Up to <b>\$30</b> Avg. yearly savings <a href="#">More Info</a>
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**Create Action Plan**



# 3

## Other Potential Access Options to Drive Conservation



**Energy/Bill Alerts**



**Call-in**



**Paper**



**Mobile Applications**



**In-home Displays**

# Customer Outreach and Conservation Plan

## Measures of Success

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### Customer and Community Experience

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Measurement of awareness, participation, installation satisfaction

### Conservation Measurement

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Reduction of therms

### Installation and Services

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Installation volume  
Complaint resolution  
Bill alert enrollments

# Reporting Example



## Smart METER

Customer Experience,  
Deployment, and  
Operations Update  
September 3, 2010

### News from the CPUC Commission Meeting SDG&E Draws Praise from the Structure Group

The SDG&E Smart Meter Customer education and outreach program was recognized at the CPUC's September 2 meeting as the "gold standard" for U.S. utilities. Stacey Wood of the Structure Group, the consultancy that independently assessed PG&E's Advanced Metering program, responded to Commissioner Ryan's inquiry about industry best practices. "Of the utilities around the country deploying similar type infrastructures around advanced metering that have done a very good job and are at what we would consider best practices would be San Diego Gas & Electric. [With] over a million meters installed, [SDG&E has had] very low complaints. Their meter infrastructure, their customer engagement, their meter deployment has all gone very well, so we would put them at the top of the list."

### Customer Experience, Interaction, & Outreach Residential Customer Interactions and General Comments

- Liaisons assisted 1 elderly/special needs customer with installation activities by meeting the installer at the home, unplugging/plugging smart appliances and also resetting clocks. This extra step is greatly appreciated by customers.

#### In Field Liaison Customer Contacts August 1 - August 31

Contact Attempts	1,854
Successful Contacts	478

#### VSI Appointments

Aug 1— Sep 4

Residential Appointments	2,087
Commercial Appointments	865
<b>TOTAL</b>	<b>2,952</b>

The majority of appointment requests are due to access and medical equipment issues.

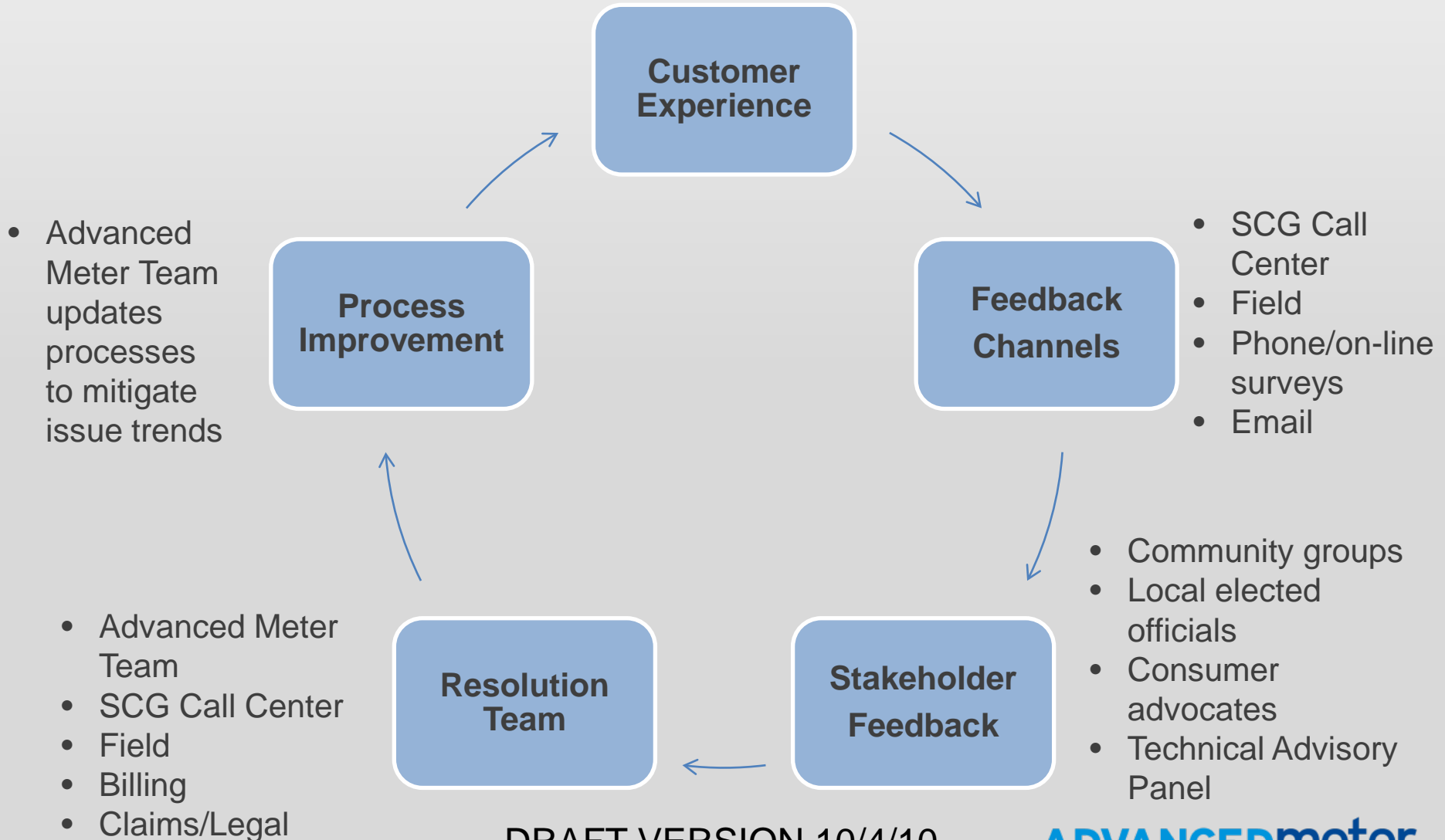
#### Claims and Complaints

Customer complaints to date	1,968 (.15% of total 1,319,981 installa-
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# Complaint Resolution

## Developing the Process



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# Customer Outreach and Conservation Support Plan Summary

1

Raises awareness of upcoming technology

2

Prepares customers for installation

3

Educates them on how to use the information and how it can benefit them

4

Inclusive of hard-to-reach and special needs customers

5

Promotes energy conservation

6

Solicits ongoing feedback and adjusts as necessary



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## BREAK OUT SESSIONS

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## LUNCH BREAK AND INFORMATION/FEEDBACK CENTERS

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# Share Your Insights

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## ➤ Key Findings

- Residential Group
- Business Group
- Outreach Group



# Next Steps

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- Incorporate feedback and file plan with the Commission by early December
- Snapshot of 2011 efforts
  - Begin defining installation timeline by geography
  - Working with local government officials for siting any needed infrastructure
  - Design/build network systems
  - Define metrics, measurement, tracking and reporting
  - Define detailed communications, outreach and conservation plans for specific key stakeholder audiences
  - Continue with customer research and message testing
  - Design/build of our web site and other access options to provide gas usage information
  - Conduct gap analysis for community outreach portion; conduct RFP



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THANK YOU

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