

Exhibit No.:  
Issue: TOU engagement and education  
Witness: Katie R. McDonald  
Type of Exhibit: Surrebuttal Testimony  
Sponsoring Party: Evergy Missouri West  
Case No.: ER-2024-0189  
Date Testimony Prepared: September 10, 2024

**MISSOURI PUBLIC SERVICE COMMISSION**

**CASE NO. ER-2024-0189**

**SURREBUTTAL TESTIMONY**

**OF**

**KATIE R. MCDONALD**

**ON BEHALF OF**

**EVERGY MISSOURI WEST**

**Kansas City, Missouri  
September 2024**

**SURREBUTTAL TESTIMONY**

**OF**

**KATIE R. MCDONALD**

**Case No. ER-2024-0189**

1 **Q: Please state your name and business address.**

2 A: My name is Katie R. McDonald. My business address is 1200 Main, Kansas City,  
3 Missouri 64105.

4 **Q: Are you the same Katie R. McDonald who filed rebuttal testimony in this**  
5 **docket on August 6, 2024?**

6 A: I am.

7 **Q: Who are you testifying for?**

8 A: I am testifying on behalf of Evergy Missouri West, Inc. d/b/a Evergy Missouri West  
9 (“EMW” or “Company”).

10 **Q: What is the purpose of your testimony?**

11 A: The purpose of my surrebuttal testimony is to address OPC witness Lisa Kremer’s  
12 rebuttal testimony focused on Evergy’s TOU education and outreach campaign.  
13 Ms. Kremer’s rebuttal testimony concludes that Evergy didn’t adequately educate  
14 our customers on TOU. My surrebuttal testimony provides the additional  
15 information and results to dispute that conclusion.

16 Additionally, Ms. Kremer mischaracterizes Evergy’s Intelligent Voice  
17 Assistant (IVA) system, specifically relative to the TOU implementation. My  
18 testimony seeks to explain the IVA design and purpose of the IVA as a tool we use  
19 to serve customers more effectively.

1 **Q: In an attempt to support her argument that Evergy did not adequately educate**  
2 **customers on TOU, Ms. Kremer asserts that Evergy should have utilized**  
3 **illustrations similar to those provided by the OPC to highlight the relationship**  
4 **between timing and energy usage. Did Evergy consider or incorporate such**  
5 **illustrations in its education campaign?**

6 A: Yes. Not only did we consider the illustrations provided by OPC, but we designed  
7 our version based on OPC's examples. Once again, it appears Ms. Kremer has not  
8 reviewed the full campaign materials, as she continues to make unfounded  
9 accusations without examining the facts or many of the materials provided to show  
10 the full breadth of the education campaign. If Ms. Kremer had reviewed the  
11 campaign materials, which Evergy provided monthly in Case EW-2023-0199, she  
12 would have clearly seen that Evergy did indeed use illustrations very similar to  
13 those suggested by the OPC, contrary to her claims. Additionally, in *Evergy's Reply*  
14 *to Comments from the Office of Public Counsel* in Case EW-2023-0199, regarding  
15 this suggestion, Evergy informed OPC that we would use similar illustrations in  
16 our materials, which we did. This is another example of how Evergy collaborated  
17 with Staff and the OPC, incorporating many of their suggestions.

18 Here are the example illustrations OPC suggested to Evergy, which OPC  
19 took from Tucson Electric and Evoenergy:

Figure 4: Tucson Electric "Don't tower your power"

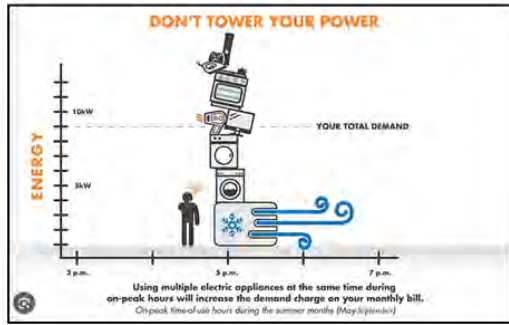


Figure 5: Tucson Electric "Level out your load"

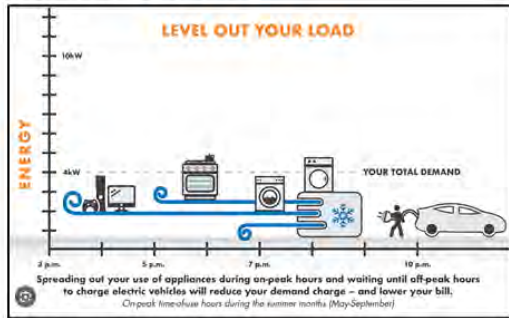


Figure 6: Evoenergy "High Peak Harry"

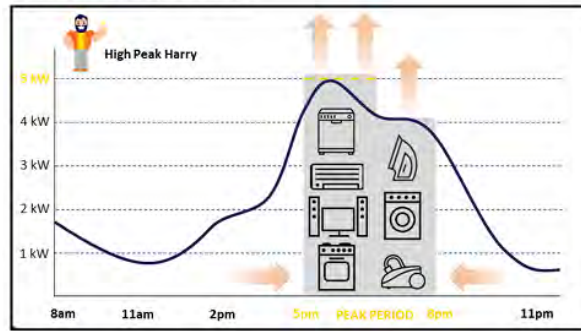
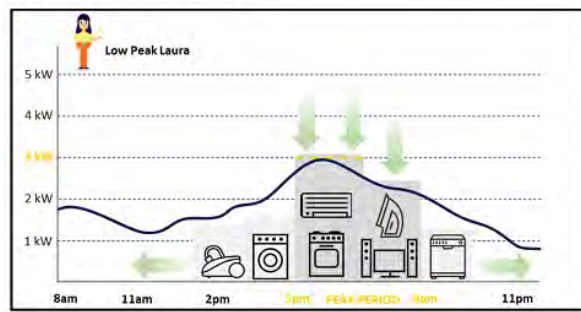


Figure 7: EvoEnergy "Low Peak Laura"



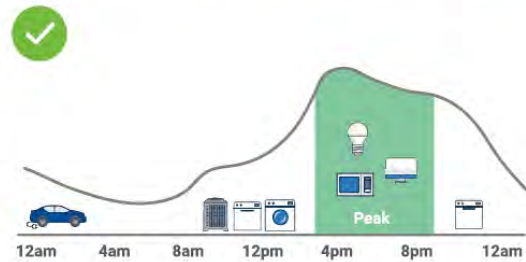
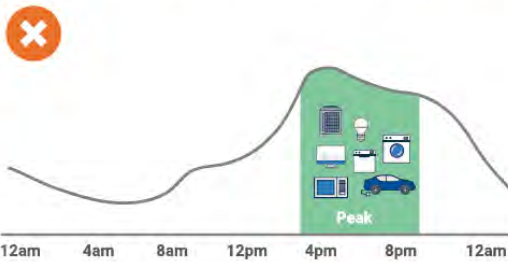
1

2

Now, here are the illustrations Eversource used in our TOU campaign:

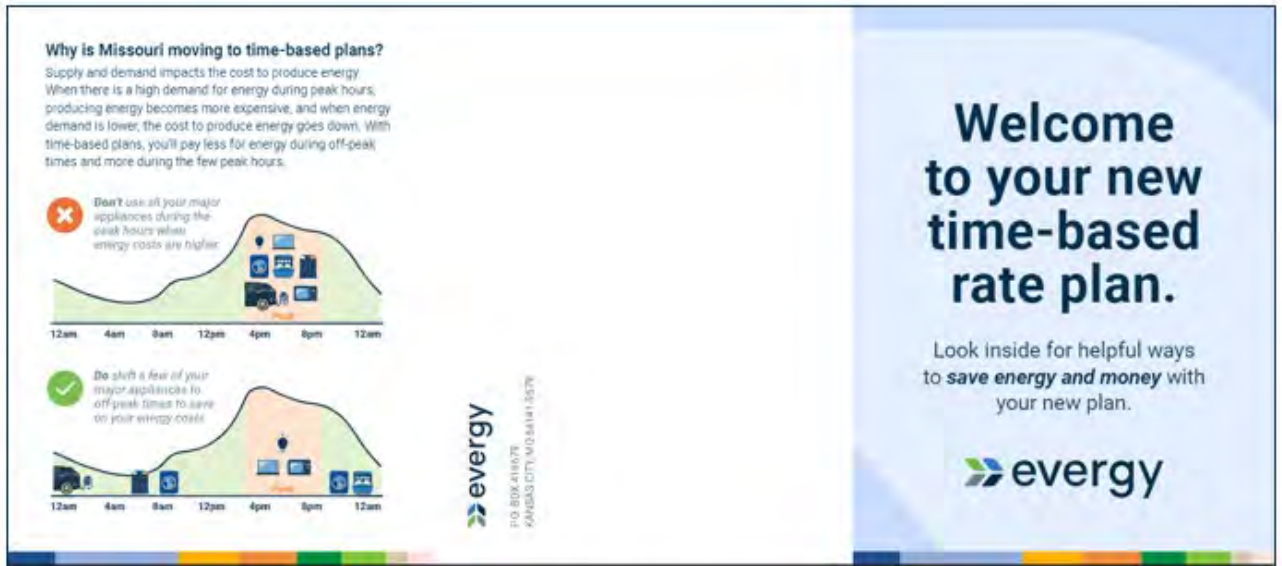
*Don't use all your major appliances during the peak hours when energy costs are higher.*

*Do shift a few of your major appliances to off-peak times to save on your energy costs.*



3

1 As an example, here is how the illustrations were used in our TOU Welcome Kit,  
2 which was sent by mail to every Evergy Residential customer in Missouri:



3  
4 As demonstrated, Evergy not only used the illustrations suggested by the OPC but  
5 also created illustrations so similar to the examples provided by the OPC that it is  
6 difficult to distinguish between them. These illustrations were utilized throughout  
7 the campaign on our website, in letters sent to customers, in customer emails, the  
8 TOU Welcome Kit, and many other materials.

9 As mentioned, Evergy provided these examples to the OPC on a monthly  
10 basis. For instance, I refer to the February 2024 Monthly TOU Report filed in Case  
11 EW-2023-0199, and direct the OPC and the Commission to the following pages  
12 from that report, where they can see the illustrations in use in our educational  
13 materials:

- 14 ■ Slide 59: Examples of Special Group Customer Outreach Journey
- 15 ■ Slide 62: Materials sent to Customer Enrolled in Average Payment
- 16 Plan

- 1           ▪       Slide 67: Rate Webpage Examples
- 2           ▪       Slide 92: September Customer Postcard
- 3           ▪       Slide 96: Electric Heat Customer Letter
- 4           ▪       Slide 99: Low Income and Senior Letter
- 5           ▪       Slide 101: Non-Digital Customer Letter
- 6           ▪       Slide 105: Letter to TOU Pilot Customers
- 7           ▪       Slide 107: Request for Information Packet
- 8           ▪       Slide 113: Default Plan Change Letter
- 9           ▪       Slide 116: TOU Welcome Kit
- 10          ▪       Slide 118: November Bill Insert
- 11          ▪       Slide 120: Welcome to Your New Rate Email

12           The continued claims by Ms. Kremer that we did not work with OPC or take their  
13           suggestions is false.

14   **Q:   Ms. Kremer states that she recommended to Evergy that the Company**  
15           **promote more of the educational benefits of TOU in its education efforts, did**  
16           **the Company do that?**

17   A:   Yes, we did. Ms. Kremer continues to rely solely on materials created in early Phase  
18           1 of our five-phase education campaign when making her accusations, rather than  
19           looking at the full breadth of materials throughout the campaign. In my Rebuttal  
20           testimony, I previously outlined Evergy’s campaign approach and how we utilized  
21           the Awareness, Interest, Desire, and Action (AIDA) model to transition customers  
22           from awareness to understanding and education. Ms. Kremer’s testimony and  
23           examples focus only on Phase 1 materials, which were developed to raise awareness

1 of the upcoming changes. This approach allowed Evergy to gain customer  
2 mindshare and establish baseline awareness regarding the transition to TOU rates.  
3 During Phases 2-5 of our TOU campaign, Evergy employed more detailed  
4 messaging and one-to-one marketing tactics to build upon the awareness gained in  
5 Phase 1, helping customers develop a deeper understanding of TOU rate options,  
6 the reasons behind Evergy’s transition to TOU rates, and how they could  
7 successfully manage their rate plans.

8 Ms. Kremer’s claim that Evergy only focused on awareness measurements  
9 is not only untrue but also fails to account for the multiple measurement dashboards  
10 provided monthly to the OPC in Case No. EW-2023-0199. These dashboards  
11 clearly show that we are tracking awareness and customer understanding, along  
12 with individual channel performance and customer actions. To correct the record,  
13 in addition to high awareness, research indicated that by Phase 3, more than 60  
14 percent of customers correctly understood the main features of TOU rates, such as  
15 paying more for electricity during peak hours and less during off-peak hours.

16 Furthermore, more than 40 percent of surveyed customers expressed  
17 satisfaction with their level of knowledge on TOU rates and indicated that they  
18 needed no further information on the topic. When asked about their beliefs  
19 regarding time-based plans, most customers correctly identified the key aspects,  
20 demonstrating their education on the plans and TOU. Customer familiarity with the  
21 plans increased throughout the campaign, with 82% being familiar with the plans  
22 by the end of 2023. Those indicating they knew “a lot” or “a good amount”

1 increased significantly by seven percentage points in Wave 3 of our third-party  
2 research.

3 **Q: Ms. Kremer says that while the Company may have been successful in getting**  
4 **awareness of TOU, that it's not the same as education.**

5 A: I agree that awareness and education are not the same thing and that Evergy was  
6 successful in both areas -- getting high awareness of TOU rates and has also been  
7 successful in educating customers about TOU. As I've outlined in both my Rebuttal  
8 and in this Surrebuttal testimony, Ms. Kremer continues to review only a small  
9 percentage of the campaign materials and results. By selectively omitting campaign  
10 research findings and failing to review all education materials, Ms. Kremer is  
11 creating a false narrative regarding our customer education and the results. Evergy  
12 developed a comprehensive, multi-faceted surround-sound outreach and education  
13 campaign, strategically designed to engage and educate customers. The campaign  
14 included multiple touchpoints, communication tactics and channels, and bilingual  
15 messaging in both English and Spanish. We developed a campaign that would reach  
16 all Evergy customers while also prioritizing engagement efforts for special  
17 customer groups including seniors, income-eligible individuals, households relying  
18 on electric heating, and those less digitally inclined.

19 Throughout their testimony in this case, OPC continues to provide examples  
20 of illustrations, videos, tactics, and messaging that they suggested would have been  
21 effective in educating customers on TOU rates. The problem is, as proven in my  
22 testimony, Evergy has implemented almost all of those suggestions and tactics. We  
23 used OPC's suggested illustrations, developed OPC's suggested videos, conducted



1 OPC's recommended outreach tactics like Food Banks and Libraries, and used  
2 much of OPC's messaging suggestions. To say that Evergy wasn't successful in  
3 educating customers would mean that either OPC gave recommendations that  
4 didn't work or that Evergy was effective in educating customers -- Ms. Kremer  
5 can't have it both ways. Either way, she continues to provide testimony that isn't  
6 based on the facts of the campaign materials or research results.

7 **Q: Ms. Kremer says a study that shows customers were concerned about**  
8 **switching to TOU proves that customers weren't educated about TOU and**  
9 **that it means the company failed. Do you agree?**

10 A: I respectfully disagree and refer to Mr. Caisley's Rebuttal testimony on page 26,  
11 where he addresses this question. Additionally, the Alliance to Save Energy must  
12 also disagree with Ms. Kremer, as the organization in August 2024 awarded  
13 Evergy's TOU campaign the "Community Engagement and Education Award,"  
14 which honors "exceptional efforts in educating communities on energy-related  
15 topics."

16 Furthermore, Ms. Kremer continues to confuse customer satisfaction with  
17 effective customer education, and her interpretation of the research results is  
18 incorrect. This flawed reasoning is misleading and can lead to faulty conclusions,  
19 as demonstrated in her rebuttal testimony. There is a reason Evergy included both  
20 customer satisfaction and customer education questions in our measurement and  
21 surveying approach, as these are clearly distinct metrics.

22 In her testimony, Ms. Kremer omits the fact that when customers were  
23 asked about their concerns, the reason was not a lack of education on the topic. "I

1 don't know enough about TOU" was one of the least cited reasons for customer  
2 concerns. The primary concern was the potential increase in their bills, which was  
3 indeed the case for some customers. As a mother and someone who diligently  
4 manages household expenses, I understand that having early concerns about  
5 potential bill impacts is logical, even for those well-educated about TOU.  
6 Customers, especially those in the Show-Me State, need time to see how their  
7 energy bills are affected by the new rate.

8 **Q: Ms. Kremer points to Escalent and JD Power studies that show lower brand**  
9 **trust for Evergy and she cited a statement that utilities that spend more on**  
10 **communications score better, does that surprise you?**

11 A: Based on past JD Power research, it was anticipated that customer satisfaction  
12 would decline when customers are transitioned to TOU rates. Both historical and  
13 current TOU research indicate that customers required to switch to TOU rates,  
14 regardless of the effectiveness of the communication campaign, tend to have a more  
15 unfavorable opinion of their utility as a result.

16 This trend was expected, as evidenced by the JD Power 2019 Utility  
17 Industry Outlook, which found that "...when pricing options are forced on electric  
18 utility customers, they respond with significantly lower customer satisfaction  
19 scores." JD Power found that Ontario saw a 70-point price index decline between  
20 customers who they moved to TOU rates and those still on the general rate plan.  
21 Similarly, California IOUs reported lower customer satisfaction when customers  
22 were placed on a TOU rate, despite varying education and marketing plans across  
23 the different utilities. Additionally, Evergy's 2022 Rate Research demonstrated that

1 customers would view Evergy less favorably if mandated to adopt TOU pricing.  
2 For further details, please refer to DR 8003 in case ET-2024-0061 which I have  
3 attached to my testimony as **Schedule KRM-4**.

4 Moreover, it is well-documented that utilities investing more in marketing  
5 and advertising tend to achieve higher customer satisfaction scores. While I  
6 acknowledge the importance of customer marketing, Evergy has consistently  
7 adopted a conservative approach in spending customer dollars on advertising.  
8 Unlike many utility peers, Evergy focuses mostly on informational, public service  
9 announcement-style advertising to balance cost increases for our customers.

10 As for the Escalent study referenced by OPC, the Company does not  
11 subscribe to this service. However, I will note that from my review of the Escalent  
12 material that is available to the public, Evergy's scores Evergy's score of 627 is  
13 between 500 (Average) and 1,000 (Extremely satisfied) so customers rate their  
14 satisfaction with the Company as above average.

15 **Q: Ms. Kremer in her testimony accuses Evergy of switching its “why” messaging**  
16 **from “matching usage to energy costs” in July to “attributing the change to a**  
17 **mandate from MPSC” in August. Is this accurate?**

18 A: No, this is not accurate. As evident in our campaign materials that were filed and  
19 shared throughout the campaign, Evergy continued to use messaging around  
20 “matching energy usage with energy costs” throughout the campaign, especially  
21 into the Fall of 2023, as shown in a number of campaign examples shared with OPC  
22 in Case No. EW-2023-0199.

1 To help illustrate this point, below are examples of the messaging used on customer  
2 bill inserts for July, August, and September 2023. (Examples from EW-2023-0199,  
3 TOU Commission Report Request Feb. 2024, campaign examples)

4 • **July 2023 Bill Insert – Feb. 2024 TOU Commission Report, page 73**

5 *“By switching to time-based rates, Missouri is working to match the cost*  
6 *you pay with the actual costs to produce energy. With time-based rate plans,*  
7 *you’ll pay less for energy during off-peak times, when demand for energy is*  
8 *lower, and more for energy used during the peak hours of 4-8pm.”*

9 • **August 2023 Bill Insert – Feb. 2024 TOU Commission Report, page 75**

10 *“The goal of time-based rates is to match the costs you pay with the actual*  
11 *costs to produce energy. With time-based rate plans, you’ll pay less for*  
12 *energy used during off-peak times, when demand for energy is lower, and*  
13 *more for energy used during the peak hours of 4-8 pm. With time-based rate*  
14 *plans, you can take advantage of discounted off-peak pricing by shifting*  
15 *your large appliance usage, like dishwasher and clothes drying, to off-peak*  
16 *hours.”*

17 • **September 2023 Bill Insert – Feb. 2024 TOU Commission Report, page**  
18 **93**

19 *“The goal of time-based rates is to match the costs you pay with the actual*  
20 *costs to produce energy. With time-based rate plans, you’ll pay less for*  
21 *energy used during off-peak times, when demand for energy is lower, and*  
22 *more for energy used during the peak hours of 4-8 pm. With time-based*  
23 *rates, you’ll pay less for any energy used during the 20 off-peak hours. But*

1                    *when energy demand is high during peak hours, the cost for energy will be*  
2                    *higher.”*

3                    As demonstrated by these three examples, Evergy not only maintained its  
4                    messaging about the purpose of TOU rates – to align energy usage with energy  
5                    costs – but actually increased the amount of messaging on this topic as we  
6                    transitioned into the Fall of 2023.

7                    **Q: Ms. Kremer says that the Company did not use our consultant’s suggestions**  
8                    **for messaging and instead chose to blame the MPSC, do you agree?**

9                    A: No. Ms. Kremer’s assumption that Evergy did not incorporate recommendations  
10                    and advice from the communication consultant in developing our TOU educational  
11                    strategy and messaging is misguided. As Ms. Kremer herself notes, the consultant’s  
12                    research provided several recommended messages for our campaign, most of which  
13                    were indeed utilized in our materials. Some of the top recommendations included:

- 14                    • Consultant Message Recommendation: *Offered customer choice about their*  
15                    *electricity rate plan*

- 16                    ○ **Evergy’s Messaging Examples:**

- 17                                       *“Missouri customers will have a choice of four new rate plan*  
18                                       *options.”* (Newspaper ads, brochures)

- 19                                       *“It’s time to choose your new time-based rate plan.” “...so Evergy*  
20                                       *has introduced four new rate plan options to fit your household*  
21                                       *needs.” “Choose your new plan now!”* (Bill insert)

- 22                                       *“Choose your new plan by October” “It’s time to choose your new*  
23                                       *time-based rate plan.” “To help you choose the best plan for your*  
24                                       *household...”* (Postcard)

- 25                    • Consultant Message Recommendation: *Highlight when customers use*  
26                    *electricity is just as important as how much electricity they use*

- 27                    ○ **Evergy’s Messaging Examples:**

1                    *“With this change to time-based rates, it will be important to*  
2                    *monitor not only how much energy you use but also when you use*  
3                    *it, to save on your monthly bill” (Customer Letter)*

- 4                    • *Consultant Message Recommendation: Share that Time of Use rate*  
5                    *plans help protect the electricity system for everyone*

6                    ○ **Evergy’s Messaging Examples:**

7                    ***Why is Missouri changing?*** (Website)

8                    *Timing plays a crucial role in energy, especially when it comes to*  
9                    *cost. As energy demand rises, the cost of generating electricity also*  
10                  *increases. This usually happens during peak hours of 4-8 pm.*  
11                  *During off-peak times (usually in the early morning and overnight)*  
12                  *energy demand goes down, which means lower energy costs.*

13                  *At the same time, reducing energy usage during high-demand times*  
14                  *(like hot summer weekdays) also helps lower the strain on the*  
15                  *energy grid.*

16                  *Together, we can embrace the change in Missouri to time-based rate*  
17                  *plans and unlock the potential for savings while making a positive*  
18                  *impact on our environment and energy grid.*

19                  ***Why is Missouri changing to time-based rates?*** (Newspaper Ads)  
20                  *Timing is everything when it comes to energy costs. Time-based*  
21                  *rates match the cost you pay with the actual cost to produce energy.*  
22                  *With time-based rate plans, you’ll pay less for energy during off-*  
23                  *peak times, when demand for energy is lower, and more for energy*  
24                  *used during the peak hours of 4-8pm.*

25                  ***Why is Missouri changing to time-based rates?*** (Bill Insert)  
26                  *Timing is everything when it comes to energy costs. By switching to*  
27                  *time-based rates, Missouri is working to match the cost you pay with*  
28                  *the actual costs to produce energy. With time-based rate plans,*  
29                  *you’ll pay less for energy during off-peak times, when demand for*  
30                  *energy is lower, and more for energy used during peak hours of 4-*  
31                  *8pm.*

32                  ***Why is Missouri moving to time-based plans?*** (Letter)

33                  *Supply and demand play an important part in the overall cost to*  
34                  *produce energy. When there is a high demand for energy during the*  
35                  *peak hours, producing energy becomes more expensive. On the*  
36                  *other hand, when energy demand is lower, the cost to produce*  
37                  *energy goes down. With the new time-based rate plans, you’ll pay*

1                    *less for energy during the off-peak times, which are most of the time,*  
2                    *and more during the few peak hours.*

3                    As illustrated in these educational materials, Evergy did indeed incorporate the  
4                    consultant’s top recommendations into our communications strategy and materials.

5                    Furthermore, Evergy has never blamed the MPSC for TOU. Only a fraction  
6                    of the materials used throughout our campaign mentioned the MPSC. As Mr.  
7                    Caisley noted in his Rebuttal, the then Chairman of the Commission himself stated  
8                    in media interviews that this change resulted from a Commission Order. Our  
9                    messaging was informative and factually correct, never attributing blame to any  
10                    party. The Staff uses very similar language in their own TOU “Frequently Asked  
11                    Questions” document, posted on the MPSC website for customers, which states,

12                    Evergy was ordered to transition all residential customers to  
13                    time-based rate plans in the period of October-December,  
14                    2023” and “The Missouri Public Service Commission has  
15                    entered orders and approved tariffs to transition almost all  
16                    residential electric customers of regulated utilities to Time-  
17                    Based rates. Ameren and Liberty transitions are occurring on  
18                    their own timelines and their own processes are governed by  
19                    different orders and tariffs than the Evergy Missouri Metro  
20                    and Evergy Missouri West processes.

21                    Additionally, since customers were aware of our past campaign and the  
22                    optional TOU rate, which the consultant’s messaging study did not account for, it  
23                    was crucial that customers understood that the time-based rate plans were no longer  
24                    optional. It was important for customers to understand that they knew the new TOU  
25                    plans were now required and that they would need to select a TOU plan or Evergy  
26                    would assign them to one.

1 **Q: Ms. Kremer makes a blanket statement on page 19 of her rebuttal testimony**  
2 **that claims the “Company’s IVA was not able to adequately serve customers**  
3 **during the TOU transition. Do you agree with this statement?”**

4 A: No. Ms. Kremer states, “Perhaps had the Company been prepared to better serve  
5 its customers during the TOU transition, answer its phone, and be available to its  
6 customers it would not have experienced the declines in the customer satisfaction  
7 that the Company points to.” This is conjecture. I’ve explained the rationale for the  
8 decline in customer satisfaction in my testimony, and Chuck Caisley has done so  
9 as well.

10 The IVA worked as designed during the TOU transition. During call center hours,  
11 it routed callers to a CSR if they either asked for a CSR or indicated they had a rate  
12 or TOU need. As it has always done for after hours calls, it indicated the hours  
13 during which a customer could call back to speak to a CSR.

14 **Q: Was the IVA intended to explain the TOU rates in detail?**

15 A: No. The IVA is well-suited to give relatively simple information and handle  
16 common transactions. It is not an appropriate vehicle to explain complex  
17 information such as TOU rates, especially with multiple rate options. We designed  
18 the system to quickly transfer a customer to a CSR once it determines that there is  
19 a rate question or need.

20 **Q: Was the IVA intended to help a customer navigate the TOU options and decide**  
21 **upon a TOU rate?**

22 A: No. As mentioned above, the IVA is not well-suited for complex rate information  
23 and helping a customer decide about a TOU rate. We designed the system to quickly



1 transfer a customer to a CSR to explain TOU options and help them make that  
 2 decision.

3 **Q: Was the IVA designed to avoid a conversation with a CSR about TOU?**

4 A: No. In relation to TOU, we designed the IVA flow to quickly get a customer into a  
 5 conversation with a CSR.

6 **Q: What did the IVA do if a customer indicated they wanted to talk to a CSR  
 7 about TOU?**

8 A: In the IVA, we first ask if the customer would like to receive a text with a link to  
 9 our website where they could see the options and read an explanation. We felt this  
 10 would help a customer visualize what a CSR would explain during the call. The  
 11 chart below shows the numbers of customers who indicated they would like to  
 12 receive a text. The customer then has the opportunity to transfer to the call queue  
 13 where a CSR would pick up the call. The chart below shows the transfers by month.

14 **Customers indicating they would like to be receive a text with a link to TOU**  
 15 **information on our website:**

2023	Percent of TOU intents vs Total Calls			Combined Dedicated & General #			
	Total Calls	Calls with TOU Intent	% of TOU calls vs Total calls	Total TOU Calls	Incoming Calls Offered SMS	SMS Sent	% SMS Sent
June 19th-EOM	214,913	228	0.10%	228	228	38	16.70%
July	290,486	660	0.20%	660	660	98	14.80%
August	299,597	15,400	5.10%	15,400	15,400	1,607	10.40%
Sept	301,878	26,185	8.70%	26,185	26,185	3,040	11.60%
October	259,856	14,410	5.50%	14,410	14,410	1,575	10.90%
November	199,273	2,088	1.00%	2,088	2088	261	12.50%
December	181,073	808	0.40%	808	808	164	20.30%

1  
2

**Customers immediately asking the IVA for a CSR:**

<b>2023</b>	<b>Ask for CSR</b>	<b>Total Calls to IVA</b>	<b>% Asking for CSR</b>
January	17,761	191,282	9.3%
February	17,816	184,386	9.7%
March	23,585	209,481	11.3%
April	22,430	191,189	11.7%
May	26,863	208,606	12.9%
<b>June</b>	<b>27,258</b>	<b>214,913</b>	<b>12.7%</b>
<b>July</b>	<b>32,146</b>	<b>290,486</b>	<b>11.1%</b>
<b>August</b>	<b>44,140</b>	<b>299,597</b>	<b>14.7%</b>
<b>September</b>	<b>45,539</b>	<b>301,878</b>	<b>15.1%</b>
<b>October</b>	<b>38,329</b>	<b>259,856</b>	<b>14.8%</b>
<b>November</b>	<b>23,643</b>	<b>199,273</b>	<b>11.9%</b>
<b>December</b>	<b>20,712</b>	<b>181,073</b>	<b>11.4%</b>

3

4 **Q: What did the IVA do if a customer indicated they wanted to talk to a CSR?**

5 A: Many customers call and immediately say to our IVA that they want to talk to a  
6 CSR. We always ask a clarifying question to get them to the right CSR skillset and  
7 if the IVA can help them with their issue, we ask if they would like the IVA to help  
8 them. If they ask for a CSR a second time, they are transferred to the call queue  
9 where a CSR will pick up the call.

10 The IVA served customers perfectly to route them to the right agents who were  
11 well trained and available to talk to them about TOU.

12 **Q: Does that conclude your testimony?**

13 A: Yes, it does.





Evergy MO Metro and MO West  
Case Name: Approval of Tariff Revisions to TOU Program  
Case Number: ET-2024-0061

Requestor - OPC\_20230911

Question:8003

Is it Evergy's position that the requirement to switch customers to TOU rates is causing a decline in customer satisfaction? Please provide a detailed explanation regarding Evergy's position on what is causing a decline in the satisfaction with Evergy

**RESPONSE:** (do not edit or delete this line or anything above this)

**Confidentiality:** PUBLIC

**Statement:** This response is Public. No Confidential Statement is needed.

**Response:**

Yes. Early data from surveying customers in June 2022 showed overwhelming customer opposition to switching to a mandated TOU rate. The Rate Options research surveyed 958 MO residential customers about their support of mandated TOU. This research was provided during the rate case in testimony and subsequently detailed in data requests.

- 74% of customers said they would not support mandated TOU
- 58% indicated they would be less satisfied with Evergy with mandated TOU
- 69% indicated they would be less satisfied with the MPSC with mandated TOU

This year, Evergy has surveyed 2,090 customers since June 2023 (ranging from 600-800 surveyed per month) to gauge their reaction to the mandatory move to TOU rates. The monthly TOU Rate survey shows from the first survey in June (when mandatory TOU messaging began) to August, a steady decline in customer satisfaction as awareness of the rates increases, with the sharpest decline (-17%) in the number of customers who are Very or Extremely satisfied. Additionally, the number of customers who are dissatisfied doubled from June (7%) to August (14%).

Also, in the monthly TOU rate survey 49% of Evergy customers indicate they now have an unfavorable opinion of Evergy based on the mandatory switch to TOU.

**Information provided by:** Cari Ferrara, Marketing

**Attachment(s):**