

July 2021

# Marketing and Account Services (MAS) Update

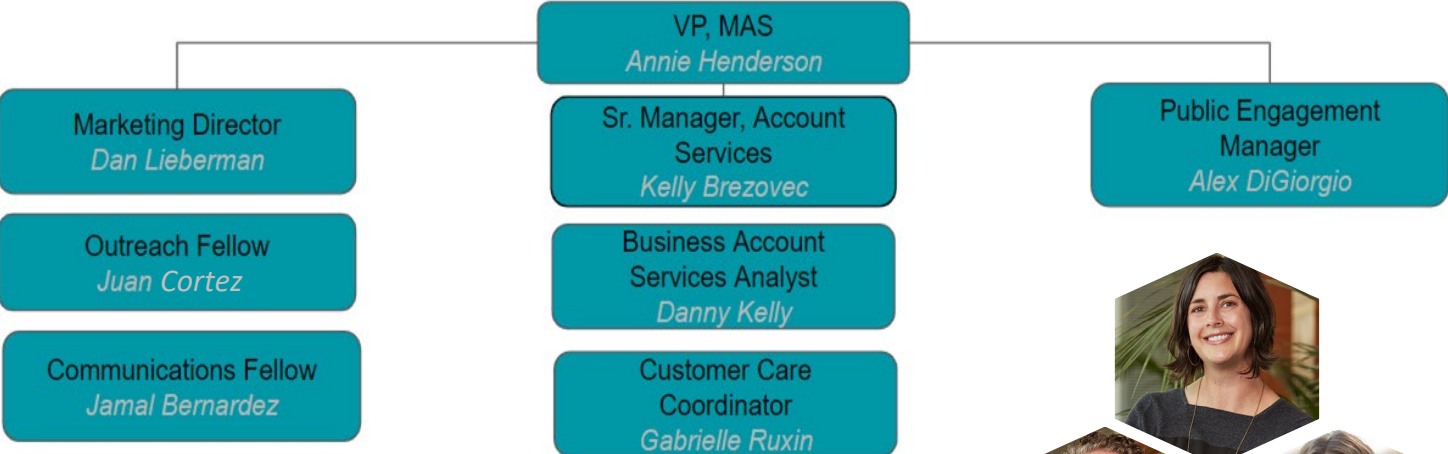
## Special Board Retreat



# Overview

- Team Structure & Areas of Focus
- Overviews
  - Marketing
  - Account Services
  - Public Engagement
- Major Activities over next 12 months
  - Product & Rate Default Transitions
  - Customer Debt Repayment and Relief
  - Additional Key Campaigns

# Team Structure



# Team Functions

## Marketing

- Social Media
- Website Management
- Brand Awareness
- Events/Outreach
- Advertising

## Account Services

- Call Center Oversight
- Key Account Management
- Billing Operations
- Customer Experience

## Public Engagement

- Community Advisory Committee Oversight
- Local Government Elected and Staff Relationships
- Local Emergency Coordination

# Marketing Overview

## Main Customer Communication Channels

- Social Media (organic and paid) - @PoweredbyEBCE
- Website – ebce.org
- Paid digital and print ads
- Newsletter
- Targeted marketing for programs
- Ongoing customer notices for new accounts
- Required mailers: Power Content Label (PCL) and Joint Rate Mailer (JRM)
- Customer surveying and market research

## Plus...

- Webinars
- Press Releases/Media events
- Videos
- Collateral
- Outreach events
- Technology improvements (GovDelivery & Pardot)
- Expanded in-language content, collateral, advertising, events

## Key Documents

- [General Brochure](#)
- [Energy Guide for Seniors](#)

### *Fun Facts:*

EBCE conducted its first community survey in June 2018, which showed **only 6%** of respondents were familiar with Community Choice Energy programs.

In April 2021, we checked again and **41%** of respondents were familiar with EBCE.

### *1 Million fun facts:*

- That's the number of notices we send each year for the PCL and JRM
- Number of emails sent in last 6 months including emails promoting our programs
- Amount of digital ad impressions per month

# HOMEWORK!



Please like and follow us on social media  
and share our posts!



# Account Services Overview

## Call Center Oversight

- Regular check-ins with call center vendor
- Talking points around news items, BOD decisions, new policies
- Bring back customer insights to other departments

## Key Account Management

- Direct relationship with our largest customers
- Provide expertise on bill analysis and special programs

## Plus...

- Operational guidance and implementation of CPUC programs such as AMP and DAC-GT
- Customer outreach for CARE enrollment and AMP participation
- NEM program management

## Billing Operations

- Rate updates
- Time-of-Use transition
- Mass enrollment
- Billing errors or anomalies

### *Fun Facts:*

Through our billing vendor, EBCE sends out over **32,000 bills** every business day.

And our call center generally gets around **250 calls** per week (much more during new enrollment, months of high bills, and rate transitions).

# Public Engagement Overview

## Community Advisory Committee

- Staff representation at monthly CAC meetings
- Support for new member application process
- Information channel for CAC and other community stakeholders

## Local Government Elected and Staff Relationships

- City Council, County Board, and local committee presentations and updates
- Monthly meetings with member agency staff
- New community inclusion/ service area expansion

## Local Emergencies

- COVID relief support, Flex Alerts, Wildfires
- EBCE representative on the Alameda County/Sheriff Office of Emergency Services (OES) meetings

## New Community Engagement

- Bring benefits of EBCE to Central Valley and other communities

### *Fun Fact:*

EBCE has been working with staff from our local member agencies through the StopWaste **Technical Advisory Group** since 2018.

Recently, we've launched our own group (the **Muni-pals**) so we can better focus the time on EBCE-related info, and welcome Tracy to the discussion.



# Fiscal Year 21-22

Major Activities over next 12 months

# Product & Rate Default Transitions

Month	Activity	# of Customers	
Oct 2021	<b>Dublin</b> residential customers move to Renewable 100	24,000	* City council revisiting at 7/6 meeting
Jan 2022	<b>Albany</b> residential (non-CARE) and commercial customers move to Renewable 100^	6,000	** Default if no action by city council
Jan 2022	<b>Hayward</b> customers move to Bright Choice*	36,000	*** Includes municipal accounts for cities of:
Jan 2022	<b>Pleasanton</b> customers move to Bright Choice**	27,000	- Emeryville
Jan 2022	Voluntary Brilliant 100 customers move to Bright Choice***	3,600	- Fremont
Feb 2022	<b>Tracy</b> residential E1 customers move to E-TOU-C	24,000	- Livermore
Mar 2022 <sup>+</sup>	<b>Berkeley</b> residential (non-CARE) customers move to Renewable 100^	46,000	- Oakland
Oct 2022 <sup>+</sup>	<b>Berkeley</b> commercial customers move to Renewable 100	5,000	- San Leandro
			- Alameda County

+ Additional jurisdictions may change default product if BOD approves by Sep-21 or Apr-22

^ Still to be approved by BOD

# Product & Rate Default Transitions

## Cross-functional efforts *(not exhaustive)*

Marketing	Account Services	Public Engagement
Customer notification mailers <i>(can target customers with high arrears for additional notification about financial impacts of product change)</i>	Backend functionality <i>(such as proactive confirmation to stay on current product)</i>	Support cities during council voting process
Outreach plans with cities	Billing QA	Council presentations
Social media content	Call Center Preparedness	Coordinate with city staff on timeline and outreach plans
Advertising <i>(Nextdoor, BANG, promoted posts)</i>	VIP Outreach	Community-wide cost analysis

# Customer Debt Repayment and Relief

## Payment Policy Suspension

- Continue to monitor proceedings and track with PG&E

## Arrearage Management Plan

- Statewide moratorium on disconnections will be lifted in Sept
- EBCE will encourage customers with utility debt to enroll in AMP
  - Outbound calls, customer engagement plan with consultant
- Supporting Connected Communities team with mechanisms for expanded customer assistance

## DAC-GT



- Disadvantaged Community Green Tariff:
- Local projects and customer discounts within designated area

# Customer Debt Repayment and Relief

## Cross-functional efforts *(not exhaustive)*

Marketing	Account Services	Public Engagement
Content in multiple languages	Backend functionality	Facilitate coordination with cities for outreach
Outreach strategies	Billing QA	Facilitate coordination with cities for project development
	Call Center Preparedness	

# Additional Key Campaigns *(not exhaustive)*

Marketing	Account Services	Public Engagement
<p><b>Tracking Campaign Performance</b></p> <ul style="list-style-type: none"> <li>New tools including Hootsuite Impact</li> <li>Tag all digital ads, emails, and social media with UTM parameters</li> </ul>	<p><b>Time-of-Use Bill Protection</b></p> <ul style="list-style-type: none"> <li>May 2022: Bill protection payments for E1 to ETOUC customers in Alameda County (~300,000 customers)</li> </ul>	<p><b>New Community Inclusion/ Service Area Expansion further into Central Valley</b></p> <ul style="list-style-type: none"> <li>City of Stockton and San Joaquin County consideration of EBCE JPA membership</li> </ul> 
<p><b>Required Mailers</b></p> <ul style="list-style-type: none"> <li>Joint Rate Mailer – July/August 2021</li> <li>Power Content Label – October 2021</li> </ul>	<p><b>NEM Policy Updates</b></p> <ul style="list-style-type: none"> <li>Annual process to pay out net-generating solar customers, including automation; revisions to “new NEM”</li> </ul>	
<p><b>Oakland Roots</b></p> <ul style="list-style-type: none"> <li>Tabling and branding at home games</li> <li>Video ads; CBO promotion; Outreach</li> <li>Title game on 9/18</li> </ul>	<p><b>Call Center</b></p> <ul style="list-style-type: none"> <li>Expansion of IVR language prompts</li> <li>EBCE in-house support</li> <li>Potential AMP concierge function</li> </ul>	
<p><b>Return to In Person Events</b></p> <ul style="list-style-type: none"> <li>Focus on Newark, Tracy, Pleasanton, Dublin (County Fair in October)</li> </ul>		
<p><b>Programs Marketing</b></p> <ul style="list-style-type: none"> <li>Accepting applications for new position until 7/12; on-boarding</li> </ul>		 <p><b>Sep-21:</b> Reso to join JPA + first reading of local ordinance</p> <p><b>Oct-21:</b> Second reading of local ordinance</p> <p><b>Nov-21:</b> BOD approves new JPA member</p> <p><b>Dec-21:</b> Submit amended Implement. Plan to CPUC</p> <p><b>Jan-23:</b> Service may begin</p>

# Thank You!

And don't forget your homework!



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