

EDF DATA REQUEST
EDF-SDG&E-DR-01
SDG&E SB 350 TRANSPORTATION ELECTRIFICATION PROPOSALS (A.17-01-020)
SDG&E RESPONSE
DATE RECEIVED: July 6, 2017
DATE RESPONDED: July 20, 2017

DATA REQUEST

1. In the Assigned Commissioner's Ruling issued on September 14, 2016, it states

...If proposed programs within the TE application contain an education and outreach component, the electric utility shall provide a logic model in its application why such an intervention is needed: i.e. what existing resources the utility will leverage to avoid duplication, the audience that the utility is trying to target, what types of messaging will be provided to customers, intended outcomes of education and outreach, and means to measure efficacy of the education/outreach activities.

SDG&E briefly describes its marketing, education, and outreach (ME&O plan) briefly on page 7 of its application and starting on RS-16 and RS-25 (testimony of Randy Schimka on the priority and standard review projects, respectively) in the associated testimony. However, as currently structured, SDG&E's application and associated testimony does not rise to the level of specificity contemplated by the above statement. To that end, please provide any marketing, education, and outreach plans that contain more detail.

SDG&E's Response:

SDG&E will develop a Customer Engagement Plan focusing on education and outreach for each proposed priority review project and the residential charging program. Each Customer Engagement Plan will leverage applicable work from the other plans, as well as ongoing work in our region. The goal of each Plan is to ensure the target audiences have a positive customer experience as they adopt electric transportation. Project kick-offs, milestones and results will be featured in each one.

The following is an overview of each Customer Engagement Plan to be developed:

Airport Ground Support Equipment Project

Objective: Support and accelerate the conversion of airport GSE to electric, as well as perform data collection and analysis.

Target Audience: Airport employees, airline facilities management and stakeholders

Customer Engagement Plan Goal: Create a robust training program for airport and airline employees to properly operate the grid integrated charging equipment in the most efficient way

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possible while gathering data for analysis that will be used to make operational recommendations. This data and results will be shared with stakeholders to encourage transportation electrification adoption.

Opportunity: Data analysis showed the airport's current vehicle charging and consumption patterns revealed many of the batteries were being run too low, were not being sufficiently charged, and were not charged during off-peak times. (RS-14, 8-9)

Messaging:

- The airport is located nearby disadvantaged community neighborhoods that have poor air quality.
- Electrification of airport transportation and ground support equipment will reduce emissions and help meet the airport's greenhouse gas emission reduction goals.
- Cleaner operating ground support equipment means cleaner air in which our employees work.
- Properly operating the charging equipment and batteries while charging during off-peak times will save both equipment and fueling costs.
- Other airports are looking to us to inform them of the benefits of airport transportation electrification.

Leveraging Local Efforts:

- **Leverage Internal Stakeholders.** SDG&E will work with key internal departments to help grow program success and visibility, as well as highlight results and best practices. These groups include: Fleet Services, Account Executives, Local Government Partnerships, Community Relations, Media Relations and Regional Public Affairs.
- **Leverage External Stakeholders.** Leverage current airport and airline employee training to seamlessly add this new program information to their training sessions. Leverage training materials from participating EV charging equipment vendors. Leverage other regional efforts focused on emissions reductions like fleet owners and municipalities to highlight successes. Work with local and state nonprofits, trade organizations, and the airport to ensure efforts are coordinated and deliver the largest return on investment. Share the data with stakeholders to encourage transportation electrification adoption.

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Electrify Local Highways Project

Objective: Provide public commuter EV charging and corridor DC Fast charging at four Caltrans Park-and-Ride locations currently within or adjacent to disadvantaged communities, as well as reduce greenhouse gas emissions.

Target Audience: Commuters and EV drivers.

Customer Engagement Plan Goal: Create a positive customer experience for Caltrans and EV drivers when signing up for and charging at any of the four Caltrans Park-and-Ride locations, while converting more commuters to electric. Share broadly the results of this program to encourage public charging for commuters.

Messaging:

- EV charging is needed in these four Caltrans Park-and-Ride locations because transportation emissions are particularly high here – due to either being within or across the street from disadvantaged communities.
- EV ranges are increasing, while the cost of electric cars is decreasing.
- With more than 30 types of EVs available, there is an electric car for every lifestyle.
- When charging at these Park-and-Rides, the special rate allows you to take advantage of renewable energy.
- Leave your car here to charge while you work, or stop by for quick charge to extend your electric miles.
- Use your smart phone to help you charge during the least expensive times of day.

Leveraging Local Efforts:

- **Leverage Internal Stakeholders.** SDG&E will work with key internal departments to help grow project success and visibility, as well as highlight results and best practices. These groups include: Marketing, Research & Analytics, Residential Outreach, Account Executives, Local Government Partnerships, Community Relations, Media Relations and Regional Public Affairs.
- **Leverage External Stakeholders.** Leverage current Caltrans education and outreach channels to commuters. Include the new chargers as part of SDG&E's standard channels like website, social media, non-paid media, advertising and outreach to community based organizations. Specialized messages can also be included in SDG&E's EV time-of-use rate information that is mailed with the state rebate checks to new EV drivers in the SDG&E territory. Each of these efforts will both leverage reach and funding to create a comprehensive Customer Engagement Plan.

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Medium Duty/Heavy Duty and Forklift Port Electrification Project

Objective: Install up to 40 grid integrated charging stations at the Port of San Diego for medium-and heavy-duty trucks and forklifts to reduced greenhouse gas emissions.

Target Audience: San Diego Unified Port District tenants – Terminalift LLC, CEMEX and Dole Food Company, and others.

Customer Engagement Plan Goal: Create a positive customer experience for San Diego Unified Port District tenants as they move through the contracting, installation and operation process. Share broadly the results of this program to encourage transportation electrification to customers in this segment.

Messaging:

- The Port District is located within a disadvantaged community that has poor air quality.
- Electrification of medium- and heavy-duty trucks as well as forklifts will help meet the Port's Climate Action Plan goals to reduce emission.
- Cleaner operating trucks and forklifts means cleaner air where our employees work.
- Properly operating the charging equipment and batteries while charging during off-peak times will save both equipment and fueling costs.
- Other Ports are looking to us to inform them of the benefits of transportation electrification.

Leveraging Local Efforts:

- **Leverage Internal Stakeholders.** SDG&E will work with key internal departments to help grow program success and visibility, as well as highlight results and best practices. These groups include: Fleet Services, Marketing, Research & Analytics, Account Executives, Local Government Partnerships, Community Relations, Media Relations and Regional Public Affairs.
- **Leverage External Stakeholders.** Leverage current San Diego Unified Port District communications channels and events targeted to their Port Tenants Association, as well as direct communication to participating Port customers. SDG&E will leverage its standard communication channels like website, social media, non-paid media, as well as outreach to community-based and trade organizations to get the word out to the community about the efforts being made with this project to reduce emissions. Work with Port to outreach to other Port locations to share best practices.

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Fleet Delivery Services Project

Objective: Provide grid integrated charging infrastructure to support electric fleet delivery vehicles and analyze a year's worth of meter and on-board data logger information to better integrate future electrification of the Goods and Fleets market.

Target Audience: Commercial market operators of medium-duty fleet delivery vehicles.

Customer Engagement Plan Goal: Create a positive customer experience for participating commercial customers as they move through the contracting, installation, training and operation process. Share broadly the results of this project to encourage transportation electrification to this segment.

Messaging:

- Our customers love that our company delivery trucks are sustainability.
- Cleaner operating trucks means cleaner air where our fleet employees work.
- Electrification of the Goods and Fleets market segment is cost effective.
- Properly operating the charging equipment and batteries while charging during off-peak times will save on both equipment and fueling costs.
- Other companies are looking to us to demonstrate the benefits of driving electric.

Leveraging Local Efforts:

- **Leverage Internal Stakeholders.** SDG&E will work with key internal departments to help grow program success and visibility, as well as highlight results and best practices. These groups include: Fleet Services, Marketing, Research & Analytics, Account Executives, Local Government Partnerships, Community Relations, Media Relations and Regional Public Affairs. Leverage SDG&E's standard communication channels like website, social media, non-paid media, as well as outreach to community based organizations about the results and program benefits and best practices to reducing emissions in our region.
- **Leverage External Stakeholders.** Leverage trade organization where these fleet customers already participate to open a dialogue about how customers can participate. For example, create a fleet workshop dedicated to best practices in transportation electrification. Reach out directly to customers who have already expressed interest, like UPS, and use their current communication channels to communicate about the program.

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Green Taxi/Shuttle/Rideshare Project

Objective: Provide grid integrated DC Fast Charging for taxis, shuttles and rideshare companies.

Target Audience: Management, drivers and passengers of electric taxis, shuttles and rideshare companies.

Customer Engagement Plan Goal: Create a positive customer experience for the management, drivers and passengers of electric taxis, shuttles and rideshare companies. Share broadly the results of this project to encourage further transportation electrification to this segment. For passengers, since every ride in an electric car is like an EV ride-and-drive experience, the goal is to have them experience the benefits and buy electric.

Messaging:

- Save money on maintenance, fuel and the total cost of ownership for your electric taxis, shuttles and rideshare vehicles.
- Stand out from your competition by picking up your passengers in a zero-emission car.
- With electric cars, drivers and passengers enjoy the latest in technology, quick speed and smooth ride.

Leveraging Local Efforts:

- **Leverage Internal Stakeholders.** SDG&E will work with key internal departments to help grow program success and visibility, as well as highlight results and best practices. These groups include: Fleet Services, Marketing, Research & Analytics, Account Executives, Local Government Partnerships, Community Relations, Media Relations and Regional Public Affairs. Leverage SDG&E's standard communication channels like website, social media, non-paid media, as well as outreach to community based organizations about the results and program benefits and best practices to reducing emissions in our region.
- **Leverage External Stakeholders.** Leverage other regional EV marketing programs to collaborate with local governments, contractors and other stakeholders to get the best value from these marketing dollars, while coordinating marketing messages and outreach effort. Work with trade organization where fleet customers attend to open a dialogue about how customers can participate. Host fleets workshop dedicated to best practices in transportation electrification. Reach out directly to fleet customers who have already expressed interest, like the airport, the local taxi association, automotive manufacturers, and the like to feature this project in workshops and meetings. This program has both a targeted effort to fleet managers and drivers, as well as a broader message to passengers using the services.

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Dealership Incentives Project

Objective: Provide training on EVs, EV rates, charging and incentives to increase EV adoption, and create a positive experience for EV drivers purchasing or leasing a car knowing their salespeople will be knowledgeable about driving electric.

Target Audience: Dealership management and their salespeople, as well as the customers buying or leasing cars from them.

Customer Engagement Plan Goal: Create an experience where dealership management sees the benefit in having their salespeople sign up for the project; where salespeople are trained and knowledgeable about electric cars and their EV sales increase; and where EV buyers say their salesperson was knowledgeable and they had a positive experience.

Messaging:

- We are working with dealerships to deliver the full promise of electric driving to new car shoppers.
- The Dealership Incentive Project will make you an expert in communicating the benefits of driving electric.
- You sell electric cars more quickly and effectively with more confidence.

Leveraging Local Efforts:

- **Leverage Internal Stakeholders.** SDG&E will work with key internal departments to help convert their circles of influence from awareness to project participant and help grow program visibility. These departments include: Residential Outreach, Marketing, Research & Analytics, Account Executives, Local Government Partnerships, Community Relations, Residential Outreach and Regional Public Affairs.
- **Leverage External Stakeholders.** Leverage the results of both Plug In America and Center for Sustainable Energy's dealership training programs. Promote the effort through SDG&E's standard communication channels like website, social media, non-paid media, as well as outreach to community based organizations about the results and program benefits and best practices to reducing emissions in our region.

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Residential Charging Project

Objective: Increase zero-emission vehicles in line with California’s 2030 greenhouse gas emission reduction goals and installing 90,000 Level 2 chargers in residents’ homes.

Primary Audience: Residential customers in single family homes, and small multifamily homes up to four units, who currently drive electric and who are considering it.

Overview: The Residential Charging Program will install Level 2 chargers and help EV drivers take advantage of the lowest price to fuel their EV. The online SDG&E Marketplace will guide customers through a brief, interactive checklist that will help them choose the best rate, charger and maintenance plan for their EV charging needs, as well as coordinate an appointment date for SDG&E to estimate their installation costs, which range from \$1,000 to a maximum of \$1,500. During the estimation appointment, an installation date will be scheduled. The charging station will be installed by a certified IBEW contractor.

Customer Engagement Plan Goal: Create a positive customer experience for EV drivers participating in the Residential Charging Program.

Messaging:

- With the Residential Charging Program, you can leave your car charging needs to SDG&E.
- We install your EV charger and help you pay the lowest price to fuel your car.
- It’s simple. Visit the SDG&E Marketplace and choose your charger.
- Save money with SDG&E’s Home Charging Program.
 1. Low Rate – Provides your EV the cheapest electricity.
 2. Level 2 Charger – Up to \$525.
 3. 10-Year Maintenance – By SDG&E.
 4. Installation provided– Up to \$1,500.
- The best benefit is knowing you’ll have a charge at a low price, plus:
 1. Low-cost electric fuel car
 2. Charger installed with little or no out-of-pocket costs
 3. Possible to manage your home energy use remotely

Customer Engagement Strategies:

SDG&E regularly communicates with customers concerning programs, services and rate options, having successfully rolled out time of use pricing rates to all businesses in 2016 and preparation has begun for the eventual residential roll out. Using some lessons learned from business experience, SDG&E will develop an overarching educational approach that will explain the offer

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and associated options. Through a series of communication channels, SDG&E will connect with customers through the right channel and will use personalized messaging that will make the information easy to understand and easy for customers to act. This approach will be intertwined with outreach and other partnership efforts of which SDG&E has several existing opportunities.

SDG&E's Outreach team has a robust network of partnerships in the community and works closely with the city Chambers. They often attend events in the community, educating customers on the variety of SDG&E programs and services. In addition, SDG&E's Account Executives, Local Government Partnerships, Community Relations, and Regional Public Affairs have established relationships with businesses, local governments and municipalities and key community members and leaders.

SDG&E will use online customer behavior tracking tools to deliver personalized content to customers across a variety of channels. SDG&E will target customers using demographic and psychographic information available through our segmentation analysis which was refreshed in 2016. This information will help to customize messaging across different channels. In addition, leveraging participants from SDG&E programs such as EcoChoice, Power Your Drive and the Electric Vehicle Climate Credit will provide an extra value add to customers.

Leading companies have set the standard for customer engagement and customers expect an experience that is streamlined, convenient and personalized. SDG&E customers already move through several different journey points that include requesting service, outage notifications, demand response alerts, bill inquiries, financial assistance/bill payment, program enrollment, and rate plan enrollment. Adding home charging to this menu of interactions will provide customers a one-stop shop access to all their energy needs.

Customers will be introduced to the offer through general awareness that will eventually move onto more personalized and customized interactions with customers. The campaign will educate customers, with the intent of increasing their understanding of the offer and associated rate options. Customers will be encouraged to interact with SDG&E through multiple channels with heavy emphasis on the digital experience. The campaign will target specific audiences, focusing on the simplicity of the offer and gradually moving to increased interaction.

Strategic priorities include:

1. **Generate awareness.** Overarching approach to connect with customers through a mix of direct marketing, outreach and education. The plan will focus on a mix of direct marketing tactics and general awareness. In addition, our broad network of outreach partners will help supplement these efforts.

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2. **Simplify the experience.** First and foremost, the main priority will be creating an experience that is easy for customers to understand and take action. The plan will be innovative, customer centric and flexible enough to adapt to changes.
3. **Personalize the experience.** Tailor this offering to customers using demographic, psychographic, and profile information. For example, one of the ways this can be accomplished is through email campaigns using automated triggers. We will also create a digital experience that uses analysis to track customer's online behaviors so tailored content can be served to customers based on their preferences.

Additional Audiences:

The primary target audience is residential customers but SDG&E will use its segmentation analysis to further refine the audience.

1. SDG&E Residential Customers

- SDG&E segmentation analysis, which uses demographic and psychographic information, will target customers best suited for this offer.
- SDG&E will analyze customer participation in SDG&E programs such as Energy Efficiency, Power Your Drive, Electric Vehicle Climate Credit, EcoChoice and others for additional customer targeting.
- Using predictive analytics and customer profile information, SDG&E will develop refined target lists from our residential customer pool. In addition, SDG&E's internal research from customer insights panels and other research will help to identify the best leads for the program.

2. SDG&E Business Customers

- SDG&E will target multifamily owners and property managers using existing contact information and our wide network of business contacts through SDG&E's team of Account Executives.

3. Developers and Architects

- Identify these contacts to collaborate with on current and future residential developments.

4. Dealerships

- Partner with dealerships and salespeople throughout the region to provide this residential program information to their EV buyers.

5. Community Based Organizations/Municipalities

- Using SDG&E's already established broad network of community partners to

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reach disadvantaged communities.

- Leveraging SDG&E's relationships with environmental organizations to demonstrate the environmental benefits of increased clean cars on the road.
- Using SDG&E's already established partnerships with local governments and municipalities to launch a residential community effort for their own employees and community residents.

6. Trade Organizations

- SDG&E has a robust workforce, education and training effort with local trade professionals and will integrate SDG&E's Home Charging Program with appropriate industry organizations.

7. Electric Vehicle Service Provider Sales Teams

- Partner with these teams to market program, and co-brand on marketing materials to ensure sales messages, strategy and customer focus align.

8. SDG&E Employees

- With over 350 EV drivers, SDG&E employees will be targeted for the offer and can serve to inform the customer experience effort.

Measurement:

- Lead generation
- Customer enrollment
- Email analytics (open rates, click rates)
- Webpage analytics (page views)
- Event leads
- Customer satisfaction and awareness results