Introduction
For utility demand-side management (DSM) departments, being able to articulate the value of energy efficiency to the right audience at the right time can be critical to whether energy efficiency is leveraged to its fullest potential.

This guide is meant to help you engage your DSM teams, through an interactive meeting, in understanding the three pillars of energy efficiency along with the related messaging architecture and talking points to inspire storytelling in support of your organization’s energy efficiency goals. The purpose of the meeting is to enable DSM leaders and practitioners to effectively communicate the many traditional, nontraditional, and strategic benefits of energy efficiency in ways that resonate with key stakeholders.

Audience
Your corporate communications department has most likely been involved in a news story, press release, case study, or public relations effort that highlighted the value of your programs or the success one of your customers had in making energy efficiency improvements. These communications usually target customers and the public.

But DSM departments have additional stakeholders they need to reach to ensure continued or expanded investment in energy efficiency. The pillars and talking points in the toolkit were developed with these stakeholders in mind:

- C-suite and other departments within the utility
- Investors and shareholders
- Regulators
- Policymakers
- DSM stakeholder advisory groups

Meeting planning
In preparation for your meeting, it can be helpful to do the following.

- Familiarize yourself with the contents of the broader toolkit (energystar.gov/eestorytelling). All toolkit materials are designed to be mutually reinforcing, so reviewing the materials can help you better understand the pillars and messaging architecture, demonstrate how to turn messages into stories, and determine how to leverage storytelling to advance organizational goals.
  - The Pillar Videos convey the essence of the pillar and key value streams. Each pillar has a designated color that is used throughout the toolkit: green for “Enabler of Growth,” orange for “Mitigator of Risk,” and blue for “Protector of the Public Good.”
  - The Communicating the Value of Energy Efficiency Presentation introduces storytelling and messaging architecture to demonstrate the interrelationship between the foundation,
pillars, talking points, and the overall impression they collectively convey. This slide deck can also be used as the basis for engaging your team in a group meeting or training.

- The **Sample Storylines by Value Pillar and Talking Point** give examples of how talking points can be used to create stories.
- The **Story Library** shows long-form stories by pillar, connecting stories to talking points and demonstrating the related foundational data necessary to substantiate the story.
- The **Action Plan Roadmap** provides steps on how to use the toolkit, engage your team, and seize opportunities to tell stories to key audiences.
- The **Creating an Immersive Experience** document provides tips on setting up your meeting space for creative thinking and ideation and for delivering an engaging, memorable working session. This is an opportunity both for your internal team meeting and for engaging other departments and stakeholder groups within your organization.

**Determine meeting goals.** Thinking through your department’s near and longer-term goals for energy efficiency can help inform the goals for your meeting and how you approach the introduction of storytelling to attendees. Available meeting time also can dictate how ambitious your agenda can be. You may wish to set aside a three-hour block to engage your team in a full exploration of storytelling or spread your learning and ideation over a series of smaller meetings.

**Customize the presentation.** Use the **Communicating the Value of Energy Efficiency Presentation** as a starting point upon which to design an engaging meeting to introduce energy efficiency storytelling to your team. The Microsoft PowerPoint® presentation can be used as is or customized to create maximum relevancy for your team and meeting goals. Consider customizing slides such as the “Purpose of Today’s Meeting,” and determine which slides you would like to complement or replace with a group exercise or discussion. (See group exercises below for ideas.) Slides noted with a ★ are considered core slides not intended for customization (though the Master Slide format may be customized to your own template as you see fit). Slides include instructional notes and sample talking points where applicable.

**Identify helpers.** Recruit three team members who are comfortable speakers who will read aloud to the group the talking points related to each pillar (slide 18, 19, and 20). Ask them to practice reading their pillar before the meeting. The diversity of voices can help bring these value streams to life in listeners’ minds. You will also likely need to identify a notetaker. A lot of good insights will come out of the discussion, so it’s critical to have someone responsible for jotting down key points, storyline ideas, and next steps.

**Consider doing a dry run.** Practice running through the presentation with your helpers to make sure you’re comfortable talking about the key points on every slide.

**Additional materials.** Consider whether you need flip charts and markers or if you will capture input digitally to share in real time. You may wish to print copies of the **Communicating the Value of Energy Efficiency Presentation** (e.g., slides 13 and 17), **Action Plan Roadmap** (e.g., pages 3-6), and any additional exercise handouts you plan to use.

**Ask your team to come prepared.** You may want to ask the meeting participants to come prepared with their favorite customer story.
Group exercises

- **Premeeting warm up (slides 2-3)**. These slides are intended to have attendees recognize the complexity of messaging around the many value streams of energy efficiency:

  - **Brainstorm** a list of known and potential value streams for your energy efficiency programs, keeping in mind company, shareholder, community, and customer benefits. (Make them numerous and technical if that is how they are typically talked about by industry.)

    ![Our energy efficiency programs deliver many value streams to our customers, community, company and shareholders, and new value streams are emerging.](image)

  - **Create a word cloud**. You can create a word cloud online (e.g., at wordart.com) or in Microsoft PowerPoint®, if you have the correct “Add-in.” (Select Insert > My Add Ins > Pro Word Cloud > highlight the text you would like to turn into a word cloud and choose “Create Word Cloud.”) You can either save this as a jpeg or use the snippet tool to quickly copy and paste it into group notes or a blank slide in the presentation.

    ![Communicating them effectively can be a challenge](image)
• **Spend time on the foundation slide (slide 14).** Discuss the messaging foundation with your team. How does it resonate with their experience? How does it align with your organization’s history with energy efficiency? What is your utility’s reputation with energy efficiency, locally and nationally? How can you maintain or expand your investment in energy efficiency? What challenges are you facing?

• **Spend some time with each pillar (slide 17).** What story ideas come to mind when thinking about each pillar. Identify the talking points that fit best with your stories. Do you have a story for every pillar? Is there a pillar that is more challenging? If so why?

• **Explore nontraditional value streams and their talking points (slides 18-20).** Have the team highlight the talking points in each pillar that represent newer or expanded use cases for energy efficiency. This can be done individually on a worksheet with a highlighter or verbally as a group. Discuss whether you envision these new use cases becoming important for your utility and over what time horizon.
• Sketch out a few examples of identifying key stakeholders, their motivations and pain points, and resonant stories (slides 22-27). This is a chance to brainstorm opportunities and follow a logic model to help match opportunities with key stakeholders, and stories that will be most resonant to them. If participants come prepared with a favorite customer story in mind, you will be one step ahead. Consider using the section “Exploring Opportunities” (pages 3-6) of the Action Plan Roadmap for this stage of the presentation.

• Spend some time with the Sample Storylines by Value Pillar and Talking Point. Explain that the content here is meant to serve as thought starters for your own stories. If there’s a value stream or talking point you’re struggling to identify a storyline for, perhaps you’ll find inspiration here.

Post-meeting activities

• If not used in the meeting, give your team the Action Plan Roadmap for homework. Review the section “Exploring Opportunities” (pages 3-6) to help identify program elements, crucial actions that could influence or change those elements, influential actors and their core motivations, and storylines that could resonate with those key audiences.
• **Gather input from your team.** Gathering and/or soliciting unique stories or case studies from your energy efficiency program should be a natural next step to get your effort underway. For example:
  o An employee working with income-qualified customers might share a powerful human story.
  o An employee working in finance might share a story about financial benefits.
  o Customer thank-you letters and positive statements to news outlets or field employees could be another lead for stories.
  o A story from another utility could form the foundation for building a similar one for your utility.

• **Develop a timeline of energy efficiency at your utility.** Ask a team member to prepare a brief written history of energy efficiency programs and investments in your organization. Document your programs and investments, including key milestones. Then consider opportunities for turning milestones from your history into compelling storytelling opportunities.

  **Are there major energy efficiency milestones you could celebrate?**
  • 5-, 10-, or 20-year anniversary of your programs
  • [#] of refrigerators recycled
  • [#],000 customers assisted last year through the income-qualified energy efficiency program
  • [#] of kWh saved over the last [#] years, equivalent to taking [#] cars off the road or powering [#] of homes
  • $[#] million in rebates paid to customers
  • [#] million customers engaged
  • [#] million light bulbs sold

• **Create, refine, document, and have your stories easily accessible.** Work with your team to build out an energy efficiency story library for your utility. You could add your stories to the talking points and storylines matrix or use some other tool of your choosing to capture and share stories. Using a platform such as SharePoint, Teams, or Google docs could be helpful to facilitate shared access, so your team members can find and use stories when opportunities arise for engaging with different audiences. Of course, practice makes perfect—tell your stories as often as possible!
• **Identify opportunities to share your stories.** Compile a list of communication opportunities, written and spoken, both within and outside of your organization.

**What internal and external communications vehicles could you use to share energy efficiency stories?**

**Internal**
- Internal newsletter
- Intranet/newsletters/blog posts
- All-hands meetings
- Budget planning discussions
- C-Suite presentations
- Interdepartmental planning

**External**
- Public/Customer forums
- Conferences
- Regulatory testimony
- Local media

• **Consider hosting a broader organizational meeting.** Use the [Creating an Immersive Experience](#) document to get ideas about how to create a memorable experience that will drive the power of your stories home.

• **Contribute stories to EPA’s ENERGY STAR® story library.** Once you’ve developed your stories, consider submitting them to EPA to feature in our story library at [energystar.gov/EEstorytelling](http://energystar.gov/EEstorytelling).