

ORA DATA REQUEST

ORA-SDGE-DR-06

A.17-12-013

SDG&E 2018 Residential Rate Design Window

Date Received: April 11, 2018

Date Submitted: April 13, 2018

DATA REQUEST: IDTM ME&O

Question 1:

In SDG&E-7, at p. HT-19, SDG&E states that outbound calling “will be considered for reaching out to the most negatively impacted customers to educate them on TOU rates and connect them to solutions. This tactic is planned to be tested in the Default TOU Pilot and may be included in the mass default plan, based on its level of success.”

- a. Please describe SDG&E’s current outbound calling plan for the default pilot. How does SDG&E define “most severely impacted customers” in this context?
- b. What metrics does SDG&E intend to use to determine the level of success for outbound calling in the default pilot?

SDG&E Response:

- a. Outbound calling provides SDG&E with an opportunity to make a more personal, customized and interactive connection with specific customers, such as the most negatively impacted. SDG&E defines “most negatively impacted” customers as those customers who fall outside of the Neutral Non-Benefiter category, which are customers expected to experience an average increase of \$0.01-\$9.99/month on their electric bill, based on the last 12 months of energy consumption. Non-Benefiters, i.e. those customers expected to experience an average bill increase of \$10/month or more on their electric bill, are considered the most negatively impacted customers.¹

SDG&E conducted an outbound call campaign in Q1 of 2018 to customers in the default pilot population who were estimated to see an increase of \$10+/month or 10% or more on their energy bill. The 4,185 pilot customers in this group represent approximately 3% of the pilot population and are comprised of 5% CARE, FERA or Medical Baseline customers. SDG&E’s Energy Savings Specialists (ESS) conducted approximately 6,000 live calls to pilot customers with the following results:

- 38% of customers were successfully reached by an ESS
 - 11% of customers made the decision to try a default TOU pricing plan
 - On average, it took almost two calls for the ESS to contact the customer
- b. Outbound calling in the default pilot provides an additional touchpoint for SDG&E that allows us to get specific, qualitative feedback from customers regarding their thoughts, concerns and understanding of TOU. The Q1 call campaign provided the following customer sentiment metrics:

¹ Non-Benefiters and Neutral Non-Benefiters are described in the Prepared Direct Testimony of Christopher Bender, A.17-12-013: SDG&E 2018 Rate Design Window.

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- 71% of customers had a positive/neutral view of TOU
- 7% of customers had a negative view of TOU
- 17% of customers chose to disconnect before the call was completed

In this case, success is determined by our ability to engage customers directly, gather their input, and apply key learnings and insights that help refine messaging and strategies for mass TOU rollout in 2019. Because the number of “most negatively impacted” customers in the general default population will be higher, SDG&E may need to redefine the threshold, criteria and/or timing for those that receive outbound calls, based on findings from the default pilot.

¹ Non-Benefiters and Neutral Non-Benefiters are described in the Prepared Direct Testimony of Christopher Bender, A.17-12-013: SDG&E 2018 Rate Design Window.