



# Time of Use Workshop 2

*EW-2023-0199 / May 23, 2023*



# Heat Safety Awareness

at the workplace



**SHADE**  
When on a break, head for the shade. Avoid overheating by taking regular breaks. Don't forget the sunscreen!

**EAT FRESH**  
Try eating fresh and cool foods, such as salads and fruits.

**AVOID**  
Alcohol, tea, coffee, hot and spicy foods. They can cause dehydration.

**SOAK**  
Take a cool shower or bath to help you cool down.

**REST**  
Make sure you get enough sleep, and rest if you feel tired.

**CLOTHING**  
Wear lightweight, light colored, loosefitting clothes.

**STAY HYDRATED**  
Drink more water!

**KEEP EACH OTHER SAFE**  
Keep an eye on friends, family and coworkers. Share your heat safety knowledge!





# Process for Follow Up Questions/Material

- To help ensure questions are addressed accurately, please remember for any follow up questions or requests coming out of this meeting that could not be answered and delivered within the construct of this meeting, please email the request(s) to:
  - [Regulatory.Affairs@evergy.com](mailto:Regulatory.Affairs@evergy.com)
  - Reference docket **EW-2023-0199** in the subject line.



# Agenda

- Introductions & Purpose
- Customer Education Plan
  - Campaign Strategy, Timeline, Messaging & Goals
  - Campaign Phases 1 - 5 Summary
  - Special Customer Groups Approach
- Digital Rate Education
- Contact Center Support & System Update
- Cost Tracking & Reporting Update
- Next Steps

# Introductions & Purpose

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# Introductions: Presenters & Participants

- Evergy Speakers:
  - Katie McDonald, Senior Director, Public Affairs
  - Jeff Beeson, Senior Manager, Marketing
  - Elena Johnston, Manager, Digital Energy Engagement
  - Julie Dragoo, Senior Director, Customer Strategy & Support
  - Cindy Circo, Director, Contact & Business Center
  - Forrest Archibald, Director, Projects
- Stakeholders
  - Missouri PSC
  - Office of the Public Counsel
  - ChargePoint, Inc
  - City of St. Joseph, Missouri
  - Google, LLC
  - Midwest Energy Consumers Group
  - Missouri Industrial Energy Consumers
  - Nucor Steel Sedalia, LLC
  - Renew Missouri
  - Sierra Club
  - Velvet Tech Services, LLC



# Purpose

- Collaborative Workshop for Customer Education and Outreach Regarding the Introduction of Default Time-of-Use Rates by Evergy Missouri (EW-2023-0199)
- Workshop 1 held March 28, 2023
  - Based on discussion and feedback, Evergy is launching its education campaign approximately (2) months earlier than originally planned
- Purpose of Workshop 2
  - Share firmer education plan with milestones
  - Provide an update on activities

# Customer Education Plan

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# Developing the Customer Education Plan

- Hired Agency partner with TOU expertise
- Defined new rates business requirements for billing system and rate modeling
- Research to define rate names and descriptions
- Developed overarching communication strategy
- Research to define key messages
- Developed media strategy and tactical plan
- Developed creative strategy
- Developed media relations plan
- Developed community outreach plan

# Campaign Strategy & Messaging

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# Campaign Goals

## Goals

1. Prepare customers for the upcoming change in rate structures, including the new mandatory rate, and how TOU rates work.
2. Offer choice and inform customers of their rate options and the benefits depending on the customer's lifestyle.
3. Provide customers with tools, resources, and reports that serve to help them understand TOU rates and options, empower them to choose their rate, and provide guidance to modify their behaviors so that they can mitigate usage and bill impact to increase their success on a TOU rate.
4. Help all customers (and with increased emphasis on special customer groups) be successful before, during and after the mandatory TOU rate transition and/or enrollment on their selected TOU rate option.



# Education and Awareness Strategy

**Strategy Overview:** Use a phased approach, that incorporates both mass awareness and direct marketing tactics, to move a customer from **awareness** to **action** and then finally to **transition** and **success**.

Campaign Phase	Objective	Message Idea	Tactic Type
<b>Phase 1</b> <b>Awareness &amp; Education</b> June 15 <sup>th</sup> – Nov. 30 <sup>th</sup> , 2023	Inform customers that Missouri is changing rate structures soon and educate them on how TOU rates work.	Missouri will be changing electric rate structures starting this Fall. Learn how to prepare.	Mass Awareness
<b>Phase 2</b> <b>Action &amp; Preparation</b> Aug. 1 <sup>st</sup> – Nov. 30 <sup>th</sup> , 2023	Prepare customers for the upcoming change, inform them of their rate options & how they work, and encourage pre-selection of a rate.	As Missouri moves to TOU rates, Everygy is offering new personal power plans. Learn about your plan options and select a plan before October.	Mass Awareness and Direct
<b>Phase 3</b> <b>Transition &amp; Coaching</b> Oct. 1 <sup>st</sup> – Dec. 31 <sup>st</sup> , 2023	Ensure customers know they will be defaulted into a new rate and provide coaching to help them be successful on the new plan.	Your rate will change on X date. We are here to support your transition to TOU.	Direct
<b>Phase 4</b> <b>Success &amp; Coaching</b> Jan. 1 <sup>st</sup> – April 30 <sup>th</sup> , 2024	Help customers understand how their rate works and encourage shifting usage to off-peak times.	Your new rate allows you to save money by shifting to off-peak times. Here are tips and tricks to help you save.	Direct
<b>Phase 5</b> <b>Summer Prep &amp; Coaching</b> May 1 <sup>st</sup> – Sept. 30 <sup>th</sup> , 2024	Prepare customers for the change in summer pricing and provide tools, tips, and resources to avoid summer peak usage.	Prices change in the summer, start preparing your home and family to avoid high usage during the summer.	Mass Awareness and Direct



# Campaign Phases

Mid-June	July	Aug.	Sept.	Oct	Nov.	Dec.
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**Phase 1: Awareness & Education** →

June 15<sup>th</sup> – Nov. 30<sup>th</sup>

**Phase Objective**  
Inform customers that Missouri is changing rate structures soon and educate them on how TOU rates work.

**Main Message Idea**  
Missouri will be changing electric rate structures starting this Fall. Learn how to prepare.

**Tactics**  
Out-of-Home, Social, Digital Display, Email, Bill Inserts/Message, Website, Media Relations, Search

**Creative Approach**  
Text over branded background. CTA: Learn more at everygy.com

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**Phase 2: Action & Preparation** →

Aug. 1<sup>st</sup> – Nov. 30<sup>th</sup>

**Phase Objective**  
Prepare customers for the upcoming change, inform them of their rate options & how they work, and encourage pre-selection of a rate.

**Main Message Idea**  
As Missouri moves to TOU rates, Everygy is offering new personal power plans. Learn about your options & select a plan before Oct.

**Tactics**  
Out-of-Home, Radio, Digital Display, Search, Social, Media Relations, Rate Education Reports, Direct Mail, Community Events & Special Group\* 1:1 Support, Website

**Creative Approach**  
Addition of lifestyle images and rate plan creative. CTA: select your rate now.

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**Phase 3: Transition & Coaching** →

Oct. 1<sup>st</sup> – Dec. 31<sup>st</sup>

**Phase Objective**  
Ensure customers know they will be defaulted into a new rate and provide coaching to help them be successful on the new plan.

**Main Message Idea**  
Your rate will change on X date. We are here to support your transition to TOU.

**Tactics**  
Direct Mail, Email, Energy Coach Emails and Weekly Reports, Community Events & Special Group\* 1:1 Support

**Creative Approach**  
Energy Coach and detailed plan information.

Q1 2024	Q2 2024	Q3 2024	Q4 2024
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**Phase 4: Success & Coaching** →

Jan. 1<sup>st</sup> – April 30<sup>th</sup>, 2024

**Phase Objective**  
Help customers understand how their rate works and encourage shifting usage to off-peak times.

**Main Message Idea**  
Your new rate allows you to save money by shifting to off-peak times. Here are tips and tricks to help you save.

**Tactics**  
Email, Direct Mail, Bill Inserts, Search, Digital, Energy Coach Emails, Rate Education Report, Special Group\* 1:1 Support

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**Phase 5: Summer Prep & Coaching** →

May 1<sup>st</sup> – Sept. 30<sup>th</sup>, 2024

**Phase Objective**  
Prepare customers for the change in summer pricing and provide tools, tips, and resources to avoid summer peak usage.

**Main Message Idea**  
Prices change in the summer, start preparing your home and family to avoid high usage during the summer peak.

**Tactics**  
Out-of-Home, Radio, Social, Email, Bill inserts, Direct Mail, Special Group\* 1:1 Support

\* Includes income-eligible, seniors, electric-heat customers



# Campaign Messaging

## Overarching Campaign Message

Missouri is changing electric rate structures this Fall, and Evergy is here to help you understand your new rate options, how to pick a plan that is best for your home, and how to be successful on the new plan as the seasons change. This means that Missouri customers will have a choice of electric rate plans that fit their household. The new rate plans will help you save money when using less energy during peak times, when people use it most.

## Sub Message by Campaign Phase

### Phase 1

Missouri will be changing electric rate structures starting this Fall. Learn how to prepare and review your new plan options.

### Phase 2

Evergy is offering new rate plans to help you save money by using less energy during peak times, when people use it most. Learn which plan may be best for you and select an option by October 2023.

### Phase 3

Your new rate plan will start in October/November. You can save money on your new rate plan by shifting usage away from peak hours of 4-8pm, learn how.

### Phase 4 & 5

As the seasons change, Evergy will support you with customized rate education and usage reports to help you maximize savings with on your new time-based rate plan.





# Rate Naming

## Naming Strategy:

Create clear and descriptive names for the new TOU rate plans that can be organized as a cohesive set of rate options.

## Guiding Principles:

- Choose names that emphasize the customer benefit of TOU rate, such as “Savings”
- When possible, utilize the rate name to indicate how the rate works
- Develop names that can be linked to one another and suggest different levels of effort

New Rate Name	Description	Rate Code (Metro & West)
 <b>Seasonal Peak Saver</b>	Default rate, w/ on-peak in Summer	1RTOU2 & MORT2
 <b>Peak Reward Saver</b>	Credit & extra charge rate	1RPKA & MORPA
 <b>Nights &amp; Weekends Saver</b>	Original TOU rate, w/ 3-periods	1RTOU & MORT
 <b>Nights &amp; Weekends Max Saver</b>	3-period rate w/ high differential	1RTOU3 & MORT3

# Campaign Creative

## Strategy:

The creative will align with the messaging and objectives of each stage of the customer journey. Starting with creating awareness, we'll gradually build understanding and consideration until the customer is ready to enroll. The new plan options will be clearly highlighted with the use of vibrant colors, and our expert support coaches will step in to guide customers seamlessly toward rate understanding.

Phase 1



**Missouri will be changing electric rate structures starting this fall.**

Evergy wants all residential customers in Missouri to know that you will have CHOICE in picking a new Time of Use rate plan for your household.

Learn more about which Time of Use rate plans are right for your household now, and how to prepare for this change by visiting [FPO] [www.evergy.com](http://www.evergy.com).

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Phase 2



**Missouri, it's time to pick your new rate plan.**

Reliable and affordable energy is a priority—and now you can choose when to use less expensive energy for your home. Evergy's online rate tool will help you compare plans, and see which one is best for your household.

*Find the plan that best works for you.  
You have the choice to pre-select before being placed on our default plan.*

<p><b>Seasonal Peak Saver</b></p> <p><small>You can save from October to May on discounted energy prices. From June to September you can save by avoiding using energy from 4 pm to 8 pm when energy prices peak.</small></p>	<p><b>Nights &amp; Weekends Saver</b></p> <p><small>You can save on lower energy prices from 4 am to 4 pm and even lower energy prices from midnight to 6 am. The weekends avoid using energy from 4 pm to 8 pm because it is more expensive, while weekends and holidays costs stay consistent and so do the savings.</small></p>
<p><b>Nights &amp; Weekends Max Saver</b></p> <p><small>This plan is for heavy energy users or EV drivers, but anyone can use it. It has three price periods: most expensive (4 pm to 8 pm), less expensive (8 am to 4 pm and 8 pm to midnight), and least expensive (midnight to 6 am).</small></p>	<p><b>Peak Reward Saver</b></p> <p><small>This plan has a set energy rate, no matter the time of day or week, but includes discount credits* from midnight to 6 am and extra charges† from 4 pm to 8 pm when energy prices peak.</small></p>

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Phase 3



**Missouri, your new rate plan is here, and so are your energy coaches.**

Learn how to be successful in your selected Time of Use plan!

All it takes is some planning and attention to when you use electricity in your home to save energy and lower your bills.

Seasonal Peak Saver	Nights & Weekends Max Saver	Nights & Weekends Saver	Peak Reward Saver
			

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Phase 4 & 5



**Seasons change. And so should how you think about using energy.**

Your energy rate plan coach can help you find ways to save as the seasons change. And, if you are not sure you are in the right plan for your household, it's not too late to make a change.

Get more coaching tips on seasonal changes to help you maximize your plan, or find out more about all the plans and our coaches, by visiting [evergy.com](http://evergy.com).

Seasonal Peak Saver	Nights & Weekends Max Saver	Nights & Weekends Saver	Peak Reward Saver
			

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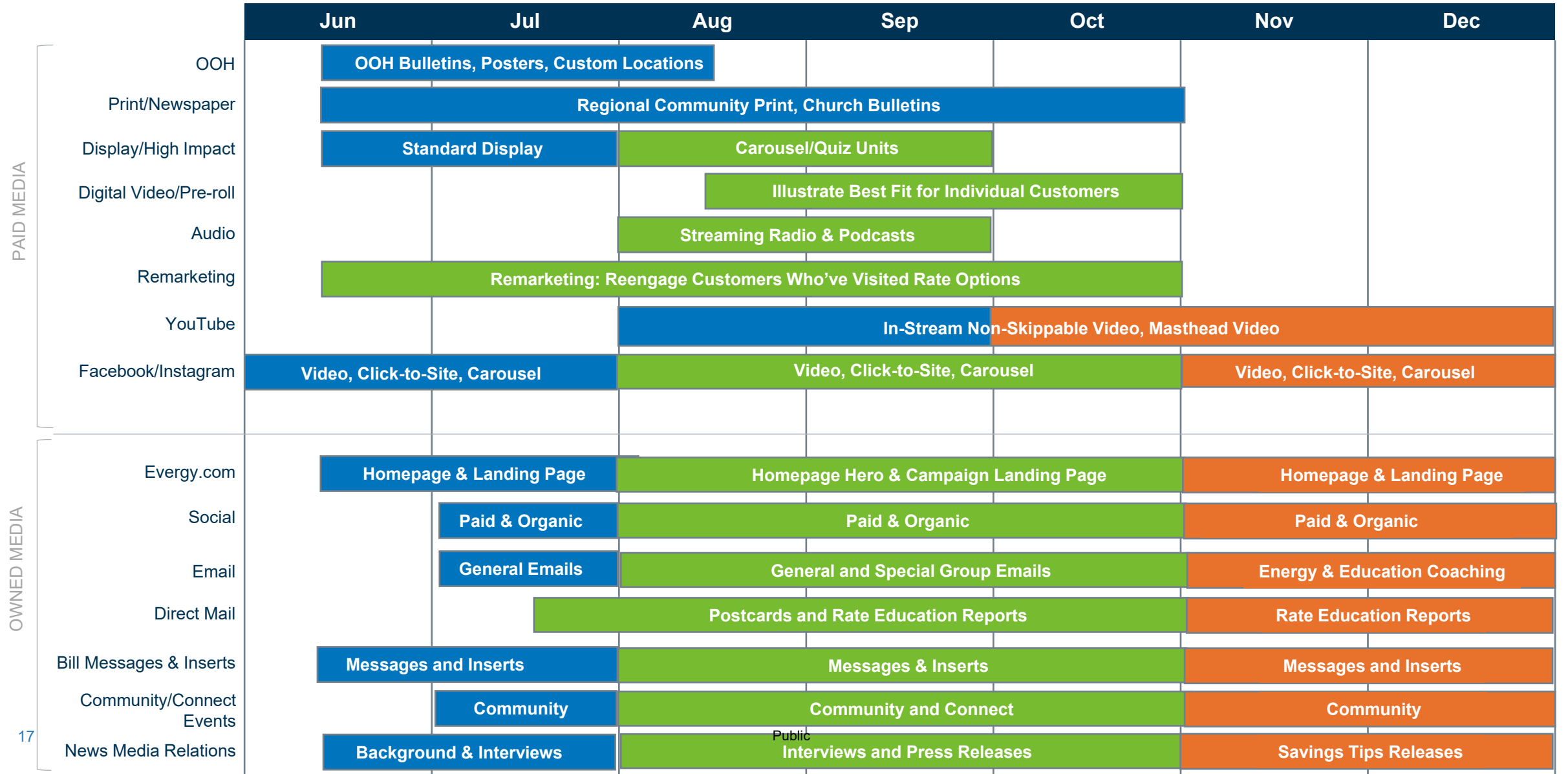
\* Some copy and design may continue to be changed





# 2023 Tactical Plan - Overview

Phase 1 ■  
 Phase 2 ■  
 Phase 3 ■



# Phase 1: Awareness & Education

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# Phase 1: Strategy Overview

## Phase Objective:

Get ahead of the upcoming rate structure change with a foundational awareness campaign. We will create general awareness and start to spark interest in the new TOU options, so customers are ready to take action in Phases 2 and 3.

## Timing:

June 15 – November 30th

## Messaging Approach:

*Missouri is changing electric rate structures this Fall, and Evergy is here to help you understand your new rate options, how to pick a plan that is best for your home, and how to be successful on the new plan as the seasons change.*

## Missouri will be changing electric rate structures starting this fall.

Evergy wants all residential customers in Missouri to know that you will have CHOICE in picking a new Time of Use rate plan for your household.

Learn more about which Time of Use rate plans are right for your household now, and how to prepare for this change by visiting [FPO] [www.evergy.com](http://www.evergy.com).

  
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# Education Channels & Tactics

Channel	KPI's	Objective
<b>Paid</b>		
Programmatic Display	Impressions, unique reach, CTR to rate options	Generate sustained top-of-mind awareness and drive site sessions
OOH Billboards & Posters	Impressions & Reach, Web Visits	Awareness among metro & rural customers
Print	Impressions, Web Visits	Connect with ethnic and hard-to-reach customers
Church Bulletins	Impressions, Web Visits	Connect with ethnic and hard-to-reach customers
Facebook/Instagram Display	Impressions, Reach, Click-Through Rate	Awareness of the changing rate structures
Google/Bing Search	Click-Through Rate	Drive customers to the site to learn about changing rate structures
<b>Earned</b>		
Media Kit & Outreach	Message Recall, Sentiment	Inform customers that Missouri is changing rate structures soon and educate them on how TOU rates work.
Community Outreach Events	Engagement, Reach	
Connect Customer Center	Engagement, Reach	
<b>Shared</b>		
Video	Impressions, Reach	Inform customers that Missouri is changing rate structures soon and educate them on how TOU rates work.
Organic Social	Impressions, Engagement	
<b>Owned</b>		
Email (General and Special Audience)	Open Rate, Click-Through-Rate	Inform customers that Missouri is changing rate structures soon and connect with special audience groups.
Website	Visitors, Session, Click-Through-Rate	Inform customers that Missouri is changing rate structures soon and educate them on how TOU rates work.
Bill Message and Inserts	Landing Page Visit	Inform customers that Missouri is changing rate structures soon and educate them on how TOU rates work.

# Phase 2: Action & Preparation

Public



# Phase 2: Strategy Overview

## Phase Objective:

Empower customers to feel in control of their rate options with a comprehensive preparation campaign. We will educate customers on rate options, how they work, and prepare them for the upcoming rate change. With our tools, we will encourage customers to pre-select a rate that best suits their needs and their savings potential.

## Timing:

August 1<sup>st</sup> – November 30<sup>th</sup>

## Messaging Approach:

*Attention Missouri customers: it's time to take control of your energy bills with Evergy's Customer Choice Plans. With customized options to fit the unique needs of your household, you can select a plan that saves you money. Simply shift your electricity use to off-peak times, which occur for most of the day. By planning and being mindful of your usage, you can easily avoid the peak hours of 4-8pm and enjoy savings.*



**Missouri, it's time to pick your new rate plan.**

Reliable and affordable energy is a priority—and now you can choose when to use less expensive energy for your home. Evergy's online rate tool will help you compare plans, and see which one is best for your household.

Find the plan that best works for you.  
You have the choice to pre-select before being placed on our default plan.

<b>Seasonal Peak Saver</b> You can save from October to May on discounted energy prices. From June to September you can save by avoiding using energy from 4 pm to 8 pm when energy prices peak.	<b>Nights &amp; Weekends Saver</b> You can save on lower energy prices from 6 am to 4 pm and even lower energy prices from midnight to 6 am. On weekdays avoid using energy from 4 pm to 8 pm because if it more expensive, and weekends and holidays costs stay consistent and so do the savings.
<b>Nights &amp; Weekends Max Saver</b> This plan is for heavy energy users or EV drivers, but anyone can use it. It has three price periods: most expensive (6 pm to 8 pm), least expensive (6 am to 4 pm and 6 pm to midnight), and least expensive (midnight to 6 am).	<b>Peak Reward Saver</b> This plan has a set energy rate, no matter the time of day or week, but includes discounts credit* from midnight to 6 am and extra charges† from 4 pm to 8 pm when energy prices peak.

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 **Rate Education Report**  
March 21, 2020  
Account number XXXXXXX

Use this shortcut to choose your new rate plan! Scan the QR code.

PO, Box 418679, Kansas City, MO 64141

Choose a new rate plan that works for you

Lorem ipsum dolor sit amet, consectetur adipiscing elit, sed diam nonummy nibh euismod tincidunt ut laoreet dolore magna aliquam erat volutpat. Ut wisi enim ad minim veniam, quis nostrud exerci tation ullamcorper suscipit lobortis nisl ut aliquip ex ea commodo consequat. Duis autem vel eum irure dolor in hendrerit in vulputate velit esse molestie consequat, vel illum dolore eu feugiat nulla facilisis at vero eros et accumsan et justo odio dignissim qui blandit praesent lacinia doloribus doloribus mollis. Lorem ipsum dolor sit amet, consectetur adipiscing elit, sed diam nonummy nibh euismod tincidunt ut laoreet.

**! Make your selection today**  
If you don't select a new plan, you'll be enrolled in Seasonal Peak starting October 2023.

 <b>Seasonal Peak</b> Lorem ipsum dolor sit amet, consectetur adipiscing elit, sed diam nonummy nibh euismod tincidunt ut laoreet dolore magna aliqua erat volutpat.	 <b>Peak Reward</b> Lorem ipsum dolor sit amet, consectetur adipiscing elit, sed diam nonummy nibh euismod tincidunt ut laoreet dolore magna aliqua erat volutpat.	 <b>Nights &amp; Weekends</b> Lorem ipsum dolor sit amet, consectetur adipiscing elit, sed diam nonummy nibh euismod tincidunt ut laoreet dolore magna aliqua erat volutpat.	 <b>Nights &amp; Weekends MAX</b> Lorem ipsum dolor sit amet, consectetur adipiscing elit, sed diam nonummy nibh euismod tincidunt ut laoreet dolore magna aliqua erat volutpat.
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**How do rate plans compare?**  
Estimated average monthly cost per plan (based on your historical usage).

Seasonal Peak	Peak Reward	Nights & Weekends	Nights & Weekends MAX	Current Plan (discontinued)
\$150	\$100	\$120	\$110	\$80

Turn over to learn more →

\* Creative mockups are examples only. Final design and creative still being developed.



# Education Channels & Tactics

Channel	KPI's	Objective
<b>Paid</b>		
Audio	Impressions, unique reach, equitable geo coverage	Education of rate options
High-Impact Display	Impressions, unique reach, CTR	Audience prospecting to qualify customers toward rate options
Programmatic Display	CTR, quality site metrics, site conversions	Re-engage those who have visited Evergy's rate options and begin remarketing
Programmatic Online Video	Video views, view rate, CTR	illustrate how rate options differ and can best fit the energy behaviors of our customers
Resident Testimonials	Impressions, reach	Use local customers to show how easy their TOU conversion can be
YouTube Video	Impressions, Reach, Click-Through Rate	Awareness of the changing rate structures, the online tools and resources, and pre-selection
Facebook/Instagram Video	Impressions, Reach, Click-Through Rate	Awareness of the changing rate structures, the online tools and resources, and pre-selection
Facebook/Instagram Display	Impressions, Reach, Click-Through Rate	Awareness of the changing rate structures, the online tools and resources, and pre-selection
Google/Bing Search	Click-Through Rate	Serve text ads to users performing rate change-related searches in Google to drive them to the site
<b>Earned</b>		
Media Kit & Outreach	Message Recall & Sentiment	
Community Outreach Events	Engagement, Reach, Call Center Volume	Awareness of the changing rate structures, the online tools and resources, and pre-selection
Connect Customer Center	Engagement, Reach, Call Center Volume	
<b>Shared</b>		
Video	Impressions, Reach	
Organic Social	Impressions, Engagement	Awareness of the changing rate structures, the online tools and resources, and pre-selection
<b>Owned</b>		
Email (General and Special Audience)	Open Rate, Click-Through-Rate	Awareness of the changing rate structures, the online tools and resources, and pre-selection
Website	Visitors, Session, Click-Through-Rate	Awareness of the changing rate structures, the online tools and resources, and pre-selection
Bill Message and Inserts	Landing Page Visit	Awareness of the changing rate structures, the online tools and resources, and pre-selection
Direct Mail	Reach, URL Visits	Awareness of the changing rate structures, the online tools and resources, and pre-selection
Rate Education Reports	Impressions, URL visits	Share rate plan options and cost impacts.

# Phase 3: Transition & Coaching

Public





# Phase 3: Strategy Overview

## Phase Objective:

Ensure customers are aware that they will be automatically enrolled in a new rate plan, if they haven't pre-selected, and offer expert coaching to help them succeed on the new plan. Our coaches will provide insights to save money and optimize energy usage around off-peak times.

## Timing:

October 1<sup>st</sup> – December 31<sup>st</sup>

## Messaging Approach:

*Get ready for the upcoming change in seasonal pricing with our helpful preparation campaign. We'll equip you with the tools, tips, and resources you need to avoid peak usage and save money on your energy bills. With our expert guidance, you'll be able to optimize your energy usage efficiency and make the most of the new pricing structure.*



**Missouri, your new rate plan is here, and so are your energy coaches.**

*Learn how to be successful in your selected Time of Use plan!*

All it takes is some planning and attention to when you use electricity in your home to save energy and lower your bills.

Seasonal Peak Saver	Nights & Weekends Max Saver	Nights & Weekends Saver	Peak Reward Saver
			

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\* Creative mockups are examples only. Final design and creative still being developed.



# Education Channels & Tactics

Channel	KPI's	Objective
<b>Paid</b>		
YouTube Video	Impressions, Reach, Click-Through Rate	Drive customers to 'How TOU Rates Work' page or their respective coaching page
Facebook/Instagram Video	Impressions, Reach, Click-Through Rate	Awareness of the changing rate structures, the online tools and resources, and pre-selection
Facebook/Instagram Display	Impressions, Reach, Click-Through Rate	Awareness of the changing rate structures, the online tools and resources, and pre-selection
Pinterest Display	Impressions, Reach, Click-Through Rate	Encourage customers to visit the website to learn more about tools/resources that can help them be successful
NextDoor Display	Impressions, Reach, Click-Through Rate	Encourage customers to visit the website to learn more about tools/resources that can help them be successful
Google/Bing Search	Click-Through Rate	Serve text ads to users performing rate change-related searches in Google to drive them to the site
<b>Earned</b>		
Media Kit & Outreach	Message Recall & Sentiment	Ensure customers know they will be defaulted into a new rate and provide coaching to help them be successful on the new plan.
Community Outreach Events	Engagement, Reach, Call Center Volume	
Connect Customer Center	Engagement, Reach, Call Center Volume	
<b>Shared</b>		
Video	Impressions, Reach	Ensure customers know they will be defaulted into a new rate and provide coaching to help them be successful on the new plan.
Organic Social	Impressions, Engagement	
<b>Owned</b>		
Email (General and Special Audience)	Open Rate, Click-Through-Rate	Ensure customers know they will be defaulted into a new rate and provide coaching to help them be successful on the new plan.
Website	Visitors, Session, Click-Through-Rate	
Direct Mail (in0home item)	Reach, URL visit	
Bill Message and Inserts	Landing Page Visit	

# Phase 4 & 5: Success & Coaching

*Seasonal Focus*

Public



# Phase 4 & 5: Strategy Overview

## Phase Objective:

Educate and empower customers to take control of their energy usage by clearly explaining how their rates work, how they are doing on their plan, encourage shifting usage to off-peak times, and preparing them for seasonal weather changes.

## Timing:

January – September 2024

## Messaging Approach:

*Get ready for the seasonal changes that may impact your energy usage by using energy during off-peak hours. We'll equip you with the tools, tips, and resources you need to avoid peak usage and save money on your energy bills, like our weekly energy coach emails. With our expert energy coaches, you'll be able to optimize your energy usage and make the most of the new pricing structure.*

## Planned Tactics Include:

Weekly Energy Coach emails, seasonal support emails and bill inserts, digital and social ads (final plans based off 2023 performance)

\* Timing, objective, messaging and creative may change based off learnings from earlier phases



**Seasons change.  
And so should how you think about using energy.**

Your energy rate plan coach can help you find ways to save as the seasons change. And, if you are not sure you are in the right plan for your household, it's not too late to make a change.

Get more coaching tips on seasonal changes to help you maximize your plan, or find out more about all the plans and our coaches, by visiting [evergy.com](http://evergy.com).

Seasonal Peak Saver	Nights & Weekends Max Saver	Nights & Weekends Saver	Peak Reward Saver
			

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# Special Customer Groups

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# Income-Eligible and Seniors

**Strategy:** Enhance TOU engagements by leveraging community events and collaborating with trusted agency partners to offer more touchpoint and educational opportunities.

## Special Support Tactics:

- Conduct training workshops for agency partners to enhance their knowledge and ability to promote our services.
- Develop a bilingual handout on Time-of-Use (TOU) plans in Spanish to facilitate customer understanding and engagement.
- Participate in over 60 community events from June to October to create awareness about our services and engage with potential customers.
- Organize Connect Center events to offer in-person assistance and support to customers.
- Increase the frequency of email and direct mail campaigns to better inform and engage customers about our services.
- Offer both in-person and virtual appointments to provide more convenient options for customers to learn about and sign up for our services.
- Targeted paid media tactics to provide additional touchpoints.
- Specialized TOU support number highlighted on education material.





# Electric Heat Customers

## **Strategy:**

Increase customer engagement with TOU plans through targeted direct mail, email, and trade ally network efforts, emphasizing the best available rates and winter savings tips.

## **Special Support Tactics:**

- Conducted a workshop with trade allies in May to educate them about the change with Electric Heat Rate.
- Will send an additional Rate Education Reports (RER) for customers who are not on the best plan.
- Increase direct mail and email campaigns to electric heat rate customers.
- Provide winter heating coaching support as part of Phase 4, to assist customers in maximizing their savings during the winter season.



# Net-Meter & Solar Subscription Customers

## **Strategy:**

Proactively inform net-meter customers of the upcoming change in their rate to the Peak Reward Saver plan and provide them with comprehensive information on how the rate works.

## **Special Support Tactics:**

- Send a direct mail letter to all net-meter customers, providing them with clear and concise information about the upcoming change in their rate and how it will impact them.
- Follow up with multiple email touchpoints to remind and update customers about the rate change, and to offer additional support and assistance as needed.
- Provide specialized TOU support number for net-meter customers to provide assistance and answer any questions.





# 2023 Tactics and Audience Summary

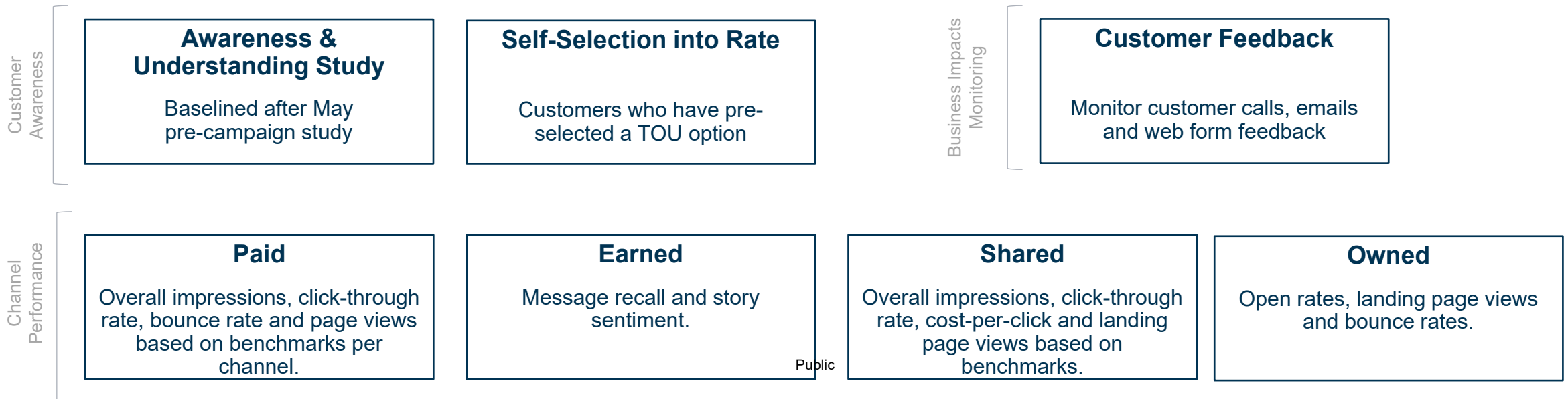
Channel	General Audience	Low Income	Seniors	Hard-to-Reach			Electric Heat Customers	Net-Meter Customers
				Rural	Non-Digital	Less Energy Engaged		
<b>Paid</b>								
<b>Out-of-Home</b>								
Traditional Billboards	X							
Posters	X	X		X	X	X		
<b>Print</b>								
Newspapers	X			X	X			
Church Bulletins	X		X	X	X			
<b>Audio</b>								
Non-Metro Radio	X		X	X	X			
Streaming Audio	X	X				X		
<b>Digital &amp; Social</b>								
Programmatic Display	X	X				X		
High Impact Display	X	X				X		
Digital Video	X	X				X		
Social Video	X			X		X		
Social Image	X			X		X		
Paid Search	X	X		X		X		
<b>Earned</b>								
Media Outreach	x		x	x	x	x		
Community Events	x	x	x	x	x	x		
Connect Center	x	x	x		x			
<b>Shared</b>								
Video	x	x						
Organic Social	x			x				
<b>Owned</b>								
Email	x	x		x			x	x
Website	x	x						x
Rate Education Reports	x			x	x	x	x	
Direct Mail	x	x	x	x	x		x	x
Bill Message and Inserts	x	x		x	x			

# Recap: Campaign Goals and Measurement Plan

## Goals

1. Prepare customers for the upcoming change in rate structures, including the new mandatory rate, and how TOU rates work.
2. Offer choice and inform customers of their rate options and the benefits depending on the customer's lifestyle.
3. Provide customers with tools, resources, and reports that serve to help them understand TOU rates and options, empower them to choose their rate, and provide guidance to modify their behaviors so that they can mitigate usage and bill impact to increase their success on a TOU rate.
4. Help all customers (and with increased emphasis on special customer groups) be successful before, during and after the mandatory TOU rate transition and/or enrollment on their selected TOU rate option.

## Measurement



# Digital Rate Education

*Pre-Enrollment, Enrollment, Post-Enrollment*

Public





# Developing Digital Rate Education

- Develop business and system requirements per rate
- Build and test each rate in CCB
- Provide technical rate information to technology provider through technical integrations
- Develop rate education content for each modeled rate and share with technology provider
- Technology provider configures rates and rate content, performs modeling, test execution
- Evergy writes and executes test cases to quality assure all the above
- Evergy and technology provider migrates all applicable code to production
- Evergy and technology provider validates production migration
- Production management



# Advisory

- Please note, all screenshots provided here are from our test environment and/or mockups. The functionality presented is still under review, editing and testing.

# Pre-Enrollment

Public



# Pre-Enrollment Tools

## Rate Education Reports

**evergy**

Rate Education Report  
March 21, 2023  
Account number XX00001

P.O. Box 418679, Kansas City, MO 64141

Use this shortcut to choose your new rate plan! Scan the QR code.

Choose a new rate plan that works for you

Make your selection today  
If you don't select a new plan, you'll be enrolled in Seasonal Peak starting October 2023.

<p><b>Seasonal Peak</b> Lorem ipsum dolor sit amet, consectetur adipiscing elit, sed diam nonummy nibh euismod tincidunt ut laoreet dolore magna aliquam erat volutpat.</p>	<p><b>Peak Reward</b> Lorem ipsum dolor sit amet, consectetur adipiscing elit, sed diam nonummy nibh euismod tincidunt ut laoreet dolore magna aliqua erat volutpat.</p>	<p><b>Nights &amp; Weekends</b> Lorem ipsum dolor sit amet, consectetur adipiscing elit, sed diam nonummy nibh euismod tincidunt ut laoreet dolore magna aliqua erat volutpat.</p>	<p><b>Nights &amp; Weekends MAX</b> Lorem ipsum dolor sit amet, consectetur adipiscing elit, sed diam nonummy nibh euismod tincidunt ut laoreet dolore magna aliqua erat volutpat.</p>
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How do rate plans compare?  
Estimated average monthly cost per plan (based on your historical usage).

Seasonal Peak	Peak Reward	Nights & Weekends	Nights & Weekends MAX	Current Plan (discontinued)
\$150	\$100	\$150	\$100	\$100

Turn over to learn more →

## Rate Comparison

Your lowest cost rate plan

Based on your electricity use history, you'll save the most on the **Seasonal Peak Saver** rate plan.

Lowest Cost | Save \$210

**Seasonal Peak Saver**

Savings Level: Some effort and flexibility needed

Who it is for: Everyday Users

Tip: Set your thermostat to avoid cooling during the summer Peak hours of 4 to 8 pm

**\$1,885**  
Estimated cost per year

Learn More

You're currently on the Tier Plan rate plan, spending about **\$2,095/year**.

Learn More

Change My Plan

## Mobile App

Rate Plan Options

Account: 0241442953  
7316 HARDY [Switch Account](#)

Rate Plan Options

Flexible rate plan options to fit your lifestyle

Look through our flexible rate plan options to help save money and align with your personal budget, lifestyle and energy usage.

**Seasonal Peak Saver**

This is our new standard rate plan that offers a discounted price for electricity 8 months out of the year.

[See More](#)

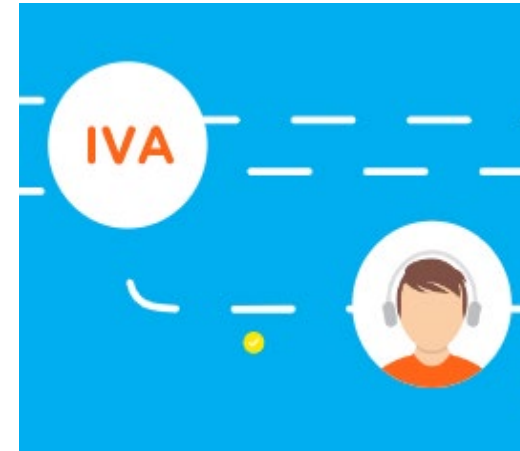
**Peak Reward Saver**

Get a set rate most of the day, plus earn bill credits for electricity used overnight.

[See More](#)

Payment Usage Outages More

## IVA



# Rate Education Reports

- **Goal:** Demonstrate financial impact of rate transition and present options
- **Tactic:** Send a digital Rate Education Report to everyone with an email and print report to every home
- **Availability:**
  - Send 1 – August 2023
  - Send 2 – tbd



P.O. Box 418679, Kansas City, MO 64141

**Rate Education Report**  
March 21, 2020  
Account number XXX0001



Use this shortcut to choose your new rate plan! Scan the QR code.

**Choose a new rate plan that works for you**

Lorem ipsum dolor sit amet, consectetur adipiscing elit, sed diam nonummy nibh euismod tincidunt ut laoreet dolore magna aliquam erat volutpat. Ut wisi enim ad minim veniam, quis nostrud exerci tation ullamcorper suscipit lobortis nisl ut aliquip ex ea commodo consequat. Duis autem vel eum iriure dolor in hendrerit in vulputate velit esse molestie consequat, vel illum dolore eu feugiat nulla facilisis at vero eros et accumsan et iusto odio dignissim qui blandit praesent luptatum zzril delenit augue duis dolore te feugait nulla facilisi. Lorem ipsum dolor sit amet, cons ectetuer adipiscing elit, sed diam nonummy nibh euismod tincidunt ut laoreet.

**! Make your selection today**  
If you don't select a new plan, you'll be enrolled in Seasonal Peak starting October 2023.



**Seasonal Peak**  
Lorem ipsum dolor sit amet, consectetur adipiscing elit, sed diam nonummy nibh euismod tincidunt ut laoreet dolore magna aliqua erat volutpat.



**Peak Reward**  
Lorem ipsum dolor sit amet, consectetur adipiscing elit, sed diam nonummy nibh euismod tincidunt ut laoreet dolore magna aliqua erat volutpat.



**Nights & Weekends**  
Lorem ipsum dolor sit amet, consectetur adipiscing elit, sed diam nonummy nibh euismod tincidunt ut laoreet dolore magna aliqua erat volutpat.



**Nights & Weekends MAX**  
Lorem ipsum dolor sit amet, consectetur adipiscing elit, sed diam nonummy nibh euismod tincidunt ut laoreet dolore magna aliquat.


**How do rate plans compare?**  
Estimated average monthly cost per plan (based on your historical usage).



**Publicver to learn more →**

## How can time of use rate plans work for you?

Small actions go a long way when it comes to shifting your energy use away from on-peak hours. You'll save energy *and* money—while lessening the impact on the grid for everyone. Take simple steps like delaying running large appliances such as your dryer and dishwasher until off-peak hours. Another great way to save is using a smart thermostat to automate your heating and cooling systems to run less frequently during on-peak hours.





---

## What time should you use energy based on new plans?


To make the most of your rate plan, do your best to make a habit of shifting energy use away from on-peak hours (4pm-8pm). See below for a breakdown of each rate plan's hours so you can find the one that works with your lifestyle.

**Seasonal Peak** more \$




\*No peak pricing Oct-May. TOU rates apply June-Sept only.

**+1 Peak Reward** more \$




\*Use electricity during super saver hours and receive discount credits.

**Nights & Weekends** 6x more \$

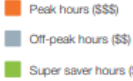


\*No peak hours on holidays and weekends.


**Nights & Weekends MAX** 12x more \$



\*No peak hours on holidays and weekends.



**Choose your new plan!**




Use this digital shortcut to choose your new rate plan. Scan QR code.  
Or call XXX-XXX-XXX.

Learn more and select your rate plan at [evergy.com/plandetails](https://evergy.com/plandetails).

This rate comparison is provided for illustrative purposes only and does not constitute a representation or recommendation by Evergy as to what rate is best for you. Evergy cannot guarantee the accuracy, completeness or usefulness of the estimated cost information. Estimated costs shown may vary from results of the online rate comparison tool, since your energy use and billing period may have changed from the time this report was generated. Evergy expressly disclaims any and all liability for any damages of any nature (including direct, indirect, incidental and consequential) arising in connection with the use of the estimated rate comparison.

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# Rate Comparison

- **Goal:** Enable evaluation of rate plan options, including personalized financial information and simulation experiences
- **Tactic:** Enhance existing Rate Comparison tool to include new TOU rates
- **Availability:** June 2023

Your lowest cost rate plan

Based on your electricity use history, you'll save the most on the **Nights & Weekends Max Saver** rate plan.

Lowest Cost | Save \$75

**Nights & Weekends Max Saver**

Savings Level: More effort and more flexibility needed

Who it is for: EV Drivers or Flexible Energy Users

Tip: Schedule your EV charger and large appliances to start overnight

**\$2,020**  
Estimated cost per year

[Learn More](#)

You're currently on the **Tier Plan** rate plan, spending about **\$2,095/year**.

[Learn More](#)

[Change My Plan](#)



### Shifting your energy habits can lower your costs.

Answer a few questions about your energy habits to see how your costs change.

[Use Our Rate Simulator](#)

Public

## Compare All Rate Plans

### Lowest Cost Rate

#### Nights & Weekends Max Saver

Savings Level: More effort and more flexibility needed

Who it is for: EV Drivers or Flexible Energy Users

Tip: Schedule your EV charger and large appliances to start overnight

**\$2,020**/year

[Learn More](#)

#### Peak Reward Saver

Savings Level: Some effort and flexibility needed

Who it is for: Everyday or Reward Focused Energy Users

Tip: Earn bill credits when you shift your large appliance use overnight

**\$2,030**/year

[Learn More](#)

#### Seasonal Peak Saver

Savings Level: Some effort and flexibility needed

Who it is for: Everyday Users

Tip: Set your thermostat to avoid cooling during the summer Peak hours of 4 to 8 pm

**\$2,040**/year

[Learn More](#)

### Your Current Rate

#### Tier Plan

Ideal for: Those who want to monitor overall energy use

Highest price: Summer. When you reach the third tier

Savings tip: Actively monitor all the ways you use energy

**\$2,095**/year

[Learn More](#)

#### Nights & Weekends Saver

Savings Level: Some effort and flexibility needed

Who it is for: Budget or Sustainability Focused Energy Users

Tip: Use smart thermostats and appliance settings to shift when you use energy

**\$2,160**/year

[Learn More](#)

# Mobile App Rate Education

- **Goal:** Enable Rate Education through the Evergy Mobile App
- **Tactic:** Add a Rate Education page to the existing Evergy Mobile App, with links to this page throughout the app
- **Availability:** June 2023

< Rate Plan Options

Account: 0241442953 [Switch Account](#)  
7316 HARDY


---

**Rate Plan Options**

Flexible rate plan options to fit your lifestyle

Look through our flexible rate plan options to help save money and align with your personal budget, lifestyle and energy usage.

---




**Seasonal Peak Saver**

This is our new standard rate plan that offers a discounted price for electricity 8 months out of the year.

[See More](#)

---



**Peak Reward Saver**

Get a set rate most of the day, plus earn bill credits for electricity used overnight.


[See More](#)

\$ Payment
Usage
⚡ Outages
⋮ More

< Rate Plan Options

Account: 0241442953 [Switch Account](#)  
7316 HARDY

---




**Peak Reward Saver**

Get a set rate most of the day, plus earn bill credits for electricity used overnight.

[See More](#)

---




**Nights & Weekends Saver**

Designed with budget or sustainability focused energy users in mind, this plan offers a lower energy price overnight.

[See More](#)

---



**Nights & Weekends Max Saver**

Designed with EV drivers in mind, this plan offers a very low energy price overnight.

[See More](#)

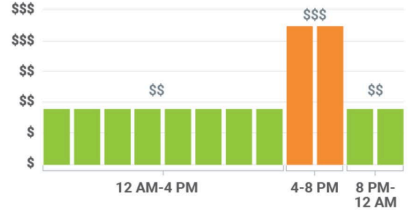
\$ Payment
Usage
⚡ Outages
⋮ More

< Rate Plan Options

Account: 0241442953 [Switch Account](#)  
7316 HARDY


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Summer Weekdays (Mon-Fri)



---

Summer Weekends (Sat-Sun)



\$ Payment
Usage
⚡ Outages
⋮ More

# Intelligent Virtual Assistant (IVA) Rate Education

**Goal:** Strategically leverage the IVA to provide TOU rate education and manage call volume

**Tactic:** Enhance the IVA to identify TOU related calls and send optional text messages to callers w/TOU self-service information ahead of or instead of directly transferring them to specialized TOU representatives

**Availability:** June/July 2023



# Enrollment


Public




## Change My Rate

### Select Your Rate Plan

1 Select 2 Review 3 Confirm




**Tier Plan** (your current plan)  
Our Tier Plan, which is going away in Fall 2023, has three pricing levels based on how much energy you use. Rates go up by tier in the summer and down in the winter. Once you use your monthly allotment of energy in one tier, your rate changes to the next tier's price. To save, monitor your overall energy use, especially in the summer. [Learn More](#)




**Seasonal Peak Saver**  
With no Peak pricing 8 months out of the year, our standard plan makes it easy to manage your energy costs. To save, focus on shifting summer (June-September) electricity usage away from weekday Peak hours of 4 to 8 pm. By shifting when you use your major appliances away from summer Peak hours (like doing laundry, cooling your home, or running the dishwasher), you pay less for the energy you use. [Learn More](#)

Select Plan




**Peak Reward Saver**  
This plan offers a set rate, but also incorporates discount credits and extra charges based on the time of day you use electricity. If you use electricity during Super Saver hours (12 to 6 am), you'll receive discount credits, whereas if you use electricity during daily Peak hours (4 to 8 pm), additional charges will be applied. To save, keep your overall electricity usage low and shift big appliance use to Super Saver hours. [Learn More](#)

Select Plan



**Nights & Weekends Saver**  
Get rewarded with a lower overnight rate. To save, schedule your smart thermostat and set your large appliances to run during the Saver (6 am to 4 pm and 8 pm to 12 am) and Super Saver (12 to 6 am) hours. It's important to avoid some electricity use during the weekday Peak hours of 4 to 8 pm, as those hours are 6x more expensive than overnight. On weekends and holidays, there are no Peak hours, so you always save. [Learn More](#)

Select Plan



**Nights & Weekends Max Saver**  
Get rewarded with our lowest overnight rate. To save, schedule your EV to charge overnight and set your large appliances to run during the Super Saver hours of 12 to 6 am. It's important to avoid heavy electricity use during the weekday Peak hours of 4 to 8 pm, as those hours are 12x more expensive than overnight/Super Saver. On weekends and holidays, there are no Peak hours, so you always save. [Learn More](#)

Select Plan

### Rate Plan Review

1 Select 2 Review 3 Confirm

Carefully review the following details before submitting your rate plan change.

**Address**  
829 W GREGORY BLVD

**Current Plan** → **New Plan**  
Tier Plan → Nights & Weekends Max Saver

**Effective Date**  
05/15/2023

Submit Plan Cancel

By submitting, I agree to the [terms and conditions](#), and I authorize Eversource to change my rate plan.

1 2 3 ✓

✓ Thank you! Your new rate plan will be effective on 05/15/2023.

**What to Expect Next**  
Your new plan will become effective on the next business day. Your electric service will remain on during this transition.


**Address**  
829 W GREGORY BLVD

**Current Plan** → **New Plan**  
Tier Plan → Nights & Weekends Max Saver

**Effective Date**  
05/15/2023

Want to see how you're doing on your new plan? Track your energy usage and costs hourly or daily with [Usage & Cost Trends](#). Plus, watch for our weekly Energy Coach emails to receive updates on how you're doing.


## Start/Transfer Service



### Start New Service


1 2 3 4 5 6 7 8

Select a plan that fits your lifestyle. You can always change your plan after your service has started.

 **Seasonal Peak Saver**


This is our standard rate plan that offers a discounted price for electricity 8 months out of the year. This is the plan that works best for most customers.

[See More](#)


 **Peak Reward Saver**

Get a set rate most of the day, plus earn bill credits for electricity used overnight.

[See More](#)

 **Nights & Weekends Saver**

Designed with budget or sustainability focused energy users in mind, this plan offers a lower energy price overnight.

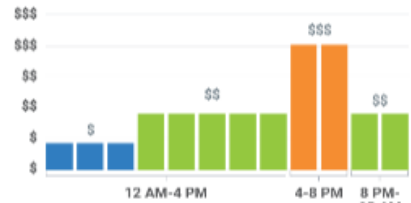
 **Nights & Weekends Saver**

Designed with budget or sustainability focused energy users in mind, this plan offers a lower energy price overnight.

- Savings Level:** Some effort and flexibility needed
- Who it is for:** Budget or Sustainability Focused Energy Users
- Tip:** Use smart thermostats and appliance settings to shift when you use energy

Get rewarded with a lower overnight rate. To save, schedule your smart thermostat and set your large appliances to run during the Saver (6 am to 4 pm and 8 pm to 12 am) and Super Saver (12 to 6 am) hours. It's important to avoid some electricity use during the weekday Peak hours of 4 to 8 pm, as those hours are 6x more expensive than overnight. On weekends and holidays, there are no Peak hours, so you always save.

Weekdays (Mon-Fri)





# Change My Rate

## 3 step process for rate change at a premise: **Select, Review, Confirm**

## Enhance existing tool with new TOU rates, available June 2023

**Select Your Rate Plan**

1 Select   2 Review   3 Confirm

---

**Tier Plan** *(your current plan)*

Our Tier Plan, which is going away in Fall 2023, has three pricing levels based on how much energy you use. Rates go up by tier in the summer and down in the winter. Once you use your monthly allotment of energy in one tier, your rate changes to the next tier's price. To save, monitor your overall energy use, especially in the summer. [Learn More](#)

**Seasonal Peak Saver**

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Select Plan

**Peak Reward Saver**

This plan offers a set rate, but also incorporates discount credits and extra charges based on the time of day you use electricity. If you use electricity during Super Saver hours (12 to 6 am), you'll receive discount credits, whereas if you use electricity during daily Peak hours (4 to 8 pm), additional charges will be applied. To save, keep your overall electricity usage low and shift big appliance use to Super Saver hours. [Learn More](#)

Select Plan

**Nights & Weekends Saver**

Get rewarded with a lower overnight rate. To save, schedule your smart thermostat and set your large appliances to run during the Saver (6 am to 4 pm and 8 pm to 12 am) and Super Saver (12 to 6 am) hours. It's important to avoid some electricity use during the weekday Peak hours of 4 to 8 pm, as those hours are 6x more expensive than overnight. On weekends and holidays, there are no Peak hours, so you always save. [Learn More](#)

Select Plan

**Nights & Weekends Max Saver**

Get rewarded with our lowest overnight rate. To save, schedule your EV to charge overnight and set your large appliances to run during the Super Saver hours of 12 to 6 am. It's important to avoid heavy electricity use during the weekday Peak hours of 4 to 8 pm, as those hours are 12x more expensive than overnight/Super Saver. On weekends and holidays, there are no Peak hours, so you always save. [Learn More](#)

Select Plan

**Rate Plan Review**

1 Select   2 Review   3 Confirm

---

Carefully review the following details before submitting your rate plan change.

**Address**  
829 W GREGORY BLVD

**Current Plan** → **New Plan**  
Tier Plan → Nights & Weekends Max Saver

**Effective Date**  
05/15/2023

Submit Plan   Cancel

By submitting, I agree to the [terms and conditions](#), and I authorize Evergy to change my rate plan.

1   2   3 ✓

✓ Thank you! Your new rate plan will be effective on 05/15/2023.

**What to Expect Next**  
Your new plan will become effective on the next business day. Your electric service will remain on during this transition.

**Address**  
829 W GREGORY BLVD

**Current Plan** → **New Plan**  
Tier Plan → Nights & Weekends Max Saver

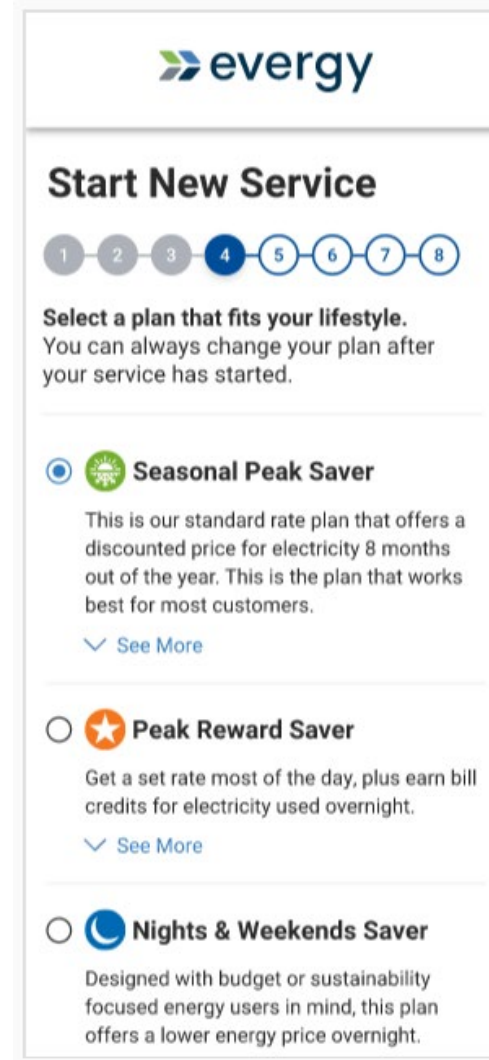
**Effective Date**  
05/15/2023


Want to see how you're doing on your new plan?  
Track your energy usage and costs hourly or daily with [Usage & Cost Trends](#). Plus, watch for our weekly Energy Coach emails to receive updates on how you're doing.



# Start and Transfer Service – Rate Choice

- **Goal:** Enable TOU rate selection at the time of Start and Transfer Service
- **Tactics:**
  - **Web:** Add a rate selection step within the web Start and Transfer Service tool, enabling full TOU choice
  - **Contact Center, Connect:** enable full TOU choice on start/transfer service calls
  - **IVA:** start new/transfer service requests on the default TOU rate
- **Availability:** August 2023






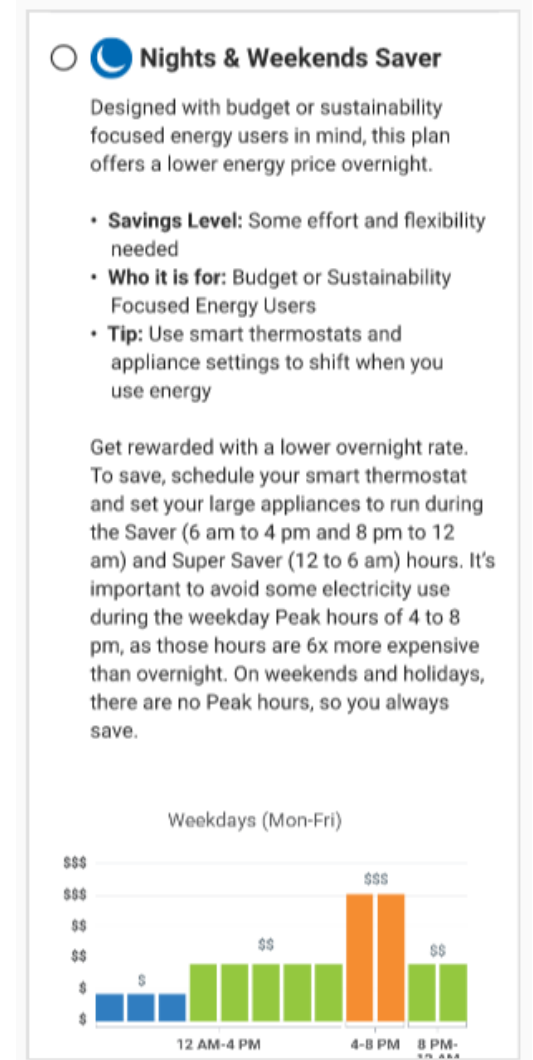



## Start New Service

1 2 3 4 5 6 7 8

**Select a plan that fits your lifestyle.**  
You can always change your plan after your service has started.

-  **Seasonal Peak Saver**  
This is our standard rate plan that offers a discounted price for electricity 8 months out of the year. This is the plan that works best for most customers.  
[See More](#)
-  **Peak Reward Saver**  
Get a set rate most of the day, plus earn bill credits for electricity used overnight.  
[See More](#)
-  **Nights & Weekends Saver**  
Designed with budget or sustainability focused energy users in mind, this plan offers a lower energy price overnight.




 **Nights & Weekends Saver**

Designed with budget or sustainability focused energy users in mind, this plan offers a lower energy price overnight.

- **Savings Level:** Some effort and flexibility needed
- **Who it is for:** Budget or Sustainability Focused Energy Users
- **Tip:** Use smart thermostats and appliance settings to shift when you use energy

Get rewarded with a lower overnight rate. To save, schedule your smart thermostat and set your large appliances to run during the Saver (6 am to 4 pm and 8 pm to 12 am) and Super Saver (12 to 6 am) hours. It's important to avoid some electricity use during the weekday Peak hours of 4 to 8 pm, as those hours are 6x more expensive than overnight. On weekends and holidays, there are no Peak hours, so you always save.

Weekdays (Mon-Fri)



Time Period	Rate Level
12 AM-4 PM	\$
4-8 PM	\$\$\$
8 PM-12 AM	\$\$

# Post-Enrollment

Public





# Post-Enrollment Tools

## Rate Coach Reports

**evergy**  
KATHRYN A. YOUNG  
Acct \*\*\*\*9600

Welcome to your Rate Coach, a weekly email designed to help you save money by avoiding high-cost times

You're currently on a Time of Use Rate Plan that charges different prices throughout the day. When customers on this plan shifted their electricity usage away from 4 p.m. to 8 p.m., they saved on average \$5 to \$30 a month.

**Here's how you used electricity during the weekdays**

What parts of your routine could you do at off-peak times?

6  
4  
2  
0 kWh

12am 6am 4pm 8pm 11pm

■ Super Saver (\$) ■ Saver (\$\$) ■ Peak (\$\$\$)

This data is based on your average weekday electricity use from Oct 7 to Oct 11.

On weekdays, electricity is 6x more expensive from 4 pm to 8 pm

\$ \$\$ \$\$\$ \$\$

12am 6am 4pm 8pm 11pm

How can you save big during peak hours?

## High Bill Alerts

Your bill is projected to be \$195

⚠ That's higher than the high bill threshold you set.

[CHANGE YOUR THRESHOLD](#)

**What you spent on electricity**

On **weekdays**, electricity is 6x more expensive from 4 pm to 8 pm.

\$	Super Saver	12am - 6am 6 hours	\$7
\$\$	Saver	6am - 4pm 10 hours	\$4
\$\$\$	Peak	4pm - 8pm 4 hours	\$3
\$\$	Saver	8pm - 12am 4 hours	\$4

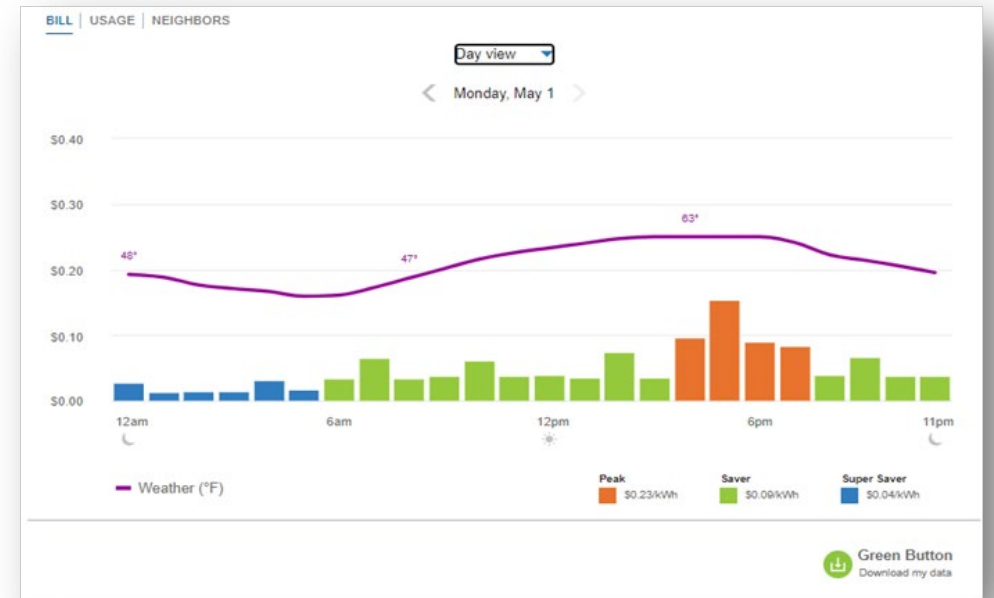
On **weekends**, there are no peak hours.

\$	Super Saver	12am - 6am 6 hours	\$5
\$\$	Saver	6am - 12am 18 hours	\$7

Based on your electricity use between January 26, 2023 - January 31, 2023

[SEE MORE ELECTRICITY TRENDS](#) Public

## Rate Management – Web and Mobile App



**Next Bill Forecast**

✓ Your projected bill is **\$50**

APR 21 - MAY 20

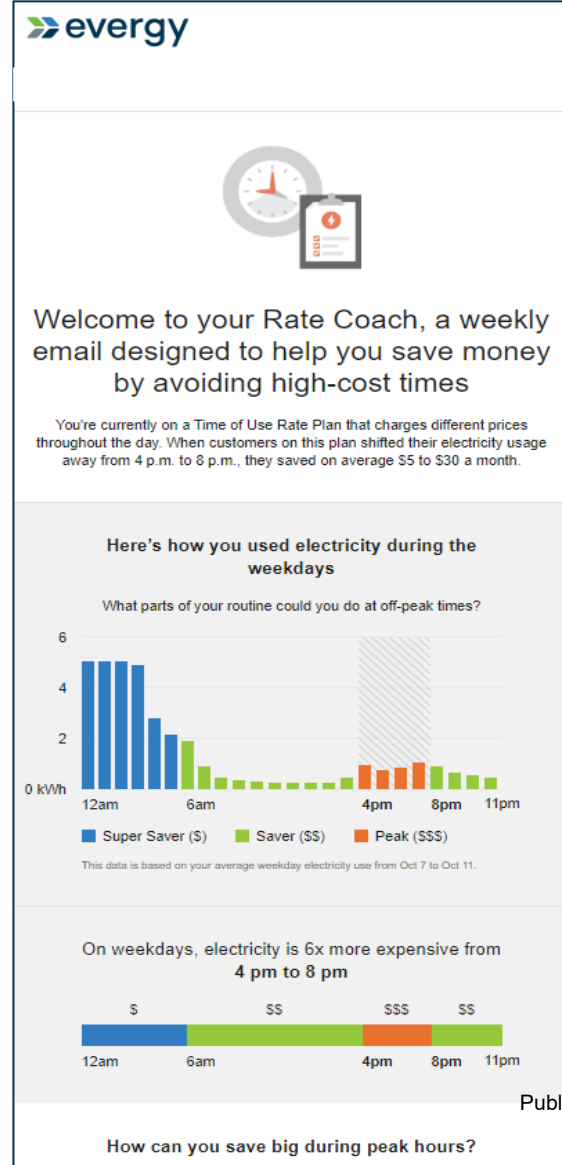
That's about **\$100 less** than last year. You've spent about **\$19** so far this bill period.

[Help Lower My Bill](#)

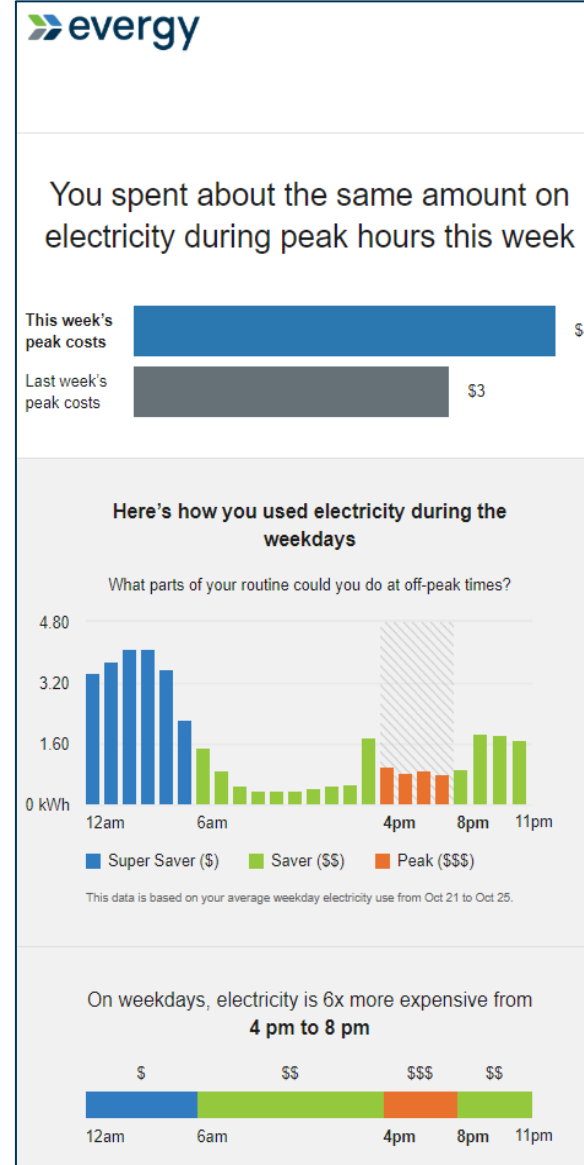
# Rate Coach Reports

- **Goal:** Encourage customers to change usage behaviors in response TOU rate pricing and enable overall rate management
- **Tactic:** Enhance existing weekly Rate Coach reports to include new TOU rates and send to all eligible customers
- **Availability:**
  - June 2023 – new TOU rates
  - August 2023 – tiered TOU rates

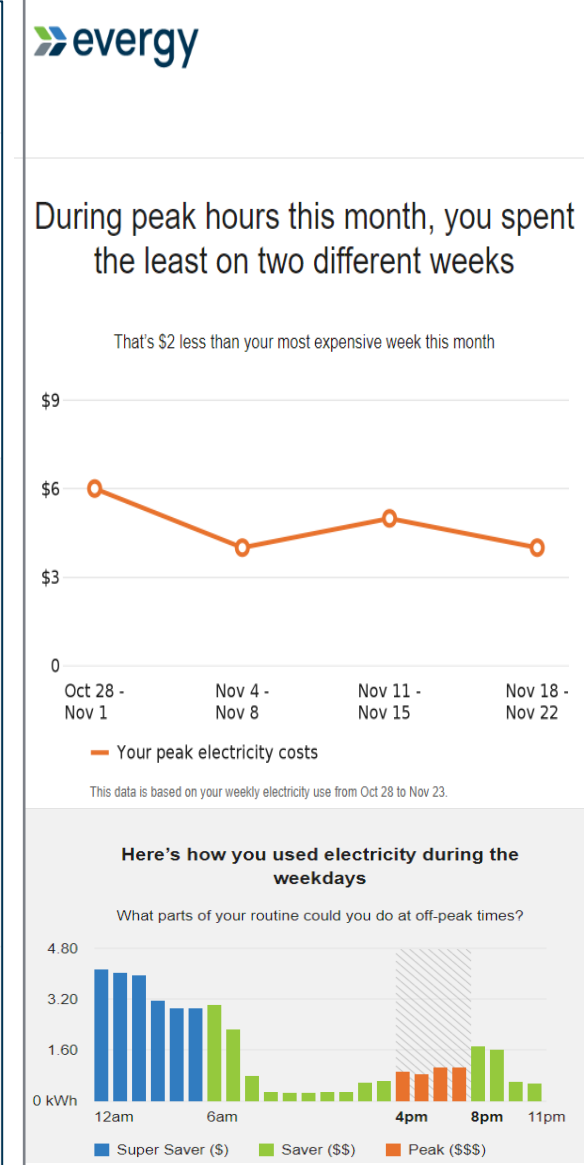
## Welcome to Rate Coach (email) 10-14 days after rate switch



## Weekly Rate Coach (email) 21 days after rate switch




## Rate Coach Monthly Summary (email) 35 days after rate switch



# High Bill Alert

- **Goal:** Help customers understand when their usage behaviors result in them tracking towards a higher-than-normal bill and suggest ways to adjust usage to avoid a higher than anticipated bill
- **Tactic:** Enhance existing High Bill Alerts to include new TOU rates and send to all eligible customers
- **Availability:** June 2023



Your bill is projected to be \$195

 That's higher than the high bill threshold you set.


[CHANGE YOUR THRESHOLD](#)

### What you spent on electricity

On **weekdays**, electricity is 6x more expensive from 4 pm to 8 pm.

	Super Saver	12am - 6am 6 hours	\$7
	Saver	6am - 4pm 10 hours	\$4
	Peak	4pm - 8pm 4 hours	\$3
	Saver	8pm - 12am 4 hours	\$4

On **weekends**, there are no peak hours.

	Super Saver	12am - 6am 6 hours	\$5
	Saver	6am - 12am 18 hours	\$7

Based on your electricity use between January 26, 2023 - January 31, 2023


[SEE MORE ELECTRICITY TRENDS](#)


### What caused your bill to change?


The weather has been similar to this time last year, and may not have affected your bill.

Other factors, like frequent use of major appliances, may have contributed.

### Ways to Save

 **Clear area around heating and cooling vents**  
Furniture and carpets can block vents and prevent rooms from warming up or cooling down efficiently. Move objects away from vents to maximize circulation and save money throughout the day, and even more during peak hours.

 **Shave a minute off shower time during peak hours**  
The average American spends about 8 minutes showering. Reducing shower time by 1 minute can save 13% on water heating costs for your shower. This saves money any time you shower, with greater savings during peak hours.

 **Use a plug-in power meter**  
Plug-in power meters show you how much electricity each of your appliances and electronics uses. This can help you know what uses the most electricity so you can avoid using those devices during peak hours.

[SEE MORE WAYS TO SAVE](#)

# Rate Management Tools (subset)

- **Goal:** Enable education and daily management of TOU rates
- **Tactic:** Enhance existing digital toolset to include new TOU rates
- **Availability:** June 2023

## Bill Forecast

**Next Bill Forecast**

✓ Your projected bill is **\$50**

APR 21 - MAY 20

That's about **\$100 less** than last year. You've spent about **\$19** so far this bill period.

[Help Lower My Bill](#)

## Rate Compare Lite

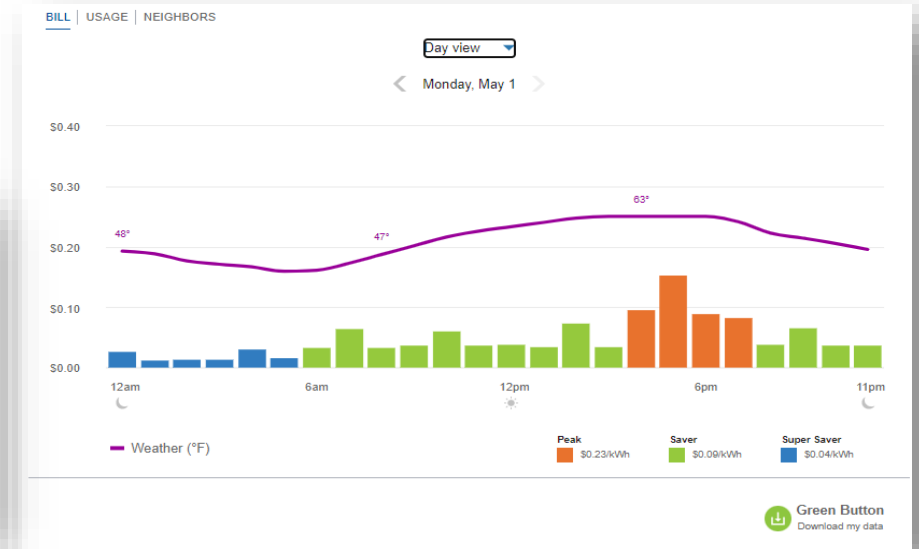
**Explore Your Rate Plan Options**

- 🌿 Seasonal Peak Saver
- ★ Peak Reward Saver
- 🌙 Nights & Weekends Saver
- 🌙 Nights & Weekends Max Saver

Did you know?  
Every offers multiple rate plans to fit your lifestyle. Visit our Rate Comparison tool to see how much you might save on a different plan.

[View My Plan Options](#)

## Hourly Cost



## Hourly Usage

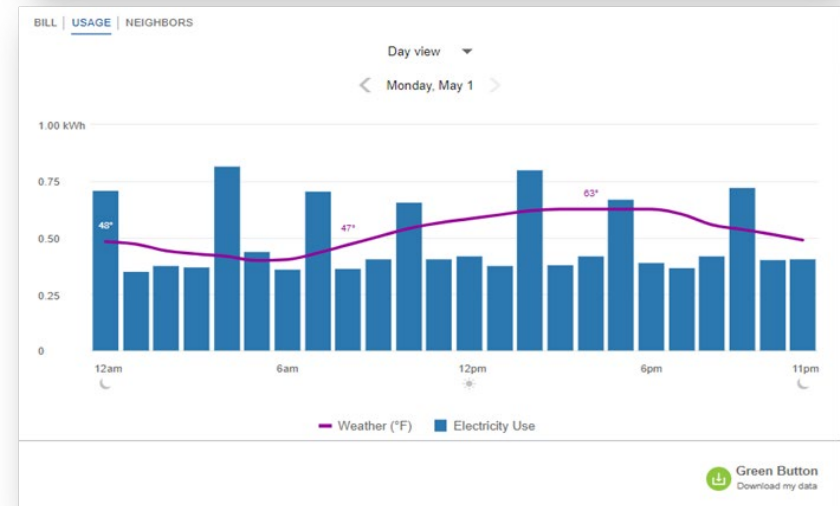
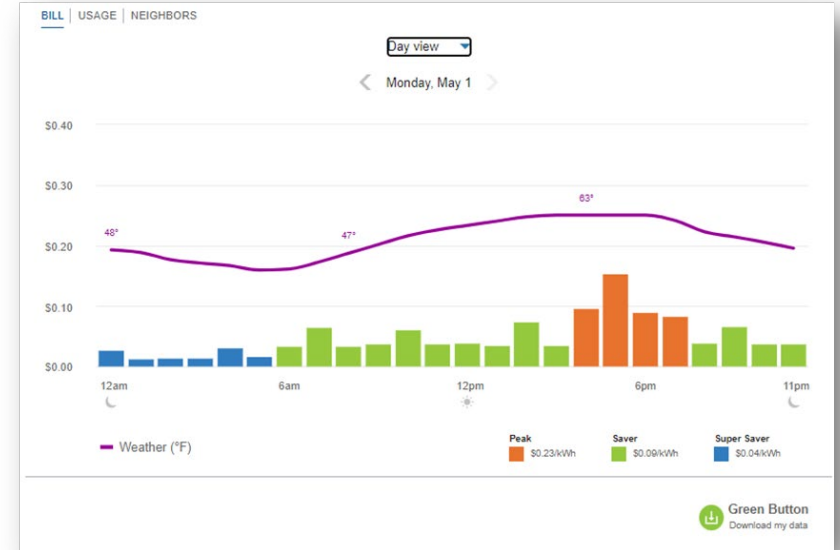




# Mobile App – Future Release

- **Goal:** Enable more accessible rate education and rate management through the Mobile App
- **Tactic:** Enhance the Mobile App with rate management tools
  - Usage and Cost
  - Bill Forecast
  - Compare My Rate
  - Change My Rate
- **Availability:** Targeting Q4 2023/early Q1 2024

*\*scope still being defined*



# Summary

Public





# Digital Rate Education Tools Summary

Education Stage	Channel/Tools			
<b>Pre-Enrollment</b>	Rate Education Reports	Rate Comparison	Mobile App	IVA
<b>Enrollment</b>	Change My Rate	Web Start/Transfer Service	IVA Start/Transfer Service	Contact Center  Evergy Connect
<b>Post-Enrollment</b>	Weekly Rate Coach	High Bill Alerts	Digital Rate Management Suite	Mobile App

# Contact Center Support and System Update

Public





# Contact Center Preparations

Public





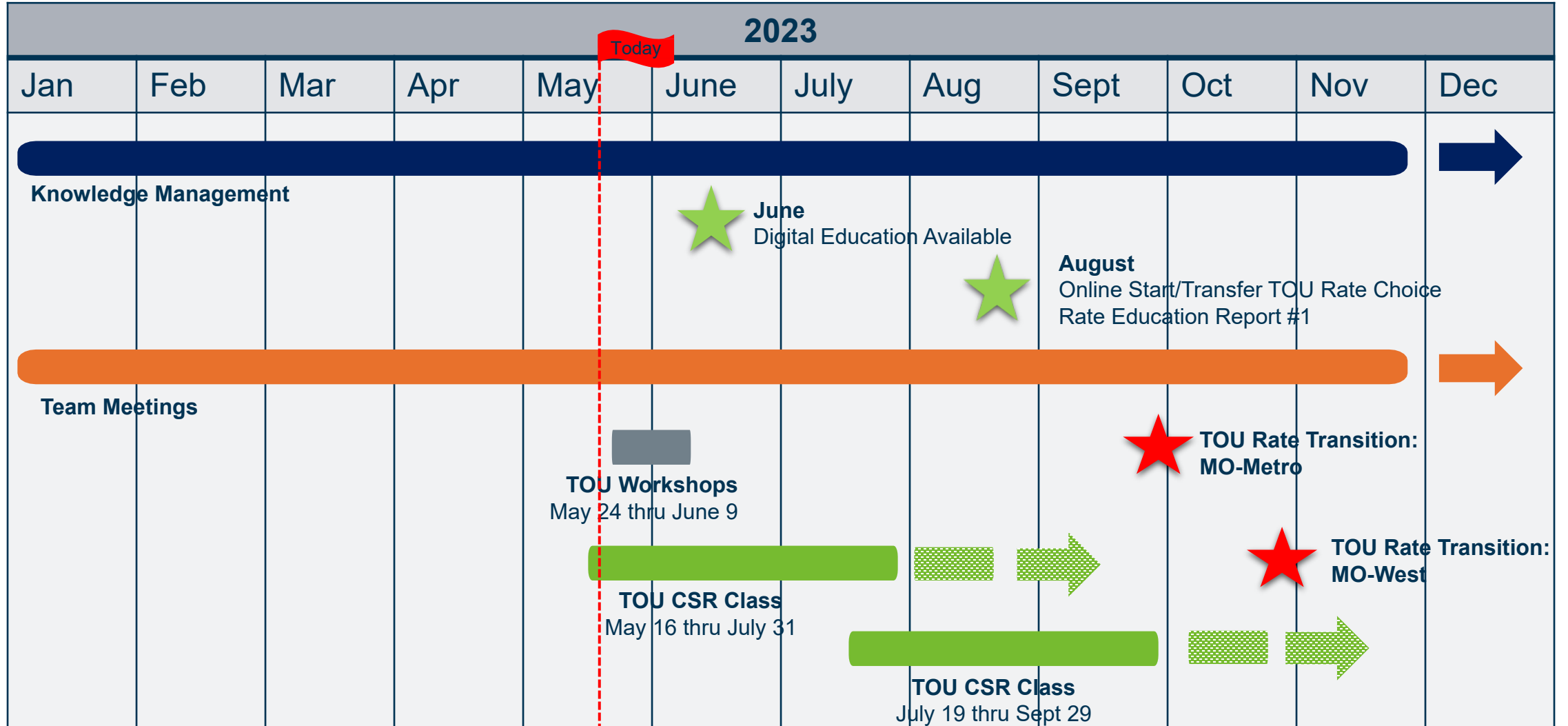
# Contact Center TOU Strategy

## *TOU Customer Support*

- Team of up to 30 TOU contingent CSRs – Staggered hiring based on need
  - First class currently in training
  - Current CSRs can and are taking TOU calls
  
- IVA Call Management
  - Two call paths for customer
    - Dedicated TOU Phone Number
    - Main Contact Center Phone Number
  - Dedicated TOU Skill Queue
  - Call Back functionality
  
- Escalation Process
  - CSRs will follow the current process and escalate to a Resolution Team member to assist with questions and/or concerns.



# Customer Support Timeline





# Customer Support Training

## *Awareness and Training*



Knowledge Management delivers timely communication, resources for training, and continually updates and maintains process documentation



Team meetings leveraged for targeted updates throughout the year



Time of Use Workshops covering: Rate Review, Customer Education, Default Implementation, Procedure and Tool Updates



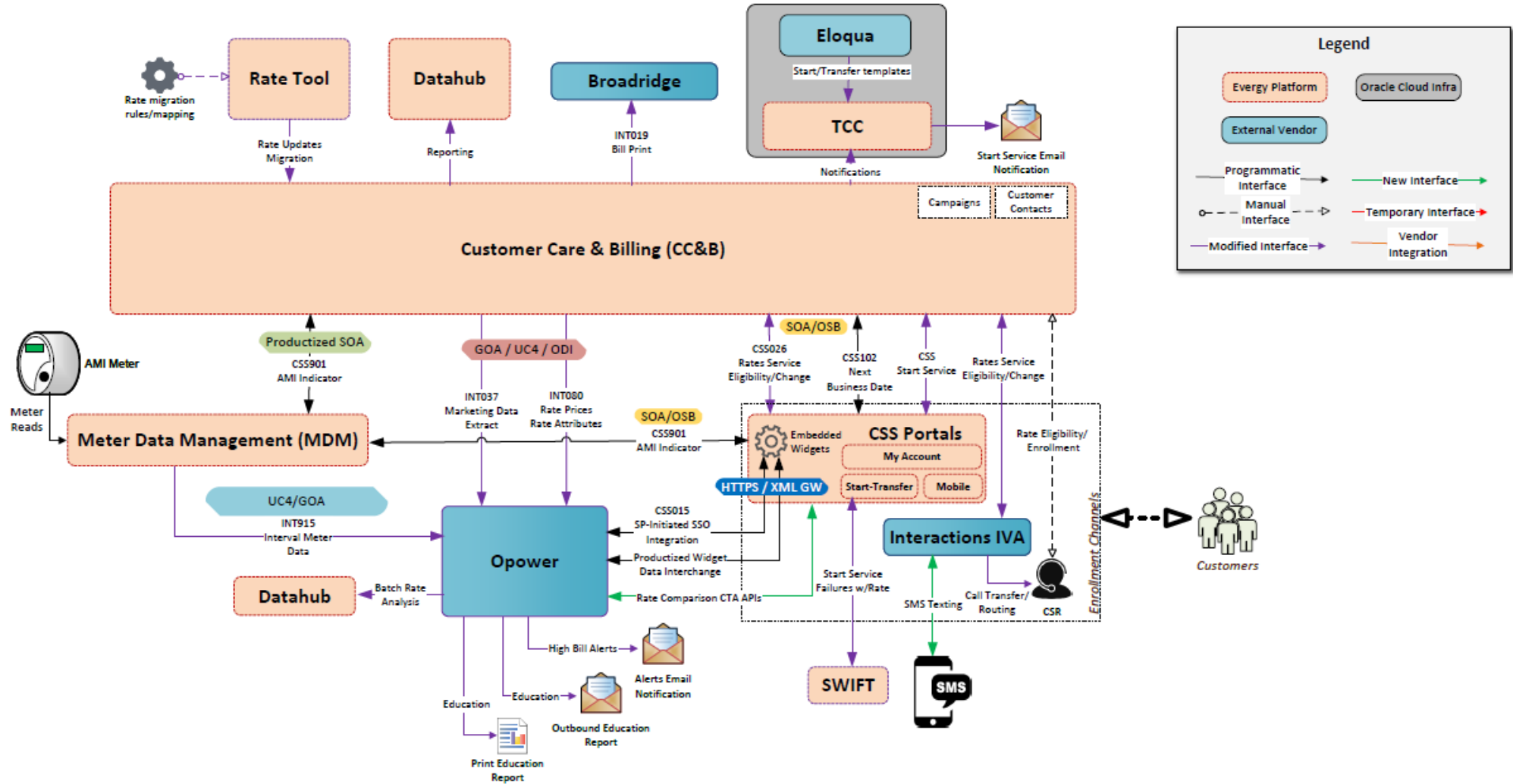
Comprehensive training for dedicated CSRs to gain familiarity with customer inquiries while adding expertise for TOU rate education

# System Integration and Change Impacts

Public



# MO Residential Default TOU Rates Architecture





# Customer Default Rate Changes

Current Rate	New Default Rate	Rate Code	Rate Name
Current TOU customers	Stay on current selected rate	1RTOU & MORT	Nights & Weekends Saver
Net Meter, Solar Subscription, Low Income Solar, Parallel Gen	Residential Peak Adjustment	1RPKA & MORPA	Peak Reward Saver
All Other Rates (General, Residential Heat, Separately Metered Heat, Other)	Two Part TOU	1RTOU2 & MORT2	Seasonal Peak Saver
Non-AMI Meters	Stay on current rate	<i>Customer's Current Rate</i>	<i>Customer's Current Rate</i>



# Default TOU Decisions

Decision	Outcome
Order of Implementation by Division	Implementation will begin with Missouri Metro with the first bill cycle for October. Missouri West customers will begin transitioning with first bill cycle of November.
Eligibility Requirements/Restrictions for Changing TOU Rate	There will be no restrictions for customers who wish to switch between eligible TOU rates. However, customer messaging will strongly recommend customers stay on rate for a season or at least 3 billing cycles to understand usage patterns and determine impact.
Start Date for TOU enrollment	Beginning in August 2023, all new starts/transfers will start with a TOU rate (default or optional) in all channels (Contact Center, IVA, Web). Escalations can be managed through the contact center





# Default TOU Decisions

Decision	Outcome
Revert to Standard Rate	Beginning in June 2023, once a customer enrolls in a TOU rate, they will no longer be eligible to revert to a Non-TOU rate at that premise. Escalations can be managed through the contact center.
Rate Compare Options	Starting in June, if a customer is enrolled in a TOU rate, the compare to general rate will not be available. If the customer is still on the general rate, the compare is available.
Non-AMI Meters	Non-AMI meter customers will stay on current rate

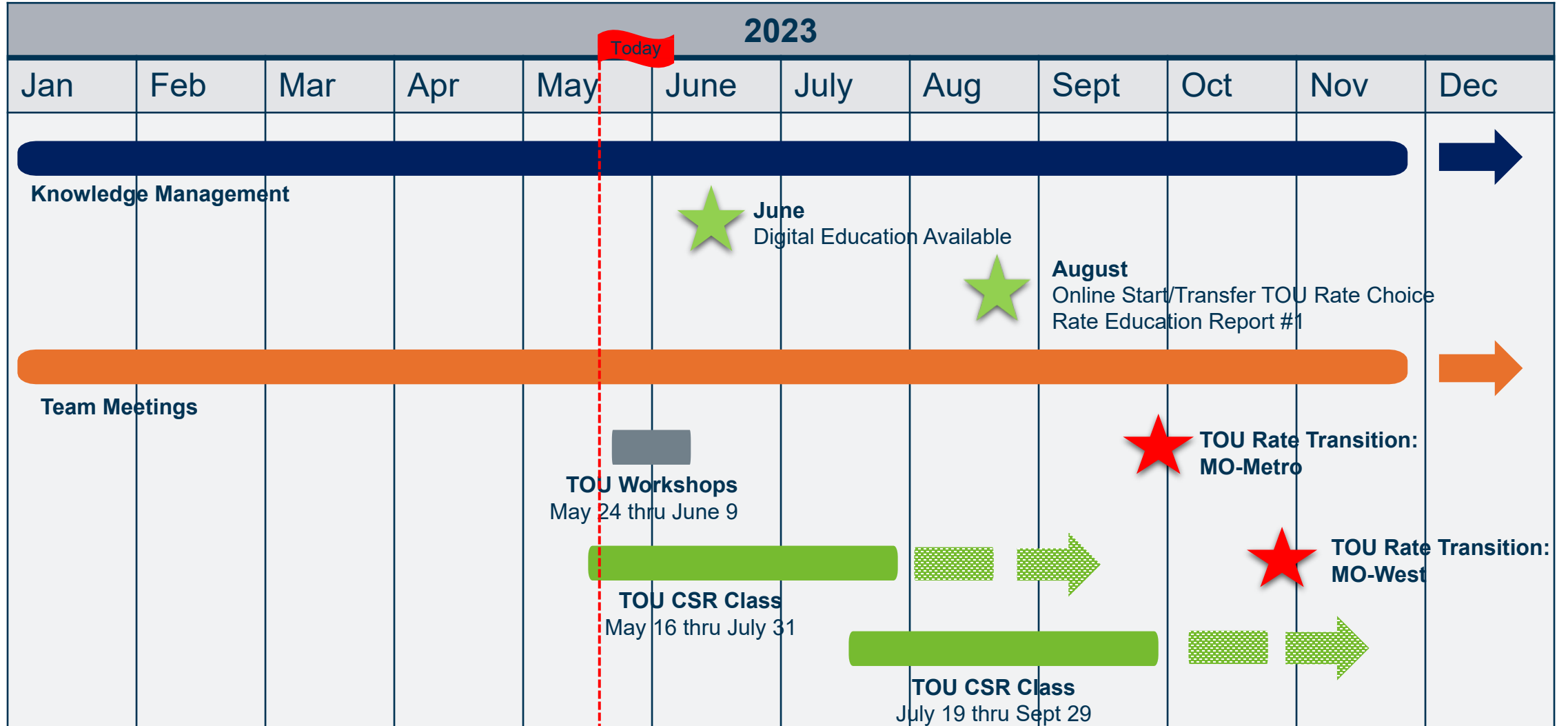


# Potential Customer Impacts

- Rate compare experience differences (new customers vs. existing customers)
- Rate tool exceptions driving manual work could impact transition timing
- Landlord reverts and setting expectations



# Customer Support Timeline



# Cost Tracking & Reporting Update

Public



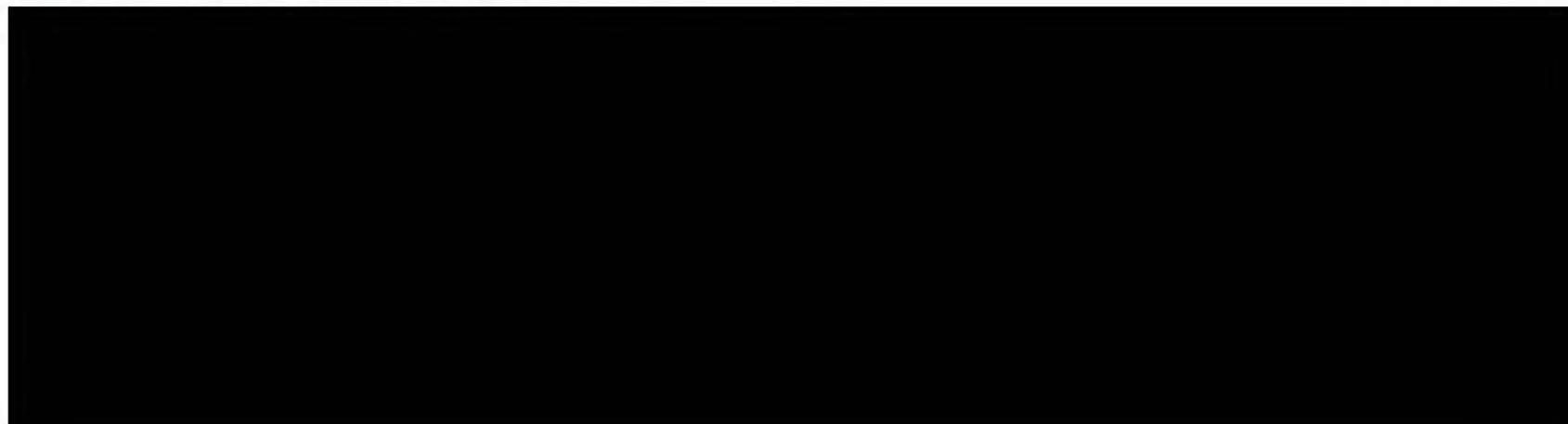


# Quarterly Cost Reporting

*Education & Outreach - AAO*

*Expenses through March 31, 2023, in millions*

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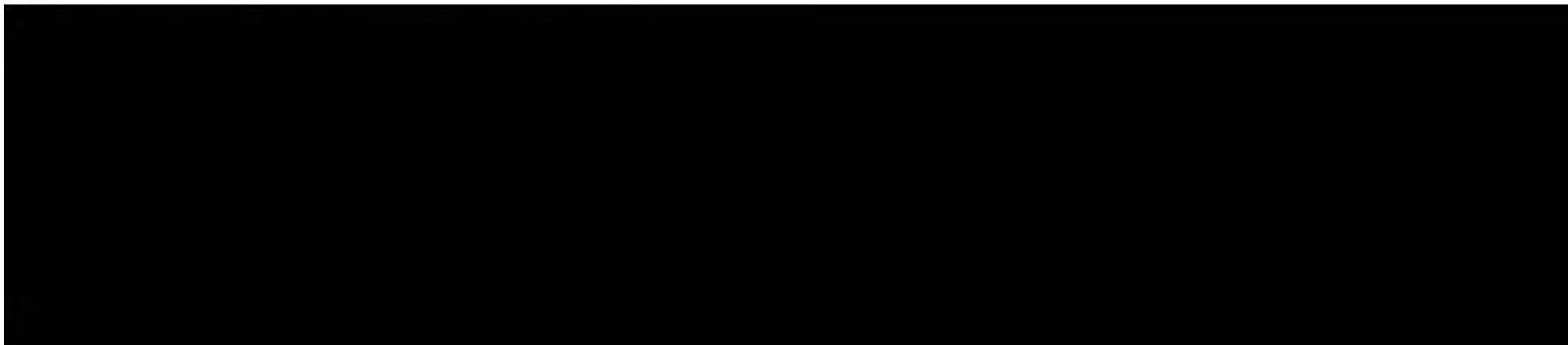


# Quarterly Cost Reporting

*Education & Outreach - AAO*

*Expenses through March 31, 2023, in millions*

\*\*



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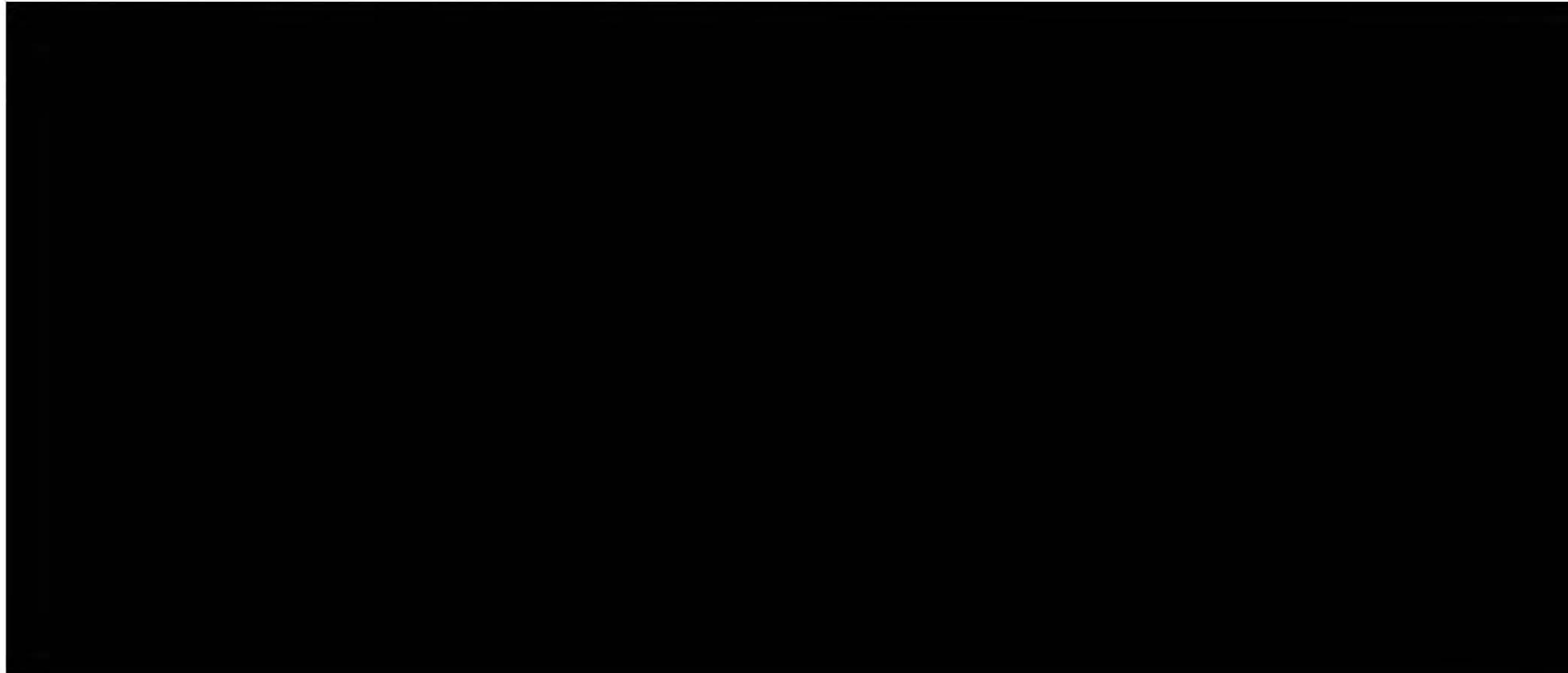


# Capital Implementation

## *System & Technology Changes – Capex*

*Expenses through March 31, 2023, in millions*

\*\*



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# Total Implementation Cost for TOU

*Education & Outreach Plus System & Technology Changes – AAO & Capex*

*Expenses through March 31, 2023, in millions*

\*\*



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*Implementation cost timeline ~ 12-18 months*



# Next Steps

Public





# Next Steps

- Quarterly Reporting
  - Initial Report Due May 31<sup>st</sup>
- Please email questions or requests that could not be answered and delivered within the construct of this meeting to:
  - [Regulatory.Affairs@evergy.com](mailto:Regulatory.Affairs@evergy.com)
  - Reference docket **EW-2023-0199** in the subject line.