

BILLING FOCUS GROUPS Discussion Guide

Introduction (5 - 10 minutes)

...Residential...	...Business...
<ul style="list-style-type: none"> ▪ Introduction of moderator ▪ Background/purpose of the research – explore billing issues for gas and electric utilities ▪ Self introduction of respondents <ul style="list-style-type: none"> ✓ Name ✓ City ✓ Household size/composition ✓ Number/ages of children (if any) ✓ Occupation (you/other adults) ✓ 	<ul style="list-style-type: none"> ▪ Introduction of moderator ▪ Background/purpose of the research – explore billing issues for gas and electric utilities ▪ Self introduction of respondents <ul style="list-style-type: none"> ✓ Name ✓ Position/title ✓ Company ✓ Type of business ✓ Years with company ✓

Warm-up (10-15 minutes)

Tonight we are going to be talking about bills you receive at (home/work). To start our discussion, I would like you to start thinking about your PG&E bill. As you may know, some people choose to get their bill online. I believe you folks get your bill printed and it is sent in the mail. I'd like to understand why you choose to get your bill mailed to you. Please use the pencil and paper we have provided to record your thoughts. Jot down whatever comes to mind...the advantages of getting the bill printed...why you don't use the online approach...and so forth. Once everyone has had a chance to do this, we will talk about it together as a group.

(MODERATOR TO EXPLAIN EXERCISE AS NECESSARY, ALLOWING RESPONDENTS TIME TO RECORD COMMENTS.)

- Open discussion of above.
- Why do you choose to get your bill printed, via mail? Why?
- What benefits/advantages do you associate with receiving printed bills? Why?
- In general, do you receive most of your bills on paper? Why?
 - ✓ To what extent have you considering switching to online billing? Why? Why not?
- How do you see your impressions regarding online vs. paper billing changing over time? How else? Why?

Current PG&E Bill (10-15 minutes)

Tonight our focus will be on **paper bills**. In a moment we are going to take a look at a current PG&E bill, but before we do, I'd like you to tell me what sorts of things you tend to review when you receive your PG&E bill....

- Aside from the cost, what do you tend to look for in your PG&E bill (e.g., energy consumption, presence of discounts, receipt of previous payment, etc)? What else?
- How extensively do you tend to review your bill?
 - ✓ On average, how much time do you spend reviewing your bill?
 - ✓ To what extent do you read the bill inserts? Why?
- Without having the PG&E bill in front of you, what sort of general impressions do you have of it? What else?

I'd like to pass out a sample of a current (residential/commercial) PG&E bill and give you all a little time to review it. Feel free to write on the bill to record your comments. Also if you see something that you particularly like, circle it; if there is something that you don't care for, place an "X" through it. Please write your name on the envelope before you get started.

(RESPONDENTS WILL BE GIVEN TIME FOR REVIEW OF BILL)

- First, does this bill look pretty similar to yours? **(IF NOT:)** How is it different?
- Now that you have an example in front of you, what are your overall impressions of the bill? Why?
- Which sections are you most likely to review? Why?
- Moderator to probe on:
 - ✓ Most appealing/useful elements
 - ✓ Least appealing/useful elements
 - ✓ Bill format and style (e.g., layout and structure, font, etc)
 - ✓ Ease of reading
- What do you think about the inclusion of the educational elements (e.g., energy efficiency programs, rebates) in the bill? Why?
- What do you do with your PG&E bills once paid? Why?

Ideal PG&E Bill (10 minutes)

Tonight we are going to be looking at alternative designs for the current PG&E bill. Before we look at those, I'd like to get your take on what would be an **ideal** PG&E bill for you and your (household/business). Please think about the content...how it should be arranged...any aesthetic comments...etc. Let's take a few moments to think about it, before we discuss as a group.

(RESPONDENTS WILL BE GIVEN TIME TO RECORD THOUGHTS)

- Open discussion of above.
- What would you like to see in this "ideal" bill? What else?
- What would make the current bill better? What else? **(MODERATOR TO ENCOURAGE REVIEW OF CURRENT BILL IF HELPFUL)**
- Moderator to probe on:
 - ✓ Content (e.g., historical use)
 - ✓ Layout
 - ✓ Style
 - ✓ One-page summary bill

Prototype PG&E Bill (45-60 minutes)

Now I'd like to distribute a new potential version of the PG&E bill and get your impressions of it. Please keep in mind the bill is not finalized – that's why we conducting this research. We'll discuss the bill once you have a chance to review it. Like before, feel free to write on it with your comments.

(RESPONDENTS WILL BE GIVEN TIME FOR REVIEW OF BILL)

Residential Stimuli:

Residential Energy Statement V1 + V2

CARE Energy Statement

BPP and CARE Energy Statement

Business Stimuli:

A10 Commercial Energy Statement V1 + V2

AG 4C Commercial Energy Statement V1 + V2

- What was your very first impression of the bill? Why?
- What initially caught your eye? Why?
- What do you find most appealing? What else? Why?
 - ✓ What sections do you find most important? Why?
- What do you find least appealing? What else? Why?
 - ✓ Which sections do you find least important? Why?

Prototype PG&E Bill – V1 (45-60 minutes) (continued)

- Moderator to probe on:
 - ✓ Content
 - ✓ Layout
 - ✓ Style/design
 - ✓ Ease of reading/understanding
 - ❖ Font size
 - ✓ Amount of detail provided
 - ✓ Where/how to get more detailed information
- Graphs → How clear are the graphs? How would you describe the graph to someone else? **(PRESENT ON BOARD AS NECESSARY. MODERATOR TO CONFIRM UNDERSTANDING THAT AS USAGE INCREASES SO DO COST LEVELS)**
 - ✓ Given the choice of the Tier Graph (summary page) or the 13-Month usage graph, which would you prefer? Why?
- Definition of Terms → What are your thoughts regarding the Definition of Terms? How helpful do you find them? Why?
 - ✓ How frequently would you refer to this (i.e., every time, sometimes, never)? Why?
 - ✓ Would you prefer they be in one place – perhaps in the back, on the Summary page – or distributed throughout the bill (i.e., footnote on each page)? Why?
- One Page Bill → To what extent would you prefer to see a one-page bill? Why?
- To what extent would you like to have an opportunity to request information about programs bill format options (e.g., one-page, Spanish version) by checking a box on your return invoice stub? Why?
 - ✓ What would you think about going online to make your request?
- Have any of you used an app on your smart phone to review additional information from one of those new QR codes? **(MODERATOR TO SHOW EXAMPLE)**
 - ✓ What do you think about having QR codes part of your bill so you could access more information regarding your usage and rate options? Why?
- **(Residential:)** What does “Baseline” mean to you? Might there be another word that is more clear (e.g., allowance, usage allotment, etc.)?
- What else, if anything, is missing? What else?
 - ✓ Do any of your other (utility) bills have features you would like to see included here? Why?
- What (other) enhancements, if any, would you like to see? What else? Why?

Prototype PG&E Bill – V2, ETC (10-15 minutes)

...V2...

As a point of comparison, I'd like to show you an alternative bill and get your reactions to it. **(MODERATOR TO DRAW ATTENTION TO DIFFERENCES AS NECESSARY AND GIVE RESPONDENTS SUFFICIENT TIME TO REVIEW)**

- Overall impressions
- Advantages/disadvantages to first prototype? Why?

...Balanced Payment Program (BPP)...

Some of you may participate in a Balanced Payment Program which spreads out your bill to help minimize super high bills in any given month. Please take a look at how it's presented and let me know what you think. **(MODERATOR TO DISTRIBUTE AND GIVE RESPONDENTS SUFFICIENT TIME TO REVIEW)**

- Overall impressions
- What do you think about the way the Balanced Payment Program is presented? Why?
- How clear do you find this? Why?
- What would make it better? What else? Why?

...Discount Program (e.g., CARE)...

Some of you may participate in qualifying discount programs with PG&E. I'd like to get your take on how the discount may be shown on the bill. **(MODERATOR TO DRAW ATTENTION TO DIFFERENCES AS NECESSARY AND GIVE RESPONDENTS SUFFICIENT TIME TO REVIEW)**

- Overall impressions
- What do you think about the way the Discount Program is shown? Why?
- How clear do you find this approach? Why?
- What would make it better? What else? Why?

Wrap-up (5 min)

Before ending our session, I'd like to excuse myself momentarily to see if there might be any additional follow-up questions.

(MODERATOR TO CHECK FOR QUESTIONS FROM BACK ROOM)

-
- Other topics of interest arising spontaneously.

THANK PARTICIPANTS