

Introduction

As energy efficiency leaders, we are frequently asked to discuss our programs with internal and external audiences. All too often, we find ourselves explaining the nuts and bolts of our energy efficiency programs in painstaking detail but failing to communicate important context about the value our programs bring to our customers, our companies, and our communities. This leaves the erroneous impression that energy efficiency is about saving energy and little else.

In today's world, we need to do a much better job of explaining why it is critical to maintain and grow our nation's investment in energy efficiency. Telling compelling stories reveals the multiple value streams of energy efficiency to people in ways that resonate with them and leave a lasting impression.

Why do we need a roadmap?

Igniting an industrywide conversation about the full value energy efficiency can deliver for our customers, our stakeholders, and our industry, will help ensure energy efficiency remains an integral strategy in a changing energy landscape. This conversation starts with DSM thought leaders like you. The steps below are intended to provide a clear path of action that can be customized to meet your unique circumstances and needs. It references elements in the storytelling toolkit that can help you along the way. Let's get started!

Roadmap outline

1) Explore opportunities

- Explore the challenges and constraints that limit your ability to tap into the full value of energy efficiency, and brainstorm possible avenues to overcome those challenges. You may wish to ground your inquiry in a set of questions that will help you identify productive avenues for change.
 - **What** constructs define our energy efficiency programs?
 - **How** could those constructs be changed to allow us to do more for our customers and reap greater benefits from our programs?
 - **Who** could affect/influence change?
 - **When** is the best time to act?

See a few concrete examples under "Exploring Opportunities" below.

2) Learn how storytelling can help

- Explore the toolkit materials. Review each section of energystar.gov/EEstorytelling to understand the power of storytelling and how it could be used to reach the audiences you wish to

influence. An internet browser search can yield a wealth of resources on the power of storytelling and building an effective messaging architecture.

- 3) Engage your team**
 - **Schedule a training/meeting to engage your team.** It's everyone's job at all levels of your energy efficiency team to be able to communicate the value your energy efficiency programs with other departments throughout the company and with external stakeholders. Consider [Creating an Immersive Experience](#) training session as a means to help all your team and/or company learn how to become engaging storytellers and better ambassadors for energy efficiency programs.

- 4) Prepare for your meeting**
 - **Use the Facilitator's Guide to prepare your presentation.** Engage team members to help present. Learn more: [Facilitators Guide](#).

- 5) Conduct your training/meeting**
 - **Leverage toolkit resources to support your meeting.** Play the [Pillar Videos](#), leverage the [Communicating the Value of Energy Efficiency Presentation](#), brainstorm opportunities using the Action Worksheet below, and leverage your team's expertise to identify organizations and individuals that could help your efforts to support energy efficiency. These individuals or organizations may be internal or external. Spend time thinking through the stakeholders' main pain points and motivations for constructive change.

- 6) Develop your own stories**
 - **Find stories that will speak to the core motivations of your target audience.** To best engage your audience, you must be able to understand their perspective, empathize with them, and talk through stories that resonate with them. You will likely need different stories for different audiences or individuals. View the [Sample Storylines](#) and [Story Library](#) for inspiration. Submit your stories to be part of the ENERGY STAR® story library using the [Story Submission Template](#).

- 7) Operationalize your stories**
 - **Present your stories to spread the word.** Many of the most effective energy efficiency program designs have evolved from peer sharing within the DSM community. Similarly, peer sharing powerful, relatable, and memorable stories that reinforce the three pillars of energy efficiency can help ensure energy efficiency remains top of mind in a changing energy landscape.

Exploring opportunities

Below is an outline for how to identify opportunities (program elements and inflection points), key stakeholders, and storylines that could most directly speak to their core motivations. Using a stepwise process, this tool can help reveal how powerful stories could be used to help you meet your goals.



I. Objectives

In this step, take stock of your energy efficiency portfolio and current and potential objectives it serves. Think about foundational elements, barriers, and real or potential strategic uses for energy efficiency in your organization. For example:

Foundational Elements

- Savings goals: kWh, kW, and/or therms
- EE leadership indicators
- EE regulatory requirements
- Program funding and mechanism
- Revenue loss compensation and mechanism
- EE performance incentives if any
- Corporate sustainability goals, if any

Barriers

- Cost-effectiveness rules
- Utility compensation, etc.
- Industrial opt-out, etc.
- Capital and/or O&M constraints

Strategic Uses

- Flattening demand (key measures)
- Grid modernization
- Congestion relief
- Combined EE/DR
- Getting EE credit for enabling DR
- Alternate to infrastructure investment

II. Inflection Points

Once you have zeroed in on particular objectives, think about crucial points in time—inflection points—for advancing your strategic goals. Consider processes, stakeholder activities, and political/regulatory actions. For example:

Processes

- Updating an Integrated Resource Plan
- Tri-annual program filing or strategic planning
- Rate cases
- Preparing for sustainability reports or certification
- Change in utility leadership
- Utility-wide planning and budgeting process

Stakeholder Activities

- Regional stakeholder review of common cost-effectiveness tests
- Meeting of the grid reliability council
- Stakeholder meetings informing new programs, filing

Political/Regulatory Actions

- Regulatory/legislative review of EE mandate or new/revised legislation
- Adoption of carbon reduction goals at state or local level
- Change in political leadership

III. Influential Actors & Drivers

Next, identify organizations and audiences that are central to the inflection points above. Think about their pain points and motivations. Being as specific as possible will help you identify resonant stories. For example:

Organizations/Audiences

- Grid operations and reliability planners
- Members of the C-Suite
- State and local political leaders
- Consumer advocates
- Environmental organizations

Pain Points

- Overloaded substations, circuits, etc.
- Utility reputation and profit
- Public perception of doing something constructive for constituents, vulnerable populations, and the environment

Main Motivations

- Keeping the lights on
- Ensuring shareholder return
- Addressing local air quality issues
- Protecting vulnerable populations
- Fighting climate change

IV. Resonant Stories

Finally, think through meaningful stories from your DSM program portfolio. Resonant stories may be large in scale and scope or meaningful on a small-scale, customer level. The point is to match key stakeholders with stories that speak to their main motivations and pain points. For example:

Organizations/Audiences

- Grid operations and reliability planners →
- Members of the C-Suite →
- State and local policy leaders →
- Consumer advocates →
- Environmental advocates →

Resonant Stories

- Neighborhood where concentrated installations of grid-connected, energy-efficient devices have extended the life of heavily-loaded distribution circuits
- Collective investments in energy efficiency have avoided costly and risky investments in new generation
- Cumulative local avoided emissions
- Individual and neighborhood stories of bill reductions and improvements in indoor air quality and comfort
- Public support stating utility is a good corporate citizen

Action Planning Elements

Consider brainstorming with your team around the following areas. Brainstorming can be approached in a linear fashion moving from objective, to inflection point to actors/drivers and then resonant stories. Alternately, small groups can brainstorm each section independently followed by a group exercise to link related findings between groups.

I. Objective

II. Inflection Point

III. Influential Actors & Drivers

IV. Resonant Stories