

DRP DEMO C - Customer Engagement Support FAQ

PG&E recognizes the integral role that customer engagement plays in the success of behind-the-meter (BTM) programs / projects and is piloting an effort to provide customer engagement support to solicitation Participants with the intent to improve the chances of program success.

What kinds of customer engagement support will PG&E provide?

PG&E will offer varying levels of customer engagement support to bidders as part of the solicitation described further below. Participants can elect the level of support that best fits with their program/project needs.

Solicitation Web Presentment

For all Participants, PG&E will launch a webpage which will provide information about the DRP Demonstration project and educate customers regarding the background and objectives of the Demonstration project. Following the successful execution of contracts with Participants, customers in the area will be able to validate information regarding the solicitation and Participants' outreach efforts.

50 Hour Support Category – Customer Acquisition and Handoff

For Participants who have selected 50 hours of customer engagement support hours in their Offer, PG&E will be offering 50 hours of support from our Business Energy Solutions (BES) team. The PG&E BES team would contact Participant-identified customer targets and hand off warmed and qualified leads to the Participant sales team. The final scoping of support is subject to negotiation and any support activities would not commence until the successful execution of a contract. PG&E does not guarantee any specific outcomes with this support. An anticipated breakdown of this support work can be found below:

• Review and approval of vendor provided script	8 hours
• Customer calls to vendor identified targets	34 hours
• <u>Generate summary report</u>	8 hours
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	50 hours

200 Hour Support Category – Custom Activities

For Participants who have selected 200 hours of customer engagement support hours in their Offer, PG&E's BES team support could take a variety of forms and does not have a set list of services due to variations in the types of customers targeted and interventions.

Participants wishing to engage with PG&E on a more tailored marketing approach will need to provide a proposed customer engagement plan specific to their proposed program / project and provide specifics on what PG&E resources would be required to execute that plan. The final scoping of support is subject to negotiation, and any support activities would not commence until the successful execution of a contract and PG&E resource availability. PG&E does not guarantee any specific outcomes with this support. Some potential activities or combinations of activities are listed below:

- BES Customer call support (hourly as described in the previous section – 50 hr min)

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- Assist in evaluating and executing co-branding opportunities
- Assist with development of outreach plans
- Assist in identifying high potential customers

How should the support be reflected in my bid?

PG&E will not directly charge Participants for these services. In exchange for Customer Engagement support, PG&E would expect to see the value of such support reflected in Participants' offers.

1. All Participants must submit a bid which presumes no customer acquisition support from PG&E.
2. Participants electing to utilize PG&E customer engagement support should also:
 - a. Select the desired category of support (50 or 200 hourly allotment).
 - b. Describe the proposed customer engagement plan and define what PG&E activities and resources are to constitute the hourly allotment.
 - c. Provide an Offer that accounts for the value of the PG&E supported activities.

Can I also get access to customer data?

Publically available customer energy data can be accessed at the [PG&E Energy Data Hub website](#) for customers and third parties. Participants are encouraged to utilize these data sources as they compile their program proposals.

Participants wishing to secure access to additional customer data specific to the Demo C location can request to do so during the negotiation phase of the solicitation. Requests for data will be reviewed on case-by-case basis and take into account the specific data requirements of the proposed program, current data security protocols, and meet data minimization and anonymization standards per CPUC directive. Any access to additional data would be allowed following the successful execution of a contract resulting from the solicitation. The value of such data access will be accessed separately from the customer engagement support outlined above.