NET IMPACT

2018 Energy Ambassador Program
In partnership with PG&E

Agenda

1. Introduction

2. Program Overview and Goals

- Identifying businesses

3. Visit Content

- Online Tools
- Rates
- Safety & Reliability
- Clean Energy
- Emerging Technologies

4. Conducting Visits

- Getting to a Successful Visit
- Customer Actions

5. Data Collection and Invoicing Process

- Data Collection platform
- Invoicing Process

6. Q&A

Introduction

Introduction

Net
Impact

Your amazing
self

PG&E

Introduction

Small Business Energy Ambassadors

Bijou Lulla
Central valley

Hilary Flack
East bay

Ted Howard
Peninsula

Introduction

Net Impact Team

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Ximena Bejarano

PG&E Team

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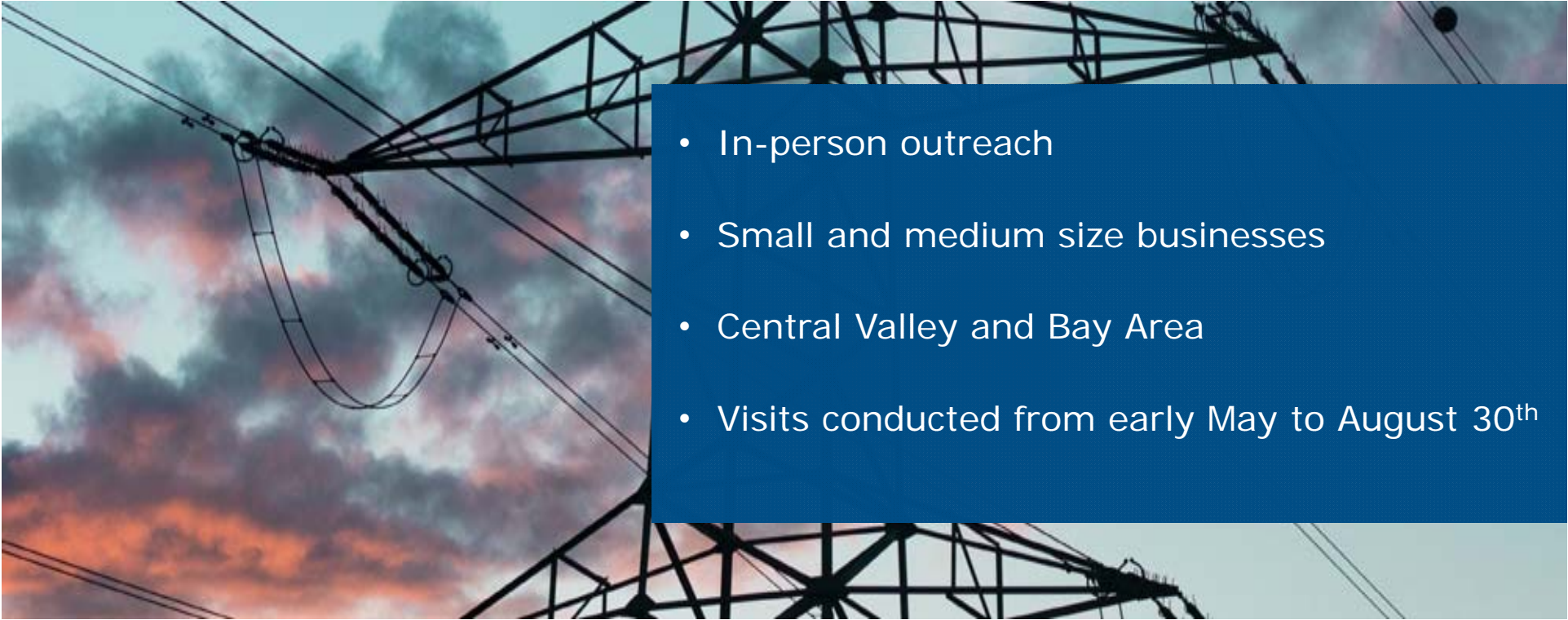
Elena Trujillo

Ceasar Gonzalez

Jana Kopyciok-Lande

Program Overview and Goals

Program Overview

- In-person outreach

- Small and medium size businesses

- Central Valley and Bay Area

- Visits conducted from early May to August 30th

Program Goals

- Help small business owners save energy and operate more efficiently and sustainably

- Conduct **1,700** successful total visits:

850 in central valley
+
850 in local bay area

- Collect feedback from small businesses

- Drive customer action towards more efficiency

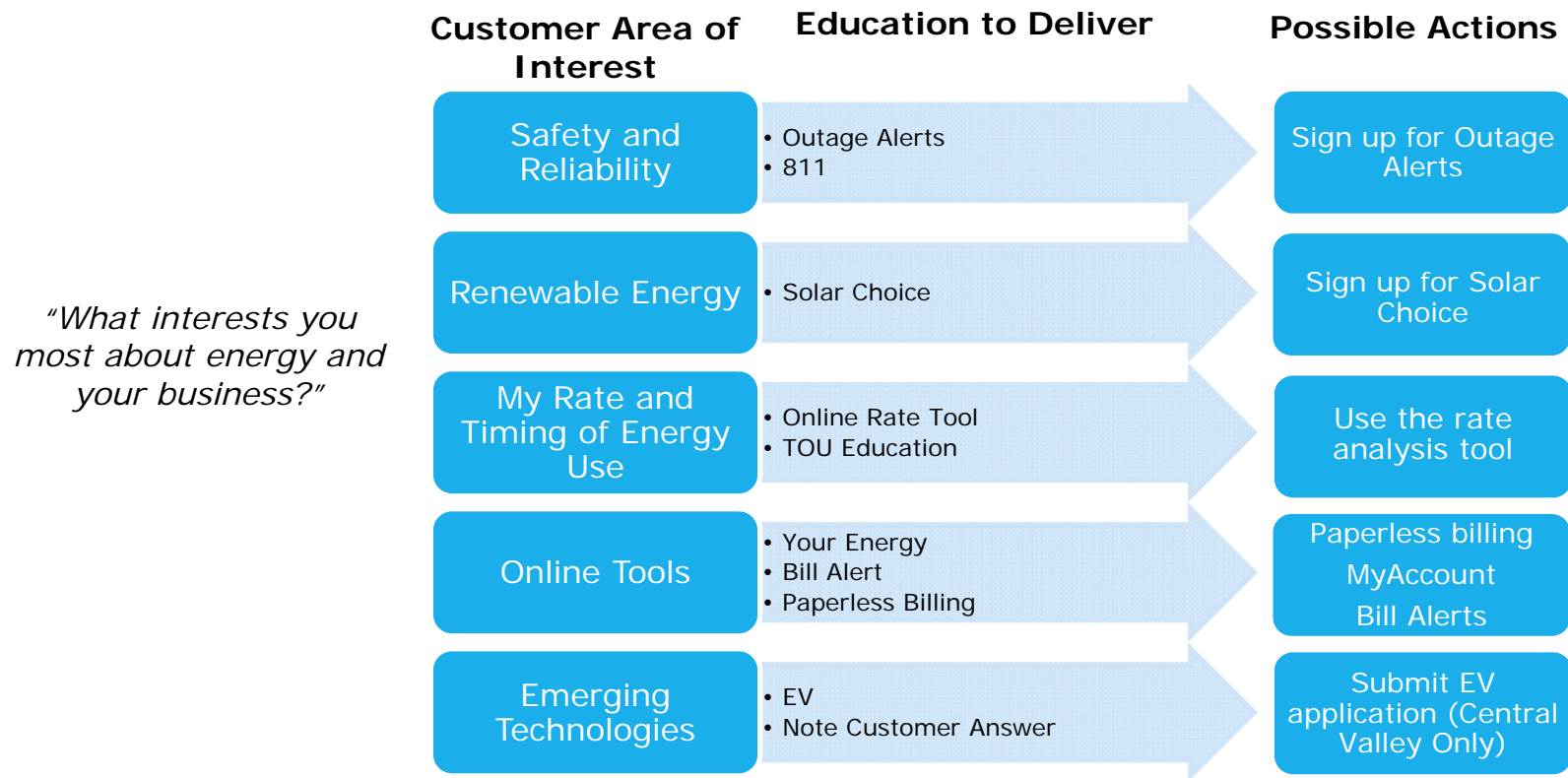- Increase customer satisfaction with PG&E

Visit Content

Successful interaction options

Successful interactions are determined based on delivering information in the following categories:

Customer Area of Interest	Education to Deliver	Possible Actions
Safety and Reliability	• Outage Alerts • 811	Sign up for Outage Alerts
Renewable Energy	• Solar Choice	Sign up for Solar Choice
My Rate and Timing of Energy Use	• Online Rate Tool • TOU Education	Use the rate analysis tool
Online Tools	• Your Energy • Bill Alert • Paperless Billing	Paperless billing MyAccount Bill Alerts
Emerging Technologies	• EV • Note Customer Answer	Submit EV application (Central Valley Only)

"What interests you most about energy and your business?"

What successful interactions should include

For each category, the following information should be tracked:

1. **Customer's area of interest**
   - Capturing the customer's particular area of interest

2. **Educational information delivered**
   - Providing more in-depth education relating to that specific area of interest

3. **Action taken**
   - Driving customer action based on any of the action options available
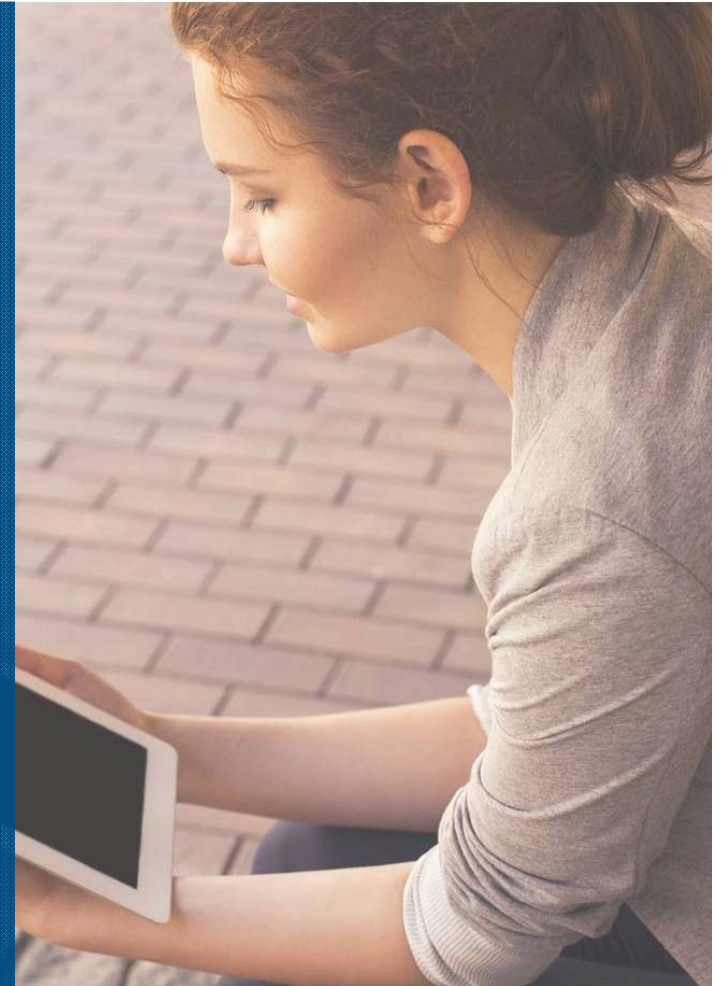
Conducting Visits

Best Practices: Preparing and planning

- **Call ahead** to determine existing businesses and their hours of operation

- Have a **calendar ready** so you know when you can schedule follow-up visits

- **Map out the areas** you will visit for the day

- Wear **business or business-casual** attire.

- Bring **business cards and pamphlets** with you. Some Ambassadors find it helpful to note their contact info on the leave-behind materials.

- Bring your **tablet and make sure it is fully charged**. Bring the charger with you in case you need it.

- Visit at **slower times** (Tuesdays, Wednesdays and Thursdays, between 11am and 2pm or after 5pm)

Best Practices: During the visit

Use the **SalesForce Communities website** to track your visit and collect data

• You **should keep track of your notes in the website.** This will help you know anything you need for your visit, or in case you have to visit again

• Remember to **note the customer's feedback** whenever possible. Their thoughts and comments will help influence future services and offerings.

PG&E wants to hear from them!

• *Visit note: They were unaware of the various energy efficiency programs available to manage their energy. I gave them an overview of the online tools available. They have not yet registered for an online account, and pay all their bills via check. I prompted him to sign up for an account and to receive alerts and notifications as a way to help him lower energy costs.*

• *Administrative note: According to customer list, business appears located in San Jose. They relocated and asked to get a visit at their new location. Previous address appears as 2533 Wakefield Ave.*

• *Customer feedback: Tony was happy to learn of this service and thinks it would be beneficial for classes to be offered to business owners so that they can learn to check their own meters and gain energy efficiency tips.*

Best Practices: Administrative

Daily

- **Email Net Impact with any questions** that emerge

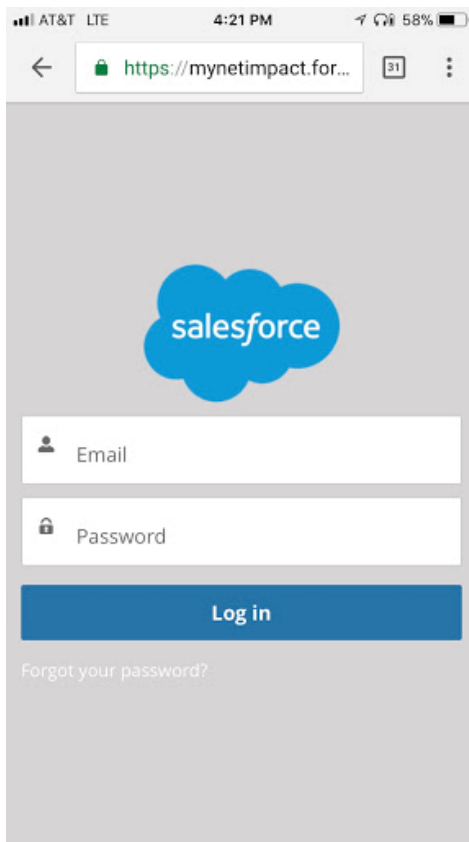- **Input and update information** for visited businesses

Bi-Weekly

- **Submit bi-weekly invoices** on all successful visits for the corresponding period

- **Evaluate whether you need another assigned zip code.** Plan ahead, allowing for 3-5 business days processing time.

Data Collection and Invoicing Process
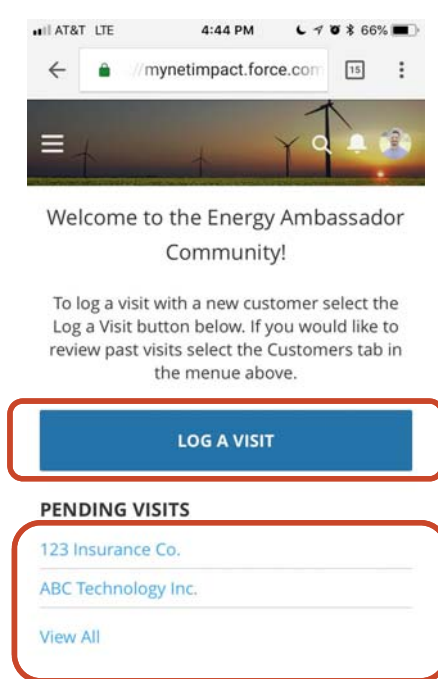
Login to the Energy Ambassador Community

On your computer or mobile device, navigate to
https://mynetimpact.force.com/energyambassadors

Log in using the email and password sent to you.

Instructions for logging a new Visit for a Customer

1. Click the Log a Visit button

2. Fill in fields

3. Scroll and select Confirm

Visit Status Definitions

Successful visit: You have visited the business, delivered the information, and recorded their area of interest.

Declined: You have visited the business, but they have declined to receive education. It is an unsuccessful visit.

Pending: This is a default status which is automatically assigned by the system when no other status is selected or the record is missing required information.
You can use this to keep track of businesses you have visited or called, but are not yet successful and you need to follow up with them. *For your own record keeping.

# How to view your Customers: Platform Views

Recently Viewed: Visits that have been recently created or viewed, regardless of visit status.

Successful Visits: Customers that have been successfully visited and need no further attention. Visits marked as successful will be logged here.

Pending: Remember this is a default status. If you have visited a business, the outcome should be one of the other visit statuses. If no status was selected, the system will tag the incomplete visit record as Pending.

Invoicing

- Paychecks will be processed **every two weeks** and will be **directly deposited** on the 15 and last day of every month

- Reference the **invoicing and payment schedule** for dates on when to submit invoices and expect checks

- The first invoice should include the initial stipend amount + any visits. **It is due on May 21st, 2018 via email**

- Please note: Net Impact **billing processes are not flexible**, and any visits improperly invoiced will need to be adjusted in the following pay period

22
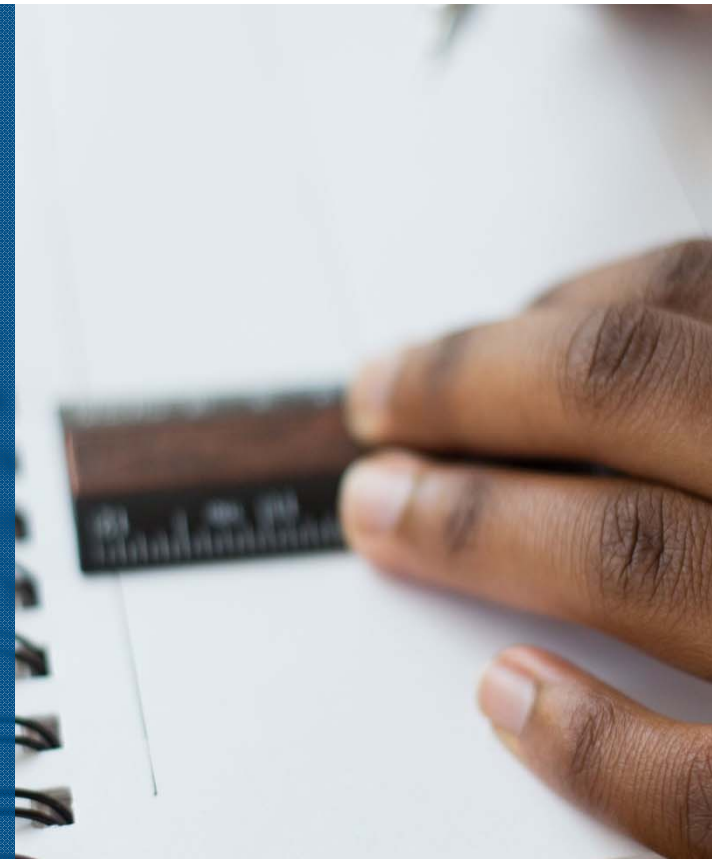
Questions?

Let's do eet!

NET IMPACT

Thank you!

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