

Oracle Utilities Opower Behavioral Demand Response

Behavioral Demand Response Product Overview



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1

Oracle Utilities Opower Behavioral Demand Response Cloud Service Overview

Welcome to the Oracle Utilities Opower Behavioral Demand Response Cloud Service Overview. Use this information to learn about features and capabilities of the product. Have a question? [Contact your Delivery Team](#) or visit [My Oracle Support](#).

Quick Links

- [Requirements and Limitations](#)
- [Behavioral Demand Response](#)
 - [Pre-Season Welcome Letter](#)
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 - [Voice Channel Communications](#)
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2

Getting Started

The Behavioral Demand Response Cloud Service uses digital communications and behavioral science messaging to encourage residential customers to reduce energy consumption during peak events.

Peak events are days in which the demand for energy exceeds a utility's capacity to supply it. These days often occur during extreme cold or hot weather conditions, when the demand for energy is high.

To reduce energy use on these days, customers enrolled in the Behavioral Demand Response program receive a variety of resources designed to motivate them to be energy-efficient. These resources include pre-season welcome letter or email, pre- and post-event emails, and pre- and post-event voice and text messages when applicable.

The following components are available in this service:

- [Behavioral Demand Response](#)
- [Inside Opower](#)
- [Customer Service Interface - Program Management](#)

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Requirements and Limitations

The following data requirements and limitations apply to all utilities and customers in the Behavioral Demand Response cloud service.

Channel Fees

Utilities may purchase a channel fee if they are using any printed behavioral demand response communications as part of the Oracle Utilities Opower program.

Channels fees are used to add on report generation, printing, mailing, and postage services to a cloud service. There are two options for channel fees: General Availability and Controlled Availability. The type that is relevant depends on the individual Oracle Utilities Opower program setup. Coordinate with your sales representative if you need help determining your channel fee type.

A summary of the fees is shown below. For more details about what each channel fee includes and the requirements for using them, see the [Oracle Utilities Opower Channel Fees Cloud Services](#) guide.

General Availability Channel Fees

The General Availability channel fees apply to utilities that generate reports as part of their cloud service. These channel fees can be purchased for different regions.

- **Report Printing and Mailing:** The Report Printing and Mailing channel fee includes the printing of generated report communications through an approved third-party print vendor, as well as services for the proper mailing of the reports. It does not include postage for mailing the reports to customers.
- **Postage for Print and Mail:** The Postage for Print and Mail channel fee includes postage for the delivery of print communications.

Note

The postage channel fee cannot be purchased alone. It must be purchased in combination with the printing and mailing channel.

Controlled Availability Channel Fees

The Controlled Availability channel fees apply to utilities with a cloud service that does not include report generation. A utility may only choose one of the channel fees listed below.

- **Report Generation:** The Report Generation channel fee includes generating a digital version of print communications. It does not include the printing and mailing of print communications.
- **Report Generation and Print:** The Report Generation and Print channel fee includes the generation and printing of print communications. It does not include the mailing of print communications.
- **Report Generation, Print and Mail:** The Report Generation, Print and Mail channel fee includes the generation, printing, and mailing of print communications.

Utility Requirements and Limitations

- **Number of Events:** Up to five events are included per 12-month service period. Events are one of two event types: hot-weather events or cold-weather events. Unused events from one 12-month service period cannot be carried over into a subsequent service period. Additional events of the same type or different type can be purchased. For more information, see [Add 5 Events Cloud Service](#).
- **Scale:** 1M+. Attrition, opt-outs, customer eligibility, and data availability may affect the actual number of communications sent. By default, at least 50,000 customers are selected to receive Behavioral Demand Response communications. Assuming a standard attrition percentage, this is the minimum number of customers required to measure the impact of the program.
- **Languages:** English and Spanish are supported. Other languages and locales are not supported at this time. Contact your Oracle Utilities Sales Representative to confirm whether Behavioral Demand Response alerts are available in your market.

Customer Requirements and Limitations

- **Data Integration and Peak Event Data:** Billing data and AMI reads are used to provide certain Behavioral Demand Response features. AMI data requires a smart meter which indicates how much energy was consumed over an interval of time. Utilities must also provide peak event definitions, including date, day, and time, and customer usage during the event to Oracle Utilities. Moreover, customers must have at least one read during the peak event to receive post-event communications. This data must be sent in the format specified in the [Oracle Utilities Opower data transfer standards](#). Your Delivery Team will work with you to identify which data standards are applicable to your situation.

Note

Non-AMI Behavioral Demand Response is available with limited features. It allows for the notification of the upcoming event, but does not include the use of smart meter data to compare a customer's energy usage with their neighbors.

- **Supported Fuels:** Gas and electricity fuels are supported, but limitations apply. For example, gas-only customers are eligible for the Neighbor Comparison experience, but not for the Neighbor Rank experience. See the 'Customer Experience Variations' section of [Behavioral Demand Response](#) for more information.
- **Non-negative Baseline Usage:** The customer's usage must not be negative for the period covered by the communication.
- **Message Delivery Window:** Specific rules govern when communications can and cannot be sent. See [Delivery](#) for more information.
- **Delivery Address Validity:** Customers must have valid email addresses, mailing addresses, and/or phone numbers to receive communications through these channels. Customers who have not double-opt-in-confirmed their SMS number are not able to receive SMS alerts.
- **Multiple Active Accounts:** Homes must not have more than one account associated with a service point.
- **Multiple Service Points:** Homes must not have more than one electric service point.
- **Residential:** Customers must be residential. Business customers are not supported.

- **Neighbor Group:** Customers must have a large enough neighbor comparison group to be eligible.
- **Minimum Energy Amount:** Customers must have a minimum amount of average energy use for the program.

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Behavioral Demand Response

The Behavioral Demand Response Cloud Service helps drive energy savings by delivering pre and post-event communications to customers through multiple channels. These communications help customers engage in saving energy during peak events, and let them know how successful they were after the events occur.

Customer Experience

The Behavioral Demand Response Cloud Service encourages and facilitates utility customers to reduce energy during peak events, thereby lowering energy demand on a large scale.

Peak events are days in which the demand for energy exceeds a utility's capacity to supply it. These days often occur during extreme cold or hot weather conditions, when the demand for energy is high.

To reduce the use of energy during peak days, customers enrolled in the Behavioral Demand Response program receive a variety of resources designed to motivate them to be energy-efficient. These resources include pre-event and post-event communications across email, voice, and SMS channels.

Customer Experience Variations

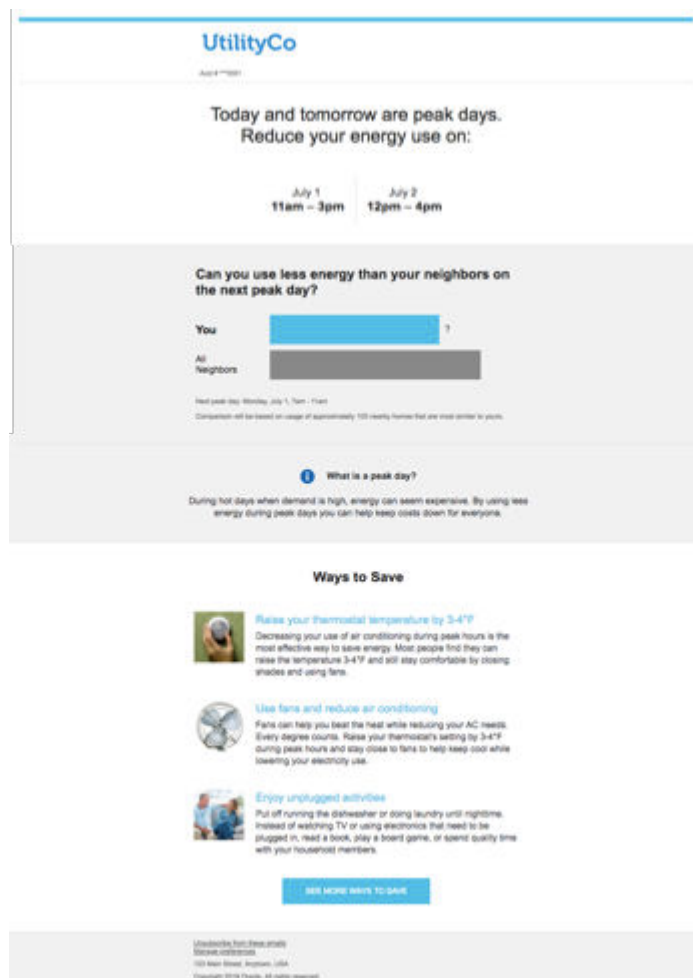
Customers enrolled in the Behavioral Demand Response cloud service may be split into different groups that receive different user experiences. For example, Group A would receive one version of an email, while Group B would receive a slightly different version with different graphics and messaging. Oracle Utilities works with utilities to determine which customers receive which experience through which channel.

Neighbor Comparison Experience

The Neighbor Comparison experience uses a neighbor comparison graphic and messaging to motivate energy efficient behavior. For emails, the neighbor comparison compares the customer's energy use to that of two groups: Efficient Neighbors and All Neighbors, and then displays the results in a horizontal bar graph. The goal is to persuade customers to improve their energy efficiency status in relation to their neighbors. Below the graphic is a list of actionable tips that customers can perform to save energy.

Eligibility: Gas customers can receive the Neighbor Comparison experience.

Example: The image below shows an example of a pre-event email sent to customers who receive the neighbor comparison experience during the summer. You can also send this email to customers who receive the neighbor comparison experience during the winter with peak day definition and tips related to the winter season.



Neighbor Rank Experience

The Neighbor Rank experience compares a customer's energy use to that of approximately 100 neighbors with similar homes, and then displays the customer's numerical rank out of those neighbors. The goal is to persuade customers to improve their ranking and show them their energy trends over time. The content of the Neighbor Rank experience varies depending on if at least one peak event has already occurred.

Eligibility: Only electricity customers can receive the Neighbor Rank experience.

Example: The image below shows an example of a pre-event email sent to customers who receive the Neighbor Rank experience during hot-weather seasons. You can also send this email to customers who receive the neighbor rank experience during cold-weather seasons with peak day definition and related tips.

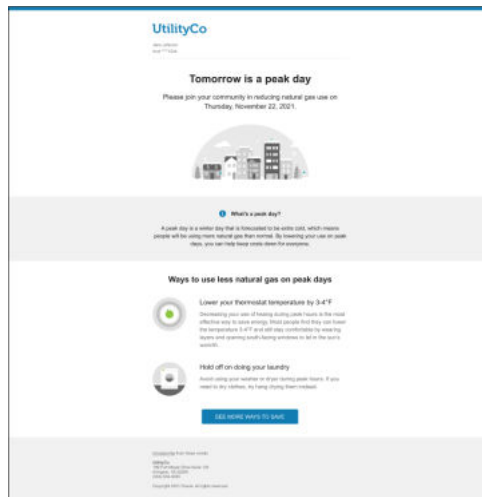


Non-AMI Experience

Gas and electric customers who do not have Advanced Metering Infrastructure (AMI) data can be placed on a track to receive a non-AMI variation. In these cases, pre-event and post-event emails use static content to invite customers to participate in a peak event. However, due to the absence of AMI data, the non-AMI experience does not include a neighbor rank or neighbor comparison.

Eligibility: Gas, electric, and dual fuel customers can receive the non-AMI experience.

Example: The following image is an example of a pre-event email sent to gas customers who receive the non-AMI track experience:



Other Variations

Similar Homes: Customers have a different experience if "similar homes" language is used instead of "neighbor comparison." In this case, all instances of "neighbor" are replaced with "similar homes."

Multi-Day Peak Event: Customers get a different experience if a multi-day peak event is scheduled. A multi-day peak event occurs when multiple peak days are scheduled over consecutive days. In such case, pre-event messages include information about the consecutive days' peak days. For example, pre-event emails and phone calls will specify the event window for the event occurring today and the event occurring tomorrow. Post-event results are communicated as soon as your energy savings from the event have been calculated, but you will not receive more than one phone call per day. If you are receiving email communications, you will receive an email as soon as your results are available and may receive more than one email per day.

Pre-Season Welcome Letter

The pre-season welcome letter is a print welcome communication sent to customers to introduce them to the Behavioral Demand Response Cloud Service before their first peak event notification is sent. The letter is designed to prepare customers for upcoming peak events and motivate them to save energy.

Note

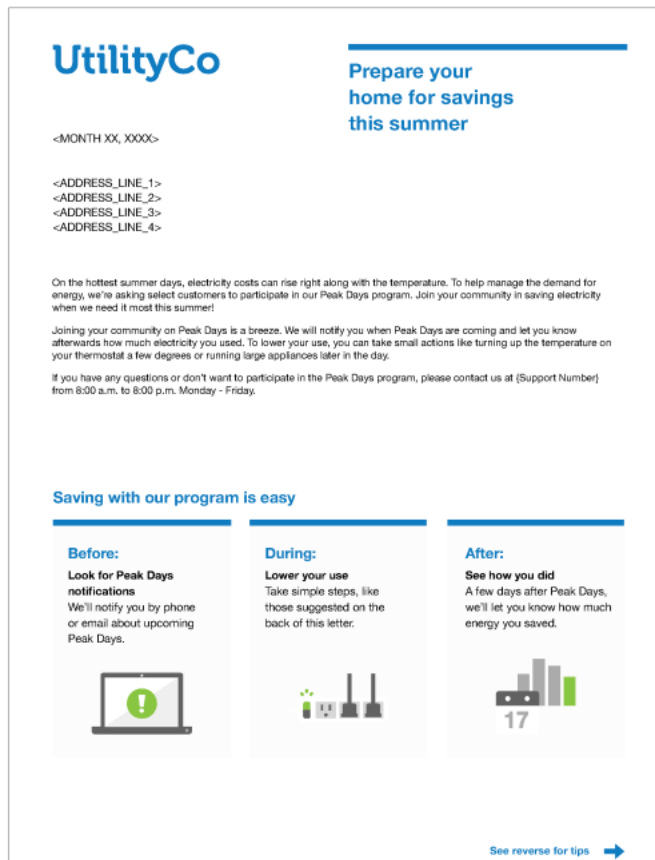
Channel fees apply to all print communications. See [Requirements and Limitations](#) for more information.

User Experience

The pre-season welcome letter tells the customer what peak events are, and informs them of upcoming notifications. Content appears on both the front and back of the letter, which can refer to either hot-weather events, or cold-weather events, depending on the season.

The following are examples of the front and back of the letter for an electric customer during a hot-weather event.

Front of the letter:



Back of the letter:



The pre-season welcome letter is composed of the following:

- **Header and Footer:** The heading of the welcome letter includes the logo of the utility, the date that the letter was sent, and the customer's name and address. The footer contains the utility's website address, customer service telephone number, customer service email address, and the utility's logo.
- **Introduction:** The introduction provides a full-color sentence that generates interest from the customer about upcoming peak events during the season.
- **Main Content:** The main content of the welcome letter defines peak events, describes why peak events are important, and encourages customers to participate in peak events by connecting the customer to a larger community of energy savers.
- **Timeline:** The timeline describes the three stages of the peak event: Before, During, and After. The timeline contains images to help the customer better understand the process.
- **Tips:** The tips section uses the entire back page of the letter. Three tips are displayed that will help customers stay comfortable during the peak event. The tips are accompanied by images that represent the tip described.
- **Learn More:** The Learn More section encourages the customer to learn more information about peak events as well as to find more tips that will help them save energy. The section contains a link that customers can follow to their utility's website.

User Experience Variations

The user experience varies for customers depending upon their service types, available data, costs, and locale. Note that this section indicates the primary user experience variations, not all possible variations.

Gas Fuel

For gas-only customers, the pre-season welcome letter includes language, illustrations, and tips that are related to gas. For example, the introductory paragraph talks about how gas costs are high during cold-weather season, and the tips are related to energy efficient actions that are more typical of such season.

Email Channel Communications

The Behavioral Demand Response cloud service uses the email channel to send pre-event and post-event emails that are designed to motivate customers to save energy during peak events.

Each email is made up of a collection of modules that contain information about the customer's energy use, or energy efficiency tips. The design of the email varies depending on which [user experience variation](#) the customer receives, and whether it is a [pre-event](#) or [post-event](#) message.

Note

Pre-event and post-event email and SMS messages are localized for Spanish. If your utility is interested in Spanish language support for voice communications, [contact your Delivery Team](#).

In this section:

- [Pre-Event Email](#)
- [Pre-Season Summer Welcome Email](#)
- [Post-Event Email](#)
- [Email Modules](#)

Pre-Event Email

The pre-event email is a short message that tells customers when a peak event is going to occur. It displays user-friendly graphics and insights to motivate participation and behavior change. The email has a different appearance depending on which user experience variation the customer receives. See [Customer Experience Variations](#) for more information.

Note

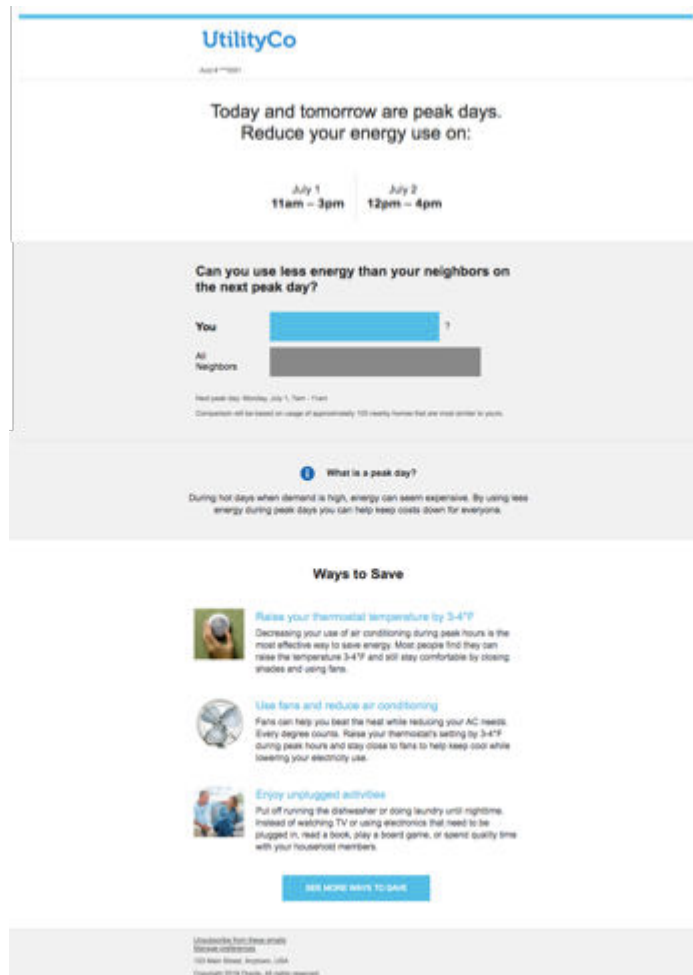
If multiple consecutive peak days are called, pre-event emails and voice messages will reflect that a customer is in a multi-day event period.

Neighbor Comparison Experience

The Neighbor Comparison pre-event email shows the customer their energy usage during peak hours compared with other homes that have similar characteristics. The goal is to persuade customers to improve their status by using less energy on subsequent peak days.

The user experience for the neighbor comparison includes a bar chart that represents the customer's energy usage in relation to similar homes, followed by a list of actionable tips to be more energy-efficient.

The following image is an example of the hot-weather experience. You can also use it for cold-weather seasons, and include the peak day definition, and actionable tips related to cold weather.



The first pre-event email of the season does not include any actual customer data. Instead, it includes a generic bar chart containing mock data and poses a question to customers to entice them to participate in the upcoming peak event. In most cases, subsequent pre-event emails use actual data from the last peak event to show customers how well they performed and motivate them to do better next time.

Allowable Modules

The following modules may be used in a Neighbor Comparison pre-event email:

- [Header and Footer Modules](#)
- [Upcoming Event Module](#)
- [Neighbor Comparison](#)
- [Introduction \(Peak Day Definition\) Module](#)
- [Tips Module](#)

The neighbor comparison user experience will vary for customers depending upon their energy use, the data available, and whether they are receiving a pre-event or post-event email. The following table indicates the most common user experience variations.

Variation	Description
The customer used less or the same amount of energy as all neighbors.	The “You used less than average but more than the most efficient homes on the last peak day.” message followed by the three bar graph comparing YOU, Efficient Neighbors, and All Neighbors energy use is displayed.
The customer used less or the same amount of energy as efficient neighbors.	The “You used LESS than the most efficient homes on the last peak day.” message followed by the three bar graph comparing YOU, Efficient Neighbors, and All Neighbors energy use is displayed.
The customer used less energy or the same as their efficient neighbors.	The “Great work on X date!” message followed by the three bar graph comparing YOU, Efficient Neighbors, and All Neighbors energy use is displayed.
The customer used less energy than neighbors, but more energy than efficient neighbors.	The “You used less than average but more than the most efficient homes on the last peak day.” message followed by the three bar graph comparing Efficient Neighbors, YOU, and All Neighbors energy use is displayed.
The customer used more energy than their neighbors.	The “You used MORE than similar homes on the last peak day” message followed by the three bar graph comparing Efficient Neighbors, All Neighbors, and YOU energy use is displayed.
One of the following scenarios occurs: • The first peak event of the season. • Two peak events take place too close to one another. • There were not enough neighbors in the customer’s neighbor group to display the comparison.	The “Can you use less energy than your neighbors on the next peak day?” message followed by a two bar graph comparing a hypothetical YOU and All Neighbors energy use is displayed. The YOU bar energy use is lower than the All Neighbors energy use.

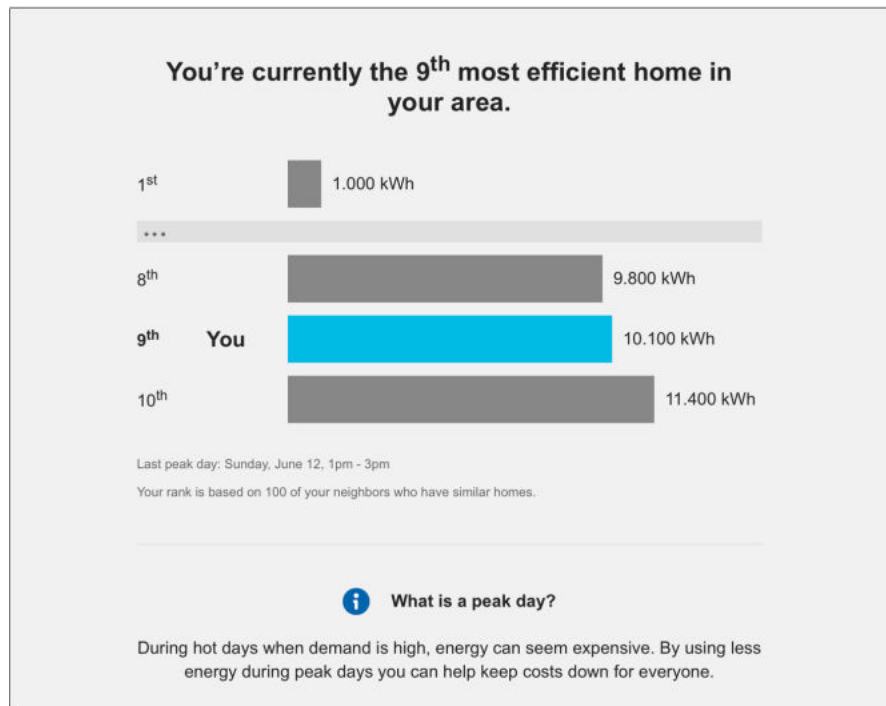
Neighbor Rank Experience

The Neighbor Rank pre-event email ranks the customer based on how their usage during peak hours compares to the usage of approximately 100 similar homes. The goal is to persuade customers to improve their ranking by using less energy during subsequent peak days. Below the rank graphic are a definition of what a peak event is, and a list of actionable tips that customers can follow to save energy. The following image is an example of the hot-weather experience. You can also use it for cold-weather events, and include the peak day definition and actionable tips related to cold-weather.

Note

The Neighbor Rank email is only available for customers who receive electricity from their utility.

The following image is an example of the neighbor rank graph within the pre-event email sent to customers who receive the neighbor rank experience for hot-weather events. You can also use this email for cold-weather events, and include a peak day definition and actionable tips related to cold weather.



The first pre-event email of the season does not include any customer data. Instead, it includes a generic bar chart containing mock data and poses a question to customers to entice them to participate in the upcoming peak event. In most cases, subsequent pre-event emails use data from the last peak event to determine the customer's rank and show them whether or not they moved up, dropped down, or remained at the same position. See [Neighbor Rank](#) for more information.

Allowable Modules

The following modules may be used in a Neighbor Rank pre-event email:

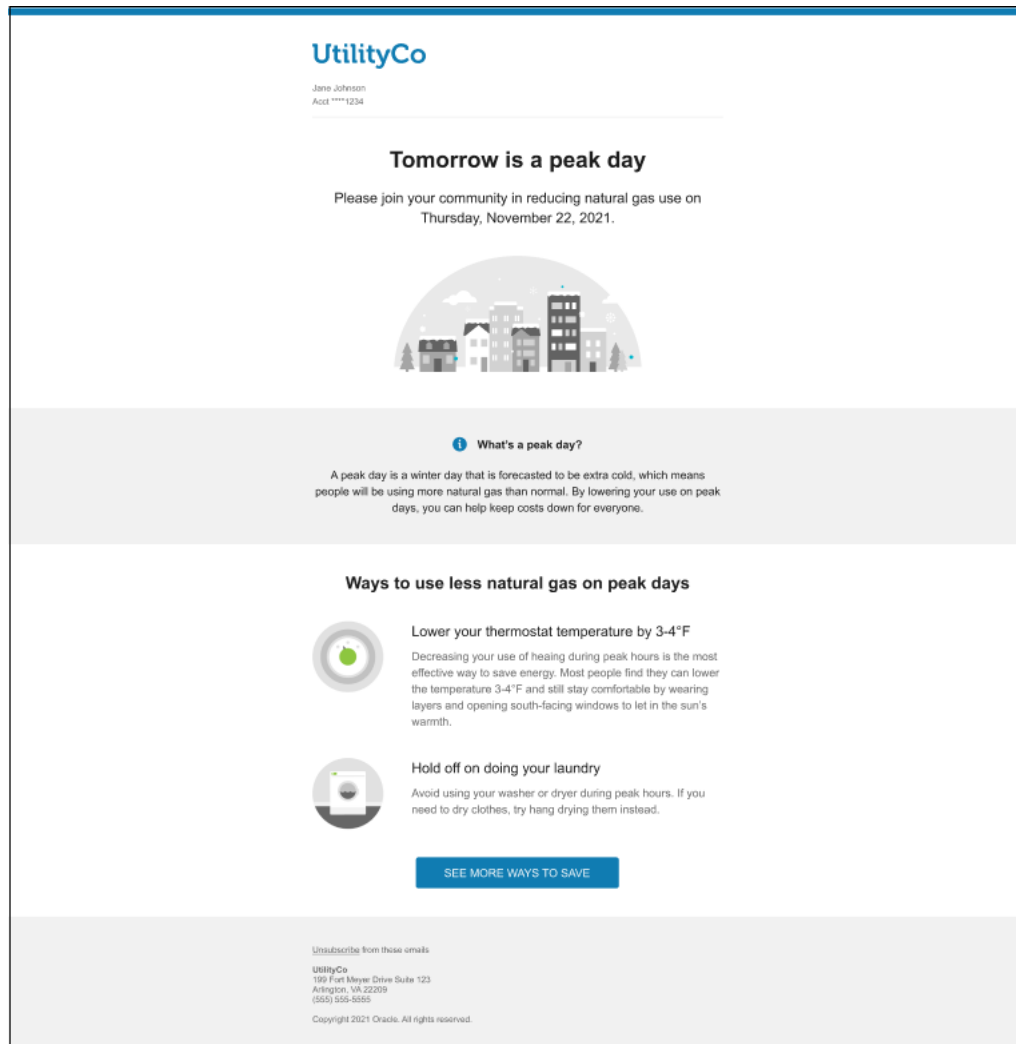
- [Header and Footer Modules](#)
- [Upcoming Event Module](#)
- [Neighbor Rank Module](#)
- [Introduction \(Peak Day Definition\) Module](#)
- [Tips Module](#)

Non-AMI Gas Experience

The non-AMI pre-event gas email uses static content to invite customers to participate in a peak event. However, due to the absence of AMI data, the email does not include a neighbor rank or neighbor comparison module.

Note

The non-AMI email is only available for customers who receive gas from their utility.



Allowable Modules

The modules below may be used in a non-AMI pre-event email. Note that there is no neighbor comparison, or neighbor rank modules.

- [Header and Footer Modules](#)
- [Upcoming Event Module](#)
- [Introduction \(Peak Day Definition\) Module](#)
- [Tips Module](#)

User Experience Variations

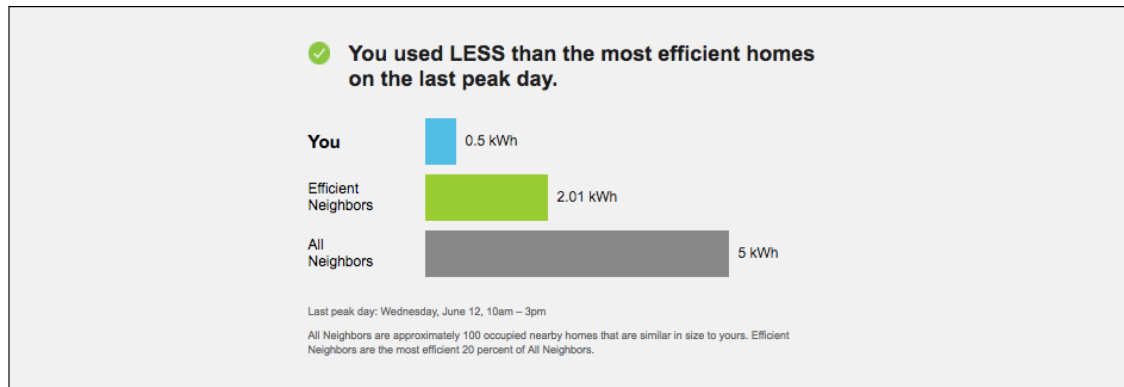
The user experience varies for customers depending upon their service types, available data, costs, and locale. Note that this section indicates the primary user experience variations, not all possible variations.

Neighbor Comparison Experience

The pre-event email can use a neighbor comparison variation to motivate energy efficient behavior during the peak event. The neighbor comparison variation shows the customer their

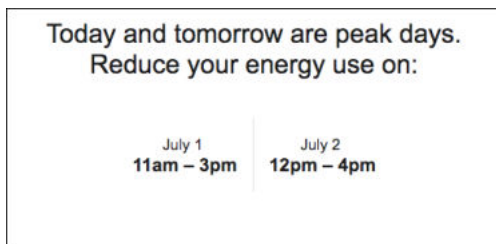
energy usage during peak hours compared with the same usage for average and efficient homes with similar characteristics.

The following image is an example of the neighbor comparison module.



Multi-Day Variation

If a peak event spans across multiple days, the following message is an example of what will appear at the top of the Behavioral Demand Response pre-event email during hot-weather months. It can also be used to show multi-day variation during cold-weather seasons:



Non-AMI Gas Experience

The pre-event email can vary if customers receive the non-AMI gas experience. In this case, both the pre-event and post-event emails use static content to invite customers to participate in a peak event. However, due to the absence of AMI data, the non-AMI experience does not include a neighbor comparison or neighbor rank module.

Pre-Season Summer Welcome Email

The Pre-Season Summer Welcome email is a short welcome message sent to customers in the mid-April to early May time frame, before any peak events are called by utilities. This communication prompts customers to save electricity on the hottest days of summer and displays user-friendly graphics and information to motivate participation.

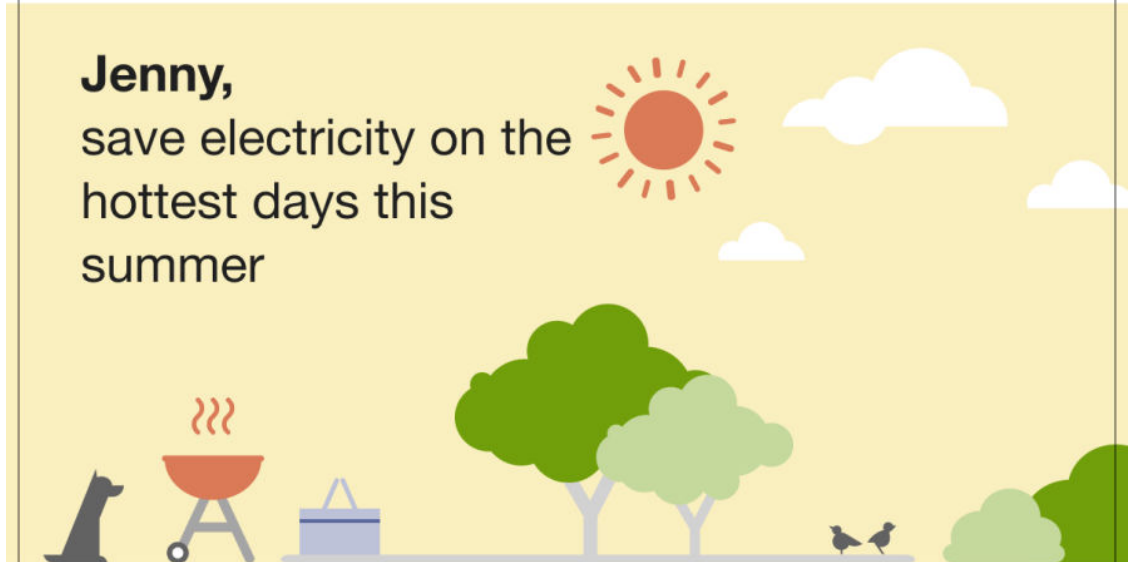
User Experience

The Pre-Season Summer Welcome email greets the customer, and introduces to them the utility's program they are enrolled in by providing key information and useful links to learn more.

UtilityCo

Account #*****7890

Jenny,
save electricity on the
hottest days this
summer



Welcome to Program Name

When it's **unusually hot outside**, the electricity needed to cool our homes puts a strain on the grid, which can lead to **power outages**.

That's why we're asking you to participate in Program Name, which are **events that last just a few hours** on designated days.

By taking simple steps to **lower your electricity use** you'll help keep everyone's electricity going!

How it works

1

Before an event

We'll notify you by email about the upcoming event.

You can also [sign up for texts](#).

Modules

The Pre-Season Summer Welcome email includes the following modules:

- [Subject Line, Header, and Footer](#)
- [Introduction Module](#)
- [Welcome Module](#)
- [Numbered Steps](#)
- [Alerts Call to Action Module](#)
- [Social Proof Module](#)
- [Checklist Module](#)

Post-Event Email

The post-event email shows customers how well they performed on their last peak day relative to other similar homes and may include ways to save more energy on subsequent peak events.

User Experience

The email has a different appearance depending on which user experience variation the customer receives. See [Customer Experience Variations](#) for more information.

Note

If multiple peak days occur in close proximity to another, the customer results will be reported as they become available.

User Experience Variations

The user experience varies for customers depending upon their service types, available data, costs, and locale. Note that this section indicates the primary user experience variations, not all possible variations.

Neighbor Comparison Experience

The Neighbor Comparison post-event email shows the customer their energy usage during peak hours compared with the usage of average and efficient homes that have similar characteristics. The goal is to persuade customers to improve their status by using less energy on subsequent peak days. The contents of the neighbor comparison vary depending on whether or not at least one peak event has already occurred.

Neighbor Rank Experience

The post-event email can vary if customers receive the Neighbor Rank experience. The neighbor rank compares a customer's energy use to that of approximately 100 neighbors with similar homes, and then displays the customer's numerical rank out of those neighbors based on how much energy they used during the last peak event.

Non-AMI Gas Experience

The post-event email can vary if customers receive the non-AMI gas experience. In this case, both the pre-event and post-event emails use static content to invite customers to participate in

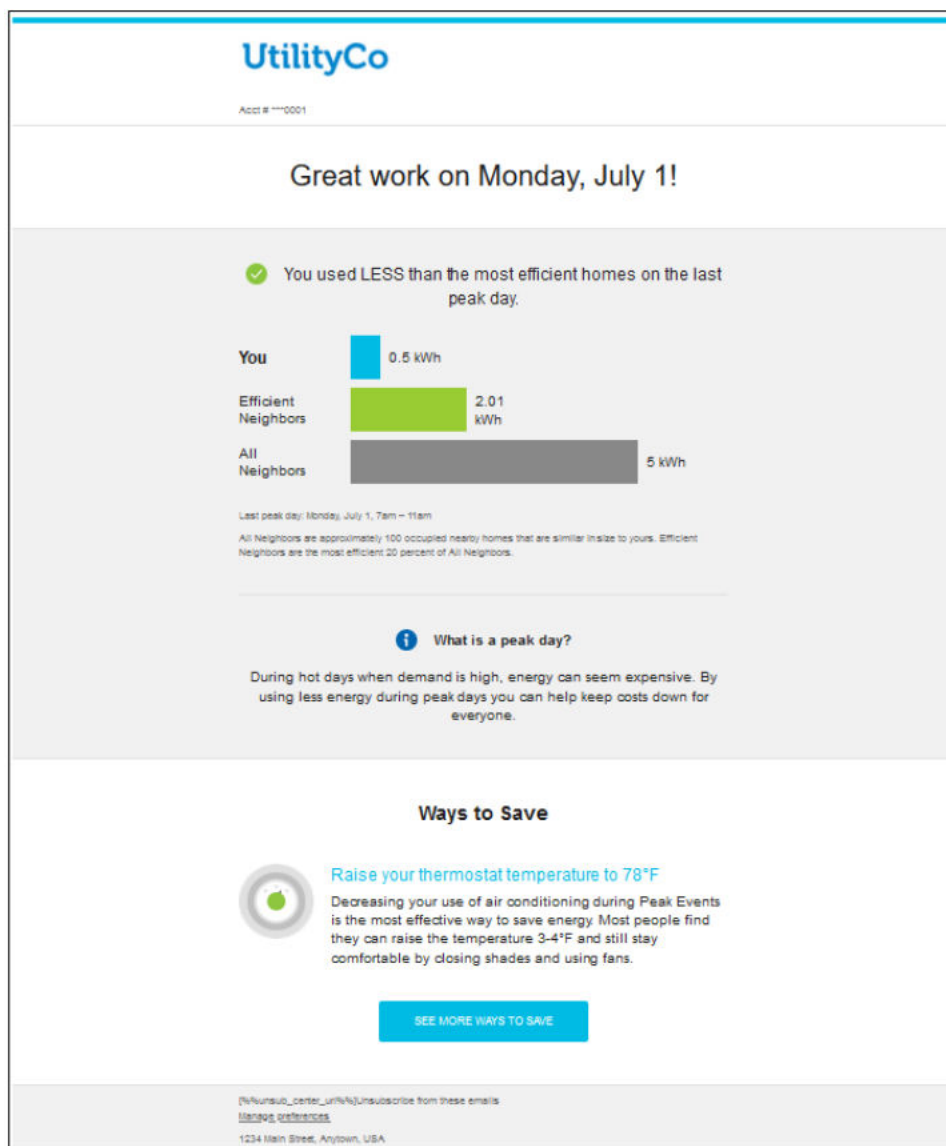
a peak event. However, due to the absence of AMI data, the non-AMI experience does not include a neighbor comparison or neighbor rank module.

Neighbor Comparison Experience

Note: The Neighbor Comparison Experience is only available for gas customers during cold-weather season.

The Neighbor Comparison post-event email compares a customer's peak-hour energy use with that of similar average and efficient homes. Its purpose is to encourage customers to reduce usage on future peak days and improve their standing. The specific message content changes depending on whether the customer has already experienced at least one peak event.

The following image is an example of a post-event email for customers who are receiving the neighbor comparison experience during the hot-weather season. This can also be used during cold-weather season for customers receiving the Neighbor Comparison experience.



Allowable Modules: The following modules may be used in a Neighbor Comparison post-event email:

- [Subject Line, Header, and Footer](#)
- [Neighbor Comparison](#)
- [Introduction \(Peak Day Definition\) Module](#)
- [Module](#)
- [Seasonal Summary Module](#)

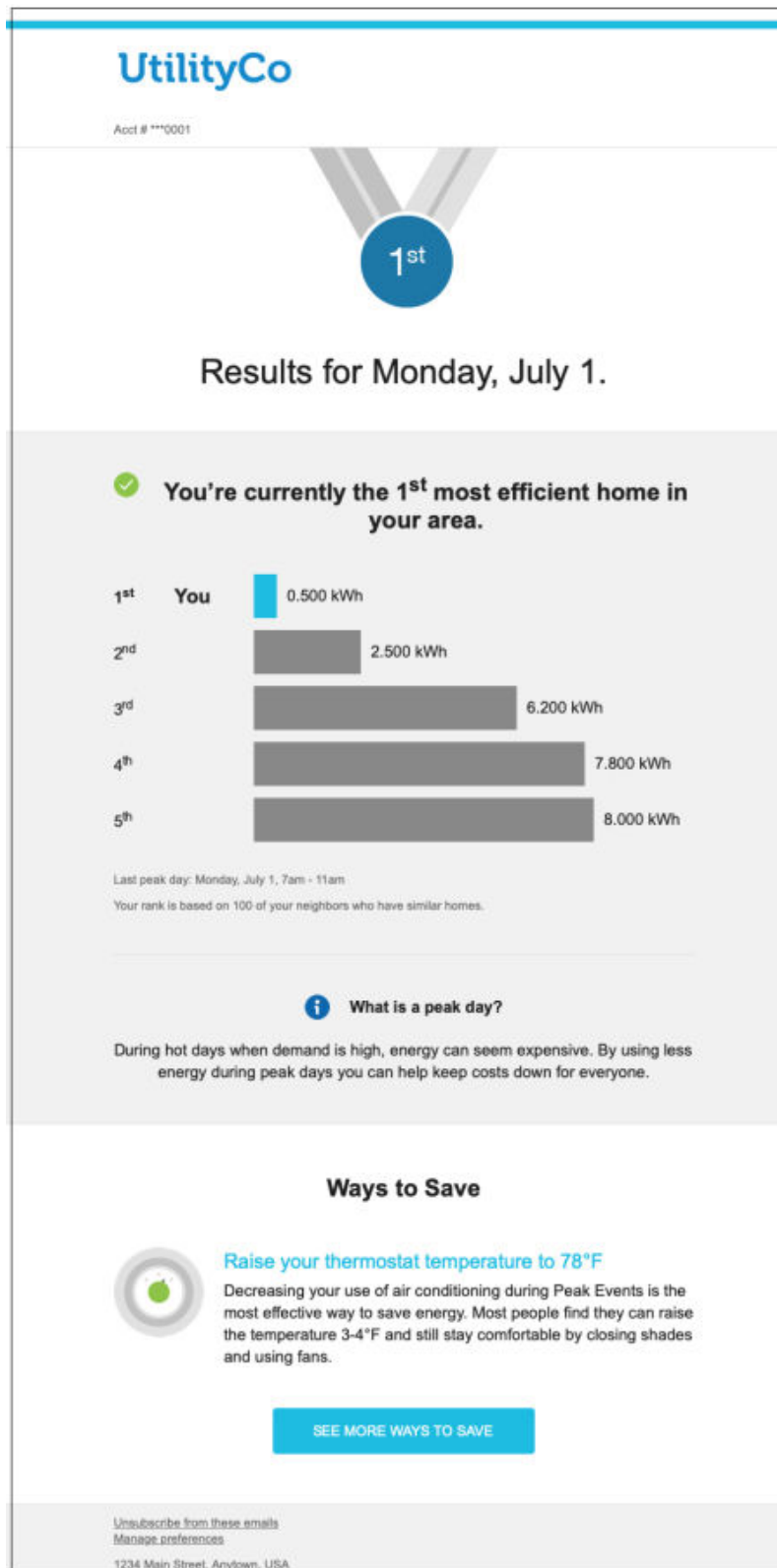
Neighbor Rank Experience

The Neighbor Rank post-event email compares a customer's energy use to that of approximately 100 neighbors with similar homes, and then displays the customer's numerical rank out of those neighbors. The goal is to persuade customers to improve their ranking by using less energy during subsequent peak days.

Note

The Neighbor Rank email is only available for customers who receive electricity from their utility.

The following image is an example of a Neighbor Rank post-event email during hot-weather season. You can also use it during cold-weather season to show actionable tips oriented to it.



Allowable Modules: The following modules may be used in a Neighbor Rank post-event email:

- [Subject Line, Header, and Footer](#)
- [Module](#)

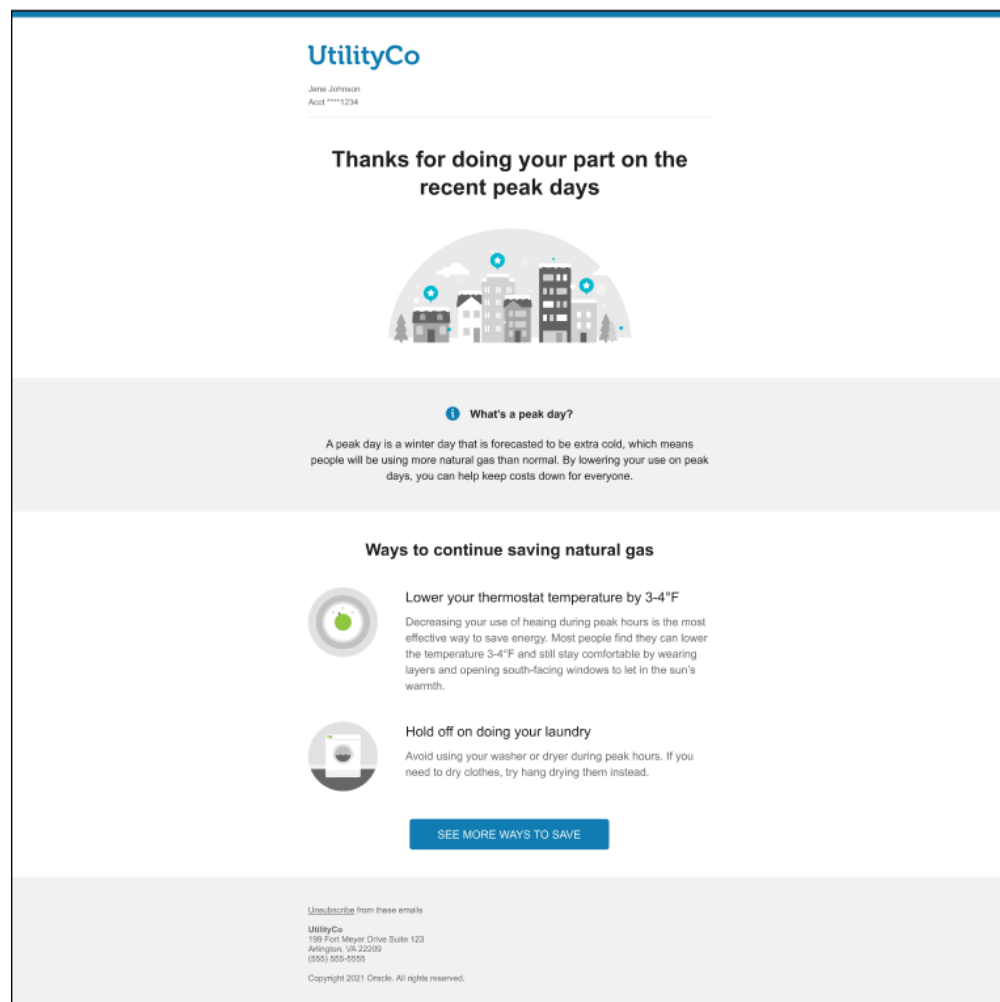
- [Introduction \(Peak Day Definition\) Module](#)
- [Tips](#)
- [Seasonal Summary Module](#)

Non-AMI Gas Experience

The non-AMI post-event gas email uses static content to thank customers for participating in a peak event. Due to the absence of AMI data, the email does not include a neighbor rank or neighbor comparison module.

Note

The non-AMI email is only available for customers who receive gas from their utility.



Email Modules

Email messages in the Behavioral Demand Response Cloud Service are structured through modules, which provide the customer with information about their energy use, upcoming events, or energy efficiency tips.

The design of the email and its modules varies depending on which user experience variation the customer receives, and whether it is a [Pre-Event Email](#), [Pre-Season Summer Welcome Email](#), or [Pre-Event Email](#) message.

Subject Line, Header, and Footer

The subject line and header are used to engage the customer and brand the communication, while the footer contains basic information, such as the utility's logo and contact information, customer information, and an unsubscribe link.

Subject Line

The default subject line varies depending on whether the customer receives a pre- or post-event message, and if the event is today or tomorrow, or today *and* tomorrow.

- **Pre-Event Email Subject Line:** Peak energy day: Tomorrow, <Month> <Day>
 - **Pre-Season Summer Welcome Email Subject Line:** <Customer First and Last Name>: Join your community in saving electricity this summer!
- **Post-Event Email Subject Line:** <First Name> <Last Name>, your <Month> <Day> peak energy results are here.

Header

The header contains a link to a HTML version of the email that opens in the user's browser. The header also includes:

- A logo provided by the utility.
- The customer's utility account number. For security purposes, four characters in the account number are shown, and the rest of the numbers are replaced with asterisks (*).

Footer

The footer includes information that provides more context about the BDR message.

- An unsubscribe link.
Warning: If customers click **Unsubscribe** in the email and then click to **unsubscribe from all emails**, this action is permanent, and they will not be able to opt back in. If they click to opt out of Behavioral Demand Response emails only, then they can opt back into them at a later time.
- The utility's contact information.
- An Oracle copyright statement.

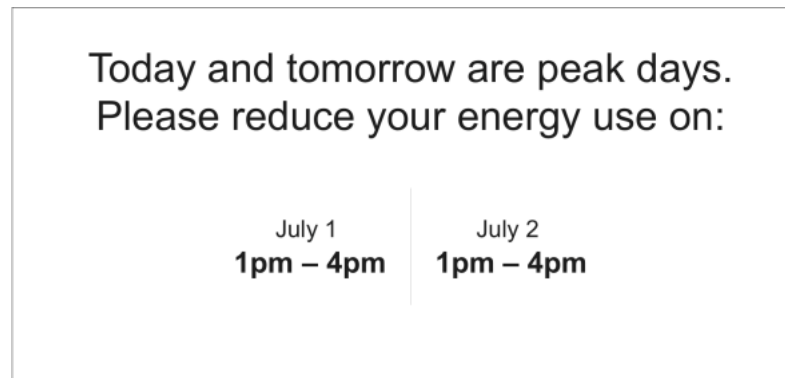
Upcoming Event

During hot and cold weather seasons, the upcoming event module invites customers to participate with their neighbors in the upcoming peak event. The invitation includes the peak event's date and time.

Note

Peak events for gas customers occur on specific days, not hours within a day. This means, for gas customers, the module only specifies the dates (not hours) on which a peak event occurs.

For multi-day peak events, the module message describes the entire duration of the peak event as shown in the following image:



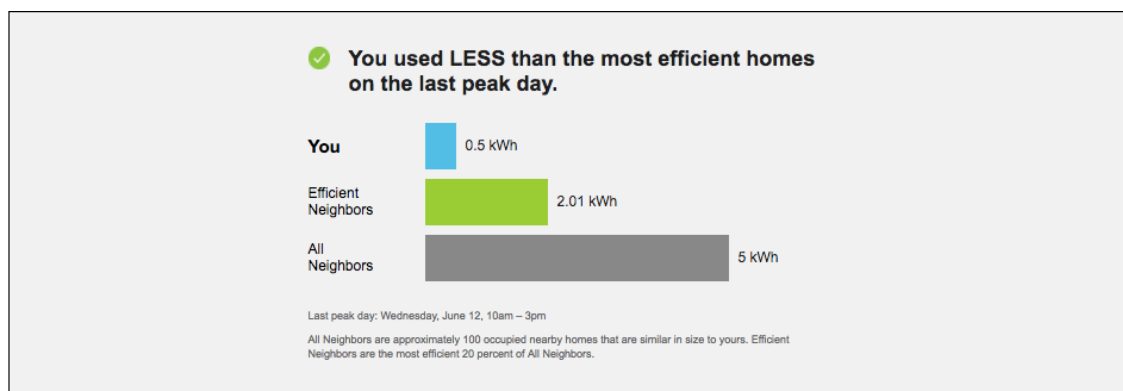
Neighbor Comparison

The neighbor comparison compares the customer's energy use to that of two groups, Efficient Neighbors and All Neighbors, and then displays the results in a horizontal bar graph. The goal is to persuade customers to improve their status by using less energy on subsequent peak days. The contents of the module vary depending on whether or not a peak event has already occurred.

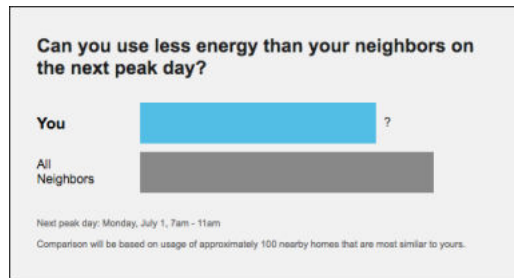
Pre-Event Email

After a peak event's occurrence, the neighbor comparison module shows how much energy the customer used during the previous event and how their usage compares to two groups—All Neighbors and Efficient Neighbors—who also participated in the event.

The following is an example of the neighbor comparison module during a hot-weather season. During cold-weather season, this module can be used to show neighbor comparisons oriented to winter peak days.



If there are no prior peak events, the neighbor comparison includes a generic bar chart containing mock data that poses a question to entice customers to participate. It also includes a statement that specifies the date and time of the upcoming peak event.



The following are descriptions of the pre-event neighbor comparison module:

- **Insight:** An insight statement that explains how well the customer performed in relation to their neighbors. This statement varies slightly depending on the customer's performance.
- **Date and Time of Peak Event:** The date and time of the most recent peak event. If the customer has never experienced a peak event, the date and time does not appear.
- **Bar Chart:** The bar chart displays how much energy each group in the comparison used. Within the chart, the bar with the smallest value is on top and the bar with the largest value is at the bottom.
 - **You:** This bar indicates how the customer performed during the peak event. This is often a color that corresponds to the utility brand color.
 - **All Neighbors:** This bar indicates how all the customer's neighbors are doing. It is usually a gray or neutral color.
 - **Efficient Neighbors:** This bar displays a usage value for the most efficient 20% of the customer's neighbors. It is usually colored green since green is commonly associated with energy efficiency. Note that the efficient neighbors value that appears in the module is *not* an average of the top 20% of neighbors. A threshold value—the 20th percentile neighbor—is used to determine the efficient neighbors value.
- **Last Peak Day:** The date and time of the most recent peak event. The module only displays information about the most recent peak event.
- **Neighbor Definition:** A brief definition of Efficient Neighbors and All Neighbors.

Post-Event Email

The post-event neighbor comparison shows how much energy the customer used during the most recent event and how the customer's usage compares to their neighbors who also participated in that event.

The following image is an example of the post-event neighbor comparison module for the summer season. During the winter season, you can use it to show neighbor comparisons oriented to winter peak days.

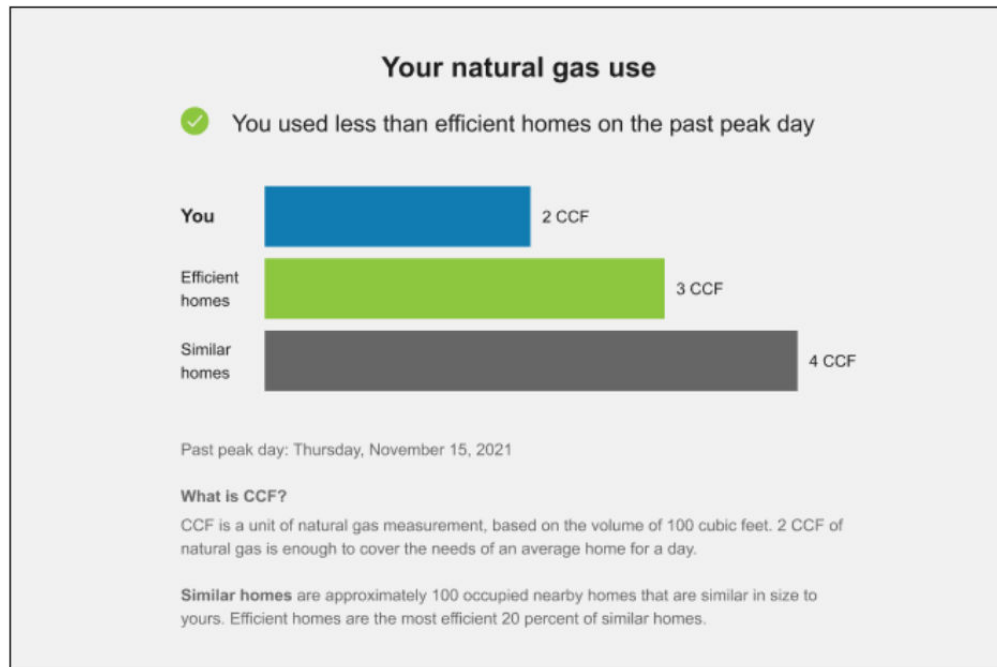
The following are descriptions of the post-event neighbor comparison module:

- **Insight:** An insight statement that explains how well the customer performed in relation to their neighbors. This statement varies slightly depending on the customer's performance.
- **Date and Time of Peak Event:** The date and time of the most recent peak event. If the customer has never experienced a peak event, the date and time does not appear.
- **Bar Chart:** The bar chart displays how much energy each group in the comparison used. Within the chart, the bar with the smallest value is on top and the bar with the largest value is at the bottom.
 - **You:** This bar indicates how the customer performed during the peak event. This is often a color that corresponds to the utility brand color.

- **All Neighbors:** This bar indicates how all the customer's neighbors are doing. It is usually a gray or neutral color.
- **Efficient Neighbors:** This bar displays a usage value for the most efficient 20% of the customer's neighbors. It is usually colored green since green is commonly associated with energy efficiency. Note that the efficient neighbors value that appears in the module is *not* an average of the top 20% of neighbors. A threshold value—the 20th percentile neighbor—is used to determine the efficient neighbors value.
- **Last Peak Day:** The date and time of the most recent peak event. The module only displays information about the most recent peak event.
- **Neighbor Definition:** A brief definition of Efficient Neighbors and All Neighbors.

Gas Customers

For gas-only customers, the neighbor comparison displays information about the customer's gas usage. The module title mentions the gas fuel type, the units of measure are in gas units, and the gas unit of measure (CCF) is explained in a text field beneath the chart.



Non-AMI Gas Customers

Gas customers who do not have AMI data can still receive an email with a non-AMI experience. However, the neighbor comparison module will not be shown, since it requires AMI data. See [Customer Experience Variations](#) for more information.

Peak Events Close Together

If peak events take place close to one another (within approximately 2-3 days of each other, for example), or if an insight was not generated during the last peak event for some reason (usually due to missing data for the customer), then the customer will receive a communication with a generic placeholder graphic containing mock data. This communication will look the same as the first pre-event communication of the season.

For example, let's say a peak event is scheduled for a Monday and then another is scheduled two days later on a Wednesday. If there was not enough time to receive AMI data from the

event on Monday, then the pre-event communication for Wednesday will not specify how the customer performed. Instead, a static bar chart will be shown.

Neighbor Rank

The neighbor rank compares a customer's energy use to that of approximately 100 neighbors with similar homes, and then displays the customer's numerical rank out of those neighbors based on how much energy they used during the last peak event. The goal is to persuade customers to improve their ranking by using less energy during subsequent peak days.

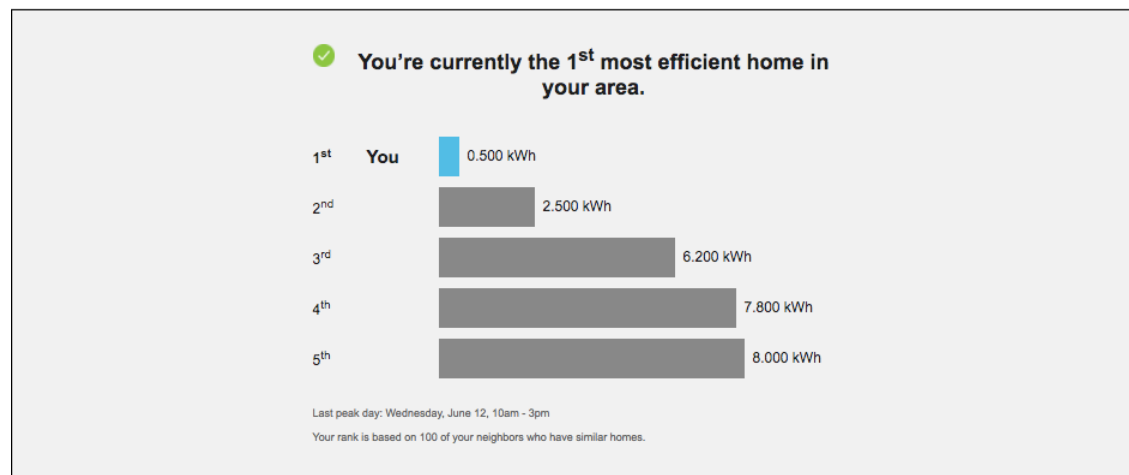
Note

Only electricity customers can receive the Neighbor Rank experience. See [Customer Experience Variations](#) for more information.

Pre-Event Email

After a peak event's occurrence, the Neighbor Rank module shows the customer's rank from the previous peak event. Customers can see how much energy they used and how their usage ranked against that of approximately 100 neighbors who also participated in the event. When not following a peak event, the neighbor rank includes a generic bar chart that poses a question to customers to entice them to participate in the upcoming peak event.

The following is an example of a pre-event email sent after a hot-weather peak event. The same format applies to cold-weather events.



The following are descriptions of pre-event customer rank graphic:

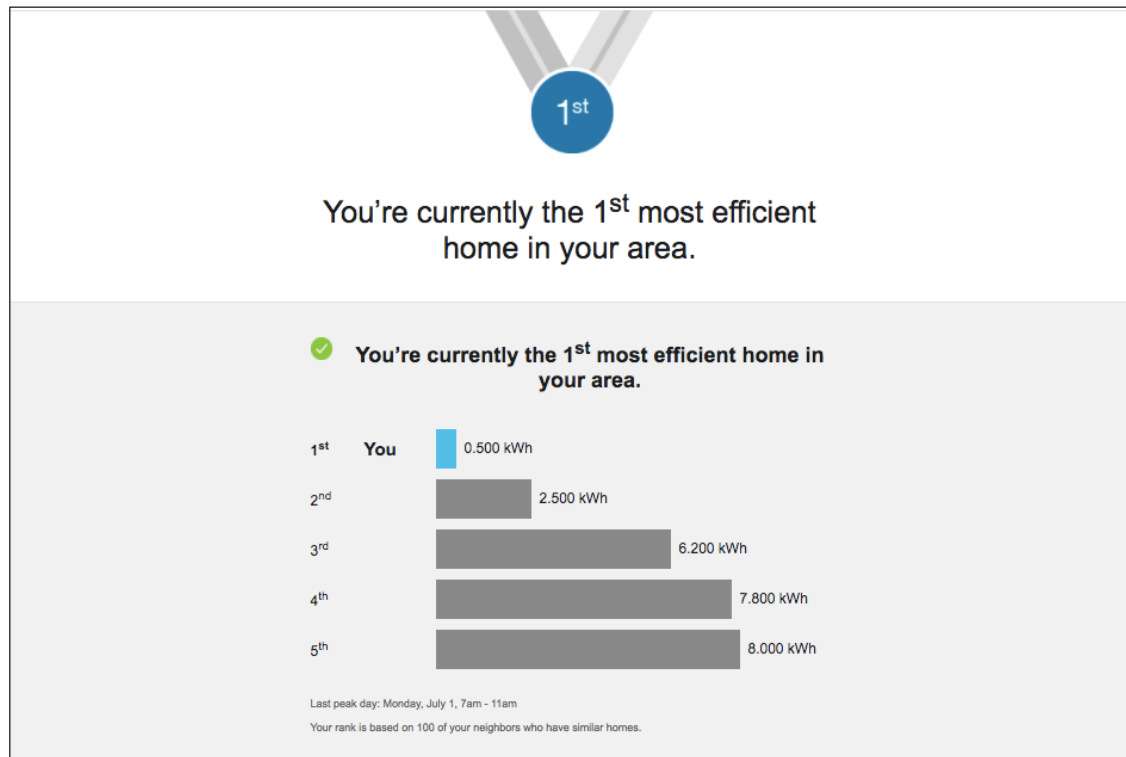
- **Insight:** Above the leaderboard is an insight statement that highlights the customer's rank in relation to their neighbors.
- **Rank Chart:** The rank chart displays four different rank spaces. The customer rank and the most efficient user always occupy two of the spaces. The final spaces orient the customer to where they fall within the neighbor ranking. The bars are color-coded to increase readability. The customer's current rank is highlighted in the "You" color. All other ranks are colored gray.
- **Energy Amount:** The amount of energy for each ranking space is displayed. Energy usage is calculated based off of the customer's usage.

- **Efficiency Bar:** A visual bar appears in each ranking space. This bar is a visual scale of how much energy is used for each ranking. The customer's bar is highlighted in the "You" color. The other efficiency bars are colored gray. The size of the bar indicates efficiency. The smaller the bar is, the more energy efficient is that specific ranking space.
- **Last Peak Day:** The date and time of the most recent peak event. The module only displays information about the most recent peak event.
- **Neighbor Description:** The neighbor description appears below the bar chart. By default, it includes a statement about how the neighbor rank is calculated and information about who their neighbors are.

Post-Event Email

After the peak event is over, the module displays the customer's rank for the most recent event. The neighbor rank shows how the customer's usage compares to that of approximately 100 neighbors who also participated in the event.

The following image is an example of the customer's rank in the post-event email during the summer. You can also use this to illustrate the customer's rank during peak events in the winter.



The following are descriptions of post-event customer rank graphic:

- **Insight:** An insight statement that highlights the customer's rank in relation to their neighbors.
- **Rank Chart:** The rank chart displays five different rank spaces. The customer rank and the most efficient user always use two of the available spaces. The final spaces orient the customer to where they fall within the neighbor comparison. The bars are color-coded to increase readability. The customer's current rank is highlighted in the "You" color. The orienting spaces are colored gray.
- **Energy Amount:** The amount of energy for each ranking space is displayed. Energy usage is calculated based off of the customer's usage.

- **Efficiency Bar:** A visual bar appears in each ranking space. This bar is a visual scale of how much energy is used for each ranking. The customer's bar is highlighted in the "You" color. The other efficiency bars are colored gray. The size of the bar indicates efficiency. The smaller the bar is, the more energy efficient is that specific ranking space.
- **Last Peak Day:** The date and time of the most recent peak event. The module only displays information about the most recent peak event.
- **Neighbor Description:** The neighbor description appears below the bar chart. By default, it includes a statement about how the neighbor rank is calculated and information about who their neighbors are.

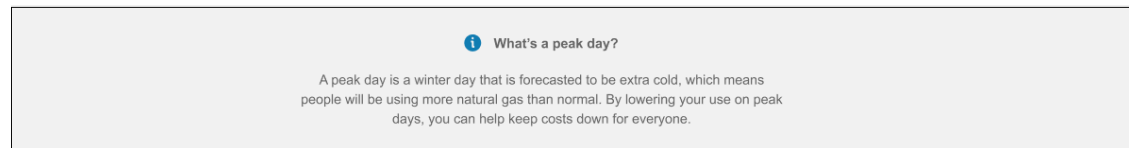
Peak Events Close Together

If peak events take place close to one another (within approximately 2-3 days of each other, for example), or if an insight was not generated during the last peak event for some reason (usually due to missing data for the customer), then the customer will receive a communication with a generic placeholder graphic containing mock data. This communication will look the same as the first pre-event communication of the season.

For example, let's say a peak event is scheduled for a Monday and then another is scheduled two days later on a Wednesday. If there was not enough time to receive AMI data from the event on Monday, then the pre-event communication for Wednesday will not specify how the customer performed. Instead, a static bar chart will be shown.

Email Introduction (Peak Day Definition)

The Introduction (Peak Day Definition) module explains what a peak day is and the benefits of participating in a peak day event. The goal of the module is to give more context about the peak events. It can appear in both pre- and post-event emails.



Location: The module is often located below the [Neighbor Comparison](#) or [Neighbor Rank](#) module.

Heading: The module heading includes an information icon and a question to indicate the type of content the module contains.

Definition: The first line of the definition focuses on what a peak day is in the context of a winter or summer season. The second line focuses on the benefit of lowering your energy use on such days. The content varies slightly depending on whether it is for gas or electricity customers.

Tips

The email tips module provides actionable steps for customers to take in order to save energy during a peak event. The tips focus peak shifting and include actions such as adjusting one's thermostat or delaying the use of large appliances until the peak event is over.

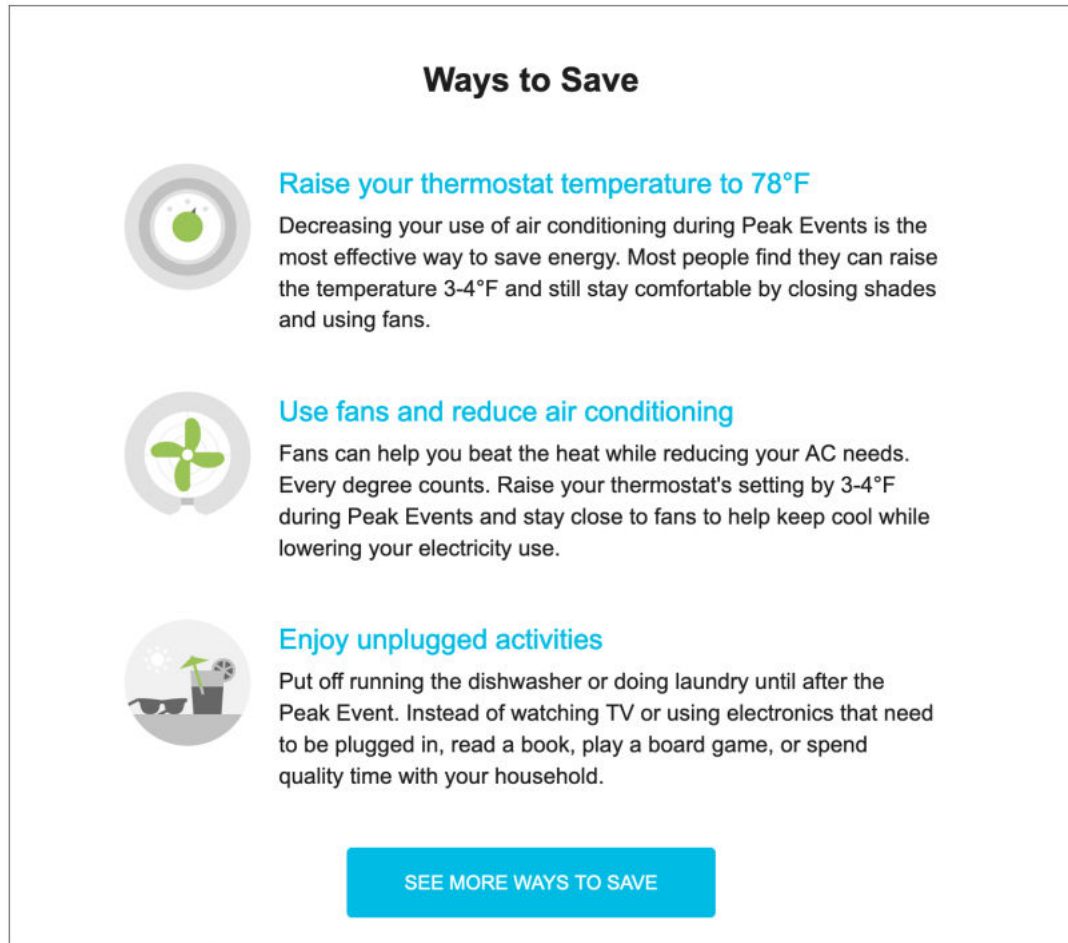
Requirements and Limitations

Same as listed in the Behavioral Demand Response [Requirements and Limitations](#).

User Experience

Through the Tips module, customers get energy-efficiency suggestions, as well as a button to more actionable steps to help them save energy during peak days.

The following image is an example of tips for the hot-weather season:



User Experience Variations

Typically, the pre-event email contains three tips that customers can implement during the upcoming peak even, and the post-event email displays a single tip that may have the biggest effect on a customer's energy use during the next peak event.

Add to Calendar

The Add to Calendar module provides an easy way for the customer to add an upcoming event to their calendar or reminder system.

Requirements and Limitations

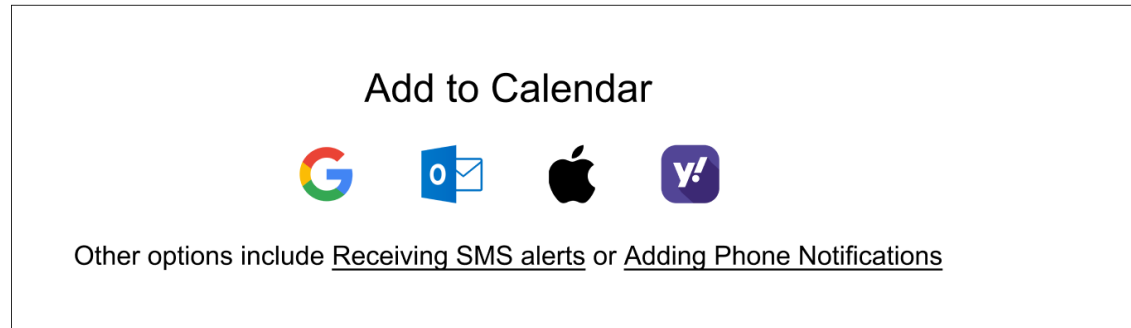
Same as listed in the Behavioral Demand Response [Requirements and Limitations](#).

User Experience

The Add to Calendar module is placed at the bottom of the Pre-Event Email communication, below the Upcoming Event reminder.

The user experience for this module includes an explanatory header that calls the customer to adding the event to their calendar, the logos for the calendar systems that are supported, and alternative options for reminders, such as Receiving SMS alerts, or Adding Phone Notifications.

The following is an example of the Add to Calendar module for Pre-Event Email communications:



User Experience Variations

There are no user experience variations for this module.

Introduction Module

The Introduction module is a personalized message which includes the customer's first name, brief text encouraging the customer to save energy in the upcoming season, and a seasonal image. The module is located at the top of the Pre-season Summer Welcome Email, after the [Header](#) module, and before the [Welcome](#) module.

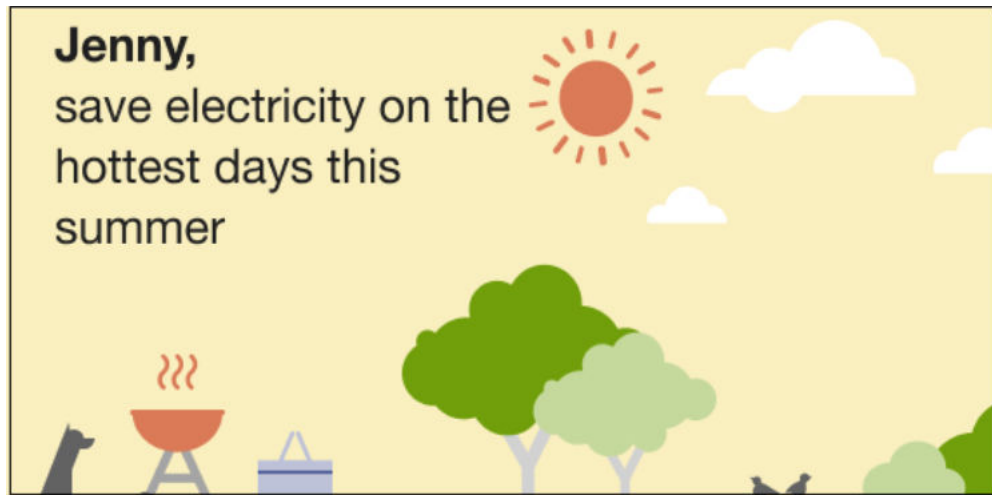
Requirements and Limitations

Same as listed in the Behavioral Demand Response [Requirements and Limitations](#).

- This module is only available to customers as part of the [Pre-Season Summer Welcome Email](#).
- This module is available for the summer season only.

User Experience

Customers get introduced to the Pre-Season Summer Welcome Email, and are encouraged to save energy during this season.



Customer Name: The customer's first name is incorporated in the Hero message to set a personalized tone.

Header: The header message informs the customer of the emails' purpose, and prepares them to learn more about how they can save energy in the upcoming season.

Illustration: A friendly illustration is included to visually connect the email to the upcoming summer season.

User Experience Variations

There are no supported user experience variations for this module.

Welcome Module

The Welcome module welcomes the customer to the program. It includes details about the program, such as when and why it is happening, how to participate, and the benefits of participating. The module is placed after the [Introduction Module](#), and before the [Numbered Steps](#) module.

Requirements and Limitations

Same as listed in the Behavioral Demand Response [Requirements and Limitations](#).

- This module is only available to customers as part of the [Pre-Season Summer Welcome Email](#).
- This module is available for the summer season only.

User Experience

Through the Welcome module customers get an overview of the program they are enrolled in, and about the impact that small actions can have during peak days.

Welcome to Program Name

When it's **unusually hot outside**, the electricity needed to cool our homes puts a strain on the grid, which can lead to **power outages**.

That's why we're asking you to participate in Program Name, which are **events that last just a few hours** on designated days.

By taking simple steps to **lower your electricity use** you'll help keep everyone's electricity going!

Header: The header message greets the customer and introduces the program's name.

Subheader message: The message emphasizes the importance of participating by lowering the electricity use on the hottest days of summer.

User Experience Variations

There are no supported user experience variations for this module.

Numbered Steps

The Numbered Steps module sets the customer's expectations for how peak events work by presenting it in three steps: before, during, and after the event. The module also provides the customer with opportunities to learn more about the event or sign up for additional alerts. The module is located after the [Welcome Module](#), and before the [Alerts Call to Action Module](#) module.

Requirements and Limitations

Same as listed in the Behavioral Demand Response [Requirements and Limitations](#).

User Experience

The Numbered Steps module walks customers through what to expect before, during, and after a peak day.

The following is an example of the module, followed by a description of its components.

How it works

1

Before an event

We'll notify you by email about the upcoming event.

2

During an event

Take actions like adjusting your thermostat by a few degrees or delaying use of large appliances to reduce your electricity use.

3

After an event

We'll let you know how you did with saving electricity.

Learn more

Header: The header prepares the customer to learn how their peak events work.

Step 1 header: The Step 1 header presents the before an event peak category.

- **Step 1 text:** We tell the customer that they will get an email notification about the upcoming event.

Step 2 header: The Step 2 header presents the during an event peak category.

- **Step 2 text:** We encourage the customer to take actions like adjusting their thermostat a few degrees or delaying the use of large appliances to reduce their electricity use.

Step 3 header: The Step 3 header presents the after an event peak category.

- **Step 3 text:** We inform the customer that they will receive information on how well they did once the event is over.

Learn more button: A button that links to the utility's program webpage.

User Experience Variations

The user experience varies for customers depending upon their energy use, fuel types, available data, and customer attributes. The following list indicates the primary user experience variations. Note that the list below does not represent all possible variations.

The Numbered Step module user experience varies based on the following:

- The channels supported by the utility.
- Whether those channels have auto-enroll or opt-in policies.
- Whether the utility has an external notifications preferences page where customers can choose which channels they want to subscribe to.
- Whether the utility has an external information webpage for this program.

Opt-In to Texts

If the utility's supported channels are opt-in, Step 1 includes a hyperlink that redirects the customer to the utility's notification preferences page.

How it works

1

Before an event

We'll notify you by email about the upcoming event. You can also [sign up for texts](#).

2

During an event

Take actions like adjusting your thermostat by a few degrees or delaying use of large appliances to reduce your electricity use.

3

After an event

We'll let you know how you did with saving electricity.

Learn more

No Opt-In, No Call-to-Action

If a program does not support opt-in, the Numbered Steps module lists all auto-enrolled channels.

How it works

1

Before an event

We'll notify you by email, text, and phone call about the upcoming event.

2

During an event

Take actions like adjusting your thermostat by a few degrees or delaying use of large appliances to reduce your electricity use.

3

After an event

We'll let you know how you did with saving electricity.

Alerts Call to Action Module

The Alerts Call to Action module encourages customers to sign up for additional alerts over text or voice channels, so that they are less likely to miss an event. The module is placed after the [Alerts Call to Action Module](#) module, and before the [Social Proof Module](#) module.

Requirements and Limitations

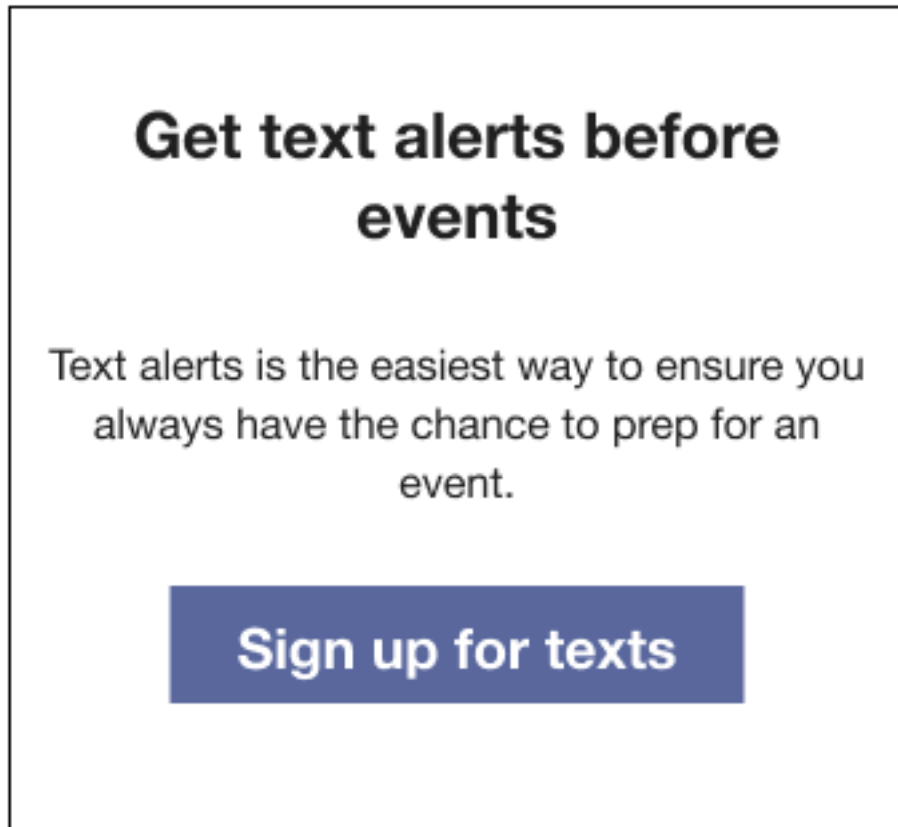
Same as listed in the Behavioral Demand Response [Requirements and Limitations](#).

- This module is only available to customers as part of the [Pre-Season Summer Welcome Email](#).
- This module is available for the summer season only.

User Experience

The Alerts Call to Action module reminds the customer that they can sign up to get text alerts before events.

The following is an example of the module, followed by a description of its components.



Header: Customers are encouraged to get text alerts before events.

Body: Tells the customer that text alerts are the easiest way to get notified about upcoming events.

Sign up for texts button: Takes the user to an external notifications preferences page where customers can choose which channels they want to subscribe to.

User Experience Variations

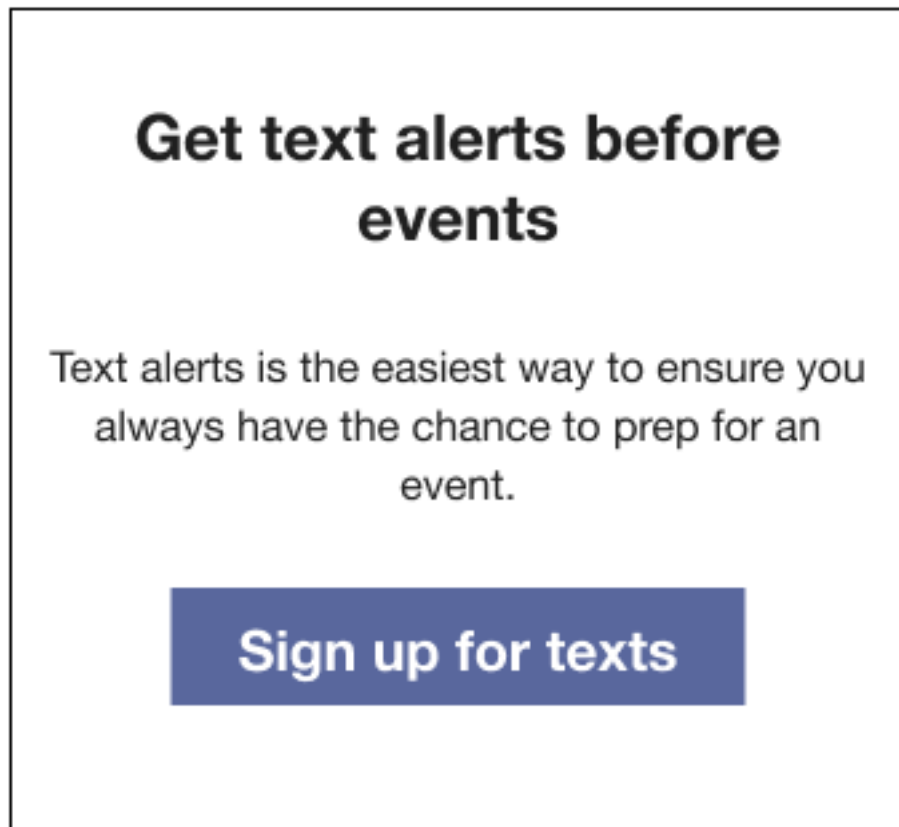
The user experience varies for customers depending upon their energy use, fuel types, available data, and customer attributes. The following list indicates the primary user experience variations. Note that the list below does not represent all possible variations.

Note

If the utility has only auto-enrolled channels of communication, this module will not appear.

Opt-In to Texts

If the utility allows opt-in to text, the customer receives a message encouraging them to sign up for SMS notifications.

**Opt-In to Phone Calls**

If the utility allows opt-in to phone call alerts, the customer receives a message encouraging them to sign up for phone calls.

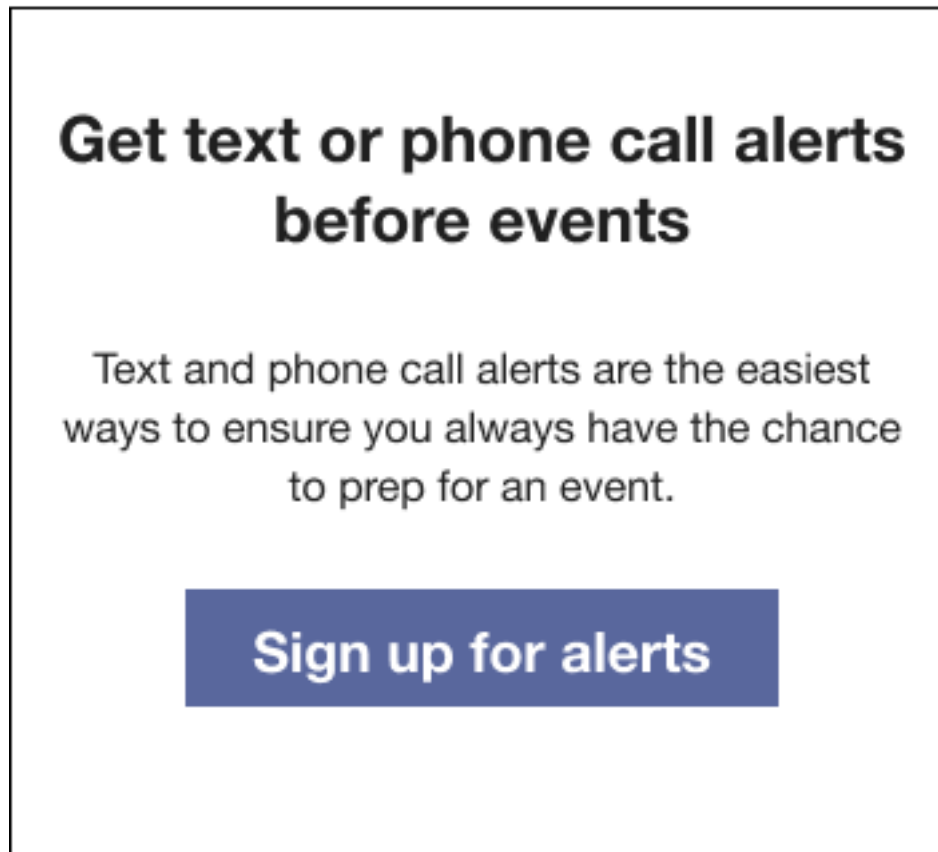
Get phone call alerts before events

Phone call alerts is the easiest way to ensure you always have the chance to prep for an event.

Sign up for phone calls

Opt-In to Text and Phone Calls

If the utility allows both opt-in texts and phone call alerts, the customer receives a message encouraging them to sign up for texts or phone calls.



Social Proof Module

The Social Proof module encourages customers to engage with their utility by citing the number of customers who participated in the program the previous summer. The module is placed after the [Alerts Call to Action Module](#) module, and before the [Checklist Module](#).

Requirements and Limitations

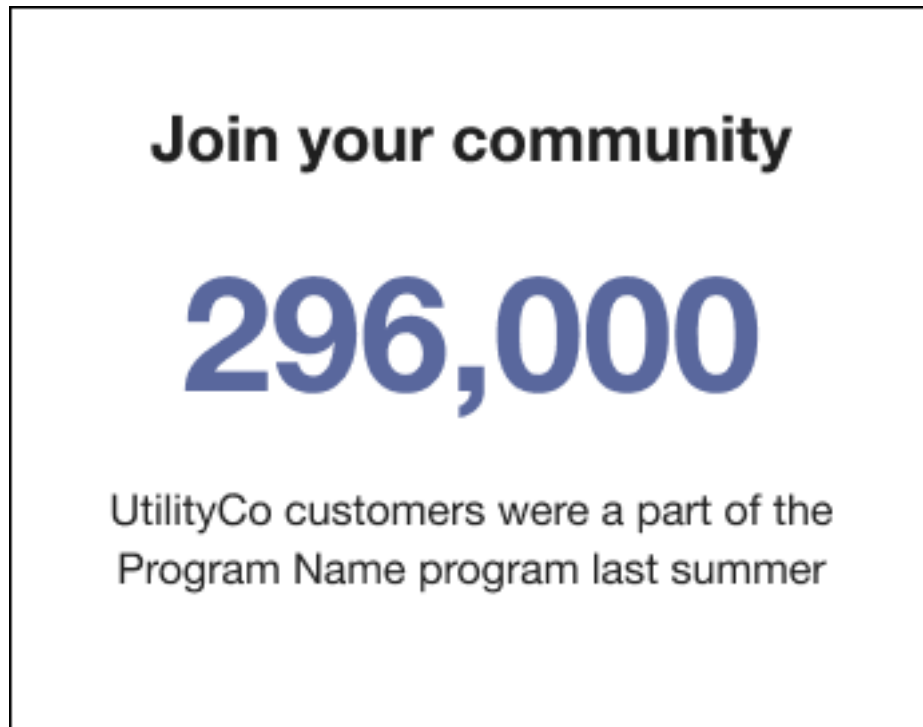
Same as listed in the Behavioral Demand Response [Requirements and Limitations](#).

- This module is only available to customers as part of the [Pre-Season Summer Welcome Email](#).
- This module is available for the summer season only.

User Experience

The Social Proof module shows the customer the number of other customers who participated in the program the previous summer.

The following is an example of the Social Proof module for the Pre-Season Summer Welcome email, followed by a description of its components.



Header: The header encourages the customer to join their community.

Social proof number: Number of utility customers who participated in the program the previous summer.

Social proof details: Tells the customer that the number stands for the utility's customers who were a part of the program the previous summer.

User Experience Variations

This module will not be shown if the utility did not run a Behavioral Demand Response program last summer.

Checklist Module

The Checklist module helps the customer plan ahead for the upcoming summer season of peak events by providing preparatory tips as opposed to the participatory tips that they will receive during actual events. The module is placed after the [Social Proof](#) module and before the [Footer](#).

Requirements and Limitations

Same as listed in the Behavioral Demand Response [Requirements and Limitations](#).

- This module is only available to customers as part of the [Pre-Season Summer Welcome Email](#).
- This module is available for the summer season only.

User Experience

The Checklist module provides a couple of actionable items to aid customers to stay on top of their energy-saving plan for the upcoming hot-weather season.

The following is an example of the Checklist module for the Pre-Season Summer Welcome email:

Have a plan for this summer



✓

Prepare and discuss

Think now about what electric appliances you can delay the use of during events, and be sure to tell everyone in your home about it.

✓

Schedule AC maintenance

Stay on top of air conditioner tune-ups to make sure you don't waste electricity during events and throughout the whole summer.

Header: The text prepares the customer to learn ways they can plan for the summer season.

Checklist item header 1: The text prompts the customer to prepare and discuss.

- **Checklist item 1:** The text encourages the customer to be mindful of their electric appliances as to agree with everyone in their home on which appliances they could delay the use of during events.

Checklist item header 2: The text prompts the customer to perform preventive maintenance for their Air Conditioning unit.

- **Checklist item 2:** The text encourages the customer to make sure their Air Conditioning unit is in optimal condition so there is no electricity waste during events and throughout the summer.

User Experience Variations

There are no supported user experience variations for this module.

Email Thank You Message Module

The Thank You Message module communicates gratitude to customers who participated in the last peak event. It appears in the post-event email for gas customers only.

Requirements and Limitations

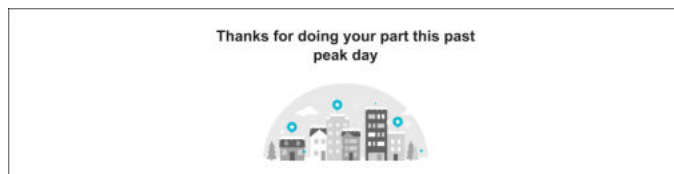
Same as listed in the Behavioral Demand Response [Requirements and Limitations](#).

Note

The Thank You message appears in the post-event email for gas customers only.

User Experience

Gas customers are acknowledged for their role in saving energy throughout the latest peak day.



Location: The module is located at the top of the email.

Message: The message thanks customers for their participation. Because the module is for non-AMI customers whose performance during the peak event is unknown, the message does not comment on customers' actual performance compared to other neighbors. It varies slightly depending on whether a single- or multi-day peak event occurred.

User Experience Variations

The message for the Thank You module varies depending on whether the past peak day was a Single Day Event, or a Multi-Day Event:

- **Single Day Event:** "Thanks for doing your part this past peak day"
- **Multi-Day Event:** "Thanks for doing your part on the recent peak days"

Seasonal Summary Module

The Seasonal Summary module is designed to help customers understand how much energy they used throughout the season. By showing the kilowatt hours (kWh) a customer used during previous peak events, the customer can determine if they are using more or less electricity throughout the season.

Note

This module will display in post-event emails after the second event.

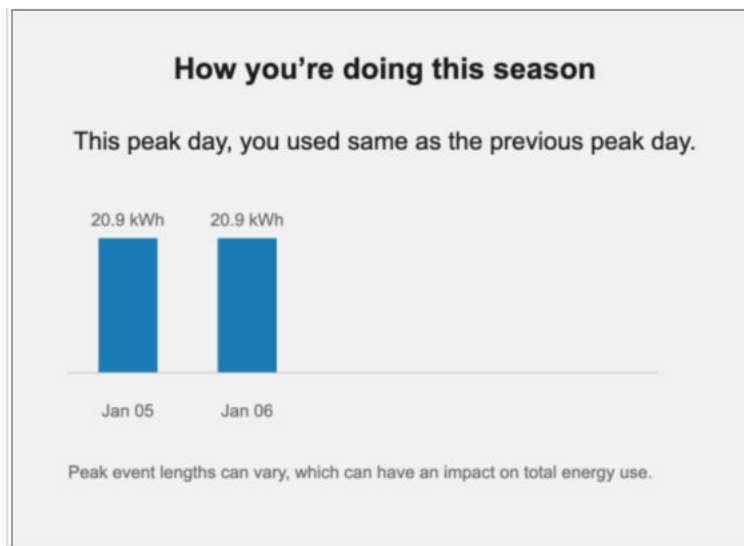
Requirements and Limitations

Same as listed in the Behavioral Demand Response [Requirements and Limitations](#).

User Experience

After the second peak day of the season, the Seasonal Summary shows customers how they did over the current season's peak days.

The following is an example of the Seasonal Summary module:



User Experience Variations

The message for the Seasonal Summary module varies depending on whether the customer used more, less, or the same amount of energy during the current season's peak days.

The following are sample messages a customer may receive, based on the amount of energy they used during the season's peak events:

- **No Rank Change:** "This peak day, you used the same as the previous peak day."
- **Used Less:** "This peak day, you used xx% less than the previous peak day."
- **Used More:** "This peak day, you used xx% more than the previous peak day."

Voice Channel Communications

The Behavioral Demand Response cloud service uses the voice channel to send automated pre- and post-event voice messages (also called Interactive Voice Response, or IVR) to customers. The messages are designed to motivate customers to save energy during peak events.

Note

If multiple consecutive peak days are called, pre-event emails and voice messages will reflect that a customer is in a multi-day event period.

Note

Pre-event and post-event email and SMS messages are localized for Spanish. If your utility is interested in Spanish language support for voice communications, [contact your Delivery Team](#).

In this section:

- [Pre-Event Voice Message](#)
- [Post-Event Voice Message](#)

Pre-Event Voice Message

Pre-event voice messages use the voice channel to notify customers of upcoming peak events, and to encourage energy efficient behavior during those events. The content of the message varies depending on which user experience variation the customer receives. For example, if multiple consecutive peak days are called, pre-event emails and voice messages will reflect that a customer is in a multi-day event period.

Neighbor Comparison Experience

The Neighbor Comparison pre-event voice message tells customers when a peak day event is about to occur and provides tips on how to save energy during the event. If enough data is available, the message compares the customer's energy use from the previous peak interval event to that of two groups, Efficient Neighbors and All Neighbors. The goal is to persuade customers to improve their status by using less energy on subsequent peak days. The table below shows how the messaging can vary depending on whether it is for the first peak day or a subsequent peak event.

Electricity Examples

Italicized sentences highlight key differences.

Condition	Message
For First Peak Day (no previous data is available)	This is an alert from [UtiliCo]. Tomorrow <Day>, <Month>, <Date> is a peak day. From 2 p.m. to 7 p.m., join [UtiliCo] customers in reducing your electric use. <i>After the peak day is over, we'll follow up and let you know how efficient you were.</i> Save by turning down your air conditioner or delaying the use of large appliances. You may reach us with questions at 1-XXX-XXX-XXXX. These notifications inform you of days to save energy and money. To cancel future phone notifications, press 9 now. To opt in for text notifications about future peak days, press 6.
For Subsequent Peak Days (data from previous event is available)	This is an alert from [UtiliCo]. Tomorrow <Day>, <Month>, <Date> is a peak day. From 2 p.m. to 7 p.m., join [UtiliCo] customers in reducing your electric use. <i>During the last peak day, you used X% more than similar homes.</i> Save more this peak day by turning up the temperature on your thermostat or delaying the use of large appliances. You may reach us with questions at 1-XXX-XXX-XXXX. These notifications inform you of days to save energy and money. To cancel future phone notifications, press 9 now. To opt in for text notifications about future peak days, press 6.

Electricity Message Variations

The actual messaging may vary slightly depending on how much more or less energy the customer saved in relation to their neighbors. The table below shows a few examples of how the messaging can vary, with italicized sentences highlighting key differences.

Note

These message variations cannot appear in the first pre-event message a customer receives, since they are dependent on data being available from previous peak events.

Condition	Message Variation
Customer saved more energy than efficient neighbors	<i>During the last peak day, you were one of the most efficient homes in your neighborhood.</i> Save even more this peak day by turning up the temperature on your thermostat or delaying the use of large appliances.
Customer used about the same amount of energy as efficient neighbors	<i>During the last peak day, you used X kWh, about the same as the most efficient homes in the neighborhood.</i> Keep your efficient status this peak day by turning down your air conditioner or delaying the use of large appliances.
Multi-day peak events	For multi-day peak events, any available results will be communicated. For example, if results are ready for two days of a three-day event, results for the first two days will be communicated during the pre-event message for the third day.

Gas Examples

Italicized sentences highlight key differences.

Condition	Message
For First Peak Day (no previous data is available)	This is an alert from [UtiliCo]. Tomorrow <Day>, <Month>, <Date> is a peak day. Join other [UtiliCo] customers in reducing your gas use. <i>After the peak day is over, we'll follow up and let you know how efficient you were.</i> Save even more by turning down the temperature on your thermostat or delaying the use of large natural gas appliances. These alerts help you save energy and money. We'll notify you before and after each peak day, so you may get a few messages from us this winter. If you have questions, you can reach us at 1-XXX-XXX-XXXX. To stop receiving these alerts, press 9. To opt in for text notifications about future peak days, press 6. To hear this message again, press 1.
For Subsequent Peak Days (data from previous event is available)	This is an alert from [UtiliCo]. Tomorrow <Day>, <Month>, <Date> is a peak day. Join other [UtiliCo] customers in reducing your gas use. <i>During the last peak day that started on <Day>, <Month>, <Date>, you used X% more than similar homes.</i> Save even more by turning down the temperature on your thermostat or delaying the use of large natural gas appliances. These alerts help you save energy and money. We'll notify you before and after each peak day, so you may get a few messages from us this winter. If you have questions, you can reach us at 1-XXX-XXX-XXXX. To stop receiving these alerts, press 9. To opt in for text notifications about future peak days, press 6. To hear this message again, press 1.

Gas Message Variations

The actual messaging may vary slightly depending on how much more or less energy the customer saved in relation to their neighbors. The table below shows a few examples of how the messaging can vary, with italicized sentences highlighting key differences. Note that these message variations cannot appear in the first pre-event message a customer receives, since they are dependent on data being available from previous peak events.

Condition	Message
Customer saved more energy than efficient neighbors	This is an alert from [UtiliCo]. <i>During the last peak day that started on <Day>, <Month>, <Date>, you were one of the most efficient homes in your neighborhood.</i> Save even more by turning down the temperature on your thermostat or delaying the use of large natural gas appliances. These alerts help you save energy and money. We'll notify you before and after each peak day, so you may get a few messages from us this winter. If you have questions, you can reach us at 1-XXX-XXX-XXXX. To stop receiving these alerts, press 9. To hear this message again, press 1.
Customer used about the same amount of energy as efficient neighbors	This is an alert from [UtiliCo]. <i>During the last peak day that started on <Day>, <Month>, <Date>, you used X CCF, about the same as the most efficient homes in the neighborhood.</i> Save even more by turning down the temperature on your thermostat or delaying the use of large natural gas appliances. These alerts help you save energy and money. We'll notify you before and after each peak day, so you may get a few messages from us this winter. If you have questions, you can reach us at 1-XXX-XXX-XXXX. To stop receiving these alerts, press 9. To hear this message again, press 1.

Condition	Message
Multi-day peak events	This is an alert from [UtiliCo]. <i>Tomorrow <Day>, <Month>, <Date> through <Day>, <Month>, <Date> are peak event days.</i> Join other UtiliCo customers in reducing your gas use on these days. During the last peak day that started on <Day>, <Month>, <Date>, you used X% more than similar homes. Save even more by turning down the temperature on your thermostat or delaying the use of large natural gas appliances. These alerts help you save energy and money. We'll notify you before and after each peak day, so you may get a few messages from us this winter. If you have questions, you can reach us at 1-XXX-XXX-XXXX. To stop receiving these alerts, press 9. To hear this message again, press 1.

Neighbor Rank Experience

The Neighbor Rank pre-event voice message tells customers when a peak event is about to occur and provides tips on how to save energy during the event. If enough data from prior peak events is available, the message compares a customer's energy use during peak events to that of approximately 100 similar homes, and then states the customer's numerical rank out of those homes. The goal is to persuade customers to improve their ranking by using less energy during subsequent peak days. The table below shows how the content of the message varies depending on whether the message is for the first event or subsequent events.

Note

Only customers who receive electricity from their utility can have the Neighbor Rank experience.

Electricity Examples

Italicized sentences highlight key differences.

Condition	Message
For First Peak Day (no previous data is available)	This is an alert from [UtilCo]. Tomorrow Wednesday July 15 is a peak day. From 2 p.m. to 7 p.m., join [UtilCo] customers in reducing your electric use. <i>After the peak day is over, we'll follow up and let you know how efficient you were.</i> Save by turning down your air conditioner or delaying the use of large appliances. You may reach us with questions at 1-XXX-XXX-XXXX. These notifications inform you of days to save energy and money. To cancel future phone notifications, press 9 now. To opt in for text notifications about future peak days, press 6.
For Subsequent Peak Days (data from previous event is available)	This is an alert from [UtilCo]. Tomorrow Wednesday July 15 is a peak day. From 2 p.m. to 7 p.m., join [UtilCo] customers in reducing your electric use. <i>Out of approximately 100 similar homes, you were the Xth most efficient on the last peak day.</i> Move up in the ranks this peak day by turning down your air conditioner or delaying the use of large appliances. You may reach us with questions at 1-XXX-XXX-XXXX. These notifications inform you of days to save energy and money. To cancel future phone notifications, press 9 now. To opt in for text notifications about future peak days, press 6.

Electricity Message Variations

If data about the customer's performance from the last event is available, the actual messaging may vary slightly depending on how much more or less energy the customer saved in relation to their neighbors. The table below shows an example of how the messaging can vary, with italicized sentences highlighting key differences.

Note that this message variation cannot appear in the first pre-event message a customer receives, since it is dependent on data being available from previous peak events.

Condition	Message Variation
Customer ranked as one of the top five	<i>During the last peak day, you were one of the top five most efficient homes in your neighborhood.</i> Keep your efficient status this peak day by turning down your air conditioner or delaying the use of large appliances.
Multi-day peak events	For multi-day peak events, any available results will be communicated. For example, if results are ready for two days of a three-day event, results for the first two days will be communicated during the pre-event message for the third day.

Non-AMI Gas Experience

The non-AMI pre-event voice message tells customers when a peak event is about to occur and provides tips on how to save energy during the event. Because it cannot include any historical AMI information, the voice message does not contain any comparison of the customer's energy use from a previous peak day event. Moreover, the voice message does not have any variations based on the customer's performance.

Note

Only customers who receive gas from their utility can have the non-AMI gas experience.

Gas Example

Italicized sentences highlight key differences.

Condition	Message
For First Peak Day	This is an alert from [UtiliCo]. Tomorrow <Day>, <Month>, <Date> is a peak day. <i>Join other [UtiliCo] customers in reducing your gas use.</i> Save even more by turning down the temperature on your thermostat or delaying the use of large natural gas appliances. These alerts help you save energy and money. We'll notify you before and after each peak day, so you may get a few messages from us this winter. If you have questions, you can reach us at 1-XXX-XXX-XXXX. To stop receiving these alerts, press 9. To opt in for text notifications about future peak days, press 6. To hear this message again, press 1.

Post-Event Voice Message

Post-event voice messages use the voice channel to tell customers how they did during the last peak event, and to encourage energy efficient behavior during the next event. The content

of the message varies depending on which customer experience variation the customer receives. See [Customer Experience Variations](#) for more information.

Neighbor Comparison Experience

The Neighbor Comparison post-event voice message tells customers how they did on the last peak event and provides tips on how to save energy during the next one. Moreover, the message compares the customer's energy use to that of two groups, Efficient Homes and All Homes. The goal is to persuade customers to improve their status by using less energy on subsequent peak days.

Note

In the examples below, italicized sentences highlight key differences.

Electricity Example

Condition	Message
Customer used more than similar homes	This is a message from [UtiliCo]. <i>During the <Day>, <Month>, <Date> peak day, you used X% more than similar homes.</i> Save more next peak day by turning up the temperature on your thermostat or delaying the use of large appliances. You may reach us with questions at 1-XXX-XXX-XXXX. These notifications inform you of days to save energy and money. To cancel future phone notifications, press 9 now. To opt in for text notifications about future peak days, press 6.

Electricity Message Variations

The actual messaging may vary slightly depending on how much more or less energy the customer saved in relation to their neighbors.

Condition	Message Variation
Customer used about the same as efficient neighbors	<i>During the <Day>, <Month>, <Date> peak day, you used X kWh, about the same as the most efficient homes in the neighborhood.</i> Save even more next peak day by turning up the temperature on your thermostat or delaying the use of large appliances.
Customer was more efficient than efficient neighbors	During the <Day>, <Month>, <Date> peak day, you were one of the most efficient homes in the neighborhood. Keep your efficient status next peak day by turning down your air conditioner or delaying the use of large appliances.

Gas Example

Condition	Message
Customer used more than similar homes	This is a message from [UtiliCo]. <i>During the peak day that started on <Day>, <Month>, <Date>, you used X% more than similar homes.</i> Save even more by turning down the temperature on your thermostat or delaying the use of large natural gas appliances. These alerts help you save energy and money. We'll notify you before and after each peak day, so you may get a few messages from us this winter. If you have questions, you can reach us at 1-XXX-XXX-XXXX. To stop receiving these alerts, press 9. To opt in for text notifications about future peak days, press 6. To hear this message again, press 1.

Gas Message Variations

Condition	Message
Customer used about the same as efficient neighbors	This is a message from [UtiliCo]. <i>During the peak day that started on <Day>, <Month>, <Date>, you used X ccf, about the same as the most efficient homes in the neighborhood</i> Save even more by turning down the temperature on your thermostat or delaying the use of large natural gas appliances. These alerts help you save energy and money. We'll notify you before and after each peak day, so you may get a few messages from us this winter. If you have questions, you can reach us at 1-XXX-XXX-XXXX. To stop receiving these alerts, press 9. To opt in for text notifications about future peak days, press 6. To hear this message again, press 1.
Customer was more efficient than efficient neighbors	This is a message from [UtiliCo]. Congratulations! During the peak day that started on <Day>, <Month>, <Date>, you were one of the most efficient homes in your neighborhood. Save even more by turning down the temperature on your thermostat or delaying the use of large natural gas appliances. These alerts help you save energy and money. We'll notify you before and after each peak day, so you may get a few messages from us this winter. If you have questions, you can reach us at 1-XXX-XXX-XXXX. To stop receiving these alerts, press 9. To opt in for text notifications about future peak days, press 6. To hear this message again, press 1.

Neighbor Rank Experience

The post-event voice message tells customers how they did on the last peak event and provides tips on how to reduce energy during the next peak event. Moreover, the message compares a customer's energy use to that of approximately 100 similar homes, and then states the customer's numerical rank out of those homes. The goal is to persuade customers to improve their status by using less energy on subsequent peak days. The actual messaging may vary slightly depending on how much more or less energy the customer saved in relation to their neighbors.

Only customers who receive electricity from their utility can receive the Neighbor Rank experience.

Note

In the examples below, italicized sentences highlight key differences.

Electricity Examples

Condition	Message
Customer did not rank in the top five	This is a message from [UtiliCo]. During the <Day>, <Month>, <Date> peak day, you were the Xth most efficient out of approximately 100 similar homes. Move up in the ranks next peak day by turning down your air conditioner or delaying the use of large appliances. You may reach us with questions at 1-XXX-XXX-XXXX. These notifications inform you of days to save energy and money. To cancel future phone notifications, press 9 now. To opt in for text notifications about future peak days, press 6.
Customer ranked as one of the top five	This is a message from [UtiliCo]. During the <Day>, <Month>, <Date> peak day, you were one of the 5 most efficient homes in your neighborhood. Great work! Keep your efficient status next peak day by turning down your air conditioner or delaying the use of large appliances. You may reach us with questions at 1-XXX-XXX-XXXX. These notifications inform you of days to save energy and money. To cancel future phone notifications, press 9 now. To opt in for text notifications about future peak days, press 6.

Non-AMI Gas Experience

Post-event voice messages are not available for customers who receive the non-AMI gas experience. However, non-AMI pre-event voice messages are available. See [Pre-Event Email](#) for more information.

Multi-Day Peak Events

If multiple peak days occur in close proximity to another, the customer results will be reported as they become available. In this situation, pre-event messages usually contain post-event results. However, customers will only receive one voice message per day. If the customer has already received a voice message before the post-event results have been calculated, those results are communicated on the next available day.

SMS Channel Communications

The Behavioral Demand Response Cloud Service uses the SMS channel to send pre-event and post-event text messages to customers. These texts are designed to prepare customers for peak events and motivate them to save energy. In addition:

- Utilities must use an SMS short code provisioned and owned by Oracle Utilities to keep Oracle Utility in compliance with all requirements set forth by the MMA Best Practices and CTIA guidelines for SMS communications. This includes managing a double-opt-in process and all required keywords that include but are not limited to STOP, CANCEL, UNSUBSCRIBE, HELP, and INFO.
- Customer preference and contact information can only be changed using Oracle Utilities Opower APIs, and the double opt-in workflow should be triggered using the APIs. CSRs can instruct customers to follow the double-opt in process if the customer has already selected a preference in the utility's preference center by texting "YES" to the utility's short code.
- Customers must go through a double opt-in process to receive text communications, and those customers that do not are ineligible to receive text communications.

- Text communications are limited to 160 characters. Customers who reply to a text with anything other than a keyword will get a response inviting them to call the call center.

Note

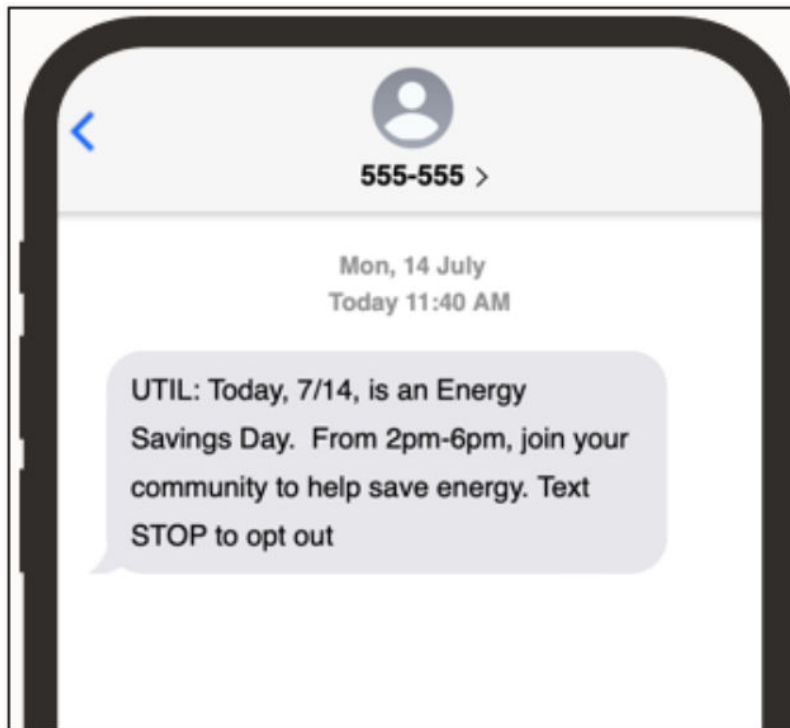
Pre-event and post-event email and SMS messages are localized for Spanish. If your utility is interested in Spanish language support for voice communications, [contact your Delivery Team](#).

In this section:

- [Pre-Event SMS Message](#)
- [Post-Event SMS Message](#)

Pre-Event SMS Message

The SMS channel sends pre-event SMS messages to notify customers of upcoming electricity peak events. The content of the messages varies based on the day of the peak event, and tells customers when a peak day event is about to start, while encouraging them to join their community to help save energy.



Note

SMS messages are only applicable to electricity peak events.

Message Variations

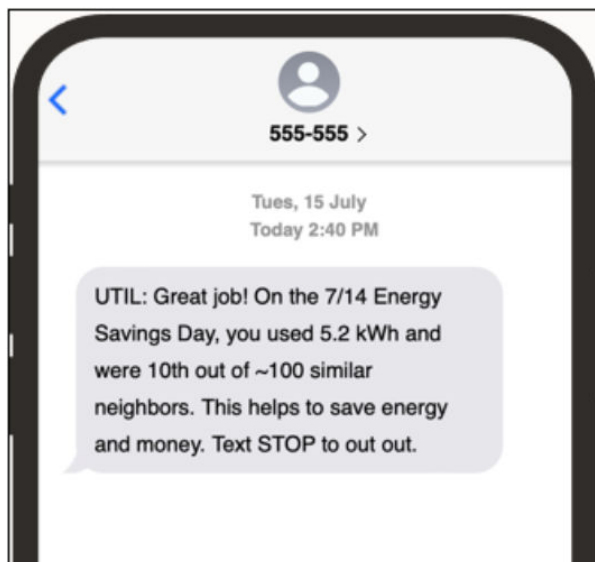
The following table shows how messaging varies based on the first or subsequent peak days.

Condition	Message
Peak event is today	UTIL: Today, 7/1 is an Energy Savings Day. From 2pm-6pm , join your community to help save energy. Text STOP to opt out.
Peak event is tomorrow	UTIL: Tomorrow, 7/2 is an Energy Savings Day. From 2pm-6pm , join your community to help save energy. Text STOP to opt out.
Peak event is today and tomorrow	UTIL: Today, 7/1 and tomorrow 7/2 are Energy Savings Days. From 2pm-6pm , join your community to help save energy. Text STOP to opt out.

Post-Event SMS Message

The SMS channels sends text messages to customers to tell them how they did during the last peak event compared to their neighbors. Messaging varies based on which customer experience variation the customer receives.

The following is an example of a post-event SMS message:



Note

SMS messages are only applicable to electricity peak events.

Neighbor Rank Experience

Post-event SMS messages tell customers how their energy use ranked compared to 100 similar homes during the peak event. The message includes how much energy they used and their numerical rank.

Message Variations

Note: The actual messaging varies based on the customer's rank compared to their neighbors.

Condition	Message
Customer ranked in top 20	UTIL: Great job! On the 7/1 Energy Savings Day, you used 5.2 kWh and were 10th out of ~100 similar neighbors. This helps to save energy and money. Text STOP to opt out.
Customer ranked 21 or below	UTIL: On the 7/1 Energy Savings Day, you used 5.2 kWh and were 30th out of ~100 similar neighbors. This helps to save energy and money. Text STOP to opt out.

Add 5 Events Cloud Service

Notifications for five additional events for either Peak Time Rebates or Behavioral Demand Response during each 12-month contracted service period can be added. Events can be one of two event types: hot-weather events or cold-weather events. Calling events of a different event type requires a separate purchase. Unused events from one 12-month service period cannot be carried over into a subsequent service period.

Enrollment

Customers are automatically enrolled in the Behavioral Demand Response Cloud Service if they meet the eligibility and selection criteria. Customers may opt themselves in to the Behavioral Demand Response events and messages for some communications directly, or by contacting a utility Customer Service Representative.

Opting Out of Communications

Customers can opt out of communications in a few ways. Their options will depend on the utility's setup and program design.

- **From the web:** It is recommended that customers use the **Account and Preferences** section in the Digital Self-Service - Energy Management Web Portal to change their preferences. If a customer unsubscribes, then this method allows them to subscribe again in the future.

Note

If the utility chooses to host their own account services, they may not offer the Digital Self-Service - Energy Management Web Portal. In that case, customers will need to contact the utility for more information about account management.

- **From an email:** Customers can click the unsubscribe link at the bottom of the email and follow the instructions to opt out of emails.

Warning

If the customer clicks **Unsubscribe** in the email and then clicks unsubscribe from all emails, they will not be able to subscribe again; this action is permanent. However, if they only opt out of Behavioral Demand Response emails, then they can subscribe again to these emails at a later time.

- **From text:** Customers can reply with **STOP** to opt out of SMS messages, which will opt the customer out of all messages sent from the SMS channel.

- **From voice:** Customers can opt out of future communications by selecting the cancel future phone notifications option provided in the prompt.

Opting In to Communications

Customers can opt themselves in to text messages through their voice channel communications. To opt in, the customer selects the opt in option provided at the end of the voice message.

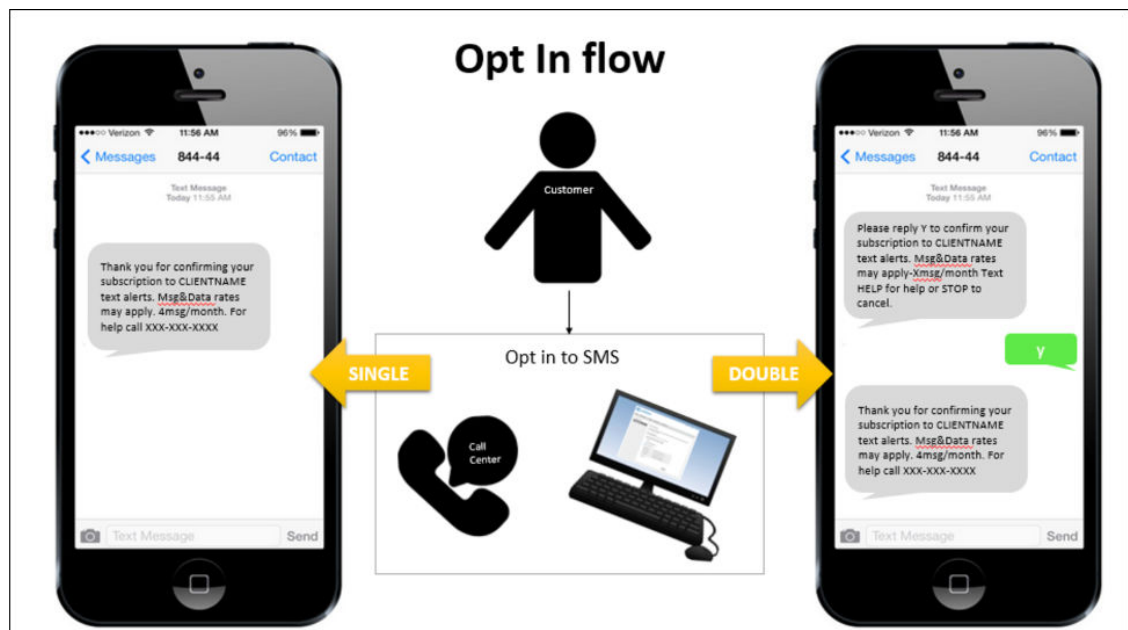
For example: *To opt in for text notifications about future peak days, press 6.*

Utilities can be set up for either single, or double opt-in to text notifications. If the utility is set up for single opt-in, the customer will receive a text message confirming their enrollment with no further action required. If the utility is set up for double opt-in, the customer will receive a text message asking them to confirm their enrollment.

Note

Behavioral Demand Response supports multiple languages for the SMS opt-in confirmation. Work with your Delivery team to set your language preferences.

The following is an illustration of the opt-in flow for text notifications.



Delivery

The way that Behavioral Demand Response communications are delivered varies by communication type:

- **Print Channel:** The print channel is used to send print materials designed to motivate customers to save energy during peak events and reward them for their participation. Delivery of print reports requires the utility purchase the appropriate channel fee.
- **Email Channel:** The email channel is used to send communications to customers before and after the peak day event. Pre-event emails are sent to customers the day prior to a

peak event is scheduled to begin. Post-event emails are sent to customers in the days following a peak event. Results are sent as soon as they are calculated.

- **Voice Channel:** The voice channel is used to send automated pre-event and post-event voice messages to customers. Pre-event voice messages are sent to customers the day before a peak event begins. Post-event voice messages are sent to customers in the days following a peak event. Customers will never receive more than one voice message a day. If results have been calculated, but a voice message has already been delivered that day, then the results are held until the following day. Otherwise, results are delivered when they are calculated.
- **SMS Channel:** Through the SMS channel, customers receive automated pre- and post-event text messages that are sent the day before a peak event begins. Post-event messages are sent to customers in days following the peak event.

Delivery Rules

Behavioral Demand Response messages are not regularly scheduled communications. They are triggered according to when peak day events are scheduled during the peak event season. These messages must be delivered within a specific delivery window. Anything outside of the specified delivery window is considered the blackout period (also known as quiet hours). Oracle Utilities will not send text or voice messages during quiet hours.

Delivery Window: Email, voice, and SMS messages must be delivered during legally mandated waking hours, 8am-5pm local time. Oracle Utilities and the utility client will mutually agree on quiet hours. Clients cannot choose the time of send. Pre-event messages can be delivered on all days, however, post-event messages are only delivered on business days (Monday - Friday).

All requests for IVR timing must be handled by your Delivery Team, as there are specific vendor requirements that must be met, which may impact the delivery window.

Delivery Frequency: Each Behavioral Demand Response message is sent only once for each peak event. For example, at the beginning of the peak event season, the pre-season postcard is only sent one time. If a customer does not receive the postcard, it is not resent. Customers will receive a pre- and post-event message for each peak event, but messages are not resent or duplicated for a single event. If the utility schedules more than one peak event season in a year (summer and winter events), this sequence repeats for each season.

Emails and Attachments: For email alerts, the email content is delivered directly in the email message with no attachments. This makes it more convenient for customers to quickly view the information, and it makes the emails less likely to be blocked by spam filters.

Multi-day Peak Event Feature: The multi-day peak event feature is designed to resolve issues arising from consecutive peak event days, peak event days in close proximity, and delayed peak event customer data (required to produce an insight). This feature ensures that customers do not receive more than one IVR notification per day by bundling pre-event messages with available post-event insights. Post-event insights may also be bundled in a single post-event IVR notification if multiple insights are available and no pre-event IVR notification is scheduled for that day. Additionally, this feature provides a variation to the messaging contained in pre-event email notifications during consecutive peak day events.

5

Inside Opower

The Behavioral Demand Response Cloud Service includes access to Inside Opower. Inside Opower is an online, utility-facing suite of tools to help users across a utility stay informed of and manage their Oracle Utilities Opower program. Utility users can access key data such as program insights, analytics, reports, contact information, and documentation. See the [Oracle Utilities Opower Inside Opower Product Overview](#) for details.

6

Customer Service Interface - Program Management

The Behavioral Demand Response cloud service includes access to the Customer Service Interface - Program Management tool. The Customer Service Interface (CSI) is an online support tool that provides utility support staff with the information and functionality they need to manage the Oracle Utilities Opower program and answer customer questions. See the [Oracle Utilities Opower Customer Service Interface - Program Management Product Overview](#) for details.

7

Providing Customer Support

Customer Support Representatives can perform a variety of tasks to support customers in the Behavioral Demand Response program, such as managing customer preferences and viewing sent copies of communications. See [Supporting Peak Day Communications](#) for details.

8

Contact Your Delivery Team

Your Oracle Delivery Team is the group responsible for setting up, configuring, launching, or expanding your Oracle Utilities Opower program. Contact your Delivery Team if you have any questions about your program products and implementation.

To contact your Delivery Team:

1. Sign in to Inside Opower (<https://inside.opower.com>). This is your portal for questions and information related to your program.
2. Go to the Community tab to see who is on your Delivery Team.
3. Contact any of the team members using the information provided.

If you need to report an issue or get technical support, contact [My Oracle Support](#).