Energy Ambassador Program:
Visit Tips, Sample Script and Talking Points.

Visit Tips

The following is a list of things you should consider doing, as well as some pointers for how to start your visit:

- **Do your prepwork-** understanding the company, products and services will help your confidence and make it an overall smoother interaction. Become familiar with locating the information on PGE.com so that you can showcase where to find it.
- **Arrive prepared and ready to speak** with the business owner. Remember, you are not selling anything. You are providing information and helping businesses use the available tools to become more energy efficient.
- **Ask to speak with the business owner or decision-maker.** You can start with a simple *"Hi, is the business owner present today?"*
- **Introduce yourself**:
  "My name is ________. I am here with Net Impact, a non profit in partnership with PG&E."
- **Ask if now is a good time**. You may be asked to come back at a later time, specially if the person is busy helping a customer. Set up follow-ups if necessary and leave a business card.
- Do not spend much time if the customer is not open to meeting with you. **Focus on providing overall information and collateral materials** whenever available. You are not expected to provide details on every topic, just let them know what is available and where to find it.
- **Thank the customer** for their time.

Sample Visit Script

Introduction

> "Hi My name is [NAME] and I am an Energy Ambassador with PG&E and Net Impact. Can I speak with the business owner (or the person in charge of managing the utilities for the business)? I'd love to get [5] minutes of your time today. I'm here to let you know how you can SAVE MONEY on energy costs by better managing your energy use.

PG&E has contracted with Net Impact, a local nonprofit, and people like me who are passionate about helping small businesses and the environment. In 5 minutes, I can show you how you can monitor your energy use and prevent your monthly energy bill from costing you more money.

NOTE: Use the SalesForce platform to record responses. This is how we track visits; if you do not use the platform, your visit will not be recorded.

Purpose of Visit

"My first question is about your energy-related priorities as the owner of ________. I'm going to show you a list – which would you say is your top priority to address in the next 12 months?"

This options are:

(a) Safety and reliability
(b) Renewable energy
(c) My rate and timing of energy use
(d) Online tools for managing my account
(e) Emerging technologies

"I am happy to help you with [energy-related priority]." [Sentence of validation – that is really important]. "I can help you address that concern through logging into PG&E's YourAccount Website."

Next, walk the business owner through the relevant area of the PG&E website that addresses their energy-related priority:

"Have you logged onto PG&E's website before?"

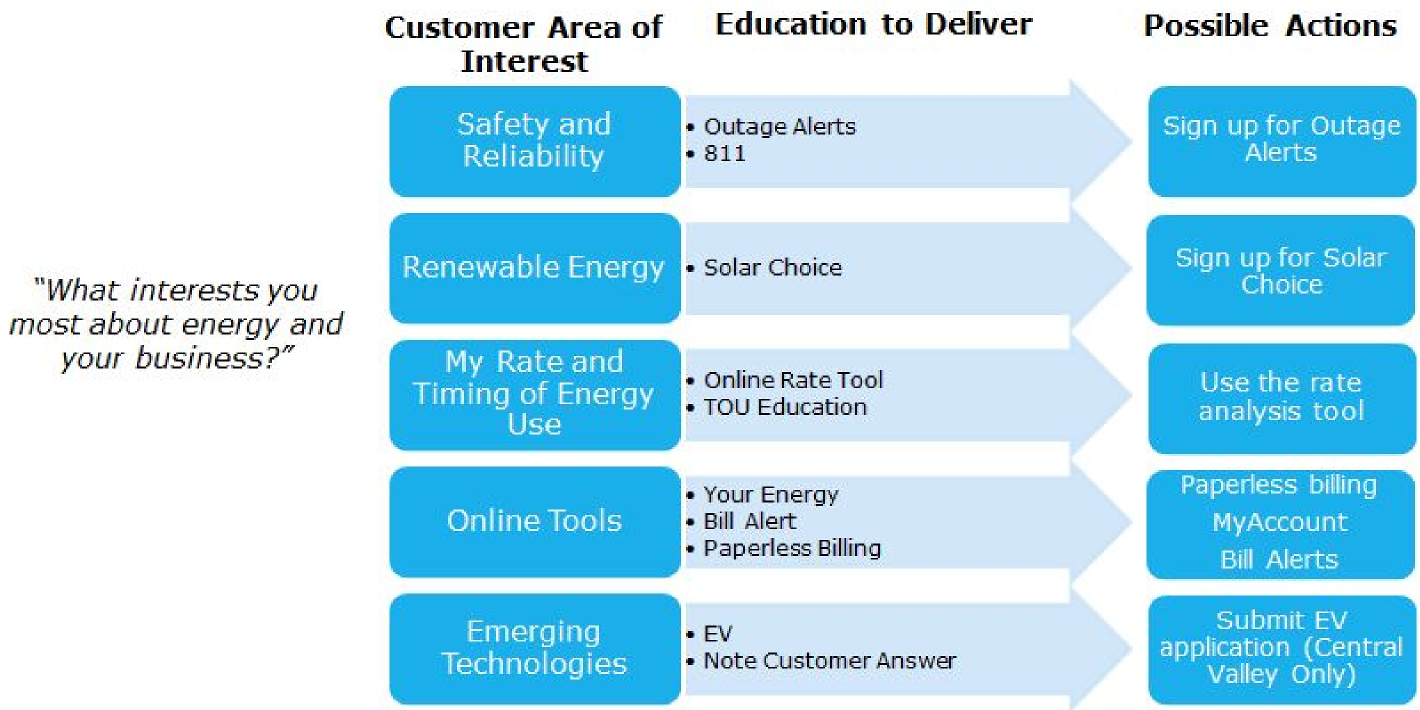
If customer answers YES, then probe on their level of knowledge so you aren't repeating information they are already familiar with.

If they answer NO you can say something like:

"Ok, no problem! I can show you how you can use it to manage your energy use."

Visit Flowchart

You can use the following diagram to help guide you through delivering all the necessary information during your visit. This will also help you in driving customer actions and knowing what other information to offer.



Wrap-up

> "That about wraps it up. Thanks so much again for your time. If you wouldn't mind, I'd like to ask you for a contact email address where my supervisor can send a survey link with a short survey and ensure that you received this information from me today."

Make sure to note the contact person's email address.

> " I really want to encourage you to start using the monitoring tools on PG&E's web site so that we can all lower the energy demands we're making and cut down on energy expenses for your business. Thanks a ton, and have a great day!"

Post-visit

Finish filling out any information needed and write any important comments or notes on the data collection platform. Submit.

You are done!

Talking Points

To dive into the visit content, we suggest you ask a leading question like:

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

Record the customer's answer as a grid priority in the data collection platform. Note it as one of the following answer buckets and touch on the respective talking points for each:

- **Online Tools**
    - MyAccount
      The single most important tool customers will need to access most online information and resources, is to register on MyAccount. The platform allows customers to pay and manage PG&E accounts, alerts and payments. All from the dashboard.
      Customers can also analyze their energy use, compare rates, and find other energy saving tools including alerts and paperless billing.
    - Alerts
      Customers can choose to receive notifications on outages, usage, budget billing, payments, and service visits among others.
    - Paperless Billing
      Paperless billing is an easy way to receive monthly statement. Itt clears the clutter of paper bills and missed payments.
      Signing up does not require customers to set up automatic payments. It just means they will receive an e-bill which they can then pay anytime before the due date.
- **My Rate and Timing of Energy Use**
    - Time of Use
      Time-of-use rate plans better align the price of energy with the cost of energy at the time it is produced. You can lower your bill by shifting when you use energy to off-peak hours.
      Rates during off-peak hours of the day are lower than the rates during the peak hours of 12 - 6 p.m. on weekdays.
    - Online Rate Tool
      Allows customers to compare rate plan options and explore Peak Day Pricing rates. To receive a custom rate analysis, log in to your PG&E online account to view your energy use and compare rate plan options.

- **Safety and Reliability**
    - Outage alerts
      Provides information on current outages and lets customers report outages in their area through the Outage Center.
      Provides information on ongoing and scheduled projects.
      Customers can sign up for alerts via text, email or phone.
    - 811

Will help customers determine where is it safe to dig, plant a tree, or build a structure and avoid underground pipelines.

- **Renewable Energy**
  - Solar Choice
    Provides a simple way to purchase power from renewable sources for customers who cannot install their own panels, whether because they lease the space or other reasons.
    Customers can obtain up to 100% of their energy consumption from this program.
  - Rate Calculator
    Helps comparing the cost of opting into this program based on how much of the customer's usage is shifted to renewable sources (you will need the KWH amount they currently use, which can be found on a bill).

- **Emerging Technologies**
  - Electric Vehicle Charging Stations
    Customers can contribute to the state's green energy goals, attract tenants or employees, and increase property value.
    The program is looking to install over 7,500 chargers over 3 years in multi-unit dwellings and workplaces. ***We are only driving action in the Central Valley at this time**.
    NOTE: Requires 10 consecutive parking spaces.

Finally, if there is a specific question or detailed information you cannot address, customers can be referred to the **Business Customer Service Center at 1800-468-4743**