



MASSACHUSETTS
**DEPARTMENT OF
ENERGY RESOURCES**

Marketing, Education, and Outreach

Expert Presentation Series | August 4, 2025

This expert level presentation series session will provide the Massachusetts Electric Rate Task Force an opportunity to learn from experts and/or other jurisdictions on the above topic.

Note: The contents of this presentation do not necessarily reflect the views or positions of the Massachusetts Department of Energy Resources.

Contact Information

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Massachusetts Electric Rate Task Force Goals

The Rate Task Force brings together diverse stakeholders to reimagine how electric rates and the regulatory framework can drive an affordable, equitable, and decarbonized energy future.

Through targeted conversations, expert presentations, and thoughtful exploration of complex issues, the Task Force aims to deepen understanding, surface critical questions, clarify challenges, and build the foundation for durable regulatory reform and action.

The Rate Task Force will use the Massachusetts Interagency Rates Working Group's Long-Term Ratemaking Study and Recommendations as a starting point for discussion and knowledge building on rate designs, ratemaking, and regulatory mechanisms.

Build technical knowledge

Provide an opportunity for **knowledge-building** by and amongst stakeholders, including those who have not traditionally been involved



Develop shared understanding

Converge towards **shared understandings** of the challenges and priorities



Facilitate open, inclusive dialogue

Engage in **open, inclusive dialogue** about complex ratemaking and regulatory issues outside of a regulatory proceeding



Frame critical questions and opportunities

Empower stakeholders to identify **critical questions and opportunities** for the advancement of rate design and ratemaking reform



Today's Focus

Ground Rules & Engagement

This work is complex – and your insight matters; let's focus on learning, listening, and shaping together!

Participation, Engagement, & Respect

- Everyone's perspective is valuable – this space works best when all voices are heard
- Respect differences in background, experience, and priorities
- Bring curiosity – ask questions and offer potential answers
- Focus on understanding others' goals and values, not just their positions
- It's okay not to have a solution – help us shape the right questions

Collaboration, Not Consensus

- This body is deliberative, it is not a decision-making space
- We don't need to agree on everything, but we should work toward shared understanding
- Where we disagree, help clarify what the tension is and why it matters

Transparency & Trust

- We'll be clear about how input is used
- Share what you can; identify when you're speaking on behalf of your organization or personally
- Materials, summaries, and key findings will be shared openly to support accountability

Focus & Productivity

- Stay on topic and honor the scope of the Task Force
- Raise related concerns, but help us stay anchored in the rate design and regulatory issues at hand
- Use the structures provided (i.e., expert sessions, targeted conversations, office hours) to deepen discussion
- Avoid discussion about open and ongoing proceedings at the DPU



Expert Presentations

I. Marketing, Education, & Outreach (MEO)

Hawks Peak Strategies, Dr. Courtney Henderson

Present on the opportunities to leverage MEO to better serve customers and the IRWG near- and long-term recommendations

II. Missouri's Time of Use (TOU) Experience

Missouri Office of the Public Counsel, Geoff Marke, PhD

Present on the roll-out of TOU in Missouri, the opportunity of TOU rates, and lessons learned.

III. MEO for Time-Varying Rate (TVR) Programs – Best Practices Across U.S.

GridX, Michael Pirro

Present on best practices and common challenges in implementing TVR, in addition to a case study of customer experience and education

IV. Dynamic Rates Engagement

Oracle, Samantha Caputo

Present on leveraging AMI for customer engagement and empowerment through the deployment of dynamic rates, in addition to a case study of a utility deployment

V. Embedded Intelligence in the Electric Grid

Sense, Mike Phillips

Present on the opportunities of edge computing and real-time applications for customer engagement and home/grid optimization

Reminder

Expert presentation sessions are not for substantive deliberation amongst participants. Questions for each speaker will be taken as time allows.



Marketing, Education, & Outreach

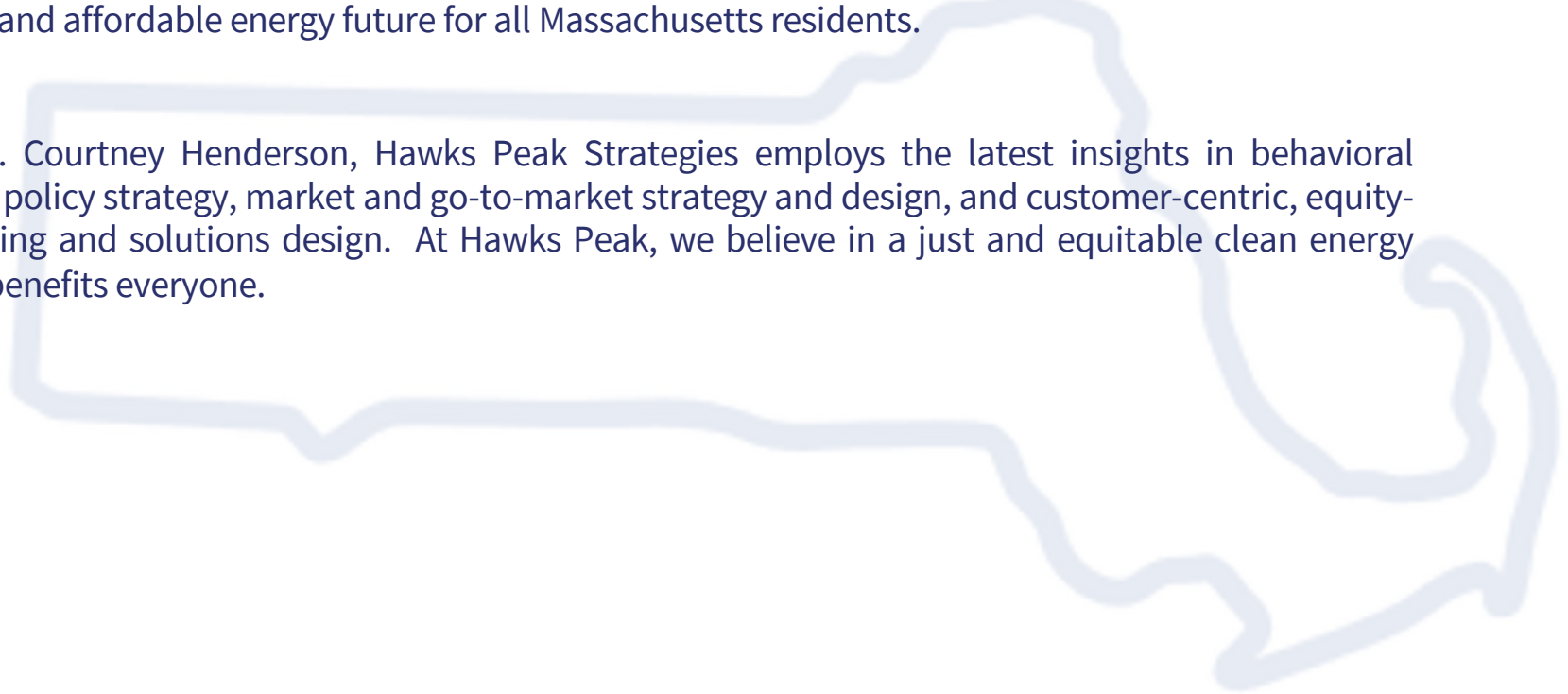
Dr. Courtney Henderson

Founder & President, Hawks Peak Strategies
Council Member & Former Mayor

Thank You!

I appreciate the opportunity to present on marketing, education, and outreach (MEO) to the Massachusetts Interagency Rates Working Group stakeholders. I also want to thank everyone who is working tirelessly for a clean, resilient, and affordable energy future for all Massachusetts residents.

Founded by Dr. Courtney Henderson, Hawks Peak Strategies employs the latest insights in behavioral science to drive policy strategy, market and go-to-market strategy and design, and customer-centric, equity-focused marketing and solutions design. At Hawks Peak, we believe in a just and equitable clean energy transition that benefits everyone.



Agenda



The Opportunity

Recommendations & Rationale

Additional Opportunities

Closing Thoughts



The Opportunity



**We communicate with
our customers every
day.**

Ease, convenience, and simplicity are crucial for frictionless customer experiences and driving desired consumer behaviors through MEO.

We must use **meaningful, easily understood, accessible, and motivating** communications that grab our customers' attention.

Why It Matters



Understand
consumers' lived
experiences



Communicate
with consumers
in the ways they
communicate

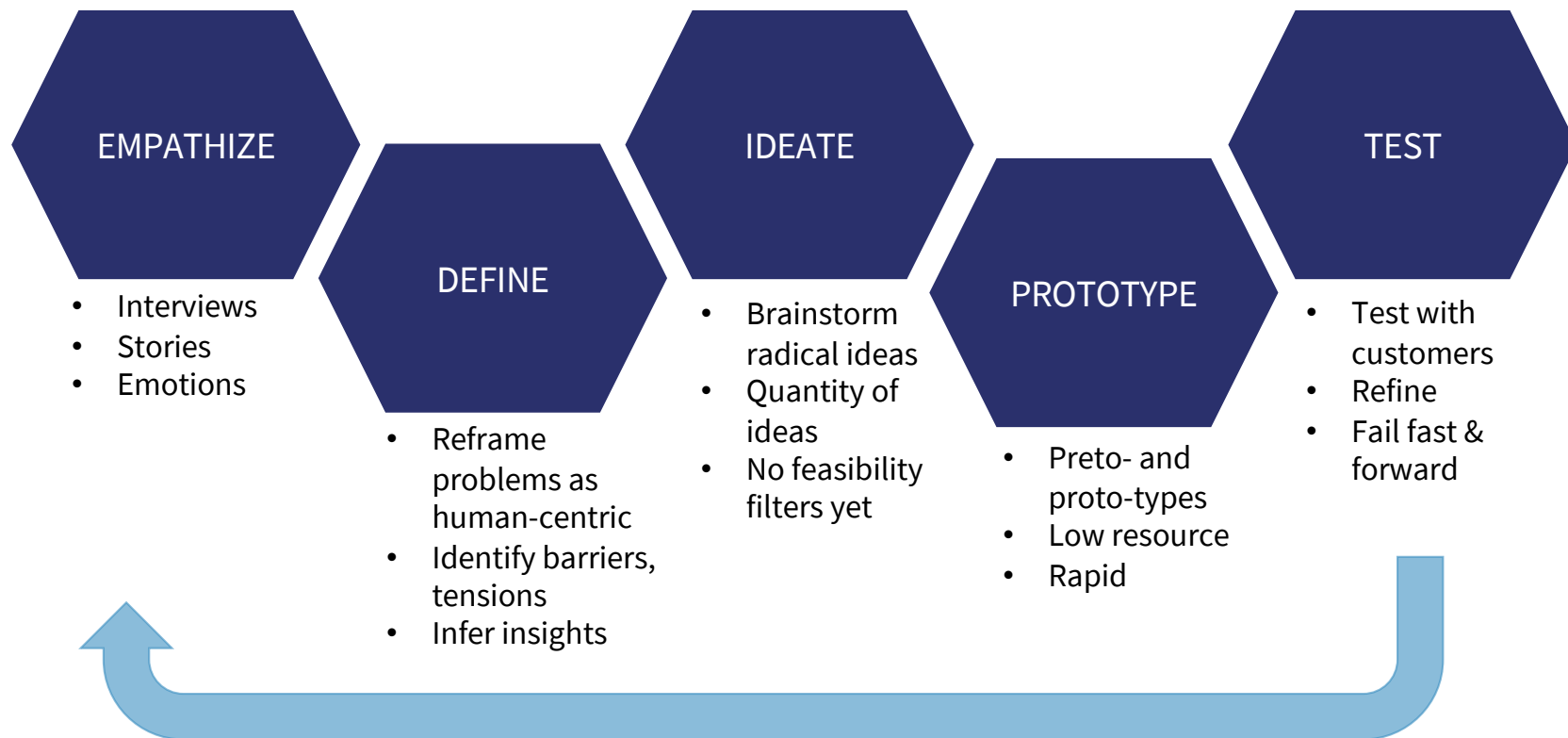


Drive
participation,
enrollment,
satisfaction, &
trust



Risk wasting
valuable
resources

We can leverage **human-centered design** to create, implement, and put MEO into market. It is an iterative cycle.



**Can customers be served
better by MEO?**



YES!



Recommendations

The IRWG's short- and long-term MEO recommendations focus on enhancing customer-centricity.

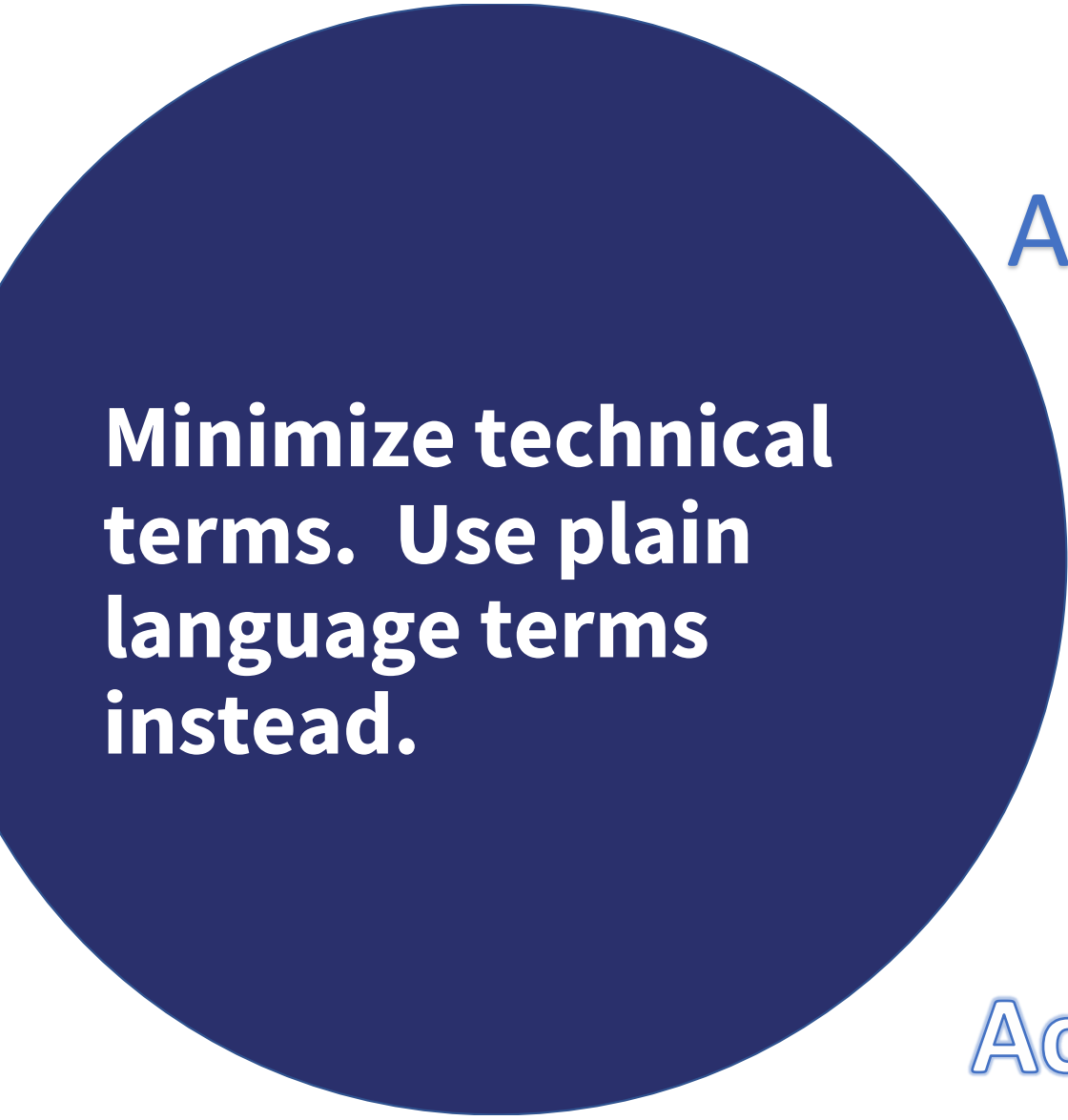
- Minimize technical terms
- Use plain-language terms (5th grade reading level)
- Provide a single point of contact for all (or several) programs, rebates, etc.
- Reduce & simplify documentation and verification requirements
- Ensure customers can easily reach knowledgeable utility staff (CSRs, website)
- Recognize & respond to language needs for limited English customers
- Meet customers where they are
- Use language that resonates (multi-cultural)
- Recognize that different communities have different barriers & motivations
- Use a variety of outreach channels
- Ensure collaboration & partnerships with community-based organizations & community members
- Target individual households based on needs & risks (as AMI is implemented)



**Start with an MEO
plan.**

This is a good way to gain buy-in amongst diverse stakeholders & helps ensure an implementable plan that is:

- Customer-centric
- Cost-effective
- Strategic
- Targeted



Minimize technical terms. Use plain language terms instead.

Arrears forgiveness

Means-tested
programs

Arrearage
management

Acronyms



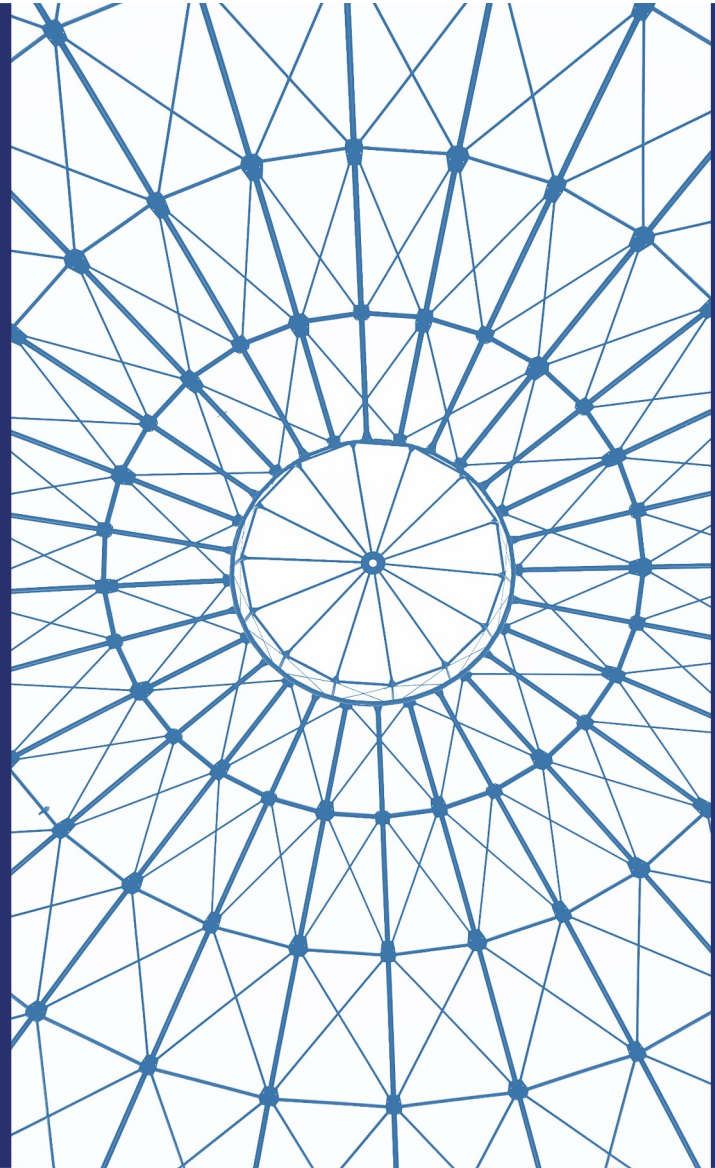
Replace with terms customers easily understand.

- “You may be able to get payment assistance.”
- “You may qualify for help with your bill.”

Want to save money? Could you use a discount?

If you meet certain criteria, you may be eligible for a discount on your electric rate and/or arrears forgiveness — here's how.

**Customers often
do not perceive
energy solutions
as discrete
offerings.**





**Streamline
affordability offerings
by providing a single
point of contact.**

- Work toward consistency in requirements
- Streamline applications
- Develop data-sharing agreements between utility & state programs
- Develop one-stop shop



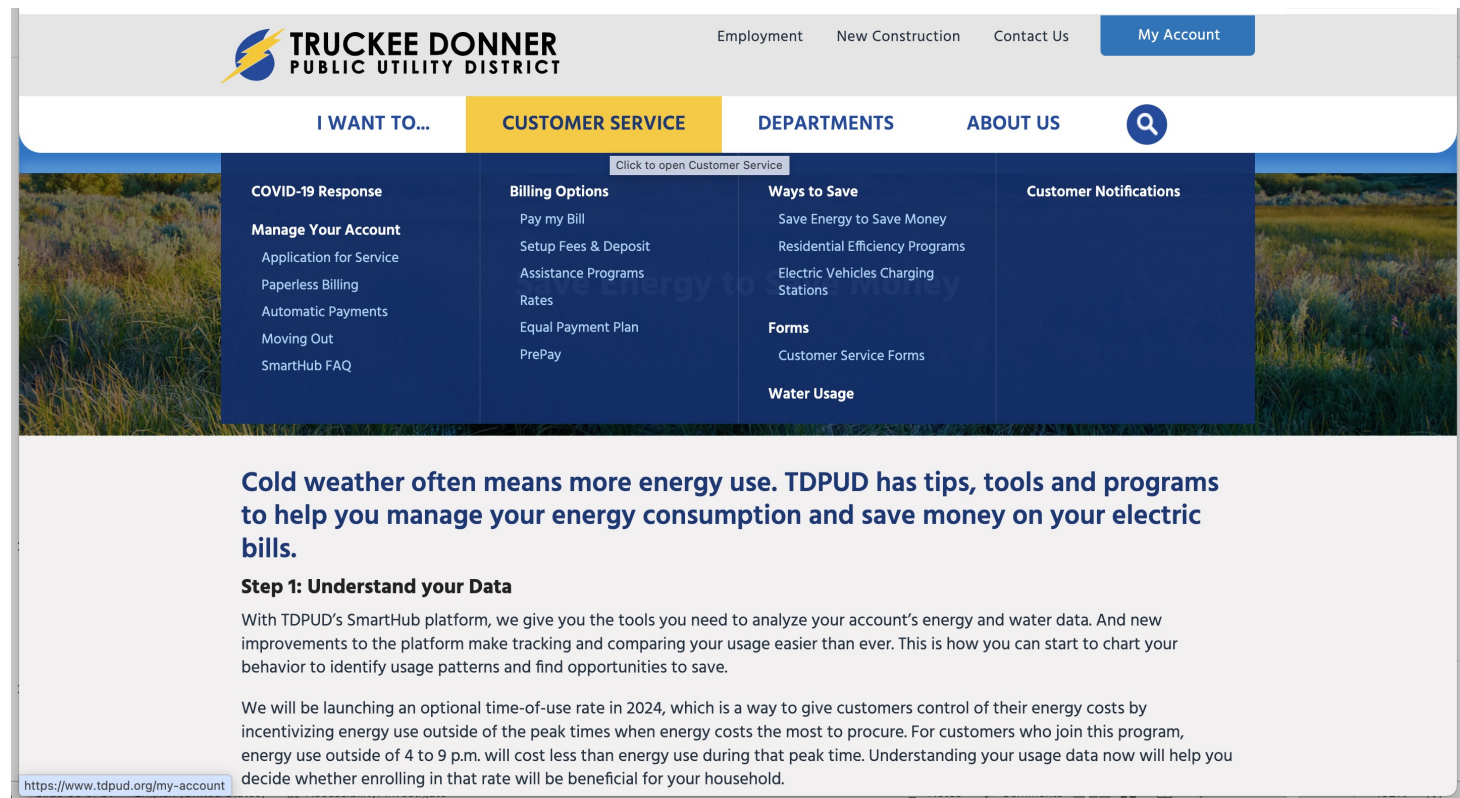
Ensure customers can easily reach knowledgeable utility staff.

- Accessibility build trusts
- Ensure consumers have the resources they need, when they need them
- For websites, consider navigability & wayfinding; navigating across providers
 - Is the program path easily identifiable for consumers?
 - Is it buried in multiple drop-down menus?
 - Is it clear which options are available to owners, renters, etc.?

How easy is your website for customers?

Have you tested it for usability?

- Do customers know where to look for what they need?
- How easily navigable is your site?
- How many drop-downs and/or click-throughs must a customer navigate?
- How far down do customers have to scroll?





**Recognize & respond to
diverse language
needs. Use language
that resonates.**

- Spanish, Portuguese, Mandarin – all spoken in MA
- Language must be:
 - Clear
 - Precise
 - Unambiguous
 - In the appropriate language
 - Attention-grabbing

Enhancing Customer-Centricity

Several opportunities.

Not customer-centric: "While PJM is not projecting generation capacity shortages that would limit customer usage..."

Specificity: no time frame on when customers should reduce their energy use.

Call to action: this contains multiple calls to action. Most consumers can only process 1-2 CTAs in a comms piece.

Other CTA considerations: placement, visibility, specificity, links to other sites.

WINTER WEATHER AHEAD



Prepare Now for Winter Weather & Extreme Cold

PJM, the organization responsible for managing the electric transmission grid in 13 states including Ohio, and the District of Columbia, has issued a [cold weather alert](#) ahead of forecasted frigid temperatures across several states. While PJM is not projecting generation capacity shortages that would limit customer usage, we always encourage customers to use energy wisely.

Our crews are ready to go to restore power if needed. We want you to be ready too:

- Stay tuned to your [local forecast](#) for weather updates.
- Assemble or refresh an [emergency kit](#).
- Protect yourself from fire hazards and [heat your home safely](#).
- Consider [these tips](#) to save energy and money.
- Get the latest information by signing up for [text alerts](#), downloading our [mobile app](#) and

Meet customers where they are. Use a variety of outreach channels.





Ensure collaboration & partnerships with CBOs and community members.

Equitable community engagement requires:

- Developing community-based stakeholder groups with representation from diverse stakeholders
- Ensuring communities have a voice in design
- Sharing outcomes with communities
- Hiring & providing incentives



**Leverage data
analytics, targeting, &
situational messaging.**

“If you’re falling behind on your bills...”

“If you need help, here is a program for you...”

“We see you’re behind on your bills, this program can help you.”

Can we use AMI data before full deployment?

YES!

This is a great opportunity to innovate our MEO efforts, and to target & test MEO.

The background of the slide features a light blue, semi-transparent image of a natural landscape. The top portion shows the dense canopy of a large tree against a bright sky. The bottom portion shows a rocky, uneven terrain with sparse, dry-looking vegetation. A solid dark blue horizontal band spans the width of the slide, serving as a backdrop for the title text.

Additional Opportunities

Consider:

- **Imagery & the power of pictures:** don't use stock imagery, text-based social media posts, & “executive speak” in videos.
- **Calls to Action:** noticeable, meaningful, & specific. Consider language, placement, context, tone, prioritization.
- **Wayfinding:** across channels & communications.

How do we ensure our MEO hits the mark?

We must test it! We can do this efficiently and expediently!

- Interviews, focus groups
- Message testing (qual, quant)
- Including consumer voices in utility proceedings, rate cases, & program design
- Iterating on communications



**Work with your customers,
not against them.**



Closing Thoughts

- Customer-centricity can be applied to all that we do in MEO & solution design.
- Embrace discomfort.
- Don't fail. Learn.



A woman with long brown hair, smiling, is seated in a black leather office chair. She is wearing a dark blue zip-up jacket. Behind her, there is a wooden plaque with a mountain scene and the text "Incorporated 1993". To the left is an American flag, and to the right is a California state flag and a blue and white flag. A desk with a blue folder is visible in the foreground.

Get in Touch!

Courtney Henderson

Founder & President, Hawks Peak Strategies
Council Member & Former Mayor, Truckee CA

Courtney@hawks-peak.com

Bio

Dr. Courtney Henderson is an energy, climate, and health strategist with 20 years of experience in those sectors, as well as the Founder and President of Hawks Peak Strategies, a strategy and consulting firm that provides market strategy, branding and go-to-market services, customer-centric research, policy and regulatory solutioning, and thought leadership in the utility and clean energy sectors. Her work has taken her throughout the United States and as far afield as Western Africa and Northern India. She has extensive experience helping utility companies and consumer advocacy organizations achieve their energy and customer goals to move toward a cleaner, more equitable energy future, and in public health, supporting organizations in the development of health research infrastructure and improving the provision of healthcare.

Dr. Henderson brings a unique lens to the energy landscape, in that she is also an elected official. In 2020, she was elected to the Truckee Town Council, immediately nominated to Vice Mayor, and subsequently, to Mayor. She is re-running for election this year, and serves on multiple committees, including the Legislative Correspondence Committee, League of California Cities, Truckee Chamber of Commerce, Nevada County Economic Resources Council, Sierra Business Council's Climate Action and Mitigation Partnership, and boards of local non-profits working on climate solutions.

She holds a Bachelor of Science from Cornell University, Master of Public Health from Brown University, and Doctorate in Public Health from the University of California, Berkeley. Courtney lives in Truckee, California where she is also a pro-level mountain bike racer, all-around adventure seeker, and mom to a thrill-seeking eight-year-old boy.

LinkedIn: <https://www.linkedin.com/in/courtney-henderson-539a29a/>

Peaks and Valleys: Missouri's Time of Use Experience



Geoff Marke, PhD
Chief Economist

Missouri Office of the Public Counsel

Geoff.marke@opc.mo.gov

8/4/25

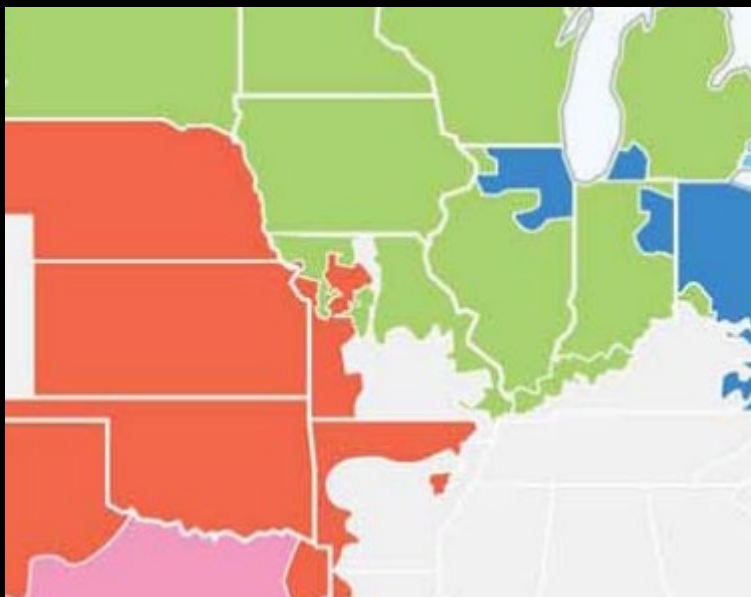
About your speaker

Geoff Marke, PhD

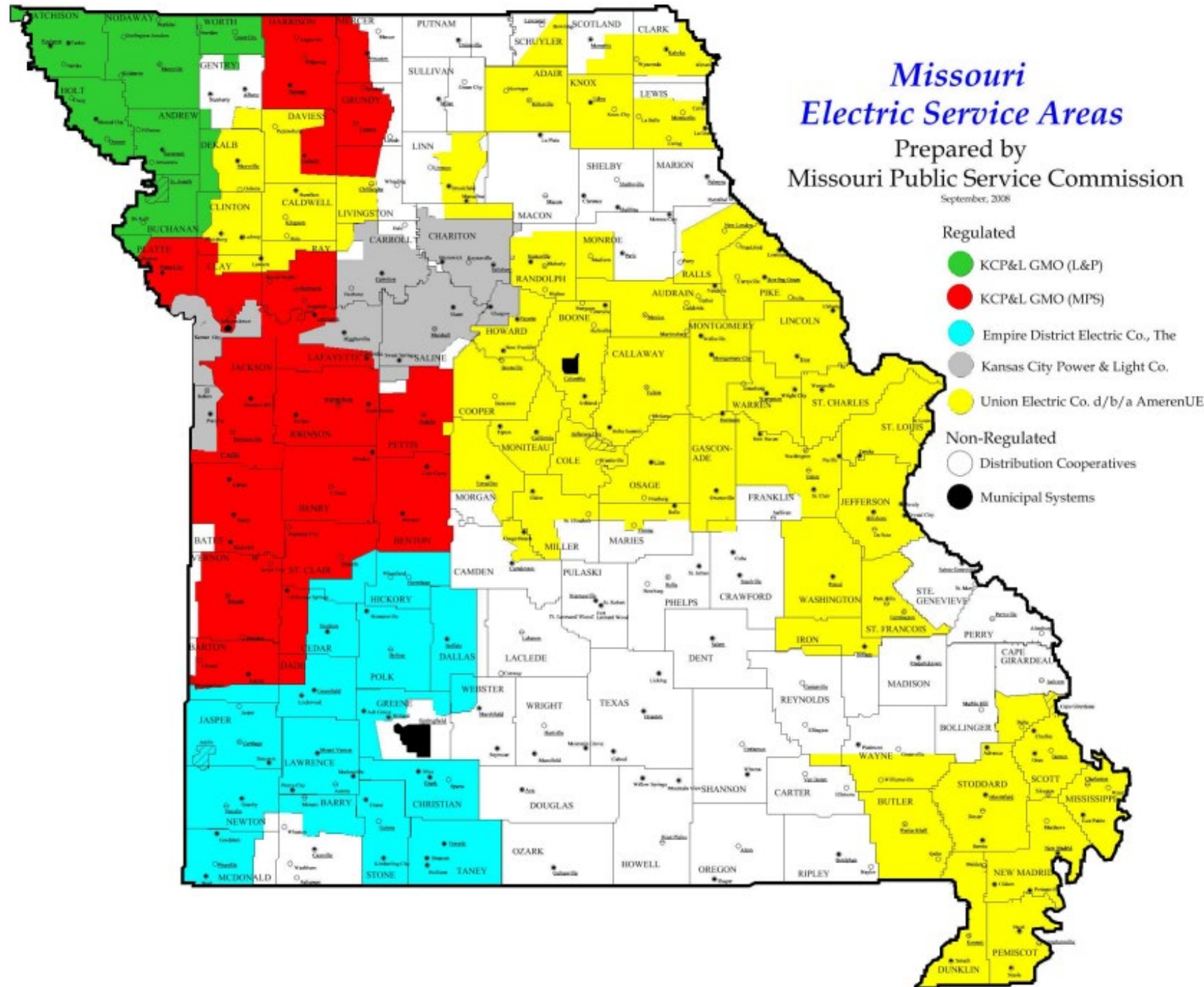
Chief Economist, Missouri Office of the Public Counsel
("OPC")

- Consumer Advocate Office for ratepayers in:
 - Vertically Integrated Electric, Natural Gas, Water, and Sewer cases before the Missouri Public Service Commission
- **Obligatory Disclaimer:**
 - The comments and work product are my own and do not necessarily reflect any position of the Missouri OPC.

Missouri The “Show-Me” State



Red = SPP
Green = MISO
Grey = Co-Ops



- *“The fact is, if you don’t find it reasonable that prices should reflect relative scarcity, then fundamentally you don’t accept the market economy, because this is about as close to the essence of the market as you can find.”*

Joseph Heath,
Economics without Illusions

A little background on the TOU roll-out in Missouri

(2021-2023)

2021-2022 electric rate cases (residential TOU opt-out differentials)

- Ameren Missouri = training wheel approach 2-cent differential
- Liberty Missouri = training wheel approach 2-cent differential
- Evergy Missouri Metro/West = originally ordered rates 9 cents (off-peak) 38 cents (on-peak 4-8 pm weekdays)
- That is a 322% increase

Wait, what?

How did that happen?

15 ratepayer-paid 3rd party studies

¹² The third-party studies that OPC is aware of include the following (which does not include the many 3rd-party customer surveys Evergy has charged to ratepayers):

1. Electric Power Research Institute (EPRI)-Matching Electric Service Plans to KCP&L's Strategic Objectives (EPRI-ESP)—EPRI Supplemental Research Project, 2012-2014;
2. KCP&L SmartGrid Residential Time-of-Use Pilot (SGDP-TOU) – a component of the KCP&L Division of Energy SmartGrid Demonstration Project, 2010-2015;
3. EPRI-KCP&L Residential Time-of-Use Impact Study (EPRI-TOU) – EPRI Smart Grid Demonstration Project Analysis, 2010-2015;
4. EPRI-Measuring Customer Preferences for Alternative Electricity Service Plans (EPRI-ESP) – EPRI Supplemental Research Project, 2014-2015;
5. KCP&L 2016 Demand Side Management (DSM) Potential Study (DSM-TOU) –Applied Energy Group, 2016-2017;
6. BMcD-KCP&L and GMO Residential Rate Design Strategy Study (BMcD-TOU)-Burns & McDonnell Engineering Company, 2017
7. KCP&L Greater Missouri Operations Company Seasonal Rate Structure Study December 12, 2017 per Commission Report and Order in Case No. ER-2016-0156;
8. KCP&L Block Rate Study December 8, 2017 per Commission Report and Order in Case No. ER-2014-0370 and ER-2016-0156;
9. KCP&L Greater Missouri Operations Company Time of Use Rate Study Project No. 97119 Final Report 12/13/2017 per Commission Report and Order in Case No. ER-2016-0156

Continued...

10. KCP&L 2020 Demand Side Management (DSM) Potential Study (DSM-TOU) –Applied Energy Group,
11. Evergy Missouri Metro & Evergy Missouri West: Time of Use Rate (TOU) Rate Design Case Report, June 15, 2021 Case No: EO-2021-0349 & EO-2021-0350;
12. Guidehouse Evaluation, Measurement and Verification (“EM&V”) of Evergy TOU Pilot December 31, 2021
13. Brattle: Transitioning to Default TOU: Observations from Other Jurisdictions March 28, 2023 in Case No. ET-2023-0290.
14. AEG: Evergy 2023 DSM Market Potential Study see pages 31-36 in Case No. EO-2023-0212
15. Oracle: Evergy TOU Rate Change Analysis July 2023. Results presented August 10, 2023 at MO PSC Agenda. Actual study obtained through discovery in Case No. ET-2023-0290.

- Installation started in 2010
- Historical investment: \$268,487,600
- Was seeking recovery for 2nd generation AMI meters
- Company did not follow Commission directives

**How do you implement a
21-cent differential rate
design?**

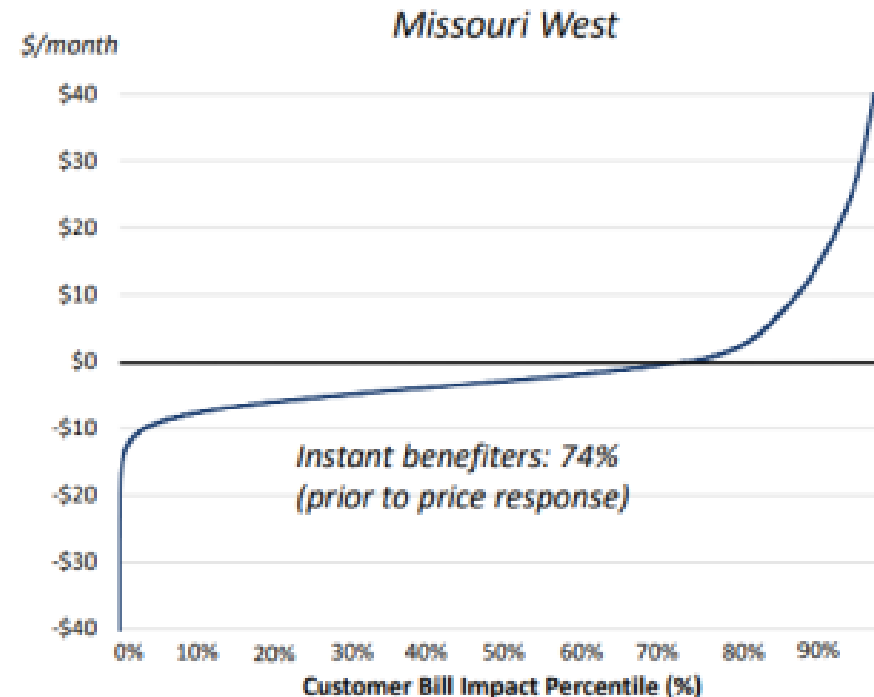
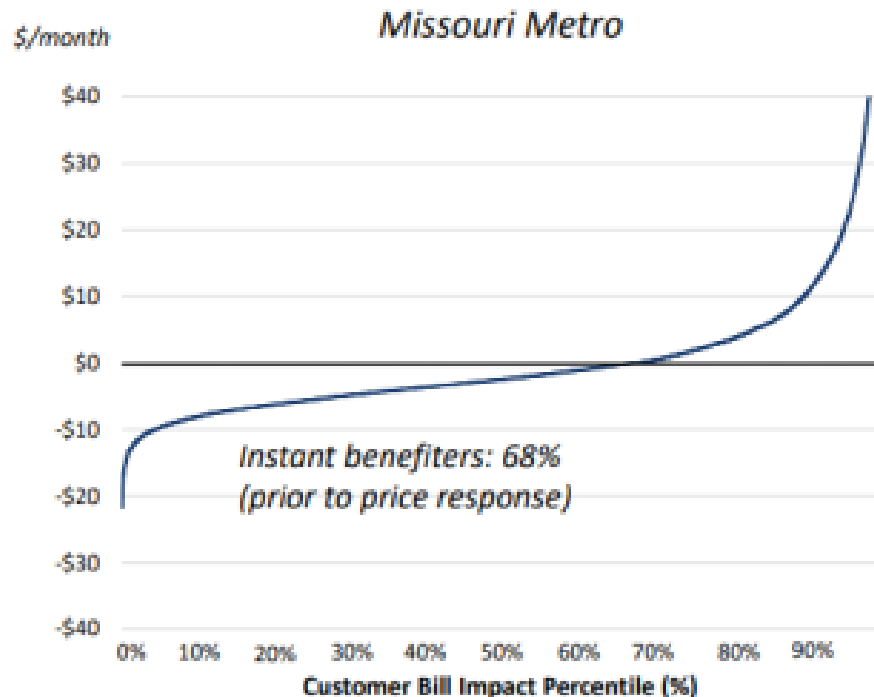
The Brattle Study:

Figure 1: Distribution of Bill Impacts¹⁷

Distribution of bill impacts

68% to 74% of customers are instant benefitters on the 2-period TOU, but around 10% could experience an average bill increase of at least \$10/month.

Average Bill Change from Standard Non-TOU Rate to Default 2-Period TOU Rate



Study #2: Oracle

- The Oracle study updated the estimated number of “winners” to encompass 89% of Evergy Metro and 91% of Evergy West customers on an annual basis. Those numbers were further broken down as follows:
 - 53% Metro and 56% West would see little change in annual bill
 - 26% and 25% would see moderate savings (5 to 10% annually)
 - 10% of customers would see significant savings (10%+ annually)
 - “losers” were largely space-heating customers on previously “frozen” promotional rates
- Importantly, these results assumed no behavioral modification

**What about deferred
investments?**

Figure 4: Evergy Metro TOU Summer Potential for Evergy Metro^{19,20}

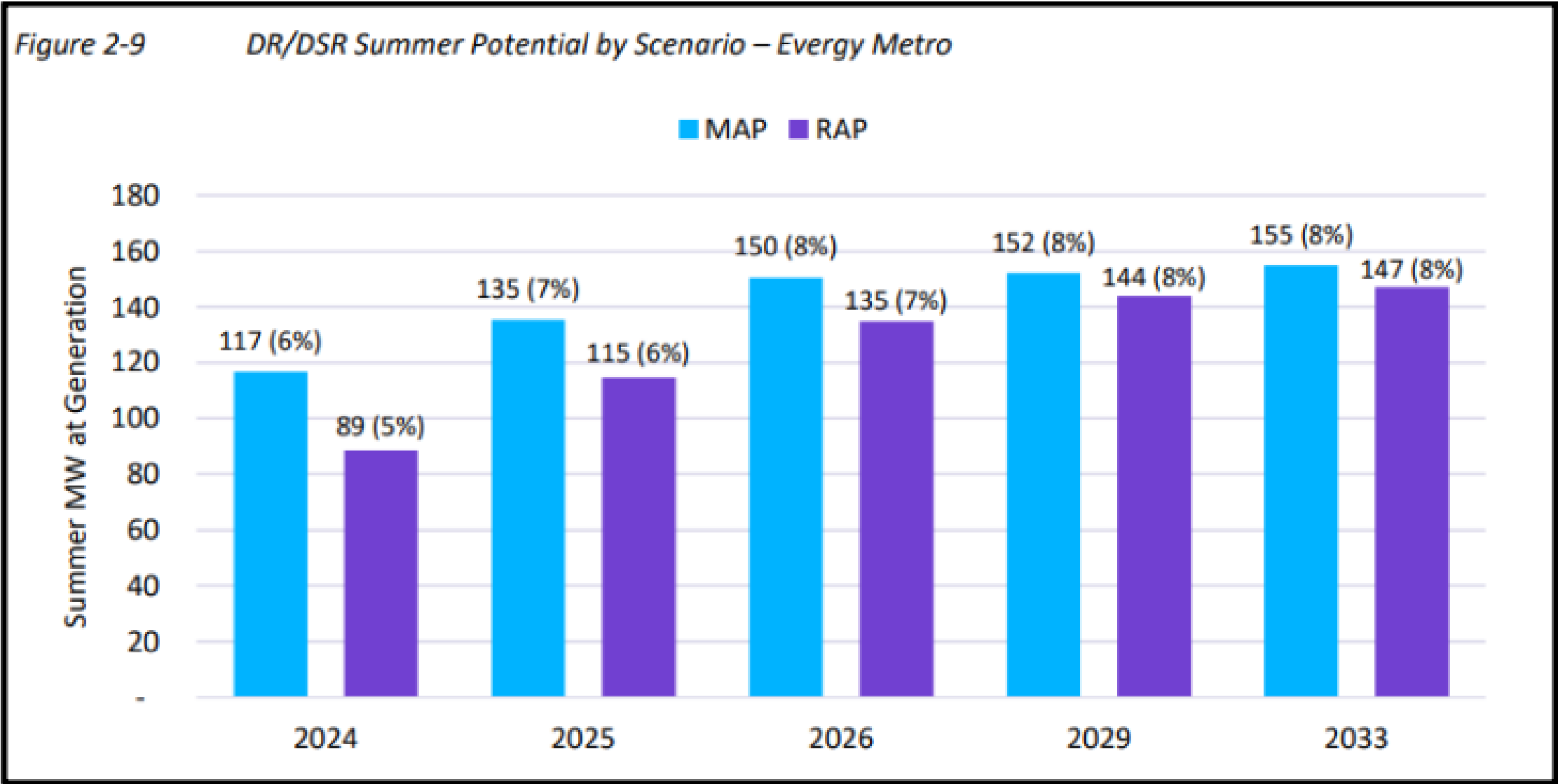
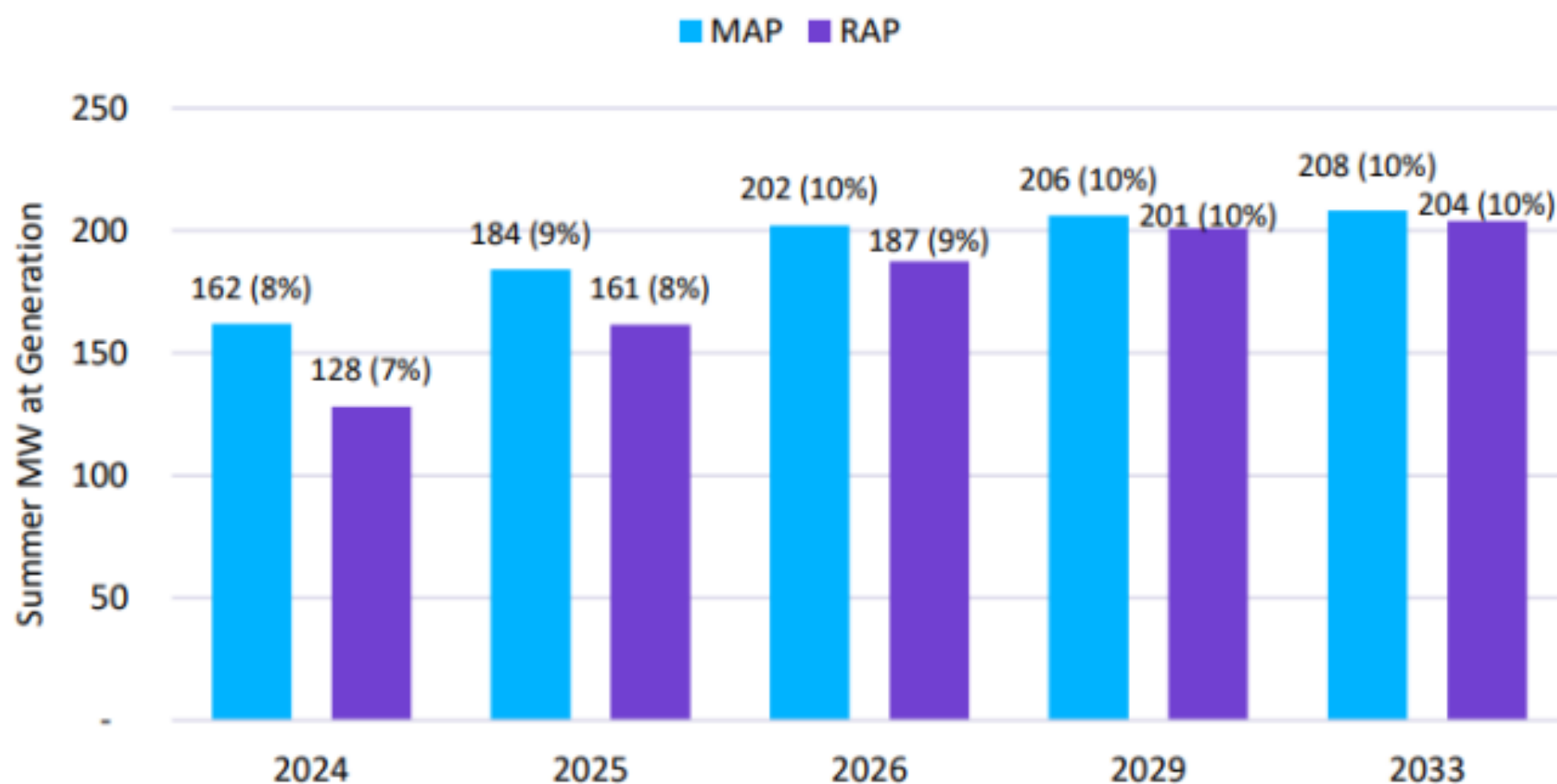


Figure 5: Evergy West TOU Summer Potential for Every West²¹

Figure 2-11 DR/DSR Summer Potential by Scenario – Evergy West

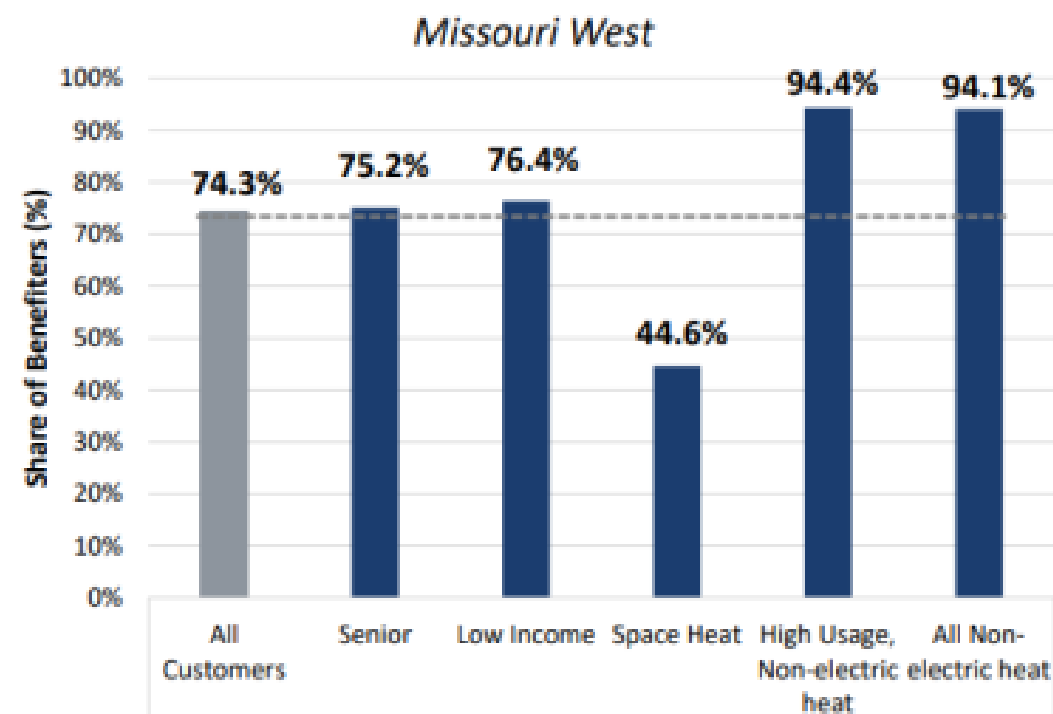
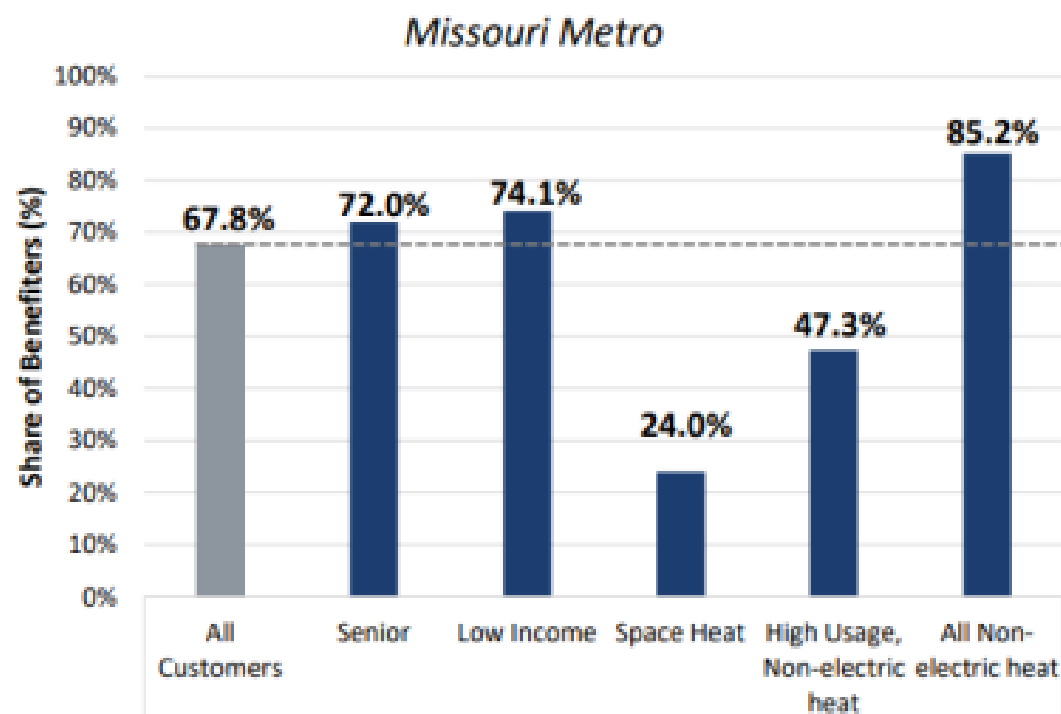


What about “X” customers?

Default TOU bill impacts by customer segment

Senior and low income customers are more likely to benefit on the 2-period rate than other customers. Electric heating customers often experience bill increases on the new TOU rate.

Share of Customers Benefiting when Moving from Standard Non-TOU Rate to Default 2-Period TOU Rate



To recap:

- PAST
 - Sunk Costs: Ratepayers invested hundreds of millions of dollars with a return on.
 - Customers currently exposed to an increasingly volatile wholesale market
- PRESENT
 - 3 out of 4 customers save without any change in behavior
- FUTURE
 - Estimated peak shavings exceed 200MW (combined) in the first year

How did the roll-out go?

- *“The main difficulty with responsive pricing is likely to be not just mechanical or economic but political.”* (1971, on responsive pricing)

William Vickery, 1996 Nobel Prize winner in Economics

Winter is coming...



Ownership?



Online Tool Kit

Rate Education Reports

- On-the-record discussion:
- <https://www.youtube.com/watch?v=eqfM2Ngp5O4&t=2264s>

Rate Plan Options

Every person has different energy needs, which is why we offer flexible rate plan options to fit your lifestyle.

Look through our flexible rate plan options to help save money and align with your personal budget, lifestyle and energy usage. You can [view our bill definitions](#) as well if there are any terms you'd like more clarity on.



Default Time Based Plan

This plan has the lowest difference in price between peak hours and off-peak hours.

[Learn More](#)

Summer Peak Time Based Plan

Shift energy usage to off-peak times on weekdays in the summer to get off-peak prices.

[Learn More](#)

Nights & Weekends Plan

Pay a lower price for energy during year-round [off-peak times](#) and on weekends.

[Learn More](#)

Nights & Weekends Max Plan

Save on overnight EV charging on this whole-home plan with the lowest nighttime rates.

[Learn More](#)

EV Only

This plan is created specifically for electric vehicle (EV) drivers who want to save more. You get big discounts when you charge at home outside of high demand times (when electricity is more costly to produce).

[Learn More](#)

How did the press frame it?

[ENERGY + ENVIRONMENT](#)[GOVERNMENT + POLITICS](#)

Missouri utility regulators plan for peak pricing prompts pushback from top Republican

Senate Majority Leader O'Laughlin accuses PSC of pushing 'woke' policies that will gouge customers with top summer rates four times higher than off-peak costs

BY: **RUDI KELLER** - JULY 17, 2023 9:01 AM



- Time-of-use pricing “has nothing to do with wokeness has nothing to do with price gouging,” Rupp said. “It’s actually very free market consumer driven. Hey, here’s the price signals. The prices are super sky high because everybody’s cranking up their air conditioner all at the same time. And if you want to save money, you know you have this opportunity.”
- The opportunity, O’Laughlin said, is a chimera. There is one Evergy plan, called the “Nights & Weekends Max Saver” rate, where electricity used between midnight and 6 a.m. is less than 10% of the cost of energy used at peak times.
- That plan actually offers little to working people, O’Laughlin said.
- “Who in the hell is going to be up doing laundry from 12 a.m. to 6 a.m. and get up for work the next day?” O’Laughlin said. “G—d—n. And you can quote me on that.”



NPR in Kansas City



KCUR
Morning Edition

NEXT UP: 9:00 AM

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news

Peak electricity rates will nearly quadruple under default Evergy plans in Missouri

KCUR | By [Frank Morris](#)

Published June 30, 2023 at 5:08 PM CDT



Some Missouri Evergy customers, on the other hand, will see rates fluctuate dramatically. Under the default plan, customers will be charged 9 cents a kilowatt hour most of the time. But the rate vaults up to 38 cents between 4 p.m. and 8 p.m. on summer evenings. That's a 322% spike.

“That is a huge increase,” said Daniel Zimny-Schmitt at the National Renewable Energy Laboratory. “There’s no way around that.”

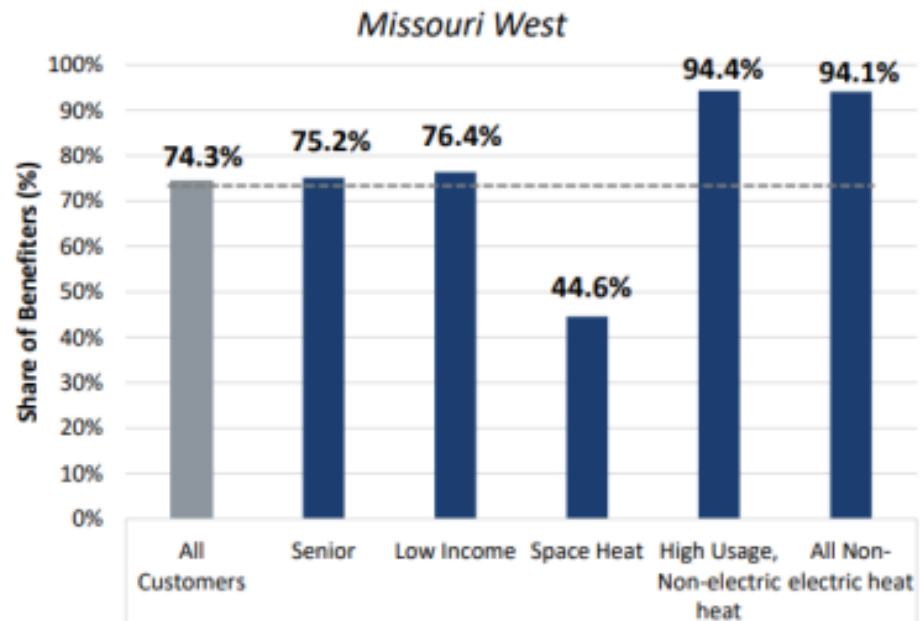
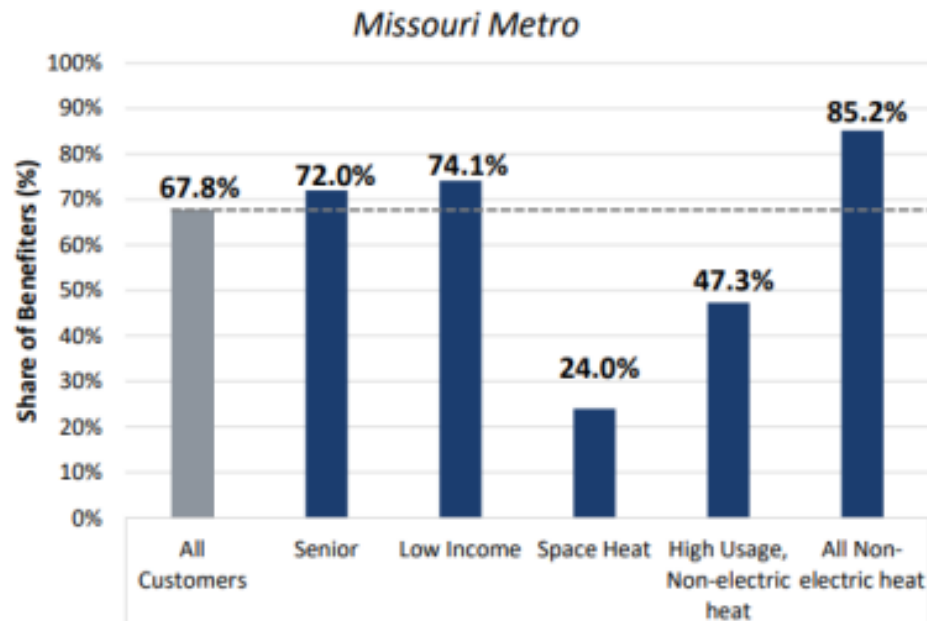
He said 38 cents a kilowatt hour, the top rate under Evergy’s default plan, would mark one of the most expensive residential electricity rates in the country outside of California.

Just a reminder

Default TOU bill impacts by customer segment

Senior and low income customers are more likely to benefit on the 2-period rate than other customers. Electric heating customers often experience bill increases on the new TOU rate.

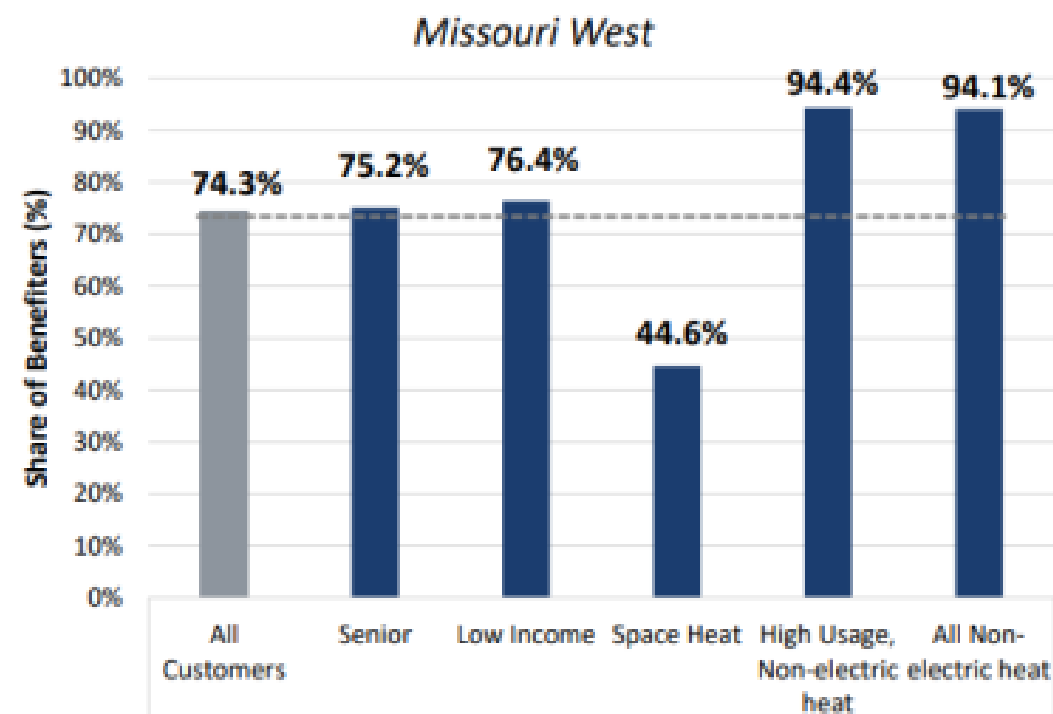
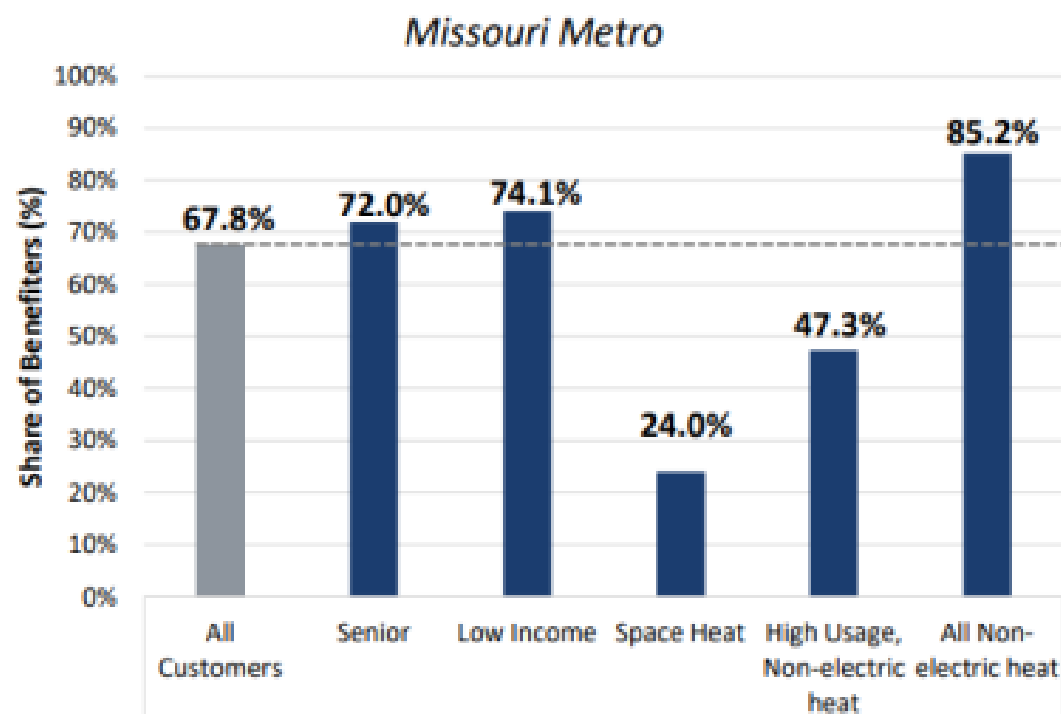
Share of Customers Benefiting when Moving from Standard Non-TOU Rate to Default 2-Period TOU Rate



Default TOU bill impacts by customer segment

Senior and low income customers are more likely to benefit on the 2-period rate than other customers. Electric heating customers often experience bill increases on the new TOU rate.

Share of Customers Benefiting when Moving from Standard Non-TOU Rate to Default 2-Period TOU Rate



So what happened?

After 10 months of back-and-forth the Commission walked back on order days before its implementation

- Since then, Evergy West has been in for a rate case where no party offered a change in differentials.
- Ameren Missouri is currently in for a rate case—no party has offered a change in differentials.
- Liberty Utility has filed for a rate case—the Company has not offered a change in differentials.
- Legislation passed to make an opt-out option always available.

Lessons learned?

Unsolicited Advice

- Model usage from the previous year with TOU rates (who wins/loses?)
- Website information
- Consider “what not to do” education and/or high usage alerts (or tying roll-out with DSM promotions)
- Target marketing and education
- Regulatory access to customer portal (dummy accounts)
- Customer Service Reps need to be trained
- Spend time on the names of the rate plans
- Get ahead of the press and have consistent messaging

- Shadow billing information before and during
- Frame it w/ anchors either/or (dumb down how markets work)
- Consider performance metrics
- Deliverable dates and goals (short and long-term)
- Get stakeholder buy-in (strength in numbers)
- Expect the unexpected – “We the People of Johnson County” example
- Take comfort in the principles of cost-causation and recognize that utility regulation is economic regulation – all of “this” is supposed to be a proxy for the market.

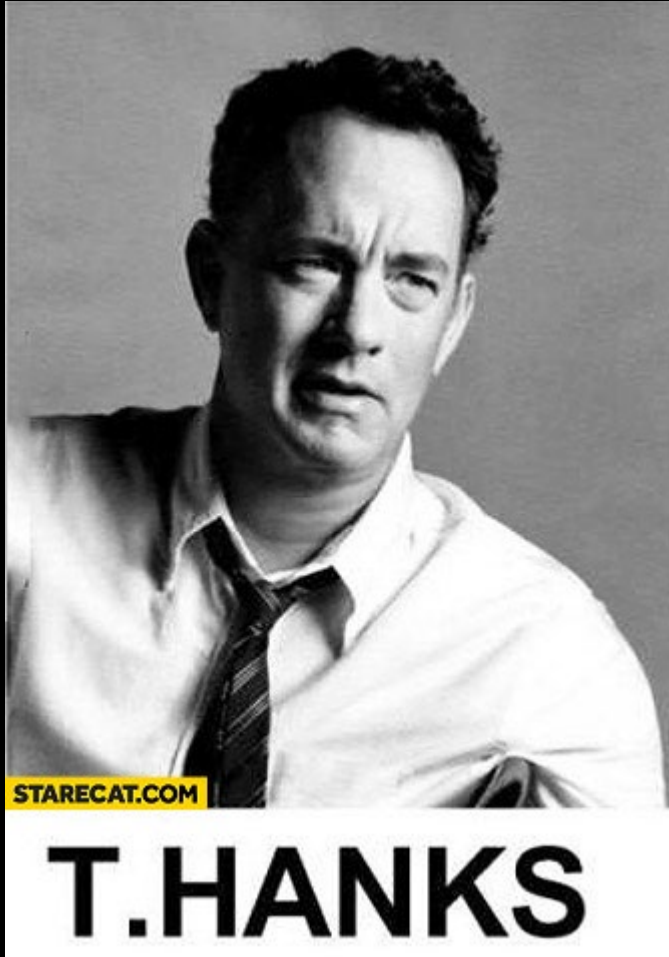
Relevant Dockets

- **EO-2021-0349:** In the Matter of the Rate Design Case of Evergy Metro, Inc. d/b/a Evergy Missouri Metro
- **ER-2022-0130/0129:** In the Matter of Evergy Missouri West, Inc. d/b/a Evergy Missouri West's Request for Authority to Implement A General Rate Increase for Electric Service
- **EW-2023-0199:** In the Matter of a Collaborative Workshop for Customer Education and Outreach Regarding the Introduction of Default Time-of-Use Rates by Evergy Metro, Inc. d/b/a Evergy Missouri Metro and Evergy Missouri West, Inc. d/b/a Evergy Missouri West
- **ET-2024-0061:** In the Matter of the Joint Application of Evergy Metro, Inc. d/b/a Evergy Missouri Metro and Evergy Missouri West, Inc. d/b/a Evergy Missouri West for Approval of Tariff Revisions to TOU Program

OPC memorandum includes responses to frequently cited retorts:

- Customers do not want to be told what to do
- This is not fair to customers
- Customers do not believe Evergy when they say they will save money
- This is government mandated behavioral modification
- Evergy's approval ratings are dropping as a result of TOU rates
- Certain space heating customers are going to run the risk of larger than normal bills.
- Vulnerable populations will be negatively impacted by TOU rates
- Adopting a low differential as the default accomplishes the same policy objectives as a high differential
- The rest of the US regulatory community is watching Missouri.

Questions?



Geoff Marke
Chief Economist
Missouri Office of the
Public Counsel

Geoff.marke@opc.mo.gov

1/16/2025

Marketing, Education & Outreach (ME&O) for Time Varying Rate Programs – Best Practices Across the U.S.



GridX

Presentation to Massachusetts Department of Energy
Resources

August 4, 2025

Agenda



- 01 GridX Introduction**
- 02 Best Practices and Common Challenges implementing TVR**
- 03 TVR Case Study review focusing on Customer Experience and Education**

GridX is the world leader in software solutions for managing the complex lifecycle of utility rates & programs.

GridX is the leading provider of Complex Rate & Data Analytics technology for the new energy economy. Our technology enables utilities to better design, promote, operationalize, and drive adoption of emerging energy products and programs.

We're enabling the clean energy transition, empowering energy suppliers to swiftly design & deploy new rates & business models, and accelerating the adoption of renewables with billing-grade conversion tools.



UNMATCHED SCALE

32M

Meters Under Contract

1T

Intervals Under Management

49M+

Bills Calculated Each Day

>500

Tariffs Modeled & Validated

COMPANY

25+

Large Utility Customers



Backed by EIP

150

Employees

2010

Founded

GridX Enterprise Rates Platform manages the entire utility rate/product lifecycle

gridx

RATE DESIGN & ANALYTICS

Build and optimize products that benefit customers and support revenue goals

RATE MARKETING & CUSTOMER CONVERSION APIS

Upgrade current customer experience with real-time, billing-grade conversion tools

KEY ACCOUNT MANAGEMENT & SELF SERVICE

Quickly access deep analysis and insights, and find best rates for most valuable customers

ADVANCED BILLING ENGINE

Augment billing systems with add-on billing engine for complex billing and calculation capabilities



Our Customers – Across the US



Rate design effectiveness depends on customer awareness, engagement, and responsiveness



The problem: Changes in new rates, programs, pricing incentives and business models create challenges for utilities and consumers alike.

- ◇ Most people struggle to understand their utility bill.
- ◇ Lack of understanding of rate options and household-level impact dissuade customers from engaging.
- ◇ Often difficult to ascertain resulting financial impacts to utilities and consumers.
- ◇ Complex rates mean complex billing.



The solution: Identify potential barriers to participation and tailor MEO efforts to mitigate and remove those barriers to create customer-centric solutions.

- ◇ Tailor efforts to meet customers where they are.
- ◇ Target individual households based on their needs and risks.
- ◇ Use meter energy usage data to communicate opportunities for electrification and reduction of financial burdens to these households.

Time-varying rates help reduce peak demand and support long-term rate reform

Advance customer understanding of rate structures

Encourage load shifting and peak reduction

Promote equitable participation

Support decarbonization and electrification goals

Offer personalized bill simulation and analytics tools to show impacts of different rate plans

Simulate savings scenarios and provide timely feedback on peak usage

Perform full-population analysis to segment customers and tailor messaging

Show how new technologies interact with rates and energy usage

Best practices to ensure a successful time-varying rates program



Customer Acceptance

1. Pre-enrollment: Provide customers with shadow bills based on their actual usage to clarify how they can save with a TVR
2. Post-enrollment: Make rate comparison tools available to customers so they can quickly determine that they are on the “right” rate



Impacts to Sensitive Groups

1. Utilize actual customer AMI data to measure rate design outcomes
2. Add bill protections for sensitive customers
3. Communicate the upside – customers can shift usage and lower bills



Value Realization

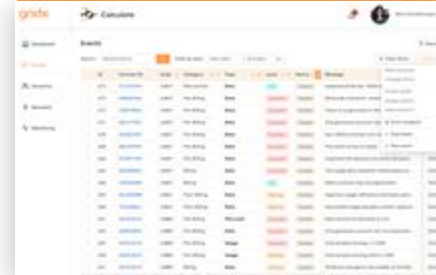
1. Consider multiple TOU rate designs to maximize adoption and system benefits
2. Support customers with the purchase of load flexible technologies (e.g. smart thermostats)



gridx

Better tools enable utilities to implement TVR in a customer-friendly, cost-effective, and equitable manner

Billing management

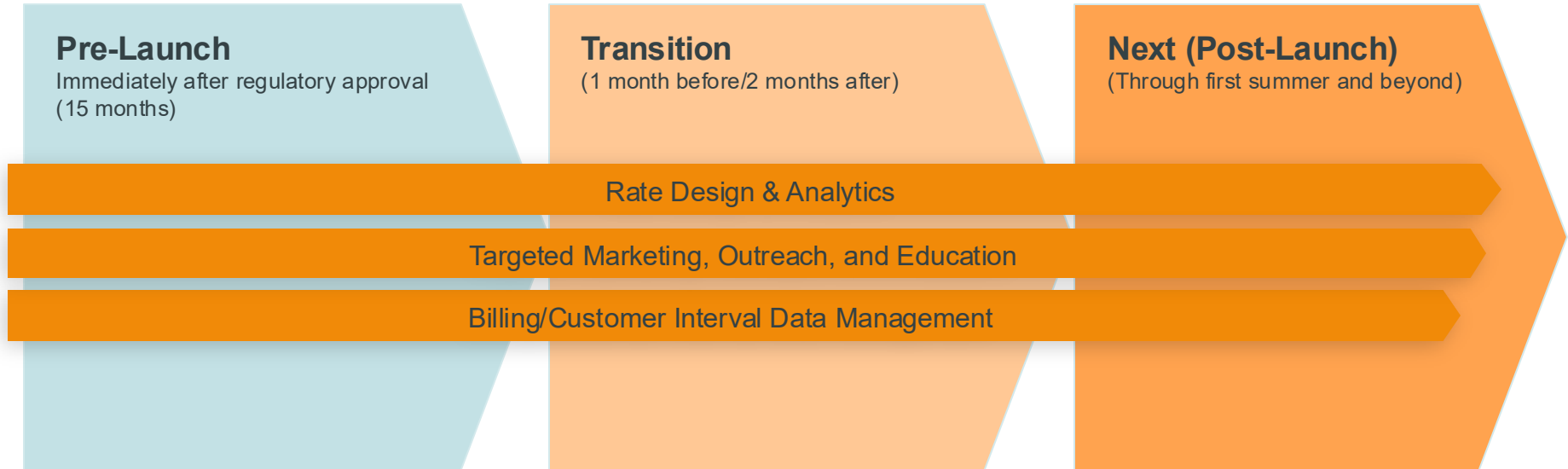


Augment legacy systems and processes and prepare for the future

Time Varying Rate Rollout

3 distinct, but overlapping and intertwined phases

Activities driven by TOD goals and objectives



Targeted ME&O (Marketing Education and Outreach)

Use insights to move and measure your audience



Pre-Launch

- Broad program awareness on-peak/off peak period marketing
- Segment analysis and creation
- Personalized and ubiquitous rate comparisons & analysis

Transition

- Marketing and education materials (rate education letters) across the customers' channels of choice
- Prepare customers for the coming summer months with behavioral tips and program incentives

Next

- Bill forecasts and bill-to-date
- Deepen understanding of audience/customer for potential new rate structures and programs through rigorous measurement

Customer & Key Account Management

Provide information and toolsets to create a connection



Pre-Launch

- Train and arm the call center to answer questions
- Personalized and ubiquitous rate comparisons & analysis
- Targeted account analysis

Transition

- Make sure customers understand they have more control over their bills
- Help customers see the long-term value of TVR in dollars and cents

Next

- Offer easy to find, intuitive customer self-serve tools to customers and enterprise accounts

Billing/Customer Interval Data Management

Prepare billing systems and use interval data to measure transition



Pre-Default

- Prepare systems for TOD transition

Transition

- Rigorous QA processes to ensure initial customers experiences are positive

Next

- Use AMI data to monitor whether customers are changing their behaviors.

Rate Design & Analytics

Gain a holistic understanding of TVR impact



Pre-Default

- Whole population bill impact analysis
- Utility revenue impact analysis
- Rate configuration & calibration

Transition

- Monitor and measure transition to TVR and rate performance

Next

- Project grouping to allow development of new rates and sharing across teams
- Quickly build new tariffs and programs

Case Studies

SCE: Rate comparison tool



Leverage existing customer portal with tailored rate plan comparison



API embeds customer specific rate plan information within existing customer portal

400% increase in rate tool logins

82% of customers believe they are on the right rate

75 MW of peak load reduction

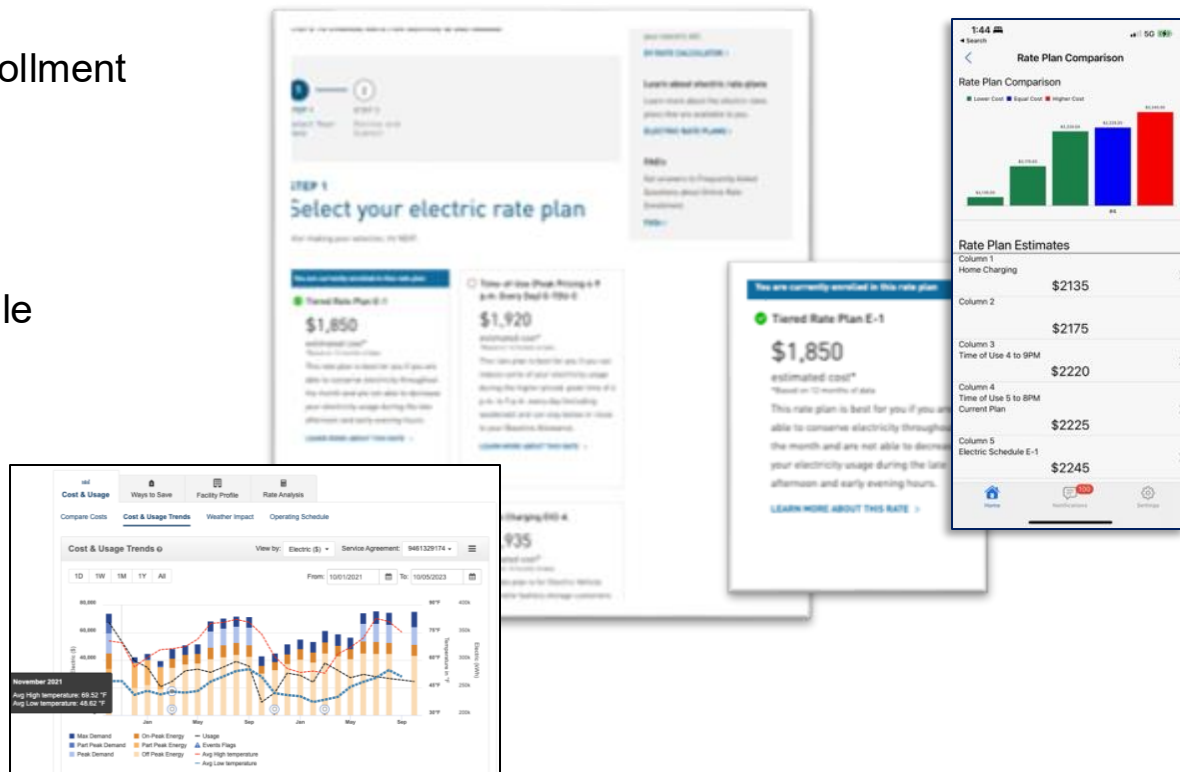
Discontinued Mar 02, 2019	Starts Mar 03, 2019		
Your Current Rate Plan TOU-PA-2-B	Your New Rate Plan TOU-PA-2-D	Option 2 TOU-PA-2E-5T08	Option 3 TOU-PA-2-E
	2		
\$611 / year	\$508 / year	\$459 / year	\$460 / year
	Savings \$14,366	Savings \$14,415	Savings \$14,414
Hours Of Highest Rates 12 p.m. to 6 p.m. Weekdays	Hours Of Highest Rates 4 p.m. to 9 p.m. Weekdays	Hours Of Highest Rates 5 p.m. to 8 p.m. Weekdays	Hours Of Highest Rates 4 p.m. to 9 p.m. Weekdays
Plan Details	Plan Details	Plan Details	Plan Details
Discontinued Mar 02, 2019	Starts Mar 03, 2019	Switch to This Plan >	Switch to This Plan >
	No Action Required	Option to switch anytime included	Option to switch anytime included

Meeting customers where they are

My Account (+ CSR
Screens)
for On-line Rate Enrollment

Business Customer
Engagement

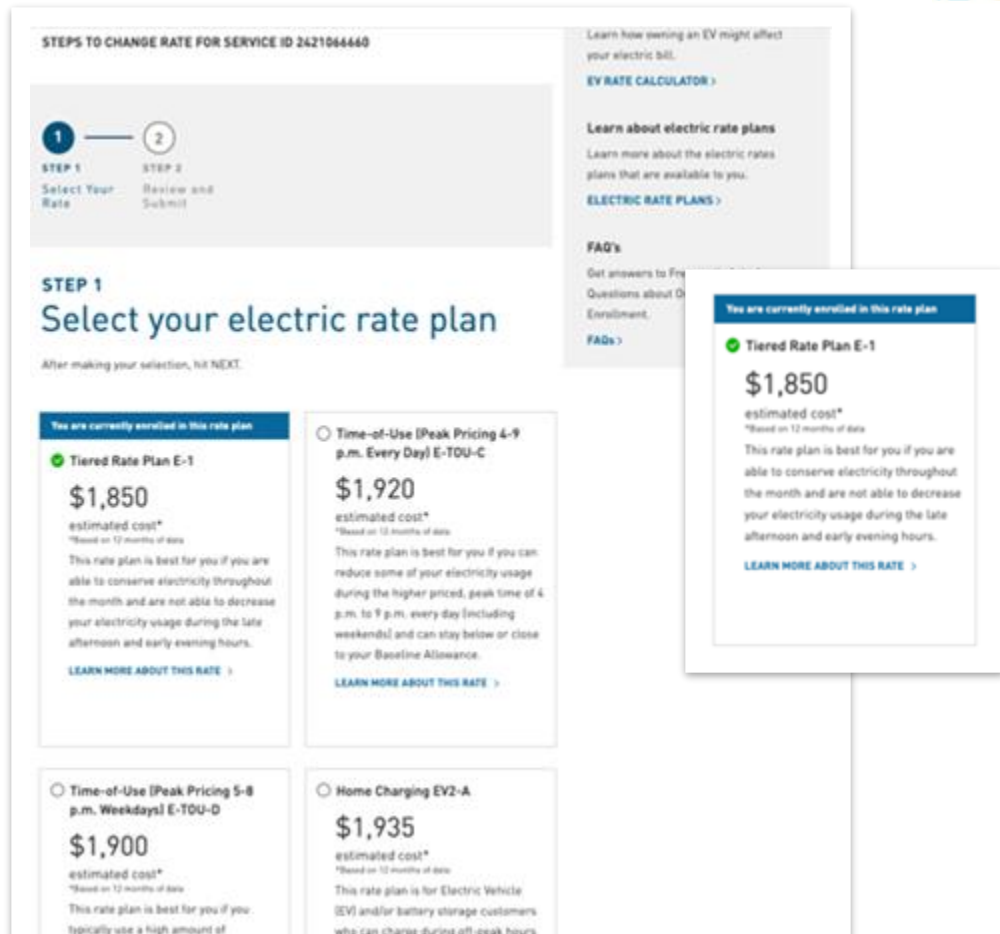
Mobile App and Apple
Watch Notifications



PG&E: Personalized and actionable interface

Online Rate Enrollment with PG&E

- ◇ Quick summary of eligible rates
- ◇ Easy enrollment (at bottom of webpage – not shown)
- ◇ Same calculations, provided by GridX Empower (APIs) are available on CSR's CIS screens to guide customers when they call in



STEPS TO CHANGE RATE FOR SERVICE ID 2421064440

1 STEP 1 Select Your Rate 2 STEP 2 Review and Submit

STEP 1 Select your electric rate plan

After making your selection, hit NEXT.

You are currently enrolled in this rate plan

- ☒ **Tiered Rate Plan E-1**
\$1,850
 estimated cost*
*Based on 12 months of data.
 This rate plan is best for you if you are able to conserve electricity throughout the month and are not able to decrease your electricity usage during the late afternoon and early evening hours.
[LEARN MORE ABOUT THIS RATE >](#)
- ☐ **Time-of-Use (Peak Pricing 4-9 p.m. Every Day) E-TOU-C**
\$1,920
 estimated cost*
*Based on 12 months of data.
 This rate plan is best for you if you can reduce some of your electricity usage during the higher priced, peak time of 4 p.m. to 9 p.m. every day (including weekends) and can stay below or close to your Baseline Allowance.
[LEARN MORE ABOUT THIS RATE >](#)
- ☐ **Time-of-Use (Peak Pricing 5-8 p.m. Weekdays) E-TOU-D**
\$1,900
 estimated cost*
*Based on 12 months of data.
 This rate plan is best for you if you typically use a high amount of
- ☐ **Home Charging EV2-A**
\$1,935
 estimated cost*
*Based on 12 months of data.
 This rate plan is for Electric Vehicle (EV) and/or battery storage customers who can charge during off-peak hours.

Learn how enrolling an EV might affect your electric bill.
[EV RATE CALCULATOR >](#)

Learn about electric rate plans
 Learn more about the electric rates plans that are available to you.
[ELECTRIC RATE PLANS >](#)

FAQ's
 Get answers to Frequently Asked Questions about Online Rate Enrollment.
[FAQ's >](#)

You are currently enrolled in this rate plan

- ☒ **Tiered Rate Plan E-1**
\$1,850
 estimated cost*
*Based on 12 months of data.
 This rate plan is best for you if you are able to conserve electricity throughout the month and are not able to decrease your electricity usage during the late afternoon and early evening hours.
[LEARN MORE ABOUT THIS RATE >](#)

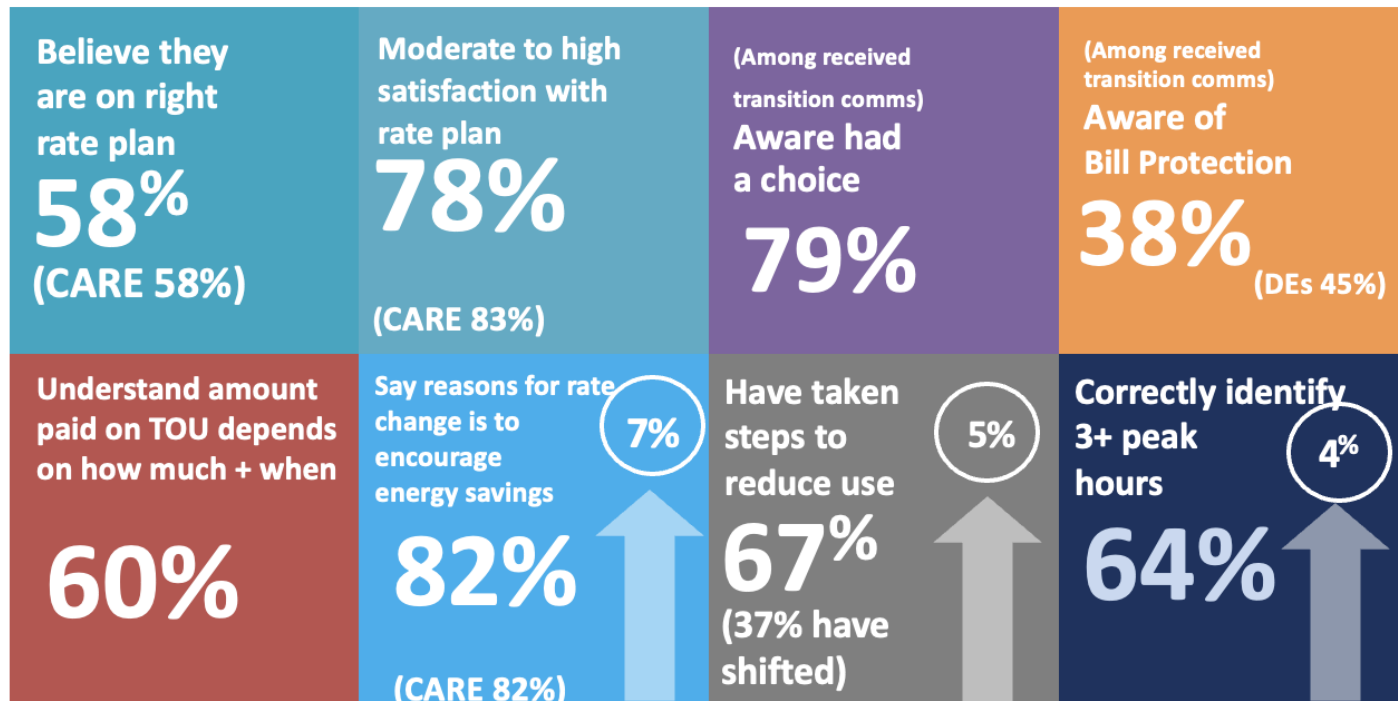
PG&E: Personalized and actionable interface

Mobile App + Apple Watch Notifications

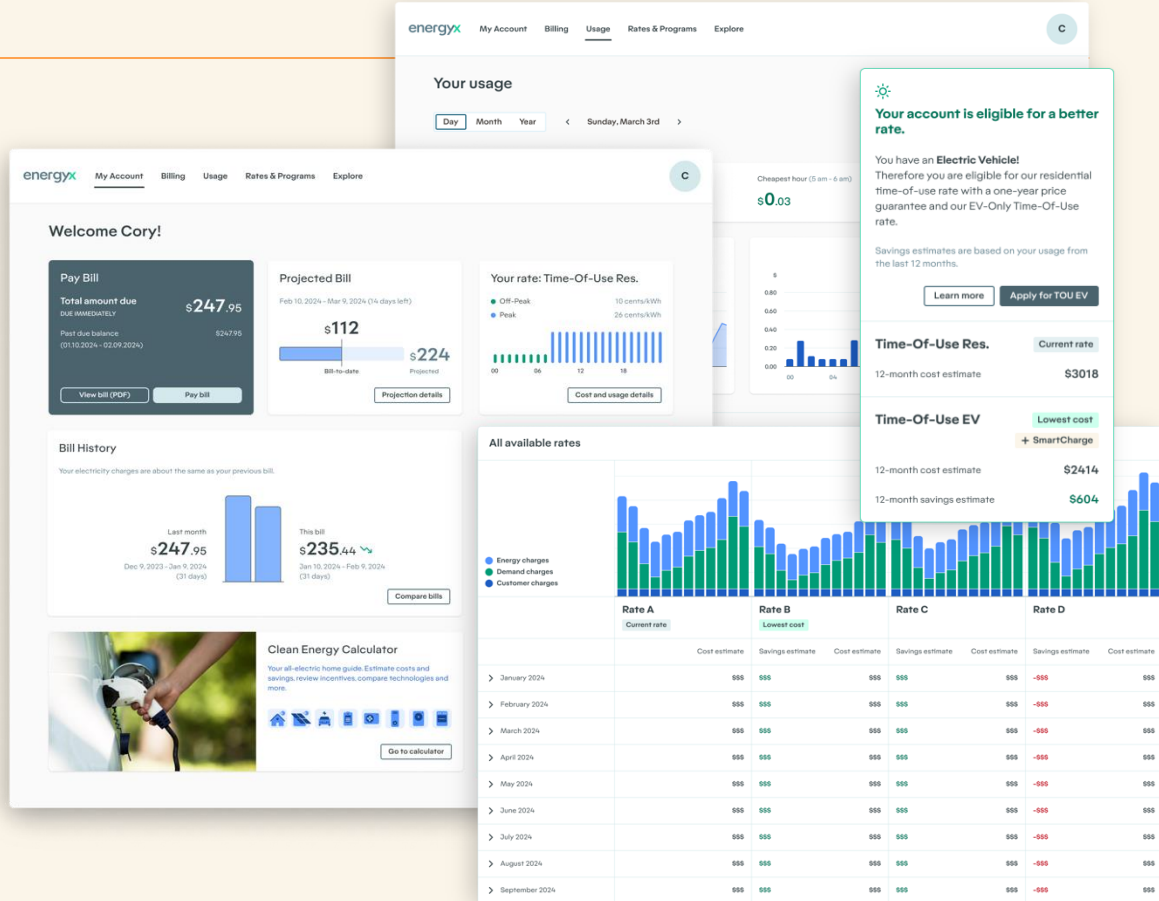
- ✓ Meet customers where they are
- ✓ Consistent information across engagement platforms



Customers understand TOU details



- Customers are using many different channels to find utility information that is useful to them:
 - Utility bills
 - MyAccount.com
 - Mobile Apps
 - IVR
 - AI Chatbots
 - Voice Enabled (Alexa)
- The utility needs to make sure the same, consistently accurate, data is presented to customers across all these channels
- Personalized analysis, using customers' Smart Meter data, makes it easy for customers to discover and enroll in the best program/rates.





Explore Drive DER adoption to meet Commonwealth Goals



- ◇ Increase adoption of clean energy technology by allowing customers to easily configure options and immediately see the bill impact.
- ◇ Give customers peace of mind by allowing them to assess whether other rate offerings can save them money.
- ◇ Total cost of ownership metrics enables customers to understand the full economics of their potential purchases.

The screenshot displays the energyx Explore web application. At the top, a navigation bar includes links for My Account, Billing, Usage, Rates & Programs, and Explore. The main content area is titled "Explore the true value of your clean energy choices." and provides a guide for estimating costs and savings. Below this, a grid of clean energy options is shown, each with a "Select" button:

- Solar panels:** 6 kW system, Orientation: South, Zip: 80120. Average monthly electric savings: \$149. 12-month total electric savings: \$1,786.
- Electric vehicle:** Tesla Model Y Long Range AWD 2023. Level 2 (3.3 kW) charger, 20 mi / weekday, 40 mi / weekend day, 9pm charging. Average monthly charging cost: \$61. 12-month total charging cost: \$732. Average monthly savings: \$29. 12-month total savings: \$346.
- Battery storage:** When combined with a renewable energy source, battery storage can power your home when needed. You can also save money by using stored energy when rates are higher during peak hours of the day.
- HVAC heat pump:** Explore how clean energy technologies like electric heat pumps, solar, and electric vehicles would impact your energy costs.
- Heat pump water heater:**
- Electric dryer:**

At the bottom right, a bar chart shows energy usage for January and February, with January having a higher usage than February.

Thank you!



Michael Pirro

Michael.Pirro@gridx.com

ORACLE

Dynamic Rates Engagement

Leveraging AMI for Customer Engagement and Empowerment

Samantha Caputo

Senior Manager, Regulatory Affairs and Market
Development

August 4, 2025



Agenda

**1. Leveraging AMI
for Customer
Engagement**

**2. Rates
Engagement**

**3. Case Study -
Evergy**

**4. Creating a
balanced portfolio**



Agenda

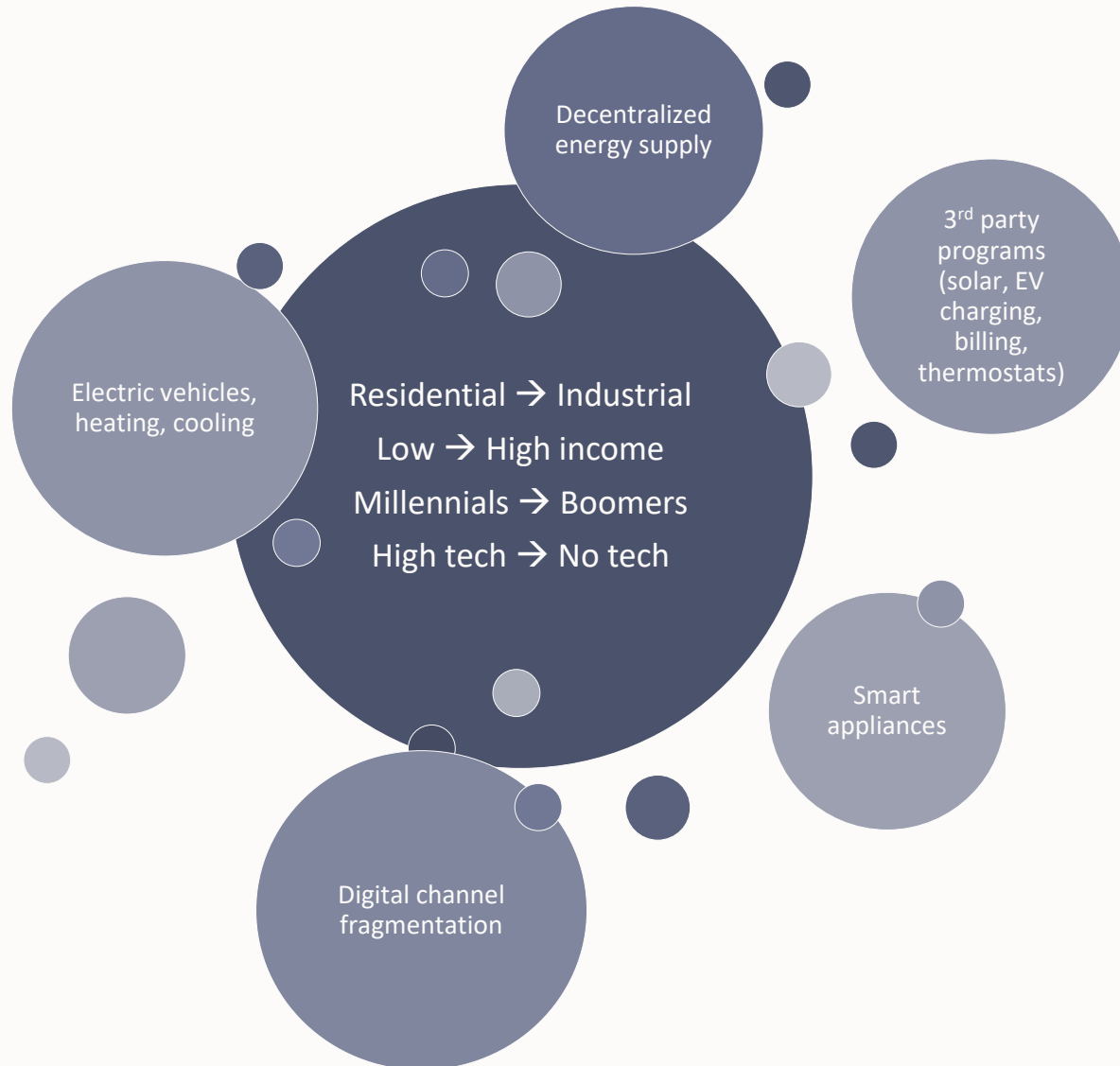
**1. Leveraging AMI
for Customer
Engagement**

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Engagement

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Evergy

4. Creating a
balanced portfolio

The customer ecosystem for rate design is becoming more complex



There's an app for everything, but disparate apps give different answers and customers end up with disjointed experiences

Not all customers are at the same level of engagement and understanding about energy

Customers need tools to put data in context at high impact moments

Utilities are in a unique position to offer:

- Equitable access to AMI data
- Whole home view
- Rate and cost information
- Pre-qualified, targeted programs
- Historical perspective
- Proactive alerts and updates

Before AMI, all information is in aggregate and after-the-fact

The Bill

**ENERGY STATEMENT**
www.pge.com/MyEnergy

Account No:
Statement Date: 08/09/2023
Due Date: 08/30/2023

Service For:

Please see details page.

Questions about your bill?

Mon-Fri 7 a.m.-7 p.m.
Saturday 8 a.m.-5 p.m.
Phone: 1-800-743-5000
www.pge.com/MyEnergy

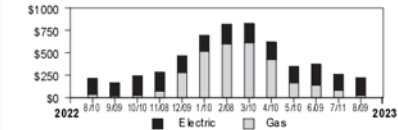
Ways To Pay

www.pge.com/waystopay

Your Account Summary

Amount Due on Previous Statement	\$261.71
Payment(s) Received Since Last Statement	-261.71
Previous Unpaid Balance	\$0.00
Current PG&E Electric Delivery Charges	\$110.77
East Bay Community Energy Electric Generation Charges	84.74
Current Gas Charges	26.84
Total Amount Due by 08/30/2023	\$222.35

Monthly Billing History



Visit www.pge.com/MyEnergy for a detailed bill comparison

Customer Support

ORACLE

Maria Villa

Account: EN64475881 Customer Class: Residential OS Division: California Family Member: Dubois, Gabriel

Try "Suggestion here"

Recently viewed

Life Support Services Lead 24 hours

Phone: 505-222-3333

Email: maria@mymail.com

Programs

Budget Billing [Learn More](#)

Auto-pay [Learn More](#)

E-bill [Learn More](#)

Weekly AMI Report [Learn More](#)

Insights

Electric Vehicle detected

Sign up for EYDUI

View Disaggregation

Customer is using 24% more energy than efficient neighbors.

Ways to save

Usage and Billing

Financial History

Payment Arrangements

Credit & Collections

St. #304 San Francisco

Residential EV TOU

SP - Residential / A

Smart Meter / 1

MC - Electric

Residential

SP - Residential / A

Smart Meter / 1

Learn

Cannot see what is happening on a daily or hourly basis

No visibility before the bill is created

Customer Self-service

Compare bills

Electricity ****5473

PREVIOUS BILL LAST YEAR

Your electricity charges are about **\$19 higher** than your previous bill.

That's about \$19 higher than this time last year. [See comparison.](#)

Previous bill

\$176

Jun 5, 2023 - Jul 4, 2023

Days: 30

This bill

\$196

Jul 5, 2023 - Aug 2, 2023

Days: 29

800 kWh

2023

Aug 3 Sep 1 Oct 3 Nov 1 Dec 4 Jan 3 Feb 1 Mar 5 Apr 3 May 3 Jun 4 Jul 4 Aug 2

62° 65° 66° 59° 51° 49° 51° 48° 51° 55° 57° 60° 61°

Weather (°F) Electricity Usage from Grid

Was this graph helpful?

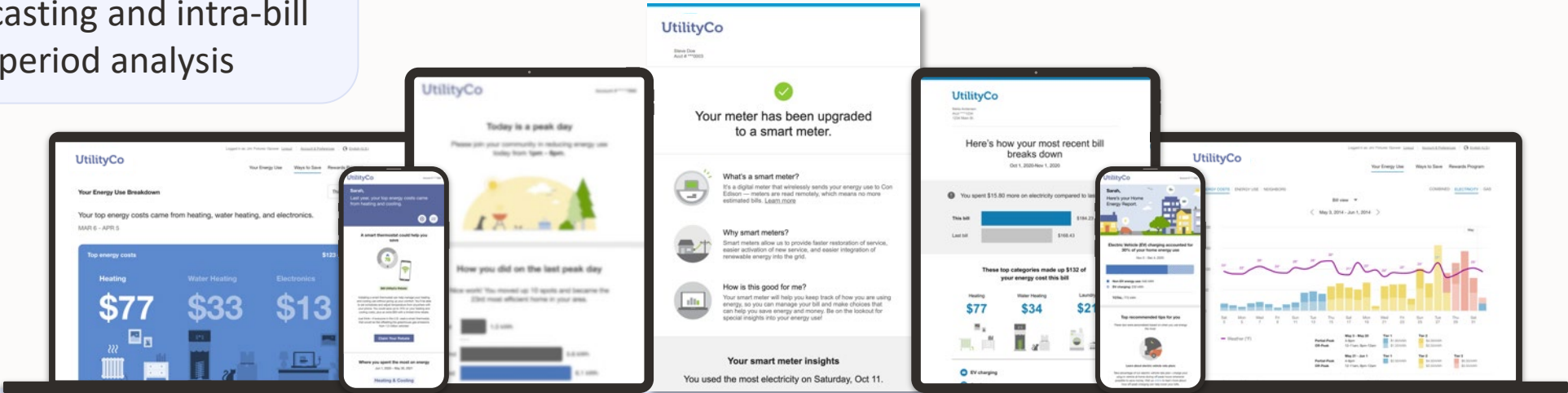
Green Button

Download my data



AMI data enables analytics for personalization and targeting of utility communications and for deeper understanding of energy use

Frequent collection of interval data drives forecasting and intra-bill period analysis



FORECASTING



DISAGGREGATION



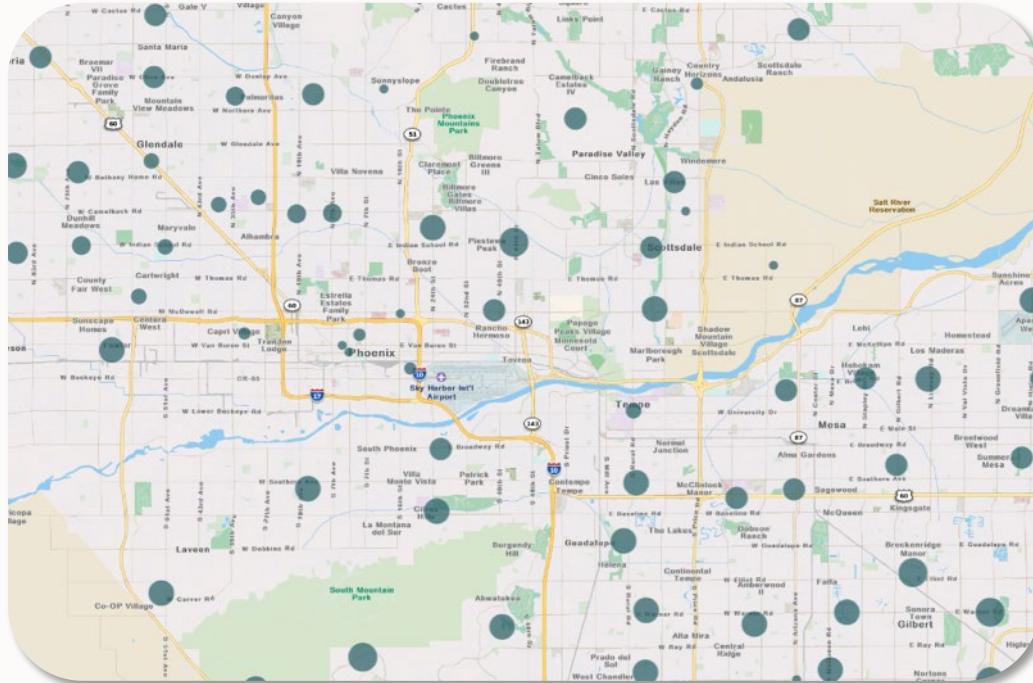
SEGMENTATION



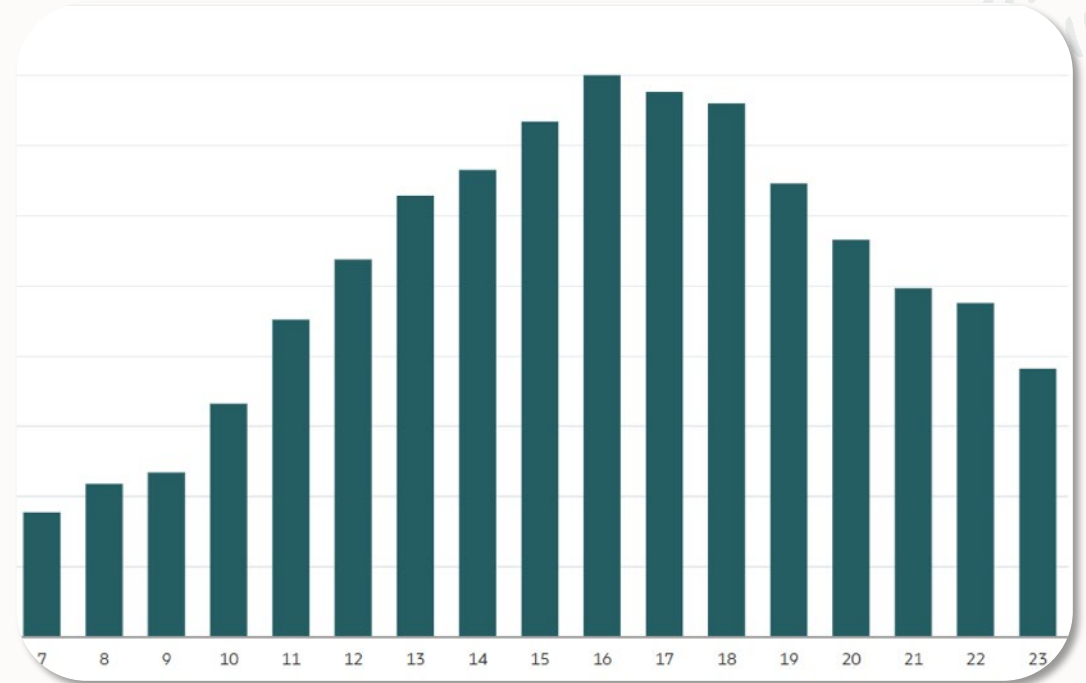
TARGETING



What does Oracle need to know to provide compelling end-use-specific insights?

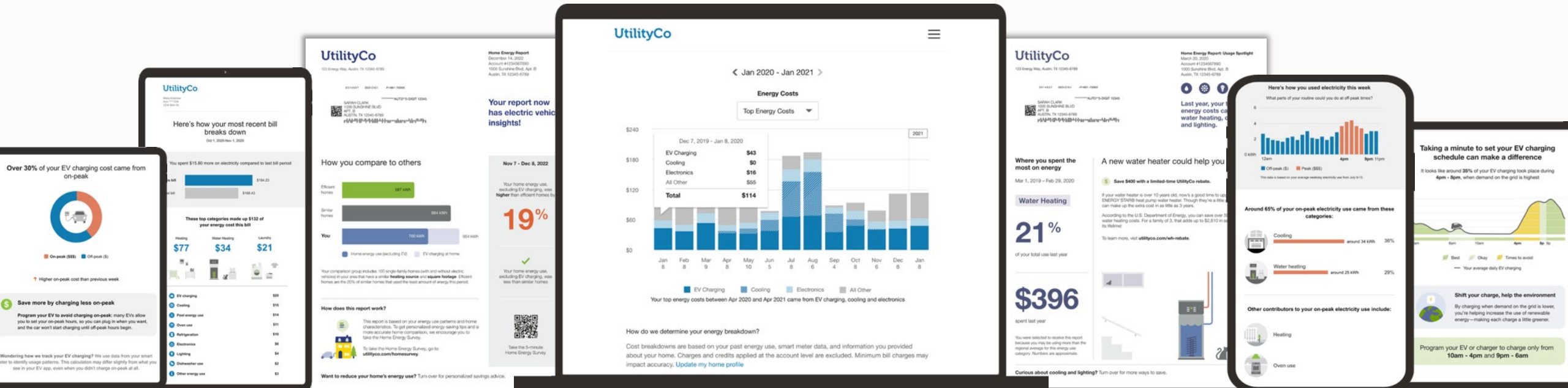


DETECT where specific end-uses exist



DISAGGREGATE their usage

Impactful disaggregation insights are embedded across Opower platform solutions to help drive important outcomes



Customer
Satisfaction

Customer
Engagement

Product &
Program
Adoption

Energy
Efficiency

Load
Shifting



Agenda

1. Leveraging AMI
for Customer
Engagement

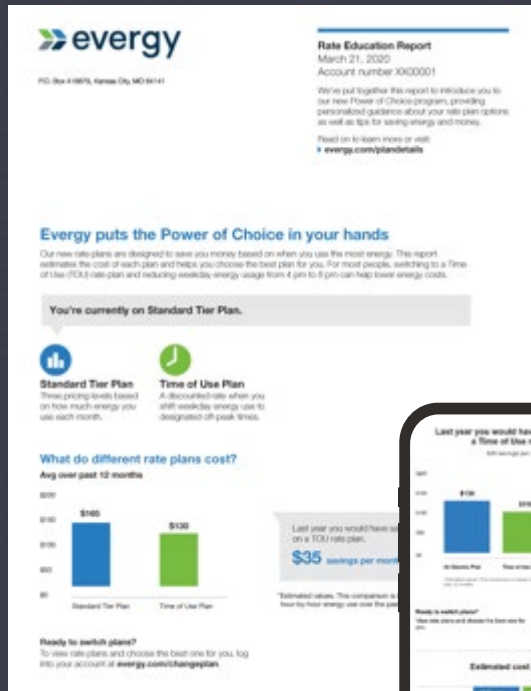
2. Rates
Engagement

3. Case Study -
Evergy

4. Creating a
balanced portfolio

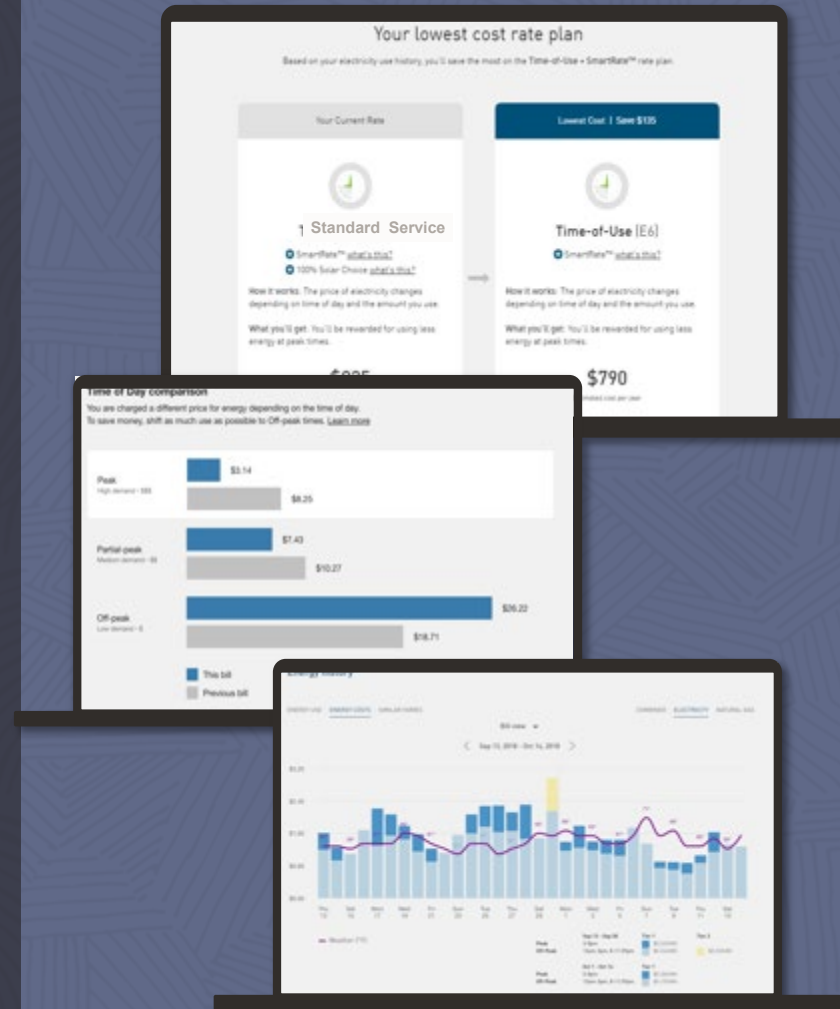
Educate

Rate Education Reports



Enroll

Rate Analysis and Insights



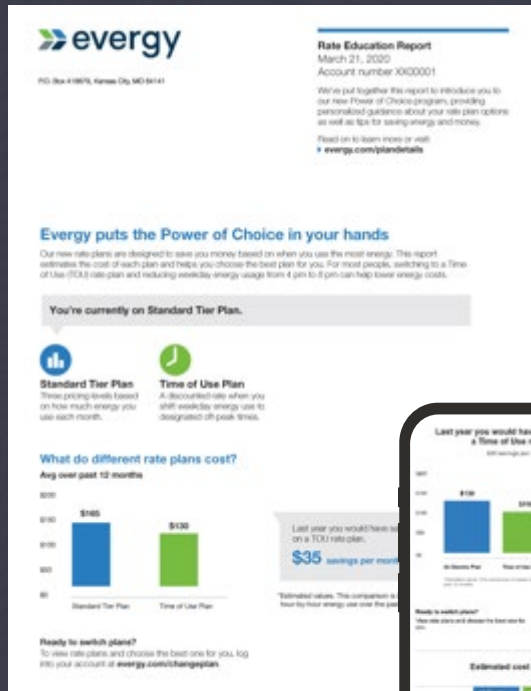
Engage & Empower

Rate Coach



Educate

Rate Education Reports



Enroll

Rate Analysis and Insights



Engage & Empower

Behavioral Load Shaping



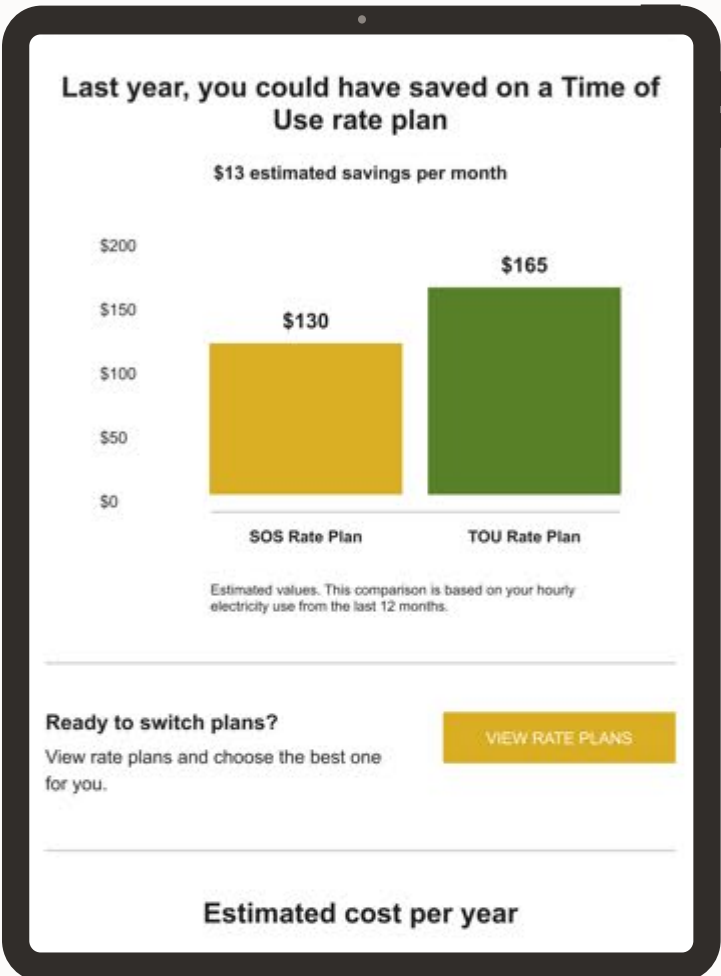
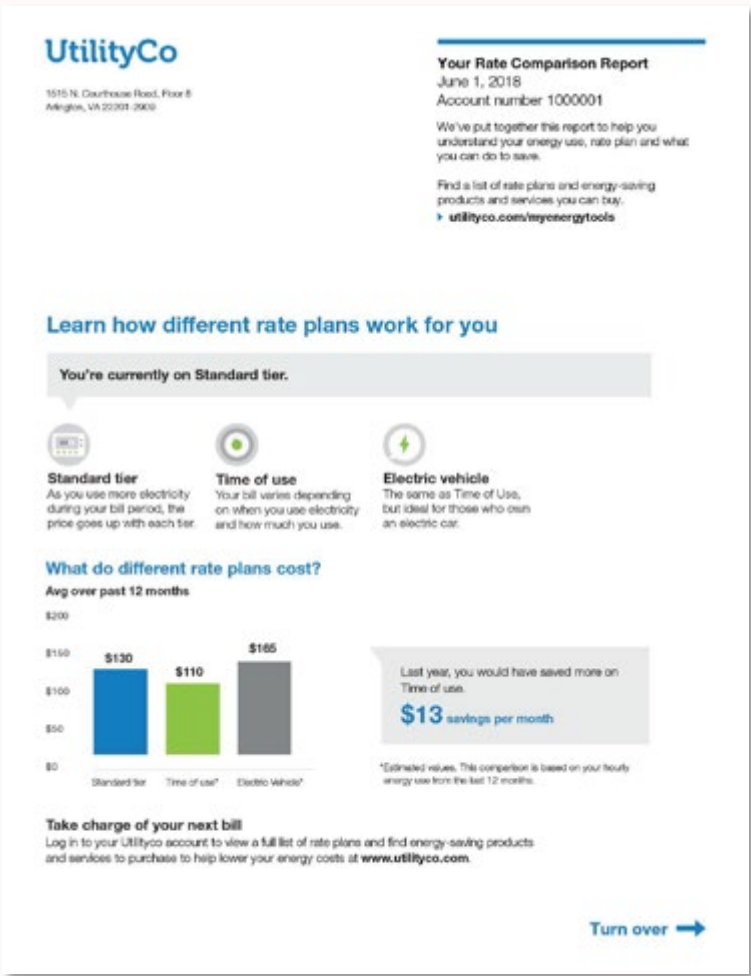
Rate Education Reports can help customers understand if a different rate is right for them

When TVR options are available, it is important to educate customers about their options in a simple way that helps them understand their options.

Rate education reports are a proactive way to engage customers in a personalized way.



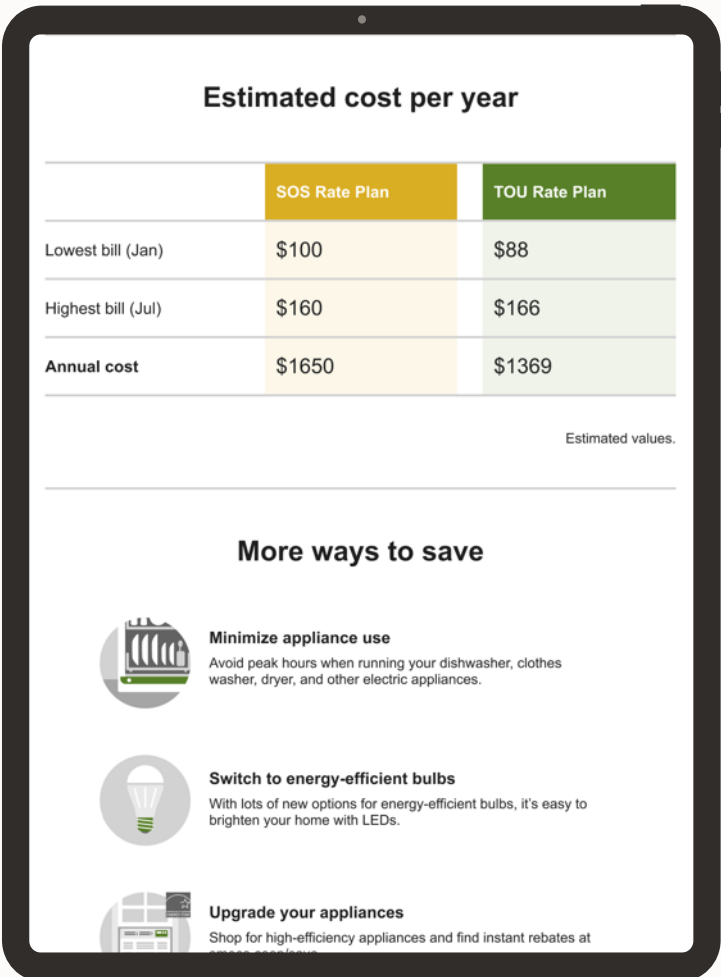
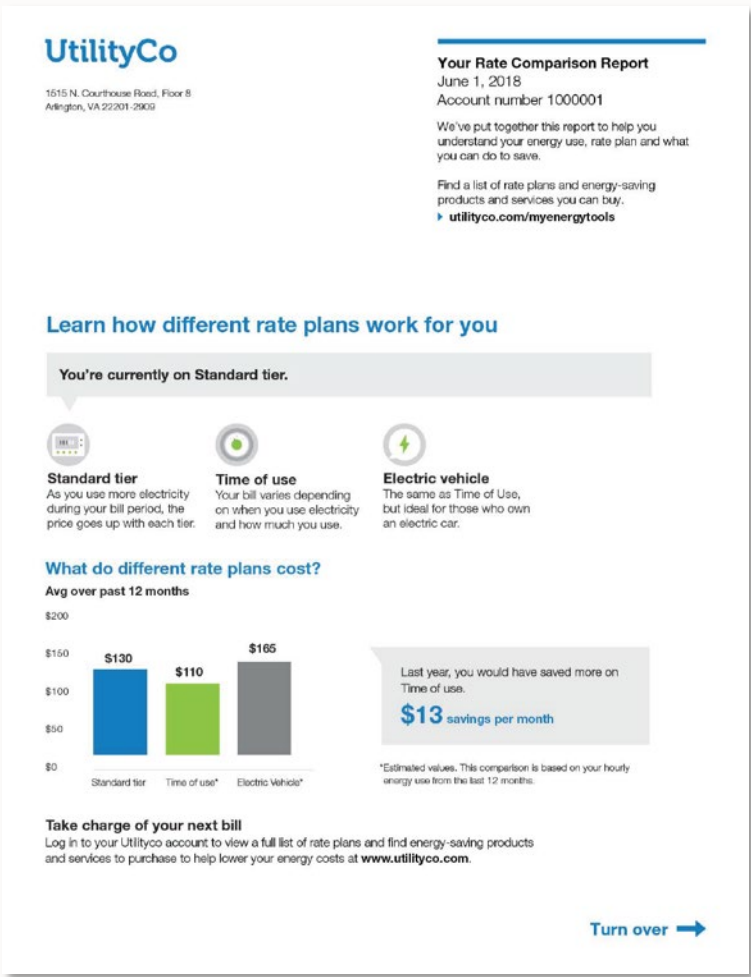
Rate Education Reports can help customers understand if a different rate is right for them



Leveraging tools such as a Rate Comparison in the Report can show customers what their bill would have looked like on the TVR and the \$ savings potential.



Rate Education Reports can help customers understand if a different rate is right for them



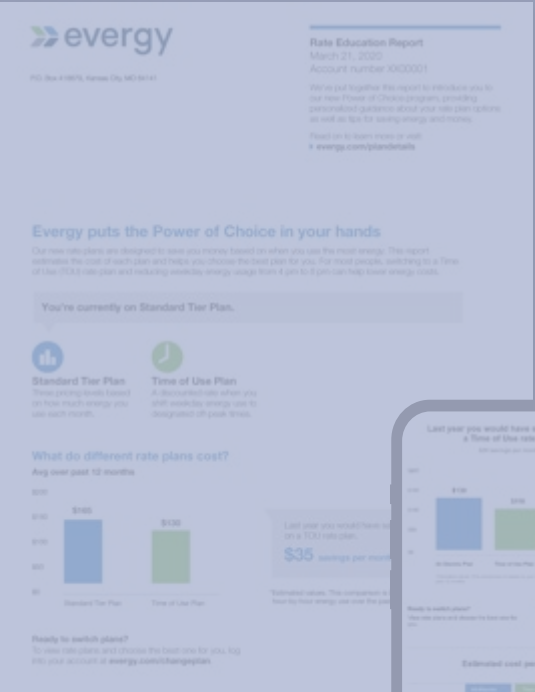
Monthly comparison shows the seasonal fluctuations based on their use

Tips module shows how to save even more



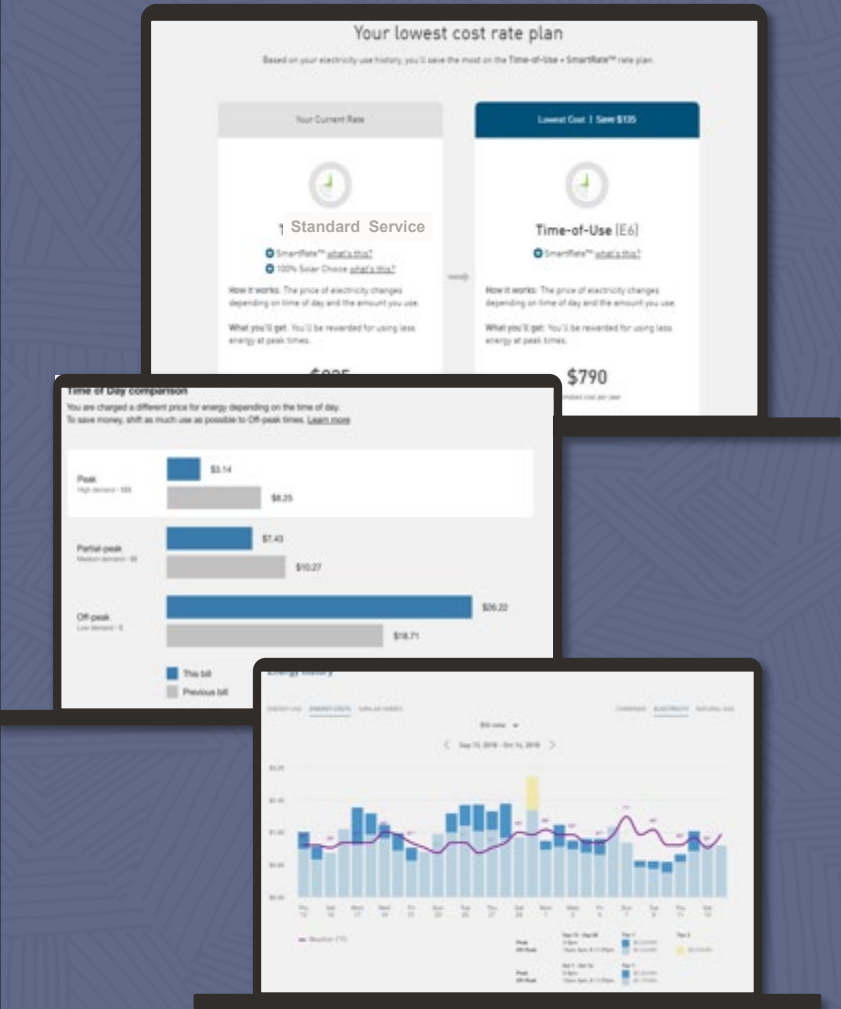
Educate

Rate Education Reports



Enroll

Rate Analysis and Insights



Engage & Empower

Rate Coach



Tools that provide rates analysis can help customers navigate which rate they should choose and encourage enrollment

Make it simple

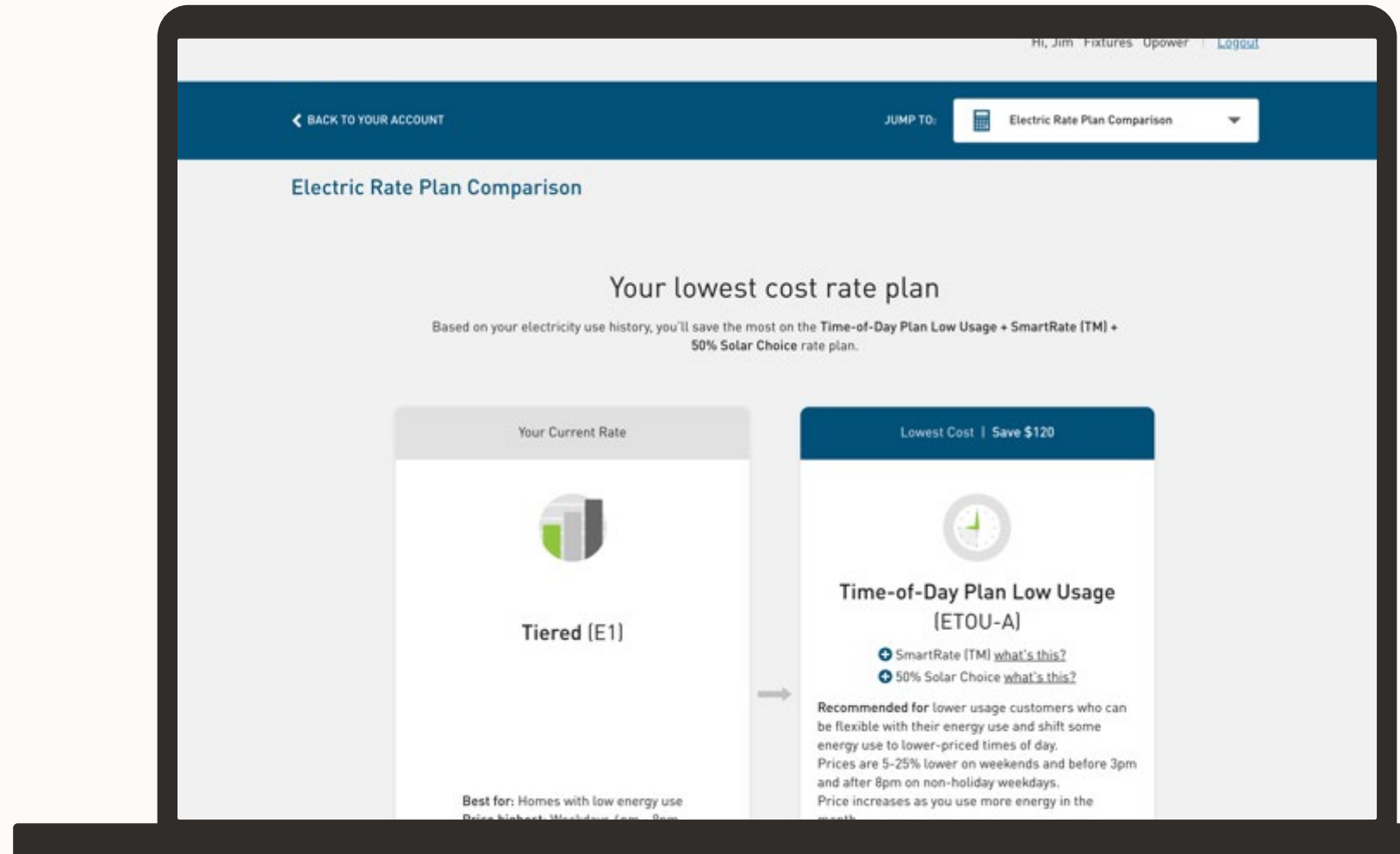
Data analytics can help households find the right rate

Help them explore

How their energy use impacts the right rate

Remove all uncertainty

Show all their rate options and why the one you recommended is best for them



Tools that provide rates analysis can help customers navigate which rate they should choose and encourage enrollment

Make it simple

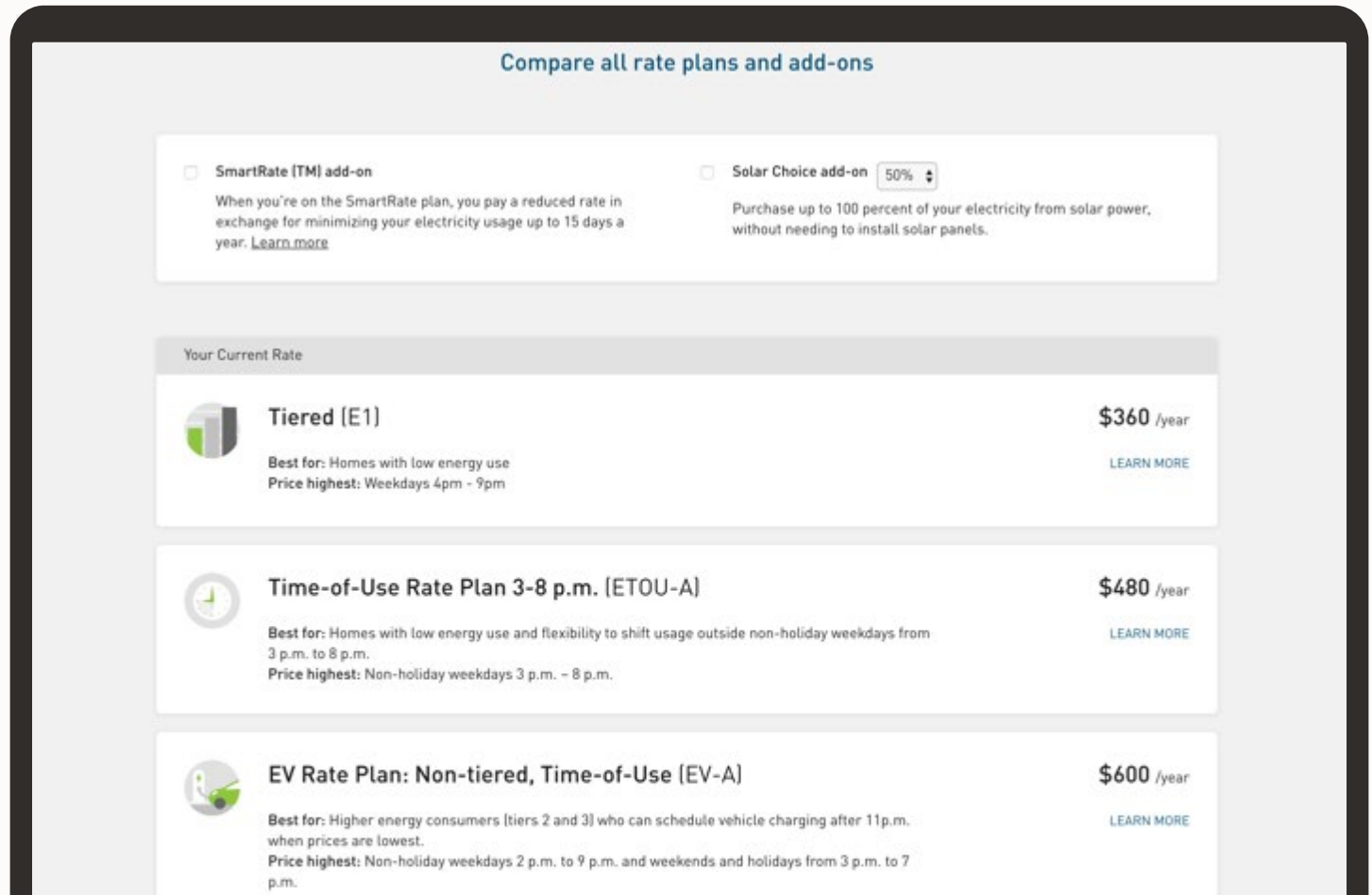
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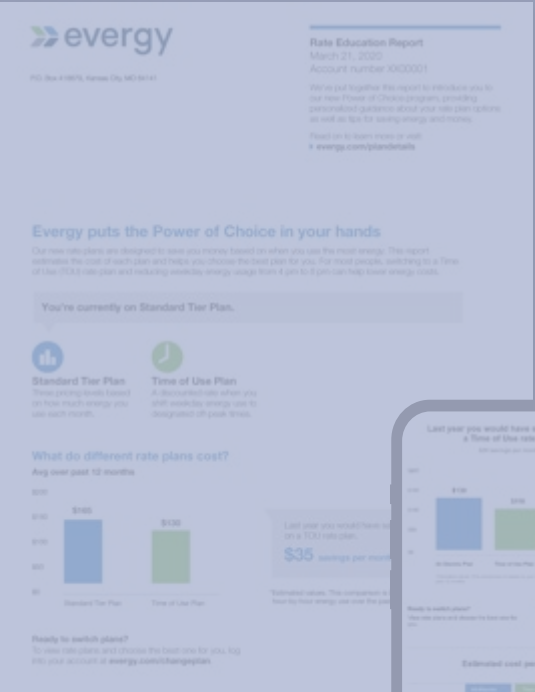


The screenshot displays a utility website interface titled "Compare all rate plans and add-ons". At the top, there are two add-on options: "SmartRate (TM) add-on" and "Solar Choice add-on". The "SmartRate" add-on is selected, showing a description: "When you're on the SmartRate plan, you pay a reduced rate in exchange for minimizing your electricity usage up to 15 days a year. [Learn more](#)". The "Solar Choice" add-on is also selected, showing a description: "Purchase up to 100 percent of your electricity from solar power, without needing to install solar panels." Below the add-ons, there is a section titled "Your Current Rate" which lists three rate plans: "Tiered (E1)", "Time-of-Use Rate Plan 3-8 p.m. (ETOU-A)", and "EV Rate Plan: Non-tiered, Time-of-Use (EV-A)". Each plan includes a description of its best use and price, and a "LEARN MORE" link.

Rate Plan	Best for	Price highest	Annual Cost
Tiered (E1)	Homes with low energy use	Weekdays 4pm - 9pm	\$360 /year
Time-of-Use Rate Plan 3-8 p.m. (ETOU-A)	Homes with low energy use and flexibility to shift usage outside non-holiday weekdays from 3 p.m. to 8 p.m.	Non-holiday weekdays 3 p.m. - 8 p.m.	\$480 /year
EV Rate Plan: Non-tiered, Time-of-Use (EV-A)	Higher energy consumers (tiers 2 and 3) who can schedule vehicle charging after 11p.m. when prices are lowest.	Non-holiday weekdays 2 p.m. to 9 p.m. and weekends and holidays from 3 p.m. to 7 p.m.	\$600 /year

Educate

Rate Education Reports



Enroll

Rate Analysis and Insights



Engage & Empower

Rate Coach



Rates Coach

Welcome

Weekly Progress

Post-Bill Report

Seasonal Changes

UtilityCo

Aria Rodriguez

Acc *****1234

Welcome to your Rate Coach, a weekly email designed to help you save money by avoiding high-cost times

You're currently on a summer rate plan that changes different prices throughout the day, and lasts from April 25-September 30. By using less electricity when it's most expensive, others have saved on average \$5 to \$30 a month.

On weekdays, electricity is 1.5x more expensive from 4pm-9pm

Off-peak (\$)

Peak (\$55) (\$)

12am

4pm

9pm 11pm

Here's how you used electricity this week

What parts of your routine could you do at off-peak times?

6

4

2

0 kWh

12am

4pm

9pm 11pm

Off-peak (\$)

Peak (\$55)

This data is based on your average weekday electricity use from July 9-13

How can you save big during peak hours?

Appliances like these use a lot of energy. By using them at lower priced, off-peak times, you'll see more savings.

Washer/Dryer

Furnace

A/C

Refrigerator

UtilityCo

Aria Rodriguez

Acc *****1234

You spent \$3 more on electricity during peak hours this week

This week's peak costs

Last week's peak costs

\$33

\$30

On weekdays, electricity is 1.5x more expensive from 4pm-9pm

Off-peak (\$)

Peak (\$55) (\$)

12am

4pm

9pm 11pm

Here's how you used electricity this week

What parts of your routine could you do at off-peak times?

6

4

2

0 kWh

12am

4pm

9pm 11pm

Off-peak (\$)

Peak (\$55)

This data is based on your average weekday electricity use from July 9-13

Around 65% of your on-peak electricity use came from these categories:

Cooling

Water heating

around 34 kWh

around 25 kWh

36%

29%

UtilityCo

Aria Rodriguez

Acc *****1234

Take a look at your on-peak electricity use for your most recent bill

Jun 1 - Jul 1, 2023

You spent \$16 less on electricity during on-peak hours compared to your last bill

This bill's on-peak costs

Last bill's on-peak costs

\$96

\$114

On-peak hours are from 4pm-9pm. Electricity is 2.2x more expensive during this time.

Around \$43 of your on-peak electricity costs came from these categories:

Cooling

Dryer use

Water heating

\$19

\$13

\$11

Other contributors to your on-peak electricity costs include:

Dishwasher use

Oven use

How do we know how you use energy?

Thanks to data from your smart meter, we can identify patterns in your electricity use that give us an idea of what appliances are using electricity in your home. We can match those end uses to different times of day to determine what appliances you use during peak hours. To get the most accurate view of your appliance use

UtilityCo

Aria Rodriguez

Acc *****1234

Coming soon: changes to peak hours and pricing

Starting June 1, peak hours and pricing will change for the new season. To save more, try to avoid using high-energy use appliances during peak hours.

	Current	New
Dates	Oct 1 - May 30	June 1 - Sept 30
Peak hours	6am - 9am	4pm - 9pm
Price difference	1.8x	1.5x

On weekdays, electricity is 1.5x more expensive from 4pm-9pm

Off-peak (\$)

Peak (\$55) (\$)

12am

4pm

9pm 11pm

Here's how you used electricity this week

What parts of your routine could you do at off-peak times?

6

4

2

0 kWh

12am

4pm

9pm 11pm

Off-peak (\$)

Peak (\$55)

Enhancing the TOU experience with appliance-level peak usage insights

But what was I **doing** in those hours?”



Sam, user testing participant

UtilityCo

Ana Rodriguez
Acct ****1234

! You spent \$3 more on electricity during peak hours this week

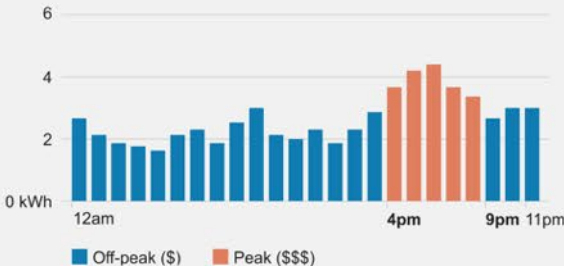


On weekdays, electricity is 1.5x more expensive from 4pm-9pm



Here's how you used electricity this week

What parts of your routine could you do at off-peak times?



This data is based on your average weekday electricity use from July 9-13.

Around 65% of your on-peak electricity use came from these categories:

Take a look at your on-peak electricity
use for your most recent bill

Jun. 1 - Jul. 1, 2023

You spent **\$16 less** on electricity during on-peak hours
compared to your last bill



i On-peak hours are from 4pm-9pm. Electricity is 2.2x more expensive during this time.

Around \$43 of your on-peak electricity costs came from
these categories:



Peak Period Disaggregation tells customers what appliances they were using during peak hours

And a breakdown of how they used electricity during peak hours this bill period

At the end of each bill period, customers get a summary of this bill's peak costs compared to the previous

UtilityCo

Ana Rodriguez
Acct ****1234

Jane, here's your Rate Coach summary for this bill period

Dec 1 - 30



Your **on-peak** use wasn't completely covered by your solar panels this bill period

You spent **\$5** more during on-peak hours compared to last bill period.

This bill's on-peak costs: \$10

Last bill's on-peak costs: **-\$5**

Rate coach can be tailored to meet complex customer needs, such as customers who have solar and EVs

And a breakdown of how they used electricity during peak hours this bill period

At the end of each bill period, customers get a breakdown of how much of their peak period usage was covered by solar panels

Your community thanks you for having solar panels and driving an EV



You are doing your part by contributing to a healthier environment, while saving on energy, fuel, and maintenance costs!

Good EV charging habits

✓ **Avoid charging during on-peak hours**

Charge your EV during off-peak hours when savings are greater.

✓ **Set an automated charging schedule**

No more going into the garage to plug in when off-peak hours start. With an automated schedule, you can plug in anytime, adding convenience to your routine!



Can you go the extra mile?

One way is to delay your scheduled start time: help avoid

Rate coach can be tailored to meet complex customer needs, such as customers who have solar and EVs

Reenforcing the positive impact of owning an EV and solar while suggesting good EV charging habits

Agenda

1. Leveraging AMI
for Customer
Engagement

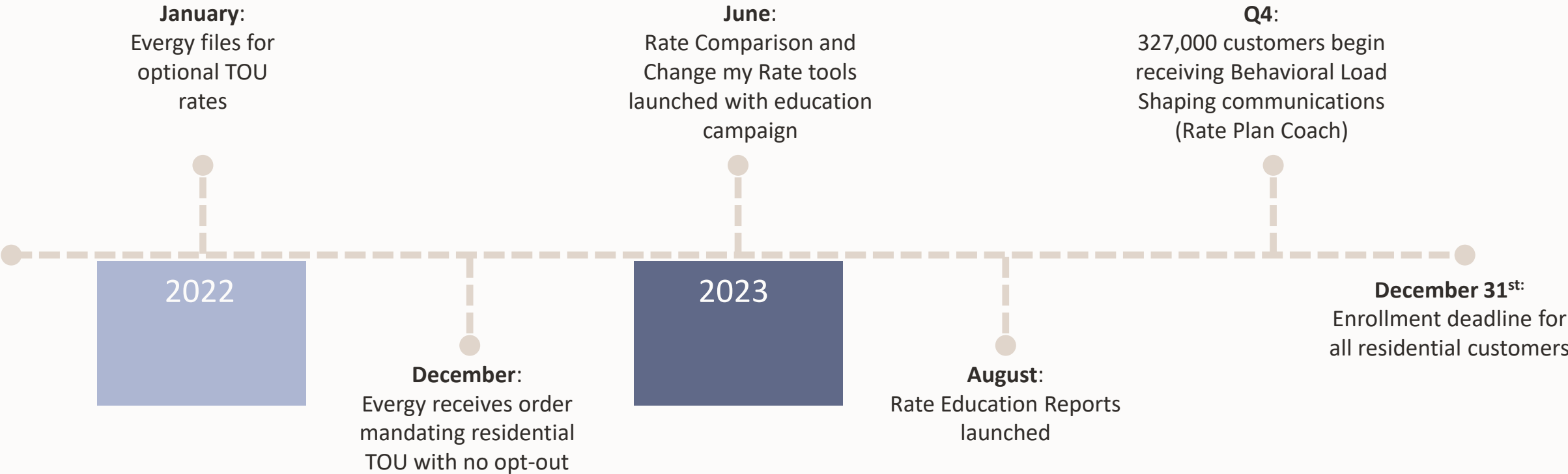
2. Rates
Engagement

3. Case Study -
Evergy

4. Creating a
balanced portfolio



Evergy launched a multi-pronged effort in just six months

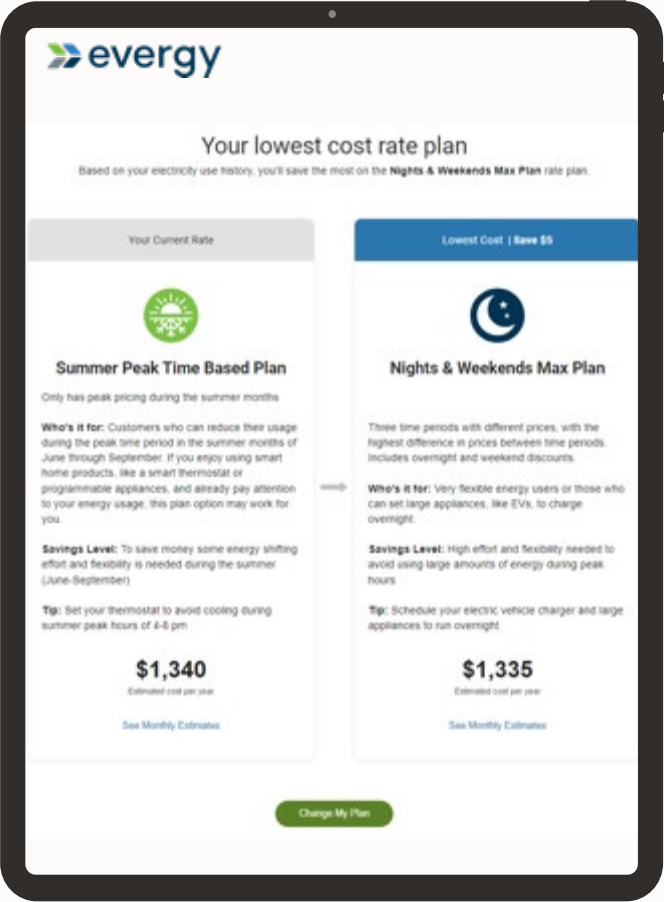


Customers were engaged throughout their TOU journey... before, during, and after enrollment

Rate Education Reports

Rate Comparison

Rate Plan Coach Reports



Evergy saw that engaging with customers throughout the journey had significant impacts

30%

160k customers
pre-enrolled in their
chosen time-based plan

80%

Customers
pre-enrolled through **self-**
service

50%

Customers used the **Rate
Analysis tool** to make
their decision

\$2M+

**Savings from calls
avoided** as a result of
digital strategy

Agenda

1. Leveraging AMI
for Customer
Engagement

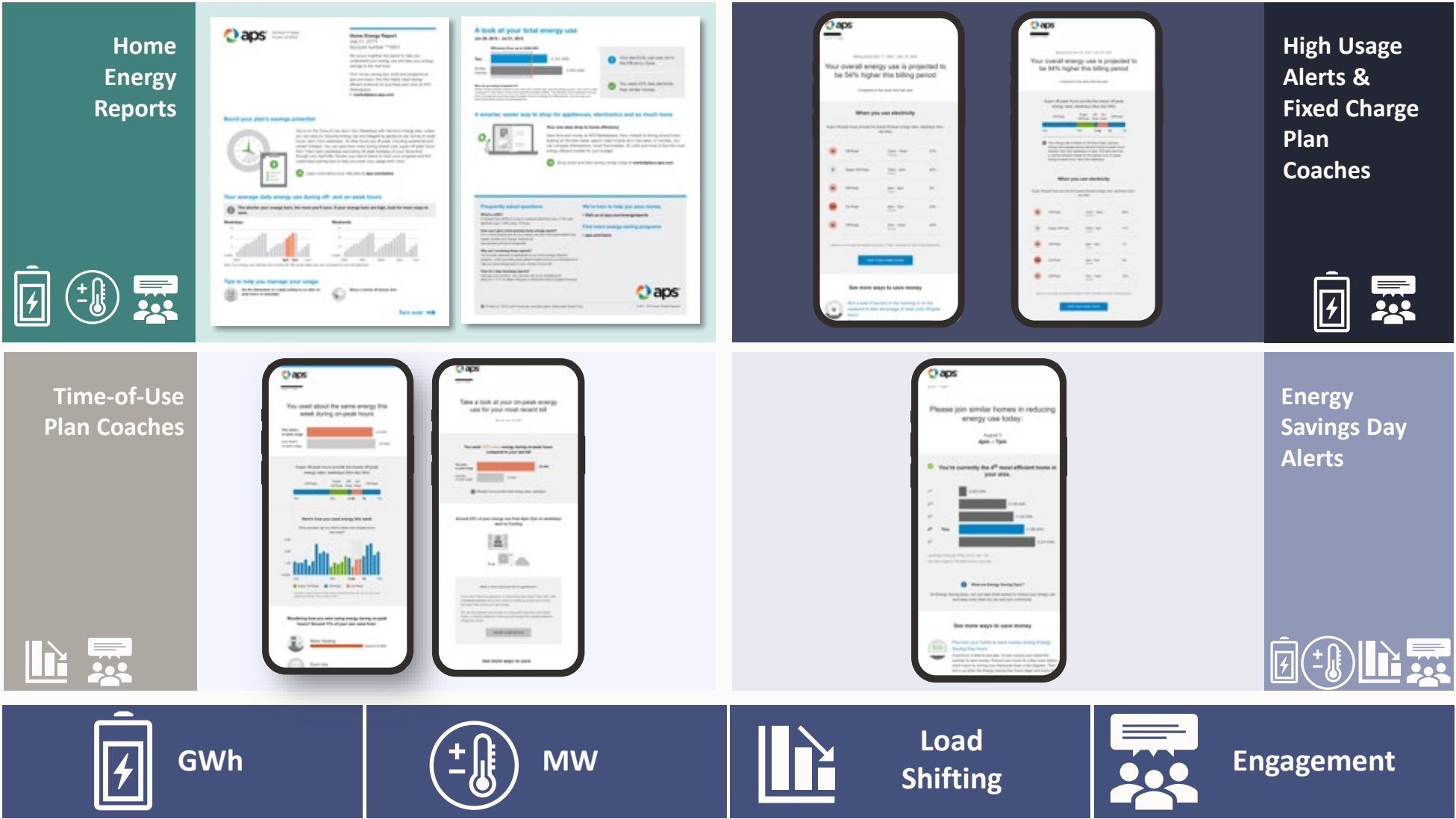
2. Rates
Engagement

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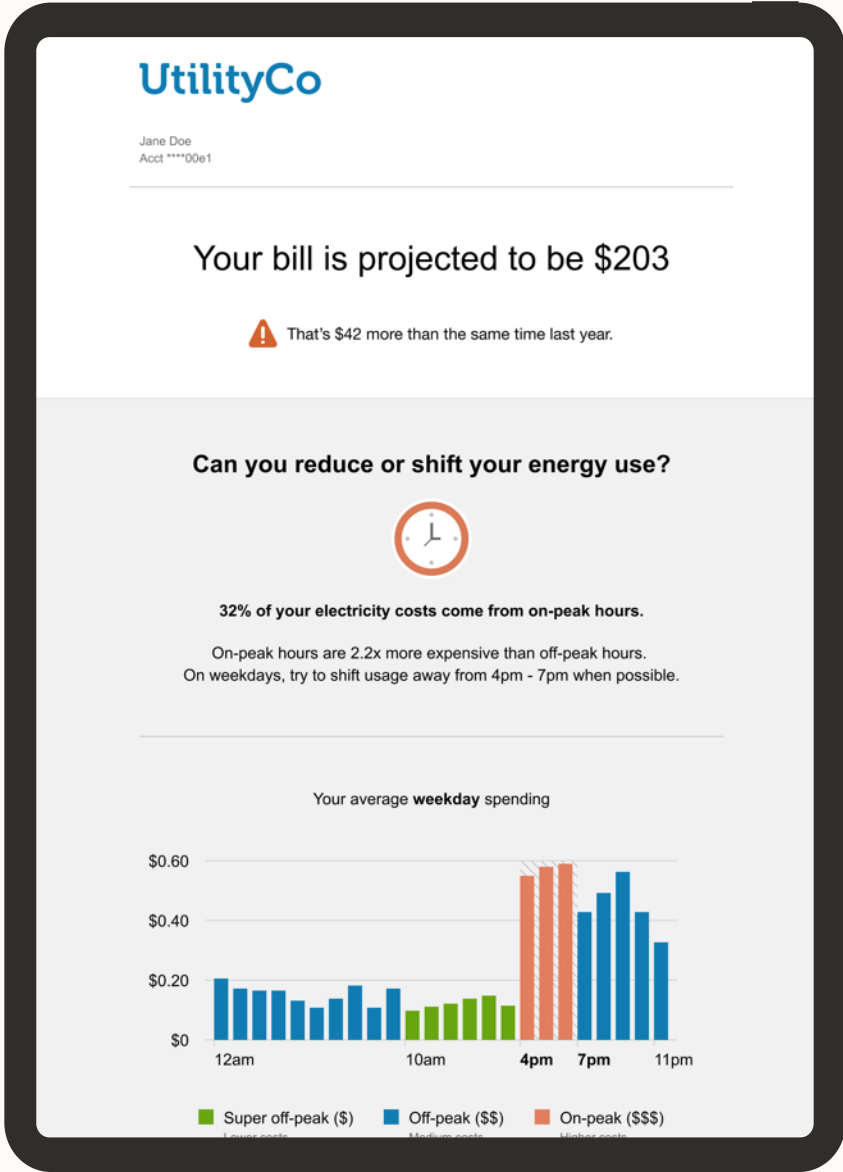
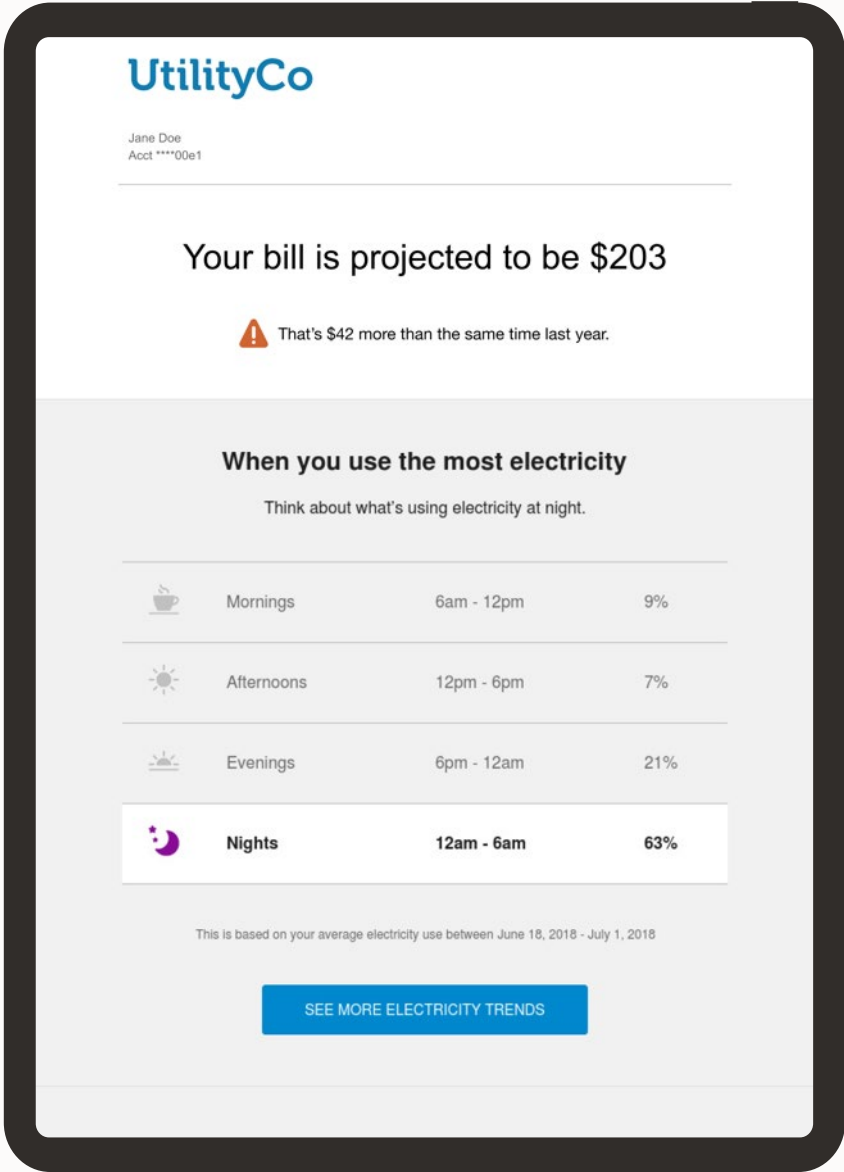
4. Creating a
balanced portfolio



Rates engagement fits into a layered DSM approach to drive reliable outcomes



Bill Alerts can provide peak insights



Bill Alerts can provide peak insights

UtilityCo

Jane Doe
And 999,999 others

Can you reduce or shift your energy use?

32% of your electricity costs come from on-peak hours.

On-peak hours are 2.2x more expensive than off-peak hours.
On weekdays, try to shift usage away from 4pm - 7pm when possible.

Afternoons

12pm - 6pm

7%

Evenings

6pm - 12am

21%

Nights

12am - 6am

63%

This is based on your average electricity use between June 18, 2018 - July 1, 2018

SEE MORE ELECTRICITY TRENDS

Can you reduce or shift your energy use?

32% of your electricity costs come from on-peak hours.

On-peak hours are 2.2x more expensive than off-peak hours.
On weekdays, try to shift usage away from 4pm - 7pm when possible.

Your average **weekday** spending

Hour	Super off-peak (\$)	Off-peak (\$\$)	On-peak (\$\$\$)
12am	\$0.20		
1pm	\$0.18		
2pm	\$0.18		
3pm	\$0.15		
4pm	\$0.12	\$0.18	\$0.55
5pm	\$0.12	\$0.18	\$0.58
6pm	\$0.12	\$0.18	\$0.58
7pm	\$0.15	\$0.45	
8pm	\$0.15	\$0.55	
9pm	\$0.15	\$0.45	
10pm	\$0.15	\$0.35	
11pm	\$0.15	\$0.30	

■ Super off-peak (\$) Lower costs ■ Off-peak (\$\$) Medium costs ■ On-peak (\$\$\$) Higher costs

Your average hourly weekday electricity spending January 15, 2024 - January 29, 2024

Your average **weekend** spending

Hour	Off-peak (\$\$)
12am	\$0.20
1pm	\$0.18
2pm	\$0.18
3pm	\$0.18
4pm	\$0.18
5pm	\$0.18
6pm	\$0.18
7pm	\$0.25
8pm	\$0.25
9pm	\$0.25
10pm	\$0.25
11pm	\$0.25

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HER Evolution: Time Of Use Rate Education

UtilityCo

123 Energy Way, Austin, TX 12345-6789

00148370023-C10-1P14851-730605

SARAH CLARK
1000 SUNSHINE BLVD
APT. B
AUSTIN, TX 12345-6789

Home Energy Report

May 20, 2022
Account #1234567890
1000 Sunshine Blvd, Apt. B
Austin, TX 12345-6789

Your energy use at a glance

Fair

Good

Great

Use this report to learn about your energy use and how you can save more.

How you compare to others

Efficient homes772 kWh

You835 kWh

Similar homes970 kWh

Efficient homes represent the 20% of similar homes in your comparison group that used the least amount of energy this period.

A kilowatt-hour (kWh) is the standard unit used to measure electricity use.

How does this comparison work?

We use your home profile to look for 100 single-family homes in your area with a similar heating source and square footage. If your report seems off, you can take the Home Energy Survey to make it more accurate.

To take the Home Energy Survey, go to:
UtilityCo.com/HomeSurvey

Want to save more on your bill? Turn over to learn how—and when—to save energy.

Feb 5 - Mar 6, 2020

Your energy use was higher than efficient homes by

8%

You used less energy than similar homes

Take the 5-minute Home Energy Survey

Save money by using less electricity during peak hours

On weekdays, electricity costs 2.3x more from 3pm-8pm.

12am10am3pm8pm11pm

On weekends and holidays, there are no peak hours.

12am11pm

Off-peak hours (\$)

Partial-peak hours (\$\$)

On-peak hours (\$\$\$)

Why does it matter when I use electricity?

Peak hours are when energy demand is highest in our region. Using less electricity during peak hours will save you more on your bill, and helps us deliver cleaner energy to the whole community.

This Time-of-Use schedule lasts May 1 - Sep 30. To view your full plan details, go to [utilityco.com/tou-rateplans](#).

Tips for peak hours and beyond

Use a power strip and turn it off during peak hours

Many devices draw power even when turned off. Use a power strip to turn off several electronics at once, including your TV, game console, and computer. Smart power strips can make it even easier to switch them all off.

This tip is low cost

Open your shades on winter days for natural light and warmth

Take advantage of winter sunlight. By opening blinds during the day to use natural light and capture free heat, you'll be able to lower the temperature on your thermostat and save on heating costs.

This tip is free

What's okay to use during peak hours?

You don't have to turn everything off to save electricity

Although it's good to save as much electricity as you can, continuing to use low-energy electronics (like your TV, phone chargers, and lights) won't necessarily drive your usage up too much during peak hours. Feel free to continue using these low-energy items as needed, while you focus on avoiding high-energy appliances, like your clothes dryer or dishwasher. Find more ways to save at [utilityco.com/peak-savings](#).

We're here to help

1-888-999-0000

efficient@utilityco.com

utilityco.com/homeenergyreport

Save more with special rebates and energy-efficient products you can buy at [utilityco.com/energysavingproducts](#).

UtilityCo

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HER Evolution: the Peak-Focused HER

UtilityCo

123 Energy Way, Austin, TX 12345-6789

0014837 0023-C10-1 -P14851-739025

SARAH CLARK

1000 SUNSHINE BLVD

APT. B

AUSTIN, TX 12345-6789

*****AUTO**S-DIGIT 12345

Home Energy Report

August 20, 2023

Account #1234567890

1000 Sunshine Blvd, Apt. B

Austin, TX 12345-6789

Electricity costs **2.5x** more during on-peak hours (4pm-9pm) on weekdays

12am 6am 4pm 9pm

Off-peak

Partial-peak

On-peak

Your on-peak hours usage is great

Jul 5 - Aug 6, 2023

On-peak electricity use

Total electricity use

You

153 kWh

834 kWh

Efficient neighbors

177 kWh

901 kWh

Average neighbors

254 kWh

1546 kWh

Efficient neighbors are the 20% of homes in your comparison group that used the least amount of electricity during on-peak hours this period.

A Kilowatt-hour (kWh) is the standard unit used to measure electricity use.

Nice! Your on-peak electricity use was **lower** than efficient neighbors by

14%

✓

You used less electricity during on-peak hours than average neighbors

How does this comparison work?

To help you see how well this rate plan is working for you, we use your home profile to look for 100 single-family homes in your area on the same **rate plan**, with a similar **heating source** and **square footage**.

Take the 5-minute Home Energy Survey

Make your reports more accurate by taking this survey: [utilityco.com/homesurvey](https://www.utilityco.com/homesurvey)

Want to reduce your home's energy use? Turn over for personalized savings advice.

Your average hourly use on weekdays

Off-peak

Partial-peak

On-peak

Average neighbors

12am 6am 12pm 4pm 6pm 9pm

Peak hour spotlight

4pm-5pm

Your average on-peak energy usage is highest during this hour.

Learn more about your peak rate at [utilityco.com/tou-rateplans](https://www.utilityco.com/tou-rateplans)

Average usage is shown in kWh.

Your best energy saving opportunities

Tip recommended for you

Cooling

Water heater

Dryer

Use fans instead of Air Conditioning

Because fans are targeted to a specific area, they can be more cost effective than cooling your entire home. To save electricity, raise the thermostat setting by 4°F and use fans to keep cool.

You are using these high energy consumers during on-peak hours. Target them for noticeable reductions in your bill and overall usage. In contrast, lighting and small electronics generally have a minimal energy impact.

Rebates are coming your way

Getting ready for summer pays off

ENERGY STAR qualified central air conditioners use up to 20% less energy than conventional models.

Choose a participating contractor for your installation, and receive a rebate of up to \$450.

To learn more, visit [utilityco.com/acrebates](https://www.utilityco.com/acrebates).

We're here to help

1-888-999-0000

efficient@utilityco.com

[utilityco.com/homeenergyreport](https://www.utilityco.com/homeenergyreport)

Save more with special rebates and energy-efficient products you can buy at [utilityco.com/energysavingsproducts](https://www.utilityco.com/energysavingsproducts).

UtilityCo

Lorem ipsum dolor sit amet, consectetur adipiscing elit, sed diam nonummy nibh euismod tincidunt ut laoreet dolore magna aliquam erat volutpat. Ut wisi enim ad minim veniam, quis nostrud Lorem ipsum dolor sit amet, consectetur adipiscing elit, sed diam nonummy nibh euismod tincidunt ut laoreet dolore magna aliquam erat volutpat. Printed on 100% post-consumer recycled paper using water-based inks. © 2012 - 2020 Oracle. All rights reserved.



ORACLE



Sense Embedded Intelligence

Sense Embedded Intelligence in the Electric Grid

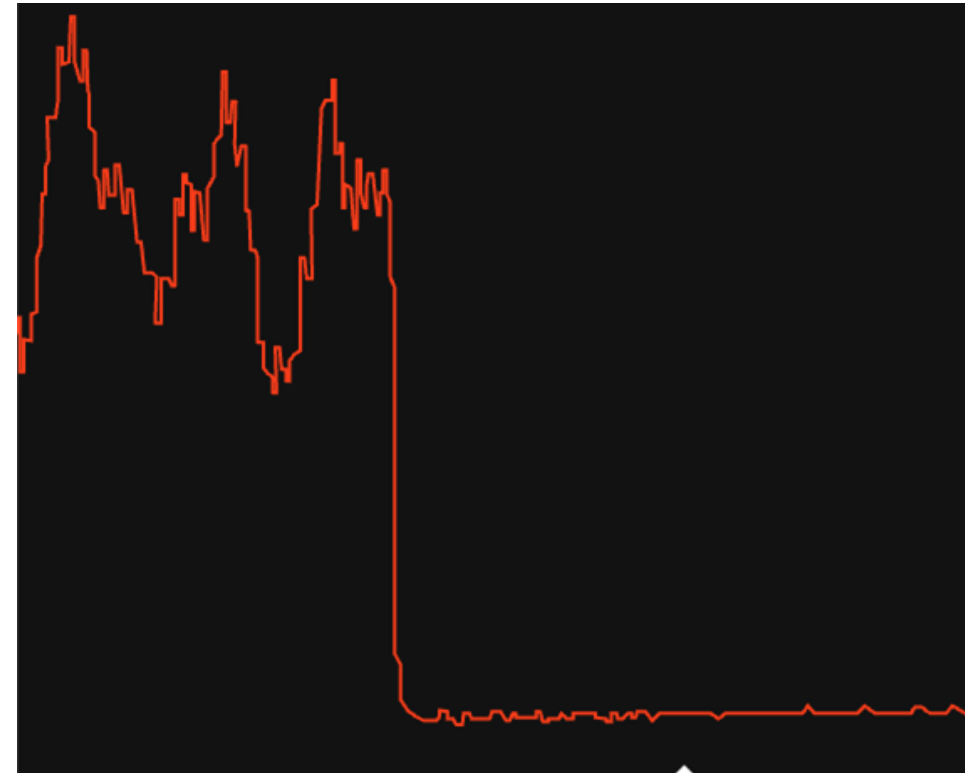


How does Sense work?



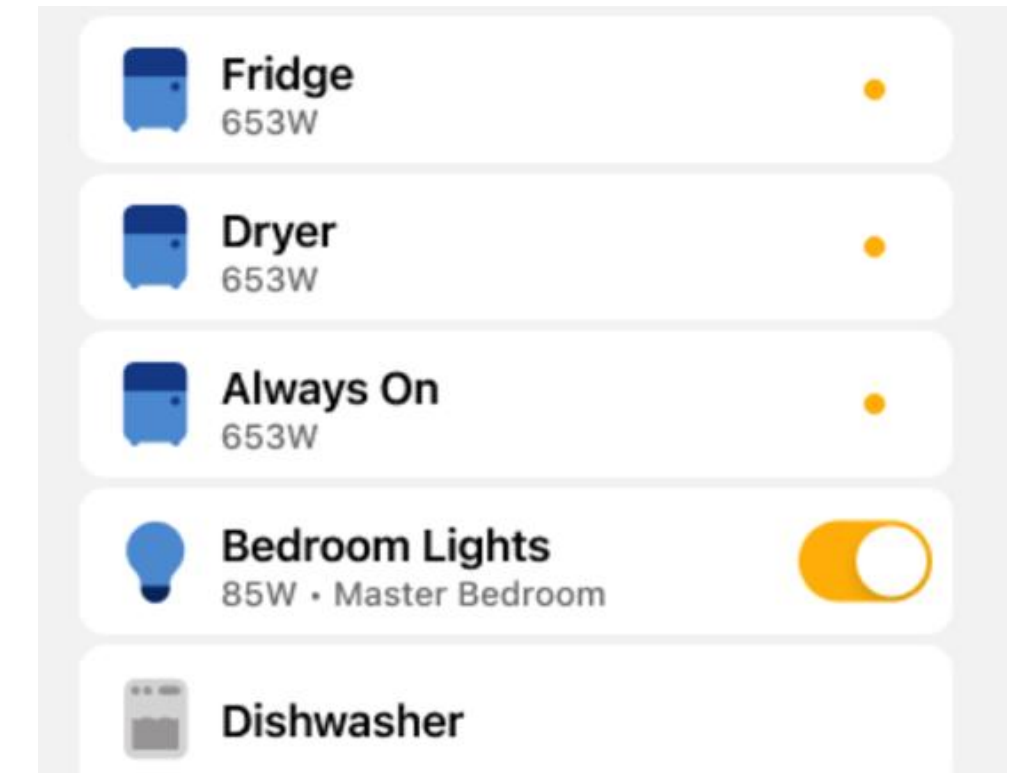
Embedded intelligence

Edge computing and low latency networking embedded in next generation AMI meters.



Machine Learning

Sense uses machine learning to identify the unique signature of each electrical device, determine its state and energy usage, tracks performance and failure signals

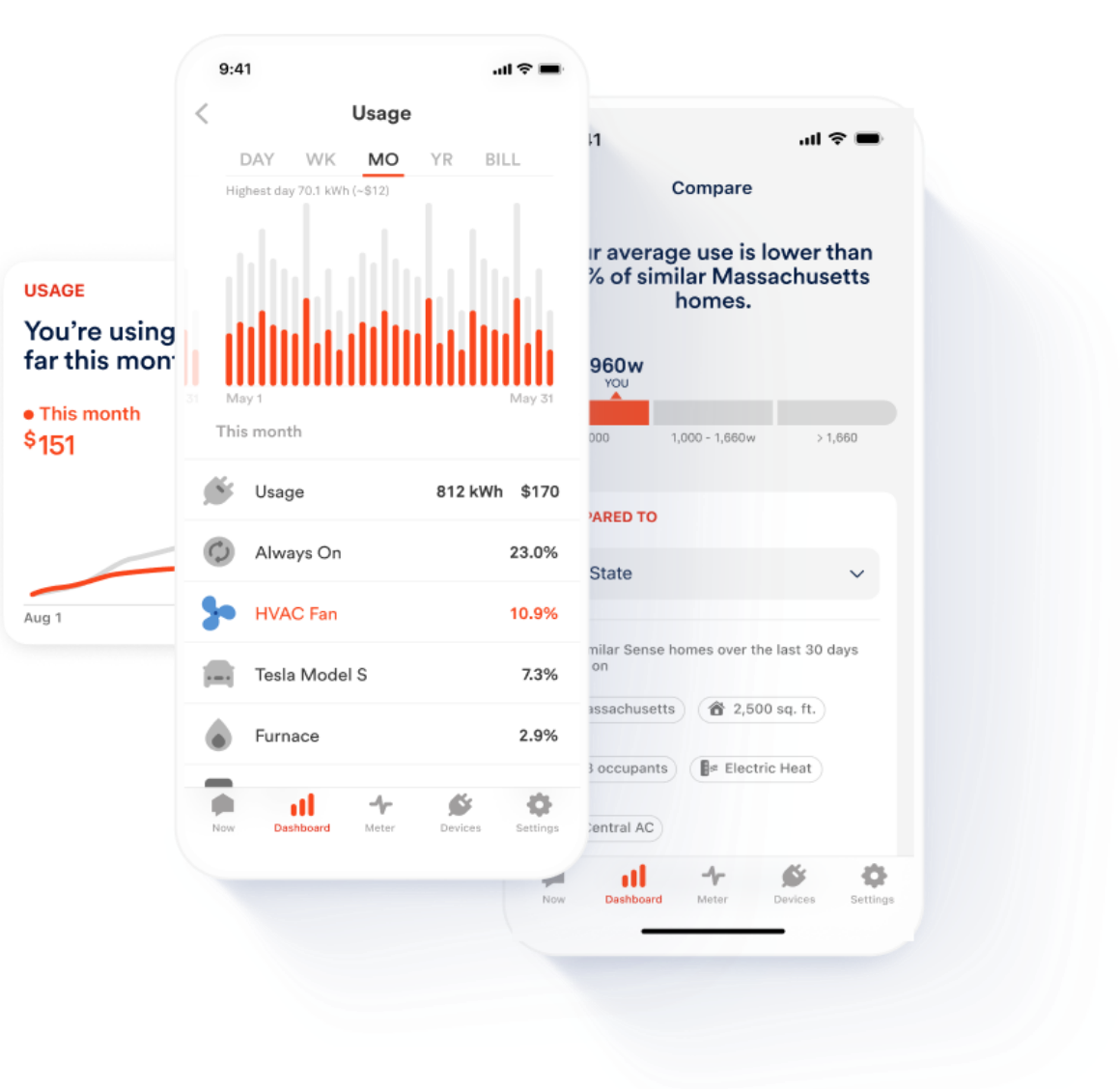


Network effect

Sense continues to build a library of device signatures. As Sense collects data in more homes, and samples a diversity of devices and appliances, the library grows.

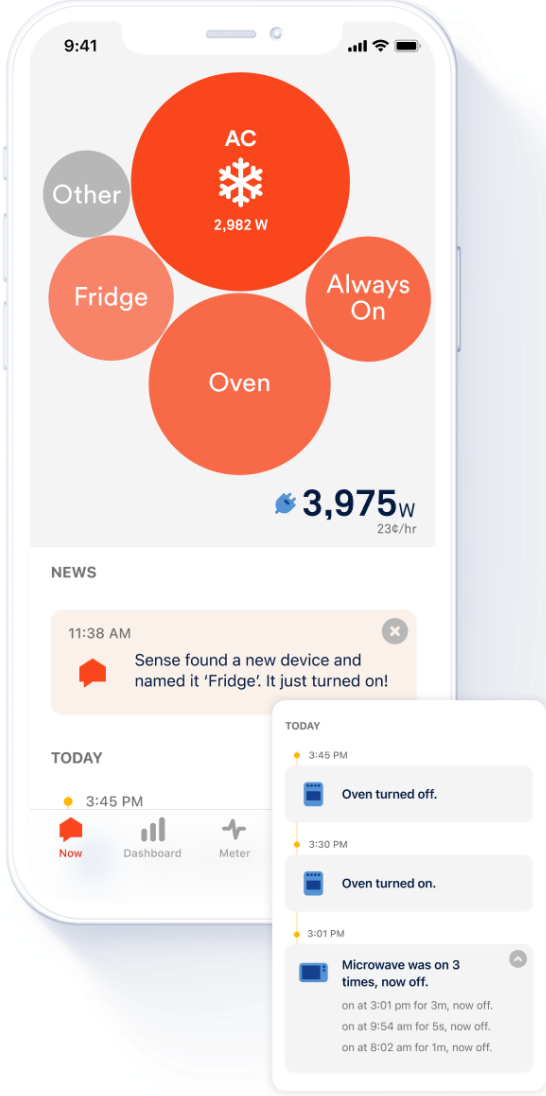


With Real-time Applications, Residential Customers Can...



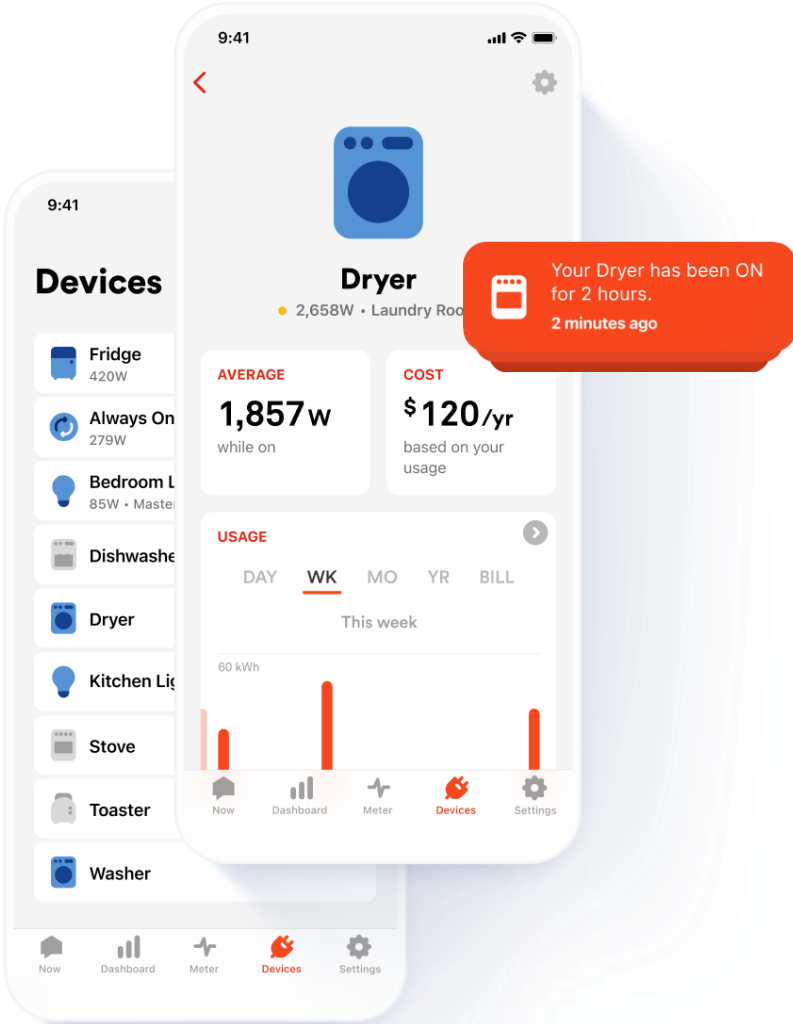
1

Compare and track energy use over time.



2

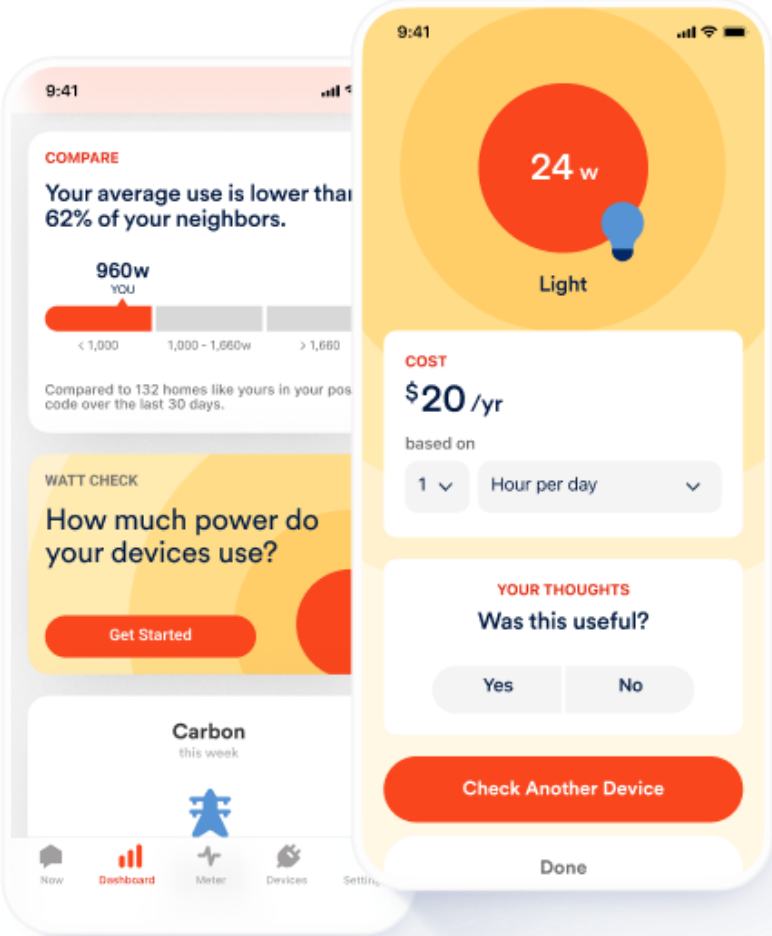
Keep an eye on real time power use throughout the home.



3

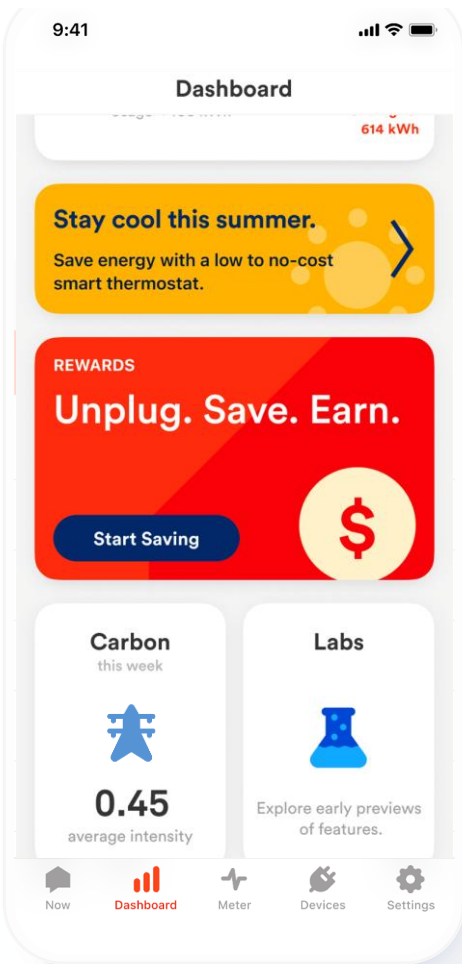
Detailed view of the home and its devices.

Real-time Experiences Keeps Customers Engaged



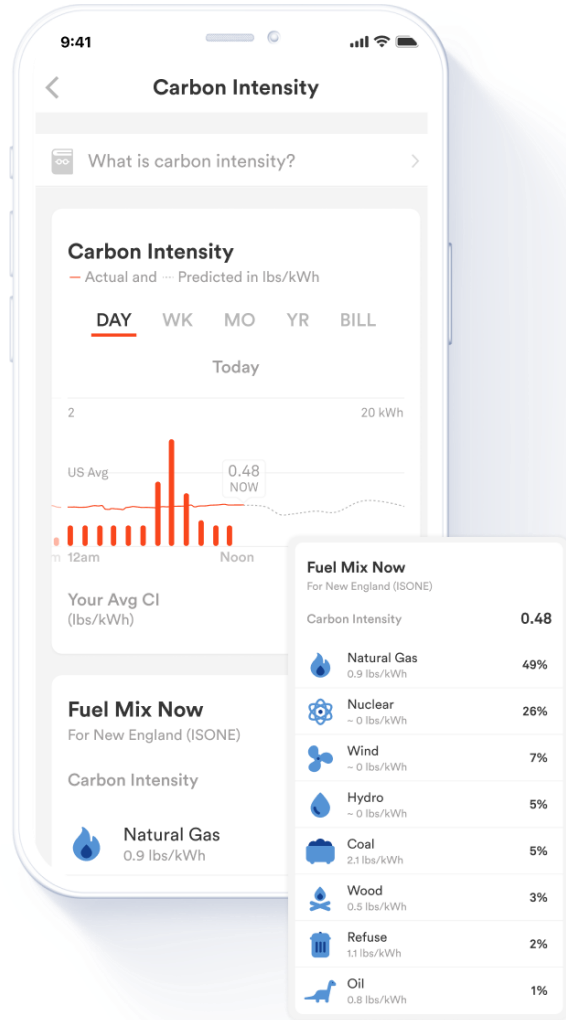
1

Check how much power devices consume and how much it'll cost.



2

Personalized offers to help customers save energy and money.



3

Tools to help customers reduce their carbon footprint.



Disclaimer: The images shown are for illustration purposes only and may not be an exact representation of the final product

Use of Real-time Customized Alerts

-  Sense

now

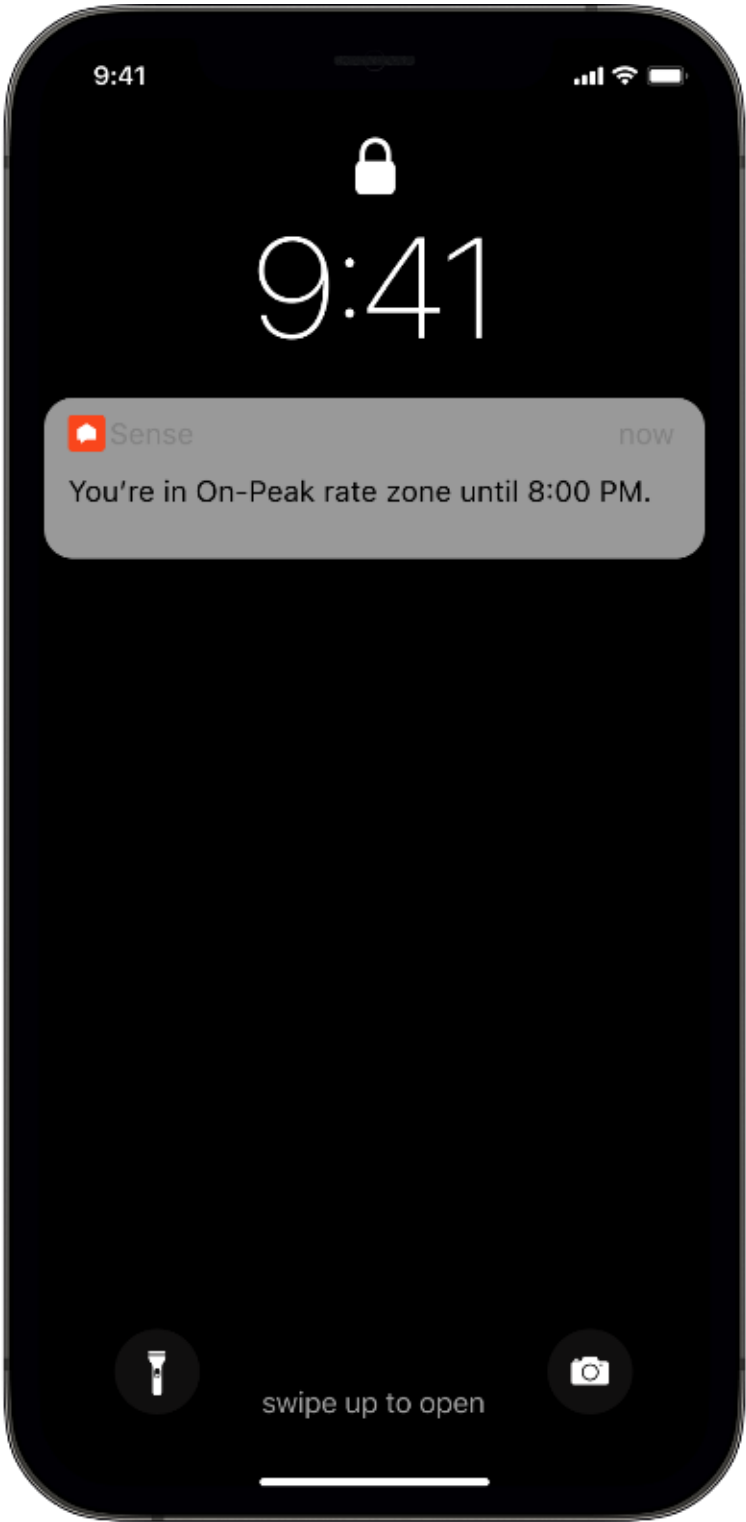
Warning: Floating Neutral Detected
This could be a serious safety issue. Sense recommends contacting an electrician.
-  Sense

now

FAULT: Appliance motor is stalling.
-  Sense

now

Your iron has been ON for 15 minutes.



-  Sense

now

Your energy use is 15% more than average in your On-Peak rate.
-  Sense

now

Your AC is inefficient compared to similar homes.
-  Sense

now

Your Garage Door just turned ON.
-  Sense

now

Your TV has been ON for 3 hours.



Real-Time Energy Insights Create Lasting Change in Wisconsin



Alliant Energy customers reduced electric use by 4% on average with Sense

In 2024, Sense wrapped a multi-year program with Alliant Energy to explore how real-time home energy insights could help Wisconsin households use less energy - and spend less doing. The program used a multi-phased approach to recruit & deploy Sense's technology to over 900 participants.

2.5 %

GAS SAVINGS

On average, participants reduced their electricity use by 3.9% annually and annual therm use by 2.5%. Savings not only persisted but increased year over year.

4%

ELECTRIC SAVINGS

10%

DEMAND REDUCTION

During summer events, participants achieved peak demand reductions averaging 10%, outperforming typical results from standard behavioral demand response programs.

85%

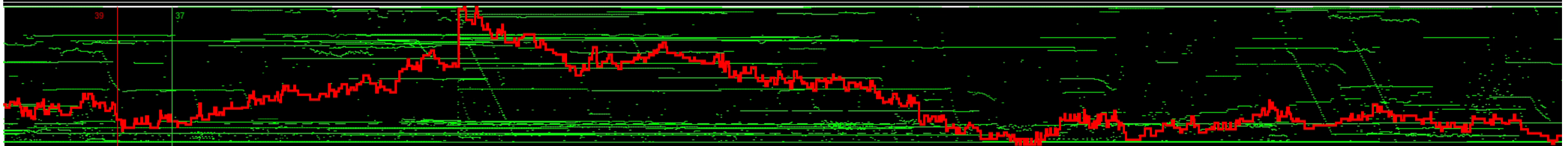
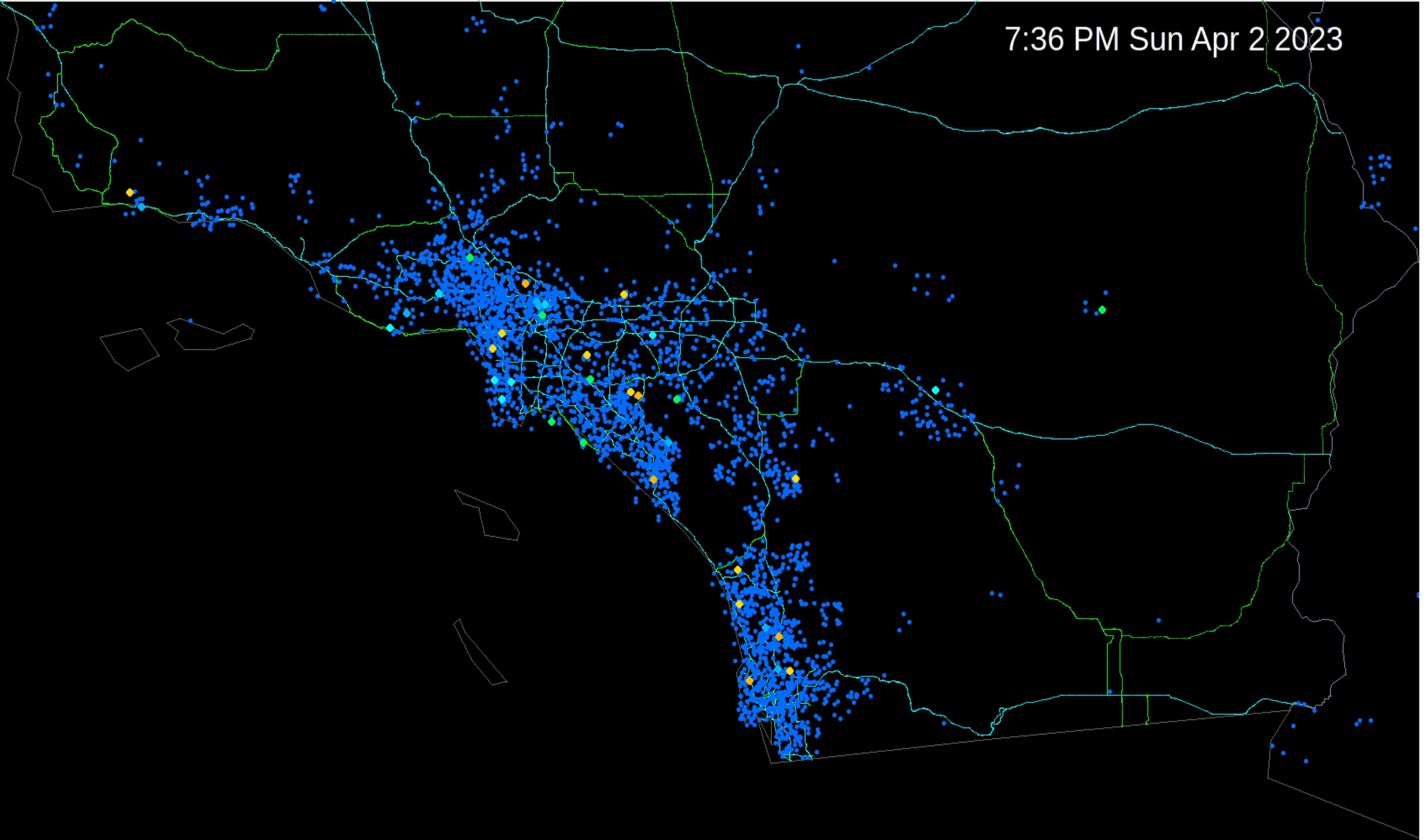
ENGAGEMENT

Most participants said the Sense app helped them build better energy habits—and 85% reported they intended to maintain those habits long term.

Moving Beyond Behavioral Control

Los Angeles

7:36 PM Sun Apr 2 2023



Software at edge of the grid



Safety + Resilience
Capacity



Modern Distributed Architecture



High Resolution Data
Edge computing
Real-time networking

Interaction between home/grid
Localized, real-time load flexibility
Service Upgrade Avoidance
Planning/forecasting
Outage management



Efficiency
Load Flexibility
Electrification
Health and safety of home



Able to control devices through software

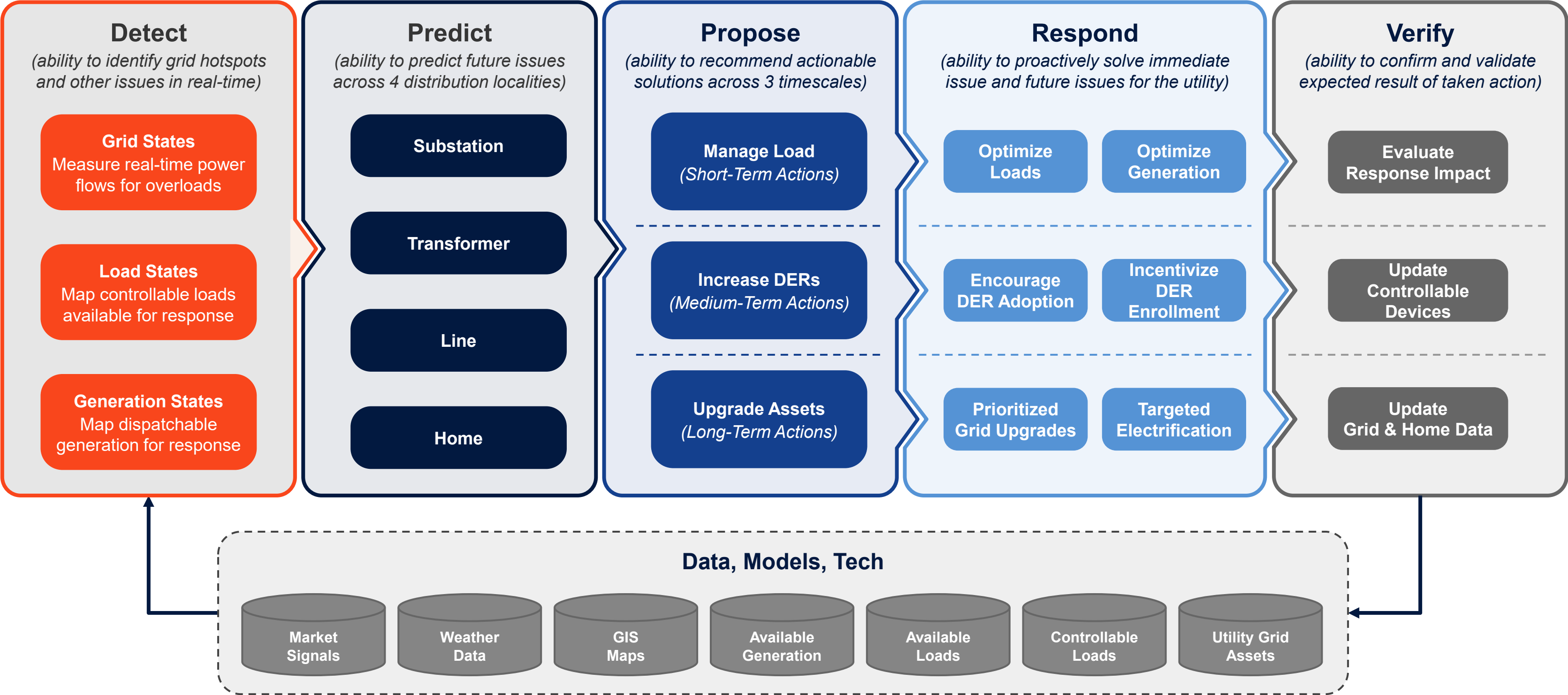


Next Generation
Utility Meter



Full view of home and grid allows optimization of energy use

Framework | Sense empowers utilities to proactively identify and manage grid capacity constraints by optimizing controllable residential loads and generation





Thank you

[Sense.com](https://sense.com)

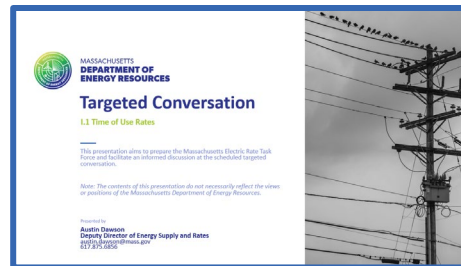
Next Steps

Targeted Conversation

August 13, 2025, 2-4pm

- Will serve as a deliberative space following related expert presentations to prompt informed discussion on policy questions and priorities

Illustrative Presentation



Optional Office Hours

August 6, 2025, 2-4pm

- Optional office hours for further conversation, serving as a structured opportunity to work towards common understandings and positions. We also encourage participants to have discussions amongst each other beside formal Task Force sessions
- Please reach out to chris.connolly2@mass.gov to request an invitation.