



NET IMPACT

2017 Energy Ambassador Program

Net Impact in partnership with PG&E

Introductions



Net
Impact



PG&E



Your amazing
self

Program Overview

Program structure:

- Currently in San Francisco, San Jose, and East Bay. Will add more around the West, East and South bay as program goes on.
- Targeted list of micro-businesses. Requires some data clean-up
- Visits conducted from February to August.



Program Overview

Our goal:

- 5,100 successful interactions
- Customer feedback from small businesses
- Increased awareness of time of day for energy use + providing resources for managing energy consumption and efficiency
- Increased customer satisfaction with PG&E



Visits and Support

Successful interaction guidelines

Determined based on:

1. Basic interaction

- Recording main energy-related concern
- Providing available resources relevant to energy-related concern
- Recording current level of satisfaction with PG&E
- Delivering Time of Use and YourAccount information

2. Engaged customer interaction

- Collecting a contact email address for the business
- Customer action: login into YourAccount, signing up for outage alerts, SmartAC, filling a rebate, etc.



Visits and Support

Best practices

Preparing & planning

- Call ahead to determine existing businesses and their hours of operation
- Have a calendar ready so you know when you can schedule follow-up visits
- Wear your shirt, bring business cards, and pamphlets
- Bring your tablet and hotspot. Make sure they are fully charged and bring the charger with you in case you need it.
- Visit at slower times (Tuesdays, Wednesdays and Thursdays, between 9am and 2pm)

Visits and Support

Best practices

During the visit

- Use the [Visit Tracking Form](#) to fill out needed information and collect data
- Note special comments or notes in the form:
 - E.g. change of address, different business name or phone number from that appearing in the customer list. Note the correct and up-to-date info in the Visit Tracking Form and include previous info in the comment field.
 - PG&E wants to hear from small businesses!

- *"They were unaware of the various energy efficiency programs available to manage their energy. I gave them an overview of TOU, and various online tools available. They have not registered for an online account, and pay all their bills via check. I prompted him to sign up to pay bills and manage their energy consumption as a way to help him lower energy costs. He said his wife handles the business finances and will need to speak to her."*
- *"Tony was happy to learn of this service and thinks it would be beneficial for classes to be offered to business owners so that they can learn to check their own meters and little energy efficient tips."*
- *"According to customer list, business appears located in San Jose. They relocated and asked to get a visit at their new location. Previous address appears as 2533 Wakefield Ave."*

Visits and Support

Best practices

As you go

- Email Net Impact with any questions that emerge
- Update the customer list with businesses contacted, noting successful visits as well as locations where visits were not possible

At the end of the week

- Fill out an invoice template (bi-weekly), and submit it via email. Make sure your list has a status for every business you reached out to.

Customer List

pty_id	Business_Name	Business_address_1	Status	Reason (If other, use comments field)	Comments
278504083	1012 GRANT LLC	1012 GRANT AVE	Successful visit		spoke to Jose, manager, about how much he could save. Loads of lights in the store. He will pass on info to his boss
493030669	FRESH INC	301 SUTTER ST	No visit	Wrong address	This is a commercial building with multiple businesses, but no office for Maguire Capital Group is listed on the directory.
1787895002	MAGIS GROUP INC	1019 STOCKTON ST	Successful visit		Wanted to find out about how to become more green. Already are online and have LED
5216786299	J CAMERA EXPRESS	506 GRANT AVE	Successful visit		notes in visit tracking form
5599479369	KEYSTONE ASSOCIATES	625 BUSH ST	Not yet visited	Other	requested chinese speaking ambassador on phone
5881156706	KUO MIN TANG	848 STOCKTON ST	No visit	Residential location	

- Shared parcel document

- Use the drop-down options to update the status of each entry

- \$40 for every updated parcel list regardless of the number of successful visits.

FAQs

- At what point should I mark a business as “No visit”?
- Who should I speak with when visiting a business?
- What should I do if my hotspot isn’t working?
- What should I do if a business has two customer IDs?
- Is there a minimum number of visits I should complete?



Visits and Support

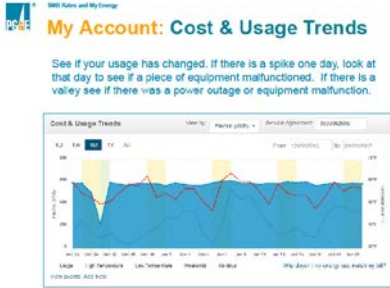
Invoicing and resources

- The following can be found in the [Shared EA Resources Google folder](#):
 - Energy Ambassador Toolkit (PDF)
 - Today's presentation (PDF)
 - Sample Visit Script (PDF)
 - Invoice submission schedule + invoice template (PDF)
- Paychecks will be issued every two weeks.
 - E.g.: first invoice (wk 1+2)
 - Invoice submission at EOD on Sunday
 - Invoices received after Sunday will be processed in the following week.
 - The week runs from Sunday to Saturday



Shared Resource Folder

Inside you will find:



Invoicing and Payment Schedule

NOTE: Checks submitted after the due date will be processed within 8 days. Please allow 3 business to receive your check in the mail if you are requesting to have it mailed.

Week	Invoice due by	Check ready for pickup
Stipendi	February 19th	February 28th
1+2	February 26th	March 7th
3+4	March 12th	March 21st
5+6	March 26th	April 4th
7+8	April 9th	April 18th
9+10	April 23rd	May 2nd
11	May 7th	May 16th

Invoice		Date Submitted:																																																
Energy Ambassador Program <i>(Select the rest of the line on Contract)</i>																																																		
Call Name (to be written on check)	Paid to: Address:																																																	
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[illegible]

- Look for an email with a link to the shared resource folder. Add it to your drive.
- Make a copy of the invoice template
- Make use of the Google group to reach out to other Ambassadors and share knowledge



Turning Myth to Motivation

Turning Myth to Motivation

Summary

- **Conviction ...**
 - comes through knowledge of the products you sell, and the introspection on why YOU would personally buy it.
 - If you aren't convinced you'd buy it, they probably won't be either; look to understand the products
- **Buyers Make Emotional Decisions and Justify Them Later.**
 - Once you have the facts, seek to understand their reason for it; what their "WHY" is. Your why is many times different than theirs.
 - What motivates them to change?
 - Find their "emotional" trigger on why they would act, and provide guidance in those areas.

Know Your Facts on LEDs...



60-80% less electricity than a similar fixture.
Large PG&E Cost Savings

Increased Lifespan

Lasts 25x longer than incandescent lighting
LEDs generally have 50,000hr lifespan
Lower maintenance/replacement costs

Better Color (CRI) Rendering

Merchandise shows better colors...more sales?
Improved safety in parking lots
More inviting to customers

Operates Cooler....80-90% less heat so they
don't act like small "heaters" your AC has to fight



PG&E's "Micro" Product List

Segment/Technology	Retail w/ Refrigeration Grocery	Office	Retail	Car Dealerships, Repair shops	Small Manufacturing, Warehousing	kWh	kW	Thrm	Skill Level required Low/Med/High	Info on Website	Point of Sale	Trade Pro Install
Low Flow Pre-Rinse Spray Valve	•							✓	Low	Yes	Yes	Yes
Door Closers	•					✓	✓		Low	Yes	No	Yes
Anti-Sweat Heat controls	•					✓			Med	Yes	No	Yes
ECM Motors	•					✓	✓		Med	Yes	No	Yes
Refrigeration Night Covers	•					✓			Med	Yes	No	Yes
Vending Machine Controllers	•	•	•	•	•	✓			Low	Yes	No	Yes
VFD's for Process motors				•	•	✓			High	Yes	No	Yes
LED Troffer Replacements	•	•	•	•	•	✓	✓		Med	Yes	No	Yes
Low Wattage T8	•	•	•	•	•	✓	✓		Low	Yes	No	Yes
Screw-in LED replacement lamps	•	•	•	•		✓	✓		Low	No	Yes	No
Down light Retrofit Kits	•	•	•	•		✓	✓		Low	Yes	No	Yes
LED Exterior Lighting	•	•	•	•	•	✓			Med	Yes	No	Yes
LED High & Low-Bay	•		•	•	•	✓	✓		Med	Yes	No	Yes
DI or 3P												
Future or pending products not yet in market (subject to change)												
LED CFL lamp replacements	•	•	•			✓	✓		Low	TBD	TBD	TBD
LED Linear Fixtures	•		•	•	•	✓	✓		Med	TBD	TBD	TBD
ADR w/ Enabling Technology	•	•	•	•	•	✓			High	No	No	Q1 2017
Smart Thermostats	•	•	•	•	•	✓		✓	Med	TBD	TBD	TBD
Adaptive Refrigeration Control	•					✓			High	No	No	TBD
Comm Dishwasher (available!)								✓	Med	Q1 2017	TBD	Q1 2017
Pool Pumps						✓	✓		High	TBD	TBD	TBD
LED Pool Lights						✓			High	TBD	TBD	TBD
Domestic Hot Water Recirc Pumps						✓		✓	Med	TBD	TBD	TBD
								✓	Med	TBD	TBD	TBD



Time of Use

Time of Use

Summary

- **Time-of-Use-Rate (TOU)**

- It is a variable rate that charges for energy depending on the time of day and season in which the energy is used. Bills are determined by both how much and when they use electricity
- Mandatory for all business customers

- **Peak Day Pricing (PDP)**

- An optional rate that offers businesses a discount on regular summer electricity rates in exchange for higher prices during Peak Pricing Events, like the hottest day of summer

- **To keep in mind:**

- Peak Day Pricing is **not** available for businesses with less than 12 mo of billing history
- Eligible customers are placed on Peak Day Pricing by default unless they opt-out
- Both TOU and PDP are mandated by the California Public Utilities Commission

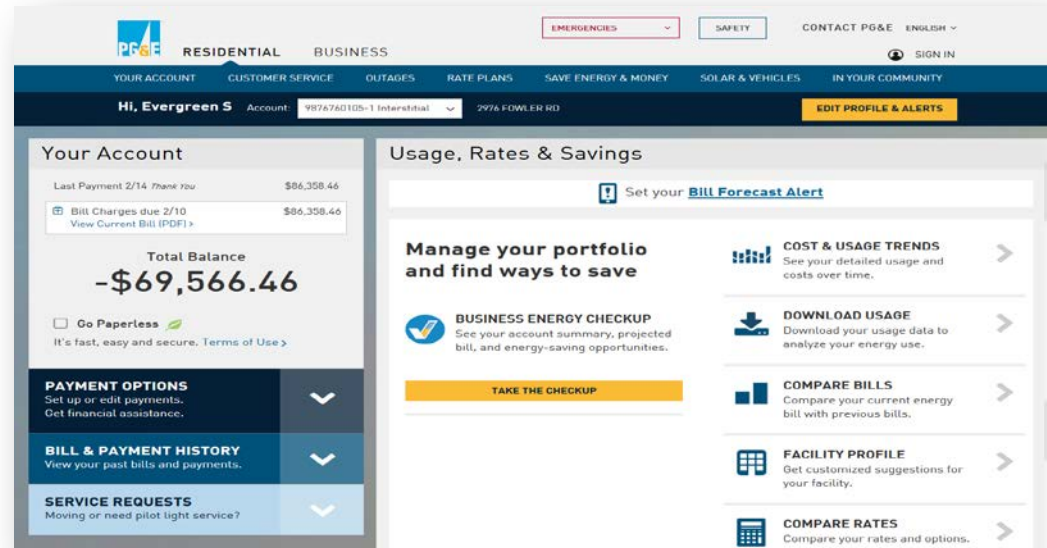


Your Account

YourAccount

Summary: Talking to a customer that has **NOT** already enrolled

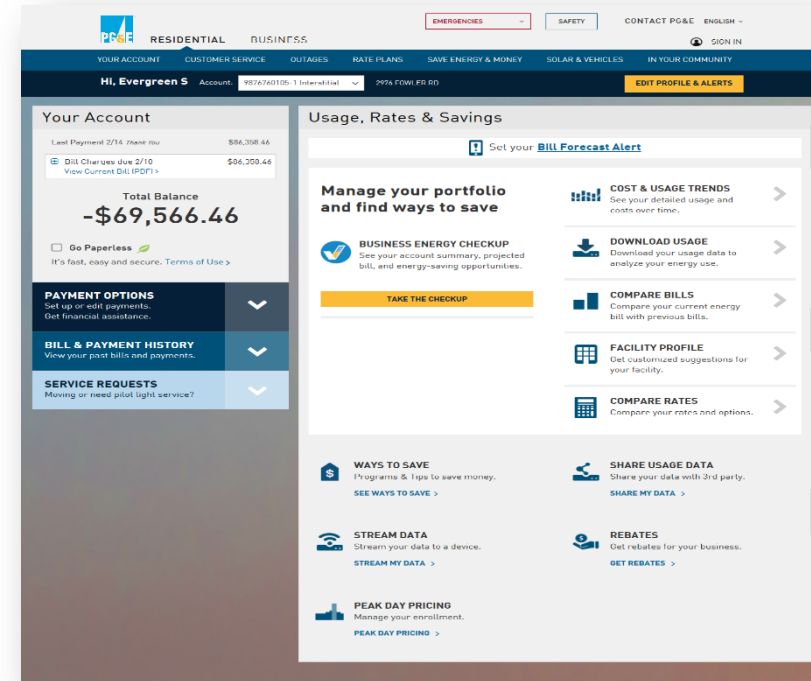
- Do you know that you can view and pay your bills online?
- *"PGE.COM allows you to view up to 24 months worth of your bills. You can also make one-time payments and enroll in monthly recurring payments."*



YourAccount

Summary: Talking to a customer that has **NOT** already enrolled

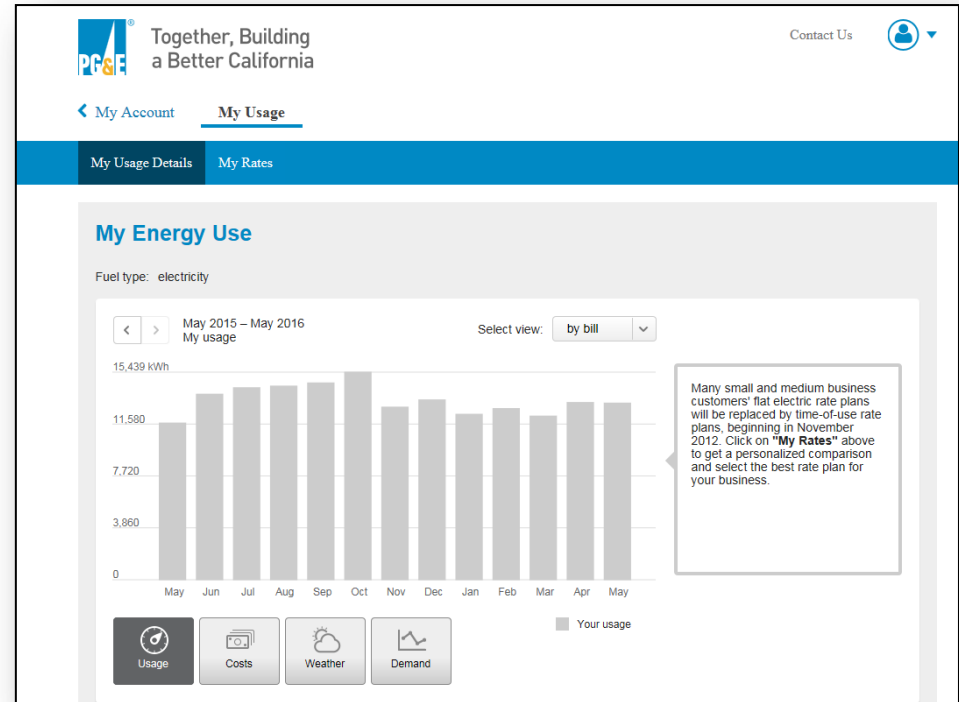
- Do you know that you can sign up to receive notifications about outages and reminders about things such as: payment due dates, outages and service appointments?
 - *"This can be very useful in helping you to make smart business decisions, in the event of an outage. I can show you how to do that now if that is okay?"*



YourAccount

Summary: Talking to a customer that **HAS** already enrolled

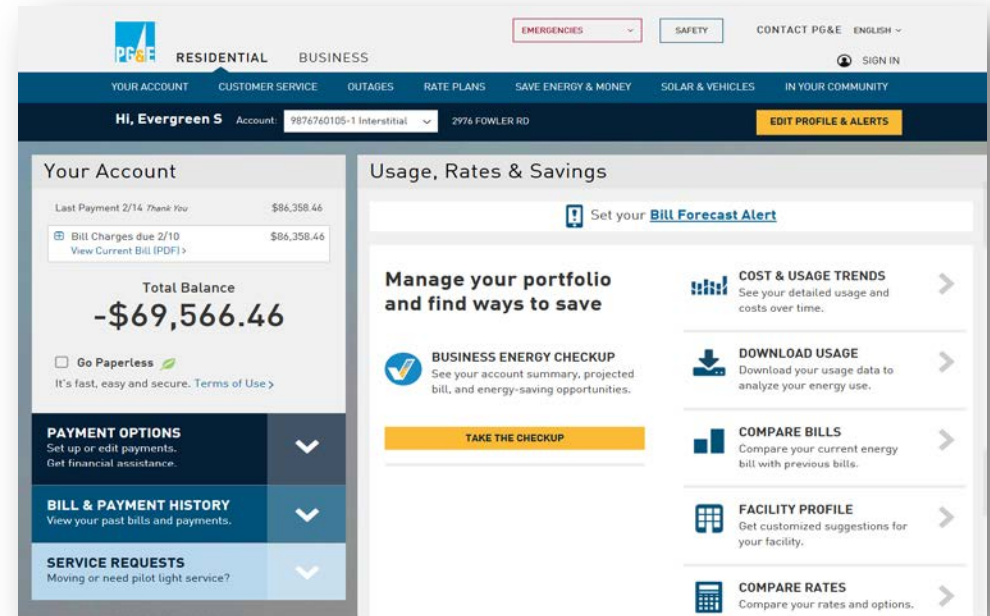
- Do you know that you can view and download your monthly, daily and hourly usage at PGE.COM?
- *"PGE.COM provides easy-to-read graphs that allow you to understand exactly when you are consuming your energy and how much."*



YourAccount

Summary: Talking to a customer that **HAS** already enrolled

- Have you ever taken a look to see if you are on the most optimal rate for your usage patterns?
 - *"PGE.COM uses your last 9-12 months of data to calculate your optimal commercial rate. It will even tell you the approximate annual cost for each rate."*





eRebates

eRebates

Summary:

- How would you help a customer who would like help with rebates?

- **Option 1: Self-service (preferred)**

- Refer to the Micro-Product list
- Go onto the PG&E website under "save energy and money"

A. Fill out and submit a rebate form

B. Find a local TradePro

Segment/Technology	Rebate Program	Eligible	Rebate	Customer Eligibility	Installation Requirements	Energy Savings	Water	Thermal	Indoor Air Quality	Indoor Water	Point of Sale	Trade Pro Install
Low Power Pro-Rate Energy Vision	•					✓	✓	✓	✓	✓	✓	✓
Green Systems	•					✓	✓	✓	✓	✓	✓	✓
Green Energy Best Controls	•					✓	✓	✓	✓	✓	✓	✓
LED Modules	•					✓	✓	✓	✓	✓	✓	✓
Refrigeration Right Controls	•					✓	✓	✓	✓	✓	✓	✓
Refrigeration Module Controls	•					✓	✓	✓	✓	✓	✓	✓
LED for Process modules	•					✓	✓	✓	✓	✓	✓	✓
LED Transfer Replacements	•					✓	✓	✓	✓	✓	✓	✓
Green Storage 10	•					✓	✓	✓	✓	✓	✓	✓
Green LED replacement lamps	•					✓	✓	✓	✓	✓	✓	✓
Green Light Controls 10	•					✓	✓	✓	✓	✓	✓	✓
LED Emergency Lighting	•					✓	✓	✓	✓	✓	✓	✓
LED High & Low Bay	•					✓	✓	✓	✓	✓	✓	✓
Other programs												
LED CFL replacement	•					✓	✓	✓	✓	✓	✓	✓
LED Linear Fixtures	•					✓	✓	✓	✓	✓	✓	✓
LED and Lighting Technology	•					✓	✓	✓	✓	✓	✓	✓
Refrigeration Controls	•					✓	✓	✓	✓	✓	✓	✓
Refrigeration Refrigeration Controls	•					✓	✓	✓	✓	✓	✓	✓
Green (Electronics) Replacements	•					✓	✓	✓	✓	✓	✓	✓
Green CFLs	•					✓	✓	✓	✓	✓	✓	✓
LED Fluorescent	•					✓	✓	✓	✓	✓	✓	✓
LED Fluorescent, High Voltage, Energy Efficient	•					✓	✓	✓	✓	✓	✓	✓

- **Option 2: Call the BCSC**

- The BCSC will generate a lead for someone to help them. Try to avoid referring them to the BCSC number unless needed.

Got more questions?

Let's do eet!

NET IMPACT 

Thank you.

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