The top 10 sessions from the 2020 E Source Forum

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October 26, 2020

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Although virtual, this year's E Source Forum was still a huge success. We featured 27 sessions across two days and four themes: postpandemic recovery, decarbonization, utility of the future, and serving vulnerable communities.

We compiled the 10 most-attended sessions from this year's event. You can check out the session recordings below and find key takeaways for all 10. If you registered for the 2020 E Source Forum, you can access all session recordings and presentations through the event page.

Save the date: E Source Forum 2021, September 28 through October 1

Opening keynote: Lives and livelihoods on the line | Utilities' opportunities as a force for positive change

- Each of us are empowered to make a long-lasting impact by aiming to create a more equitable energy and water future.
- High energy burdens result in cost-juggling for the customer. They often need to make the choice to heat or eat.
- Households with high energy burdens tend to suffer from other consequences, including health problems. In addition to looking at the energy benefits when interacting with these customers, there's an opportunity to look at the non-energy benefits.
- Equity and equality are two different goals. Equity would be if a utility customizes customers' offerings to reach the same goal, while equality would be if the utility offers all customers the same program, even if it doesn't work for their needs.
- Engaging local partners can give utilities an authentic way to engage their communities. Partnerships can help you find boots on the ground that know the community in a unique way.



Turning customer insights into results: A strategy discussion with executives and marketers

- You should approach your corporate strategic priorities at an enterprise level and use those priorities to drive the data you capture and use.
- The energy industry is maturing past its standard high-level customer persona approach. The technology available with data science and artificial intelligence allows you to understand your customers more granularly, at a household level.
- Microsegmentation starts with customer experiences and relationships. Macrosegmentation may still work for general product development and targeting.
- Be purposeful about harnessing customer data and do it in a way that benefits customers and the business.



Closing keynote: Creating the perfect experience for your customers | Is it possible?

- Whether you're building a first-rate university or moving a bus out of the snow, with passion, empathy, courage, and a little design thinking, you can make somebody's worst day their best day.
- Passion is what drives us and gives us the power to be relentless. And if you're passionate, you can have passion for anything.
- At the core of passion is empathy. If you don't empathize with the people you're trying to solve problems for, you'll never get to the root cause of their problem.
- You also need courage. Courage is sitting in a room of people who say they can't do something and challenging them to think otherwise. It's using your voice and finding the one way you can do something among the thousands of reasons you can't. Ninety percent of doing the impossible is believing that you can do it, and the other 10% is the design process.
- How can utilities achieve this? Start by asking, "How might we?" Bring in the right people to a conversation and listen to them.



EV sales dropping? Consumer insights tell us what we're doing wrong and how to fix it

- This session highlighted important consumer insights that can help shape utility electric vehicle (EV) initiatives and support increasing EV sales.
- We featured results from the 2020 E Source Electric Vehicle Residential Customer Survey that examined barriers to and drivers of EV adoption. Improving the consumer experience was the most notable way to increase EV sales.
- We discussed the importance of market segmentation and how E Source developed Colorado's EV Education and Awareness Roadmap to target the next segment of EV buyers.
- We also talked about the results from a joint project with Ameren Missouri that forecasted EV adoption impacts on the distribution network. This project shows how utilities can focus on increasing EV sales now while preparing for future grid impacts.



Utility business strategies for a shifting economic and societal climate

- Three executives from Consumers Energy, FortisBC, and PG&E had a frank conversation about strategic approaches to their businesses.
- They discussed the value of the natural gas distribution system, especially given the backdrop of the need for radical carbon reduction.
- Each executive emphasized the continuing value of energy efficiency in their portfolio but also recognized that it’s just one tool to reduce carbon, keep bills low, and address equity needs.
- They also discussed how their businesses would make money in the future. They like the idea of increased performance-based incentive regulation, where the regulatory bodies provide broad goals around key performance metrics—such as keeping rates low, offering excellent reliability, and improving customer service—and then let the utility earn profits based on those goals.



Unlocking the value of AMI data

- Throughout the session, we spoke on how to evaluate, design, and successfully implement (advanced metering infrastructure) AMI technologies.
- We heard from Alameda Municipal Power on successful use cases including meter reading, theft or tamper, and outage visualization. Loudon Utilities quickly identified safety issues including hot sockets and leaks to help their customers. Long Beach Water crafted a well-branded campaign with positive perception despite difficult field conditions and COVID-19.
- Each utility had unique drivers and challenges along the way, but we learned that AMI programs have huge benefits. These utilities were strategic during the installation period and are continuing to look for opportunities to elevate the use of their AMI data.



Low-income customer panel: What we need from our utilities

- Utilities' low-income customer group has grown due to COVID-19. About one-third of utility customers have lost income during the pandemic. Empathy is no longer a choice; it's a necessary action when interacting with this customer group.
- Customers who have lost some of or all their income during the pandemic were less likely to agree that their utility makes decisions in the customers' best interests, communicates effectively, offers customized billing and payment options, or has a contact center that's equipped to handle their needs.
- Low-income customers prioritize their utility bills over groceries and medical expenses.
- Frame innovation challenges as how might we questions when coming up with solutions. For example, how might we interact with low-income individuals and leave them satisfied and happy when the interaction is over? How might we more-effectively communicate what actions low-income customers can take that will make noticeable impacts on their bills?



Why it’s imperative to unify your clean-energy and energy equity initiatives

- Utilities must unify their clean-energy and energy equity initiatives, or they risk creating siloed solutions that can negatively affect the most vulnerable people they serve.
- Energy insecurity, the inability for someone to meet their household energy needs, affects tens of millions of households, and utilities are in a powerful position to help.
- Collaboration across diverse stakeholders is the key to creating solutions that address climate change and energy inequity.



How PPL is taking a data-driven approach to optimize decision-making

- Let the data drive the decision-making process. Stephanie Raymond, vice president of distribution operations at PPL Electric Utilities, doesn’t like when people bring her prebaked use cases. Her reason being that those always have baggage and hidden assumptions. Instead, bring the problem you’re trying to solve and let the data tell the story.
- A data-driven journey can support innovation across an entire organization. PPL is solving reliability issues, reducing operations and maintenance, improving customer satisfaction, and supporting distributed energy resources. A comprehensive data science approach can be deployed across all parts of the utility.
- Using data science makes sure machines are doing what machines do best, freeing up human resources. PPL partners with the E Source Data Science Division not to replace humans but to complement and empower them to do what they do best.



Maximize your impact on vulnerable communities through segmentation and outreach

- Integrate the temporary changes your utility has made to program design and eligibility during COVID-19 into your postpandemic demand-side management (DSM) programs. Create a DSM offering for moderate-income and high-energy-burden customers to better reach this vulnerable customer segment going forward.
- Partner with community-based organizations to gather insights on the unique interests and needs of different communities in your territory. Then use the data to design targeted DSM programs.
- Work with community-based organizations to find extra funding sources and to measure the impact of your partnerships on specific demographics.
- Develop regulatory metrics around diversity, equity, and inclusion to build a business case for the moderate-income programs and offerings for vulnerable customers.
- Acknowledge the non-energy benefits associated with specific projects and populations without directly quantifying them to justify your programs to regulators.



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