

WORKSHOP AGENDA: SMART CUSTOMER

JANUARY 30, 2012
NOON – 5:00 PM
COURTYARD ROOM
CPUC, 505 VAN NESS AVENUE, SAN FRANCISCO, CA 94102

Objective of this workshop

Identify and agree on the information and roadmap needed for an effective and complete Utility Smart Grid Deployment Plans to be approved by the Commission. Enhanced Deployment Plans must include information that will provide a guideline for launching appropriate outreach efforts throughout the course of smart grid deployment.

Specifically, the workshop will attempt to further clarify and expand on the following three areas:

1. Clarify/define the utility role in customer awareness versus the role of a third party.
2. Identify potential customer concerns as related to Smart Grid participation and acceptance and ways to manage them.
3. Bifurcate utility customer engagement and awareness to create a near term roadmap that is more specific and a longer term plan that should be detailed overtime.

Agenda

Noon – 12:10pm

Welcome and Purpose (ALJ Sullivan & CPUC staff)

12:10pm – 1:30pm

The utility role vs. third party role in customer awareness, enablement, and engagement (defining what an “engaged customer” means, and then how do we get to that stage and who gets us to that stage where customers are aware, engaged, and enabled to use smart grid technology).

(Led by Adam Langton or Marzia Zafar, CPUC - Panel discussion to define the utility versus third party role; the panel will consist of IOUs, interested third parties, and consumer advocates.)

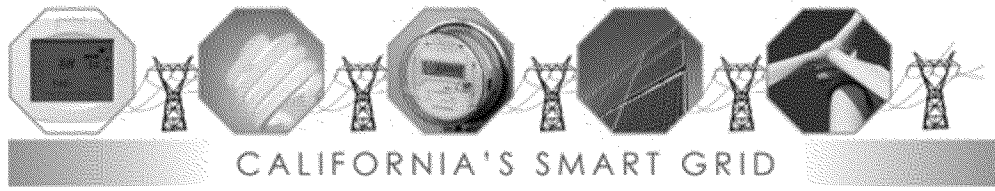
Panelists

1. Tendril – Dan Fredrickson
2. OPower – Jeff Lyng
3. Edison – Seth Kiner



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BREAK – 1:30pm – 1:45pm

1:45pm – 3:00pm

Identify potential customer concerns related to Smart Grid participation and acceptance and ways to manage them.

(Led by Marzia Zafar, CPUC – Panel discussion to first define potential risks for overall participation and acceptance; the panel will consist of consumer advocates and third parties as well as IOU participation.)

Panelists

1. SDG&E – Carolyn Winn
2. Greenlining – Stephanie Chen
3. UCAN – Michael Shames

BREAK – 3pm – 3:15pm

3:15pm – 4:45pm

Bifurcate utility customer engagement and awareness to create a near term roadmap that is more specific and a longer term plan that should be detailed overtime.

(Led by Jennifer Caron, CPUC – Utility presentation to identify near term outreach needs based on specific utility rollout of Smart Grid programs that will require customer participation. Near term is defined as 2012-2015 while long term is defined as 2015 and beyond.)

[Note – see below for specific questions that will need to be prepared in advance for this section]

Panelists

1. EDF – Tim O’Connor
2. PG&E – Felicia Lokey
3. DRA – Lisa Marie Salvacion

4:45pm – 5:00pm

Closing Remarks

Specific Outreach Needs for the Near Term (2012-2015)

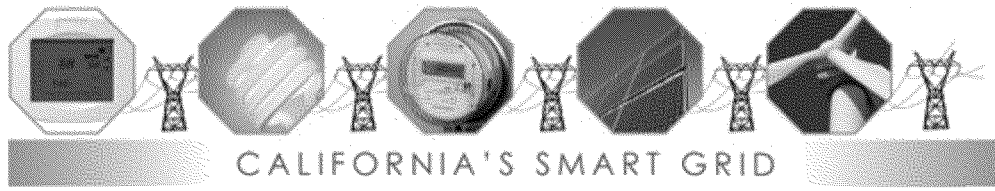
30 min A. Utilities describe potential projects and pilots that require customer awareness

75 min B. Discussion Questions



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1. Which customers should be made aware of the projects:
 - All?
 - Likely early adopters?
 - Specific segments? (Commercial/Res etc.)
2. What level of detail will be needed:
 - All customers need some information?
 - Likely early adopters need specific information?
3. Who should provide information to customers:
 - Are there separate rolls for utility, government, non-profits and vendors to provide information to customers?
 - Is one entity best at delivering certain types of information?
 - Where and how should entities overlap in their messaging?
4. In addition to project-specific awareness is general awareness needed between 2012-2015:
 - What do customers need to know and why?
 - Is there a need for statewide awareness, if so, why?
 - Should information be introduced to customers in stages, if so, what do they need to know first, second etc?
 - Of the entities listed above who should deliver general information?

