Key highlights and memorable moments from the 2023 Forum

By Sara Patnaude
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As we wrap up 2023, we wanted to reflect on the success of E Source Forum 2023. So I sat down with Dave Perotti, E Source CEO, and Michael Carter, president of E Source Research and Advisory, to do just that.

“This year’s Forum was dedicated to not only elevating the customer experience but making it an equitable one. Because of this, the overarching theme seemed to be one of transformative exploration,” said Perotti.

Save the date for the E Source Forum 2024

We can’t to see you at E Source Forum 2024, October 8–10!

Carter agreed, recalling, “As I spoke with many of our utility clients at Forum this year, one strong thematic observation I noticed was the fact that all utilities are getting serious on addressing affordability and equity issues. There are two important perspectives: One is understanding, engaging, and better defining the customer experience. The other is coming to terms with the reality of the disproportionate costs utilities must bear associated with addressing affordability and equity, as well as the opportunities to address these costs.”

The engagement and enthusiasm that Perotti, Carter, and, really, all the E Source team saw at the Forum reaffirm our industry’s dedication to continuous improvement and customer-centric innovation.

So, in case you missed it, here are some of the highlights from the 2023 Forum.

Put the customer first

We put the customer first in our customer experience (CX) track, offering sessions that addressed:

- Equitable outage solutions

- The benefits of self-service offerings
- How using customer data can improve operations
- The E Source 2023 Achievements in Customer and Employee Experience awards

Improving self-service capabilities improves the customer experience

Utilities need to implement the right software that will allow customers to easily self-serve. During the "Digital engagement through customer self-service" workshop, PG&E and the City of Tallahassee, Florida, shared strategies they used to meet customers' self-service expectations.

For example, PG&E encouraged attendees to put the customer first in website redesign. In PG&E's recent move to radical simplicity on its website, it focused on making copy more accessible and readable.

Lori Geoffroy, senior director of Digital Strategy at PG&E, noted that even if you don't have the budget to improve CX, you can still improve your website content. She encouraged others to use data to simplify their websites and create opportunities for customers to stumble onto content—like putting key messages where customers are looking such as the login menu.

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Using data helps utilities identify customer issues and improve the customer experience

In the session Using customer data to improve operations and the customer experience, we heard from utilities that have made operational changes to improve the customer experience in common utility-customer interactions.

For example, Dominion Energy launched an effort to develop and assess a new residential bill design using employee and customer feedback in 2022. The utility learned that most of its customers look only at the first page of the bill and prefer a one-page bill. Dominion Energy used this feedback to design a bill that was clear, easy to understand, and more customer friendly.

Revamp customer programs

The customer programs track brought attendees on a journey to improve programs and offerings. We covered topics including:

- Ways to find new customers and more energy savings
- Electrification
- Affordable and sustainable residential housing
- How to support commercial and industrial (C&I) customers on their sustainability journeys

Energy efficiency programs deserve some love

Are your programs not providing the savings or participation you expected? We shared a few strategies for revamping utility programs in the session Find new customers and more energy savings with a

program makeover.

For example, a few utilities shared how they've used pilots to generate new learnings to help existing programs find new savings:

- In presenting its LED lighting market transformation, ComEd shared that it's noticed its contractors are moving away from lighting and focusing more on solar and EV infrastructure.
- And Public Service Electric & Gas Co. talked about how it's using the utility marketplace to increase energy savings and customer engagement with its energy efficiency programs.

Electrification works both ways

The confluence of technology maturation and societal issues is making electrification a major and mainstream movement. We recommend that utilities address this from both the transportation and building angle.

In what might have been the most entertaining session, attendees witnessed an electrification showdown among panelists. In this game show–style session, utility contestants squared off on how to best prioritize decarbonization efforts in buildings and transportation.

The confluence of technology maturation and societal issues is making electrification a major and mainstream movement. We recommend that utilities address this from both the transportation and building angle. We also suggest that you get your transportation and building teams connected so they aren't working at cross-purposes.

Affordable zero-net-energy homes are possible

In our session New residential housing: Can it be affordable and sustainable?, our panelists discussed how utilities can meet their carbon goals while lowering the energy burden and improving affordability for all customers.

The biggest takeaway? Affordable zero-net-energy homes are possible but need a comprehensive set of measures and utility guidance through the entire design and building process.

Sustainability and resiliency go hand in hand

We're seeing utilities make strides in their efforts to support commercial customers in meeting decarbonization goals. To make sure your utility isn't behind on this, we recommend:

- Listening to your customers, which is key to establishing trust and developing programs that provide customers with what they truly need.
- Developing programs or products to address emerging greenhouse gas–related issues, such as problems associated with refrigerants.
- Investing early in public EV charging infrastructure—even in the absence of present-day demand—to signal to commercial customers that utility support will be available when they move to electrify their fleets.

Optimize the future of the grid

The distributed grid management track covered topics including:

- Electrification and grid updates
- Virtual power plants
- EV demand forecasting and planning
- Customer-centric distributed grid

Use data (instead of just collecting it)

Utilities should aim to use data strategically, advocating for a proactive and purpose-driven approach in data collection, especially in areas like EV programs. You can take advantage of DMV data, advanced metering infrastructure data, and self-disclosure data to identify customers who have EVs in your service territories.

Data can also come from your customers in the form of market research and surveys. It's essential to understand where your customers are so you can support them with the right programs.

Encourage collaboration and partnerships between different teams, particularly in bridging the gap between planning and strategy in electrification efforts.

Build bridges across utility functions

Lack of collaboration and communication can cause many teams to feel siloed. In one session, we focused on the business case for merging energy efficiency with electrification work, and we talked through some of the regulatory and tech challenges with attempting a merger like that.

Don't lose sight of the importance of breaking down silos within your organization. Encourage collaboration and partnerships between different teams, particularly in bridging the gap between planning and strategy in electrification efforts.

Discover the power of effective marketing and communications

In our marketing and communications sessions, we covered topics such as:

- Using market research to create effective program marketing strategies
- Increasing low- and moderate-income (LMI) customer engagement
- Using innovative digital marketing strategies
- Honoring the E Source 2023 Utility Ad Awards winners

Know your customers

Utilities should meet customers where they are in the customer journey. To better understand customers' needs and wants, we recommend using market research to identify barriers to and motivators for program participation.

Doing so can enable utilities to become the trusted source of information (on topics such as EVs and energy-efficient appliances) by providing customers with the resources and tools they really need.

Build lasting relationships with your business customers

It's important to develop and keep strong relationships with business customers. A standout session, Shaping tomorrow together: Building strong utility-business alliances, included an insightful panel discussion where speakers emphasized the importance of building trust and credibility with customers by:

To better understand customers' needs and wants, we recommend using market research to identify barriers to and motivators for program participation.

- Adopting personalized approaches
- Collaborating to achieve sustainability goals
- Customizing engagement programs
- Supplying support where needed
- Ensuring equity in engagement strategies

Tailor your LMI engagement and reengagement

Although LMI customers show a lot of interest in saving energy and money, their participation in utility programs is low.

During the session LMI customer engagement: Rethinking and tailoring your outreach strategies, we shared the following tips for building equity into your LMI customer marketing:

- Design universally accessible and relatable campaigns
- Use multiple languages and marketing channels
- Reflect the diversity of the audiences you're trying to reach in the images you use

Save the date for the 2024 Forum

When reflecting on her time at this year's Forum, Stefanie Reiter, manager of Transportation Electrification Business Programs at Portland General Electric, said, "I definitely recommend [Forum] to anybody in the utility space wanting to connect meaningfully with others in the industry."

She mentioned how Forum's intimate size was a big positive, explaining how, "I had been to another utility conference the week before in Las Vegas that had 40,000 people in attendance—I hated it! Coming off that experience and entering the Forum, I found it to be the perfect size for collaboration. I was able to make real connections with other utility peers."

We hope that you'll feel the same way when you attend in 2024. We can't to see you at E Source Forum 2024, October 8–10!

What's the buzz at the 36th E Source Forum?



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