

# Successful strategies for technology implementation communications

E Source Technology Planning and Implementation Consulting



# Today's agenda

- Introductions
- About E Source
- Technology communications strategy
- Organizational change and awareness
- Client spotlight: City of Lawrence H2O Smart
- Customer engagement
- Key takeaways
- Q&A

# Your speakers for today



**Kierra Thomas**

Senior Consultant, E Source

*Expertise: Communications, marketing, grant writing, and project management*



**Elizabeth Vamos**

Senior Consultant, E Source

*Expertise: Organizational change management, workplace/personnel assessment, and learning and development*



**Tara Turch, PMP**

Manager, PMO, E Source

*Expertise: Utility operations, program management, technology implementation and deployment*



**Mike Hoffmann**

AMI Program Manager, City of Lawrence

*Expertise: Project management, IT, and business systems*



# About E Source



# The E Source team

*Our team has provided similar advanced metering infrastructure (AMI) services to more than 200 utility and municipal clients across the US and Canada*



"E Source has been an incredible partner for us throughout all phases of our AMI implementation. Their skillset is extensive, and they have the ability to provide expertise in all aspects of an implementation, consisting of business case development, project management, technology integration and meter deployment. However, aside from their vast technical knowledge, what truly makes them our partner of choice is their professionalism, integrity, and unconditional support to ensure our success."

Andre Pedefferri, AMI Program Mgr.  
253-502-8997  
[APedefferri@ci.Tacoma.wa.us](mailto:APedefferri@ci.Tacoma.wa.us)

# What we do

## Assessment and business case



- Technological, operational, and organizational readiness assessment
- Capital and operations and maintenance O&M cost estimate
- Anticipated quantitative and qualitative benefits identification
- Utility vision and roadmap development

## Procurement and contracting



- Software, hardware, and infrastructure requirements definition
- Implementation strategy development
- Proposal solicitation and development
- Contract negotiations
- Grant writing and reporting

## Implementation program management



- Project and vendor management
- Systems integration and testing oversight
- Change management and business process design
- Stakeholder awareness and education

## Field and deployment services



- Field surveys
- Deployment strategy
- Installation contractor oversight
- Quality assurance and quality control inspections
- Back-office data validation

## Post-deployment optimization



- Data management and analytics
- Benefits realization and verification
- Systems support and operations staff augmentation
- Performance tracking and continuous improvement
- Customer communications

## Product and service innovation



- State-of-the-industry technology education
- Endpoint specification and configuration
- Network architecture planning
- Design and implementation of add-on technologies

# Our consulting approach



## **We're forward-thinking**

Our consulting work is fueled by the desire to help you evolve your operations, customer experience, products, and technologies. We bring best-in-class techniques and ideas from inside and outside the public and utility sectors.



## **We have world-class market research capabilities**

We deploy a combination of qualitative and quantitative customer research with various instrumentation for an easier, more agile approach to collecting data and insights. We combine methods and conduct research iteratively, so you can build on previous insights and avoid losing learnings from one phase to the next.



## **We're invested**

We have the right team of focused utility consulting experts who've made utilities their career choice and personal passion. Our people know your business, have lived your challenges, and have delivered successful solutions that are endorsed by utility personnel, customers, and governing or regulatory bodies.



## **We're focused on utilities and cities**

E Source has an unwavering commitment to helping utilities and cities continually improve. Our solutions are grounded in the trust and insights we've gained through more than 30 years of working with utilities across the US and Canada.

The background of the slide is a composite image. The top half is a solid dark blue gradient. The bottom half is an aerial night photograph of a city, showing a complex highway interchange with multiple overpasses and several illuminated skyscrapers.

# Technology communications strategy



# Technology communications overview

*Our communications approach involves crafting and executing a utility-specific campaign to bring understanding and endorsement to actively adopt the new technology system*

- Campaign strategy
  - Establish program goals, objectives, and strategy
  - Support development of overall branding efforts
- Organizational change and awareness
  - Analyze stakeholders and determine level of information/support
  - Communicate transitional change affecting the organization
- Customer engagement
  - Share benefits and information
  - Develop content for a variety of customer-facing materials

*E Source has executed 50+ customer engagement campaigns for our clients, driving positive adoption of AMI*

**Stakeholders can impact new technologies either ...**

**Negatively** by threatening, opposing, or hindering either directly or through **imposing a critical eye** or opinion

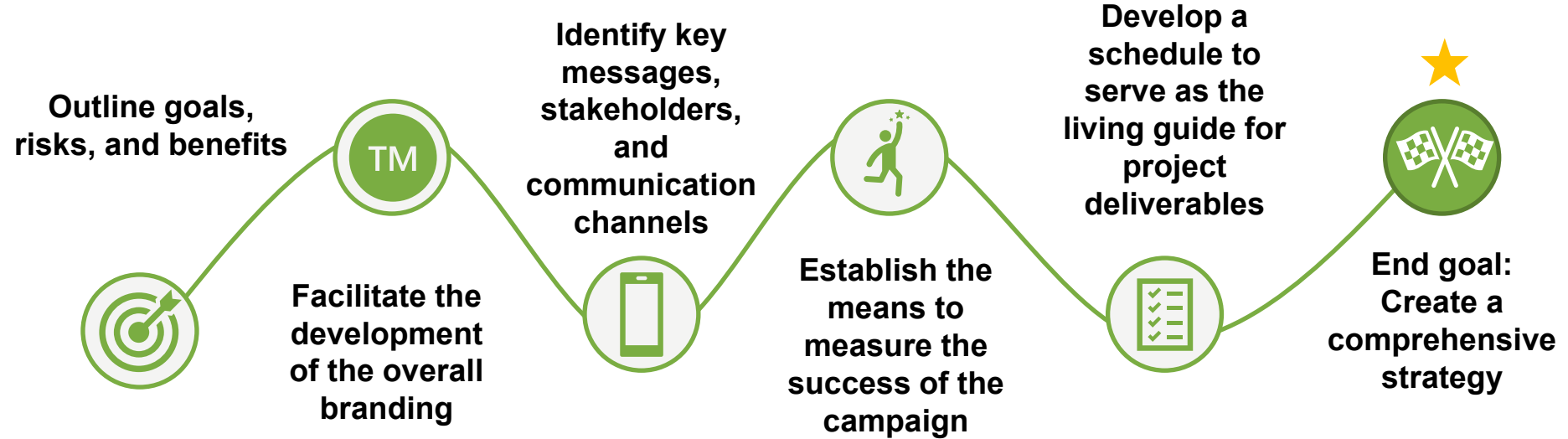


**or**



**Positively** by investing resources to create value or benefits, make a difference, or help (support, promotion) through contribution

# Key components of campaign strategy



# Communication goals, risks, and benefits

1

## Goals

Create specific communication goals and objectives rather than solely relying on the project goals.

2

## Risks

Identify risks during the planning phase so you're prepared to take a proactive approach.

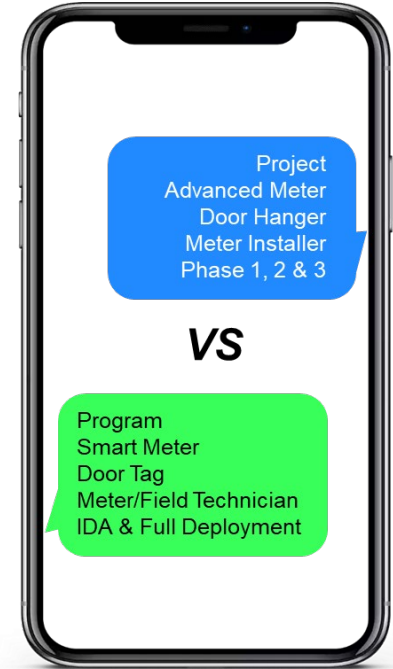
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## Benefits

Lead with the benefits! Internal and external stakeholders want the answer to the age-old question, *What's in it for me?*



# Branding and labeling



***Selecting terminology that resonates with your stakeholders is key.***

# Key messages, audiences, and communication channels

*Your audience will determine the language, style, and level of detail of your communications.*





# Communication metrics



Identify available data to determine communication outcomes




- Program enrollment
- Customer inquiries
- Website metrics
- Social media analytics and engagement
- Surveys
- Focus groups
- Staff feedback
- Event attendance
- Media coverage

“

**The planning process and communication plan were extremely valuable** enabling me to develop original website content and provide key messages and narration for those talking to customers. **I'm very thankful for E Source's expertise and the final communication plan. They made my job so much easier** and me more effective.

—*Sandi Edgemon,  
City of Richland*

”

The background of the slide is a composite image. The top half features a dark blue sky with a few wispy clouds. The bottom half shows a vibrant, high-angle night photograph of a city. A complex multi-level highway interchange with glowing orange and yellow light trails from traffic is prominent on the left. To the right and in the background, numerous skyscrapers and city buildings are illuminated with various lights, creating a dense urban landscape.

# Organizational change and awareness

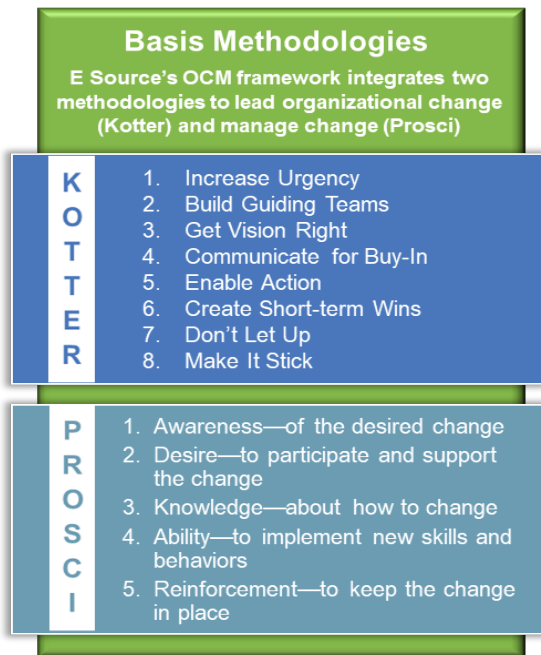
# Organizational change management (OCM)

*The collection of **tools, techniques, and mindsets** that help organizations ensure people are **ready to engage, willing to commit, and able to do what it takes** to realize the full potential of solutions*



# The E Source AMI OCM Approach

*E Source's approach to OCM applies processes, tools, and techniques to help staff move from the current state to high performance in the desired future state*



## Processes

**Assess and prepare:** Creates and maintains a strong sense of urgency and vision; all involved will believe the *change is critical*

**Manage:** Gets everyone involved and remains visible to the rest of the utility through wins; focuses on high-leverage behaviors that drive results

**Reinforce:** Ensures lasting change and identifies the behavior we want to change; makes folks work with us rather than against us

## Tools

Personnel interviews | Stakeholder analysis  
Communication plan | Coaching plans | Training plan  
Short-term win plan | Resistance management plan



# Tell us your problems ...

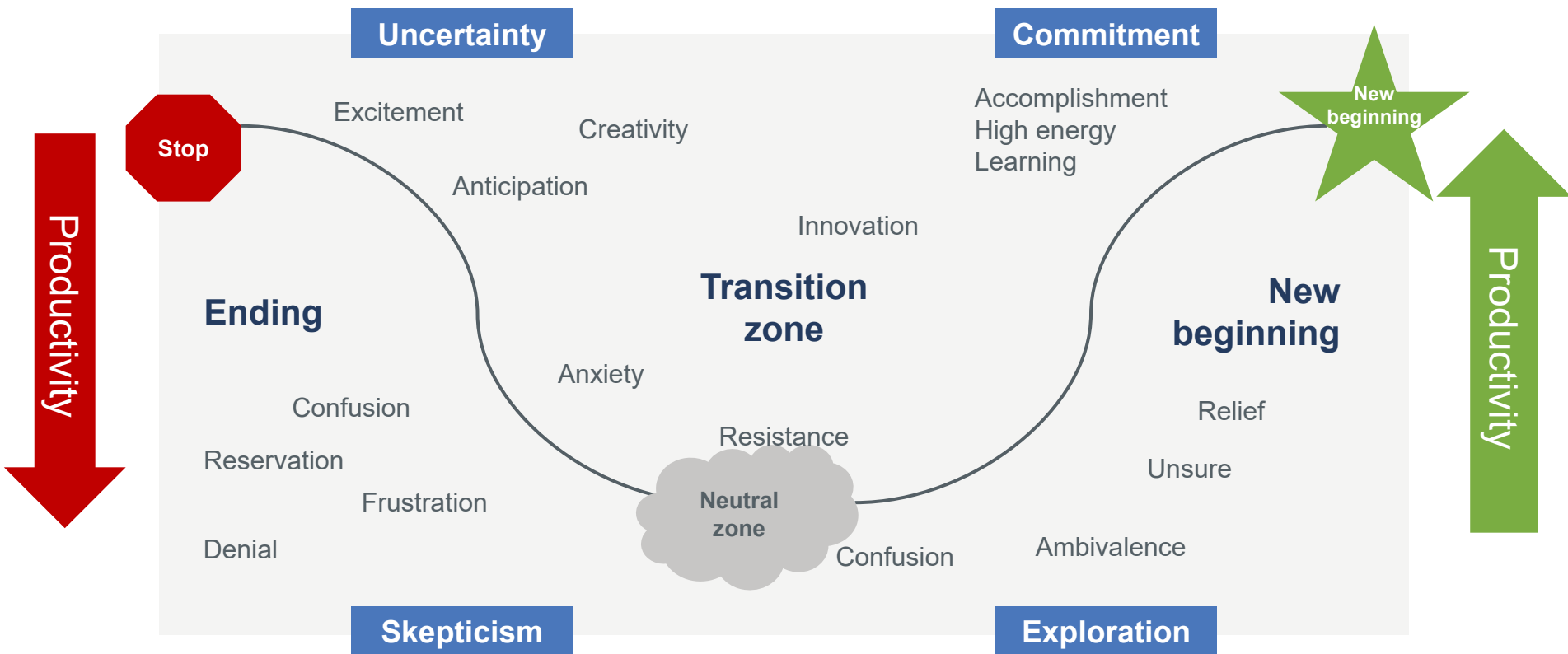
What are  
your change  
management  
problems?



“My profession has probably been transformed again  
just since we started this session.”

# Why can't people just change?

Bridges' transition model



# Change is a very difficult process



# Why people resist change

**01** Are satisfied with the status quo (if it's not broken, don't fix it)

**02** Fear the change will mean personal loss of security, money, status, friends, freedom, etc.

**03** Believe it is wrong

**04** Think it will make the situation worse

**05** Believe they had no input in the decision

**06** Believe the timing is poor

**07** Believe that prior initiatives were not properly implemented

**08** Believe the change will not be successful

**09** Lack faith in those who are driving the change

**10** Lack confidence that they'll be able to perform the new practices effectively

# Structure questions to keep in mind

## **Work design/structure:**

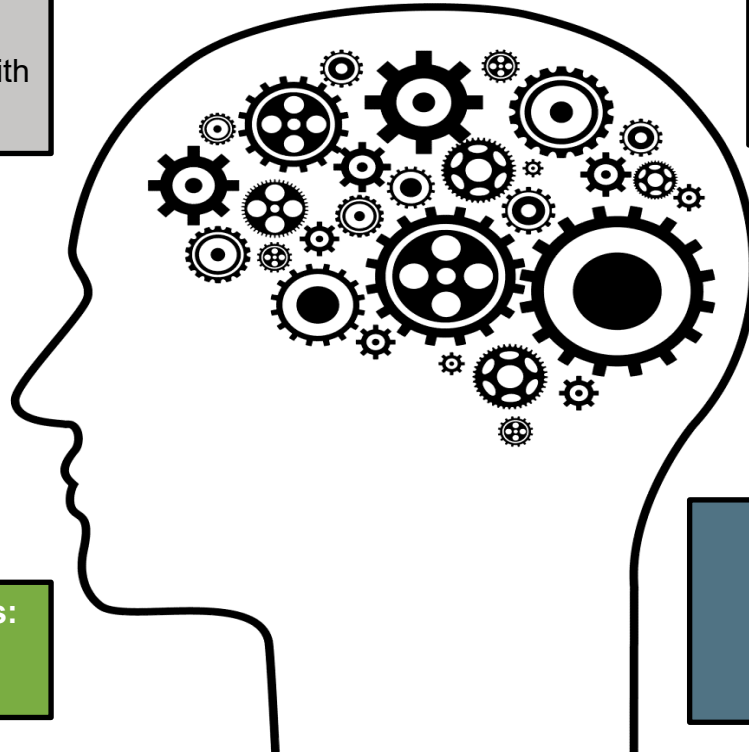
Are the roles and responsibilities aligned with the new processes?

## **Demands from managers:**

Are the new expectations clear? Do employees understand what is required moving forward and what should be stopped?

## **Communication processes:**

What is the communication structure if there are issues?



## **Rewards and recognition systems:**

What are the new behaviors that should be encouraged and what are the ones that should be discouraged?

## **Skills and competencies:**

What knowledge, skills, abilities, and other characteristics are needed from the employees who have new job roles or moved to other job positions?

## **Relationships:**

What are the new interdepartmental and external service providers' working patterns? Do new lines of communication have to be established between each?



# Top four ways to incorporate change



01

Analyze  
stakeholders



02

Educate and  
engage staff



03

Involve  
sponsors



04

Reinforcement  
planning

“

**I was pleasantly surprised at the value I saw in the OCM work E Source has done thus far on our AMI project. I can think of a few previous projects that I wished had OCM included ...**

—Eric Olmedo,  
City of High Point

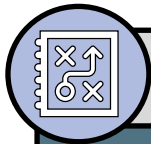
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# Client spotlight: City of Lawrence H2O Smart

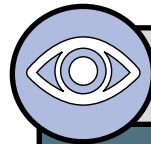


# AMI program management



## Wealth of experience

Often when we run into a situation where we are unsure on how to best proceed, E Source is there to advise us using all their combined experience.



## Attention to detail

Being extremely busy with the process of implementing AMI, I am not as well-versed in all the details of our contracts as I like to be. Thankfully, the E Source PM can always quickly give the guidance I need.



## Customer advocacy

When issues arise with vendors, E Source does a great job of advocating for the customer and working with the vendors to ensure a favorable outcome, while keeping relationships amicable.

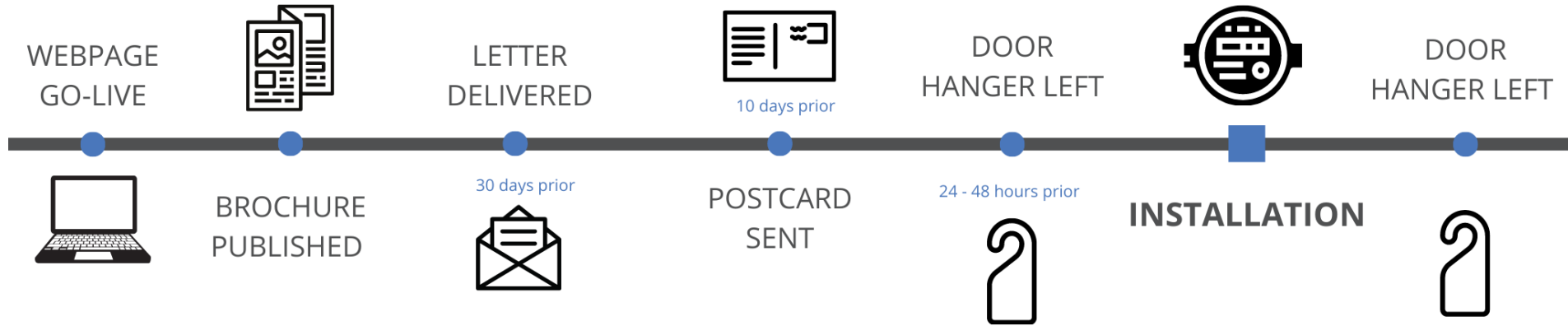


## Responsiveness

Staff at E Source is always quick to respond to: emails, calls and meeting requests. I have never felt like our project has been put on the back burner with the E Source project team.



# CUSTOMER NOTIFICATION TIMELINE







# Customer engagement

# Customer experience

Utilities are working to improve the overall customer experience (CX). For utilities, CX is critical because they need:



Customers' cooperation to provide quality services



Customers' support to better reduce energy consumption during peak demand periods and promote water conservation



Customers' trust as utility teams deal with weather disasters and outages

# Deploy multiple communications



**Traditional print**



**Community outreach**



**Public relations**



**Government relations**



**Electronic**

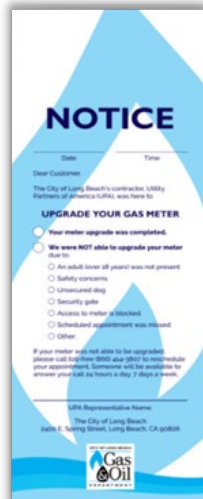


**Social media**


# Top four communication recommendations

1

Include 3 to 5 direct notifications to customers regarding the program  
(Letters, postcards, door hangers, emails, and brochures)



**Information About Your Meter Upgrade.**



Our installation contractor, Professional Meters Inc. (PMI), is expected to be in your area over the next few weeks.

Each PMI employee will be dressed in uniform, have a marked vehicle, and have a valid photo ID. During the COVID-19 pandemic, PMI will follow all relevant public health guidelines to ensure your safety while they conduct their work.

During the upgrade, you may experience a brief interruption of water service lasting approximately 30 minutes. You don't have to be present. You also do not need to contact us in advance for an appointment.



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**Albemarle County Service Authority** **MyWater**  
Serving & Connecting Provided by ACSA

**Your Meter Upgrade is Coming Soon!**

Albemarle County Service Authority (ACSA) is upgrading all of our water meters as part of our new MyWater improvement program.

These new advanced meters will safely and securely send us information about your water usage for your bills.

At no cost to you, MyWater, with the help of your new water meter, will provide several new benefits in the coming months.

**MyWater's Benefits Will Include:**

- Proactive Leak Alerts
- Enhanced Customer Service
- Customer Cost Control
- Added Efficiency & Sustainability

For more information, visit [www.serviceauthority.org](http://www.serviceauthority.org).





Home > Energy Resources > Smart Gas Metering Program > What To Expect

**What To Expect**

A representative from the City of Long Beach (CLB) Gas Utility or the City's meter installation contractor, Utility Partners of America (UPA), will be working in your neighborhood to facilitate the meter conversion process. All customers will receive a letter in the mail and a notice on their bill in advance of having their meter upgraded. The meter conversion process is expected to take 30 minutes or less. If your meter is unable to be upgraded, the installer will leave a notice with additional instructions.

All installers are required to have a valid identification badge, company logo on the vehicle and to be in uniform. Please view the images below to see what CLB's and UPA's vehicles, uniforms and identification badges will look like. Customers are encouraged to ask for identification and to call the City directly at 562-570-5700 to verify the installer's identity.



Energy Resources Department's Uniformed Installer

UPA Uniformed installer

**Smart Gas Metering**

- Smart Gas Meter Program
- Benefits
- How It Works
- What To Expect
- Frequently Asked Questions

Download CLB's Smart Gas Metering Brochure

Read Frequently Asked Questions (FAQs)

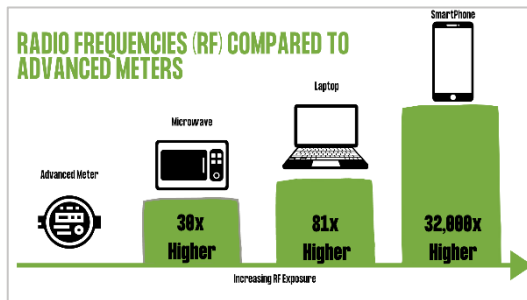
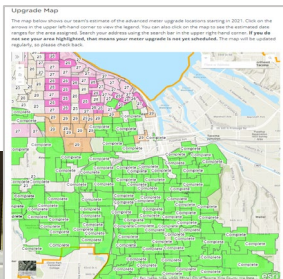
Work with your employees to create content (*They're customers too!*)

2

# Top four communication recommendations

## 3

### Show and tell



City Utilities is excited to debut MyWater, our latest program, which includes the following benefits:

- Improved customer service and satisfaction**  
City Utilities can provide faster response times, more informed customer service representatives and averted high water bills due to leaks, breaks and other common issues.
- Customer empowerment and cost control**  
Customers can now effectively manage their usage and receive push notifications including leak and high bill alerts by utilizing the new MyWater Link customer portal.
- Proactive customer notifications**  
Using interval consumption data and on-demand readings, customer service representatives can more readily notify customers and troubleshoot problems.

**MyWater**

**Questions?**

**MyWater Link Customer Portal**

MyWater Link is a resource to help you better understand and manage your water use. You can access all your water usage, bills, bill information, payment, forms and other services.

Sign-up for the MyWater Link Customer Portal in Three Easy Steps!

- 1 Go to [www.uxc.com](http://www.uxc.com) on your mobile device or web browser
- 2 Enter your billing account number and email address
- 3 Access all of your water information and more tools as they become available

Register today if you'd like to:

- ✓ View Your Usage History
- ✓ Access Your Bill
- ✓ Get Money Saving Recommendations
- ✓ Usage and Payment Alerts

You can also manage automated messaging based on consumption data and set up notifications, such as leak alerts. MyWater Link will provide information to help you navigate the process of finding and fixing leaks.

## 4

### Partner with organizations to promote your programs



# Key takeaways



# Sharing is caring

What's your  
biggest  
takeaway?



What lesson  
did you learn  
today ?

# We're here for you!

*The E Source Technology Planning and Implementation Consulting team supports a variety of technology project communications, including:*

## Technology programs

- AMI
- Customer engagement portal
- Customer information system
- Interactive voice response system
- Outage management

## Utility initiatives

- EVs
- Solar
- Sustainability
- Customer assistance programs
- Rate increases
- New service offerings (such as prepay)

# Questions?

# Want to continue the conversation?



## Kierra Thomas

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POWERING WHAT'S **NEXT**

**Thank you!**