

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 energy.
 - **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, company, and shareholders, and new value streams are emerging.

- Diversified energy resource portfolio
- Performance spread across energy desires and locations
- Supporting system reliability and resiliency
- Reduced planning and operational uncertainty
- Deferred investments in new infrastructure
- Effective management of unintended consequences from growth of renewable energy and mass scale electrification (EVs, transportation)
- Targeted deployment to reduce grid congestion
- Improved customer satisfaction and enhanced customer experience
- Supporting corporate goodwill and public relations
- More stable energy bills
- Better indoor air quality
- Proactive appliance and equipment maintenance and replacement helps to avoid emergency replacements
- Sub-optimal energy reliability and affordability for future generations
- Leading to fewer greenhouse gas emissions
- Creating more productive integration of renewable resources
- Supporting successful partnerships in the community
- Protecting public safety and health inside and out
- Actualizing the view of utility as hometown heroes
- Helping customers better manage their energy bills
- Many customers associate comfort and health benefits with energy efficiency improvements
- Supporting vulnerable populations and community organizations
- Small- to large-scale grid modernization
- Locational and dispatchable management of resources
- Attributable scaled decarbonization projects
- Low-cost carbon/greenhouse gas reductions
- Innovative business strategy
- Possibility of shareholder return
- Regional economic and job growth
- Change management to ease transition to time-based rates
- Lower energy bills and improved bottom line
- Use of new and efficient technologies
- Cost effective improvements to homes and businesses
- Improved long and working conditions
- Positive employee satisfaction
- Reinforcement of savings in other investments

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- **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

Word cloud visualization of the text from slide 2, featuring prominent words like: Energy, Supporting, Locations, Scale, Reliability, Health, Growth, More, New, Grid, Bills, Out, Public, Resource, Renewable, Reduce, Air, System, Many, Manage, Low, Efficient, Greenhouse, Gas, Emissions, Better, Indoor, Air, Quality, Improved, Customer, Satisfaction, and Enhanced, Customer, Experience, Proactive, Appliance, and, Equipment, Maintenance, and, Replacement, Helps, to, Avoid, Emergency, Replacements, Sub-optimal, Energy, Reliability, and, Affordability, for, Future, Generations, Leading, to, Fewer, Greenhouse, Gas, Emissions, Creating, more, productive, integration, of, renewable, resources, Supporting, successful, partnerships, in, the, community, Protecting, public, safety, and, health, inside, and, out, Actualizing, the, view, of, utility, as, hometown, heroes, Helping, customers, better, manage, their, energy, bills, Many, customers, associate, comfort, and, health, benefits, with, energy, efficiency, improvements, Supporting, vulnerable, populations, and, community, organizations, Small- to, large-scale, grid, modernization, Locational, and, dispatchable, management, of, resources, Attributable, scaled, decarbonization, projects, Low-cost, carbon/greenhouse, gas, reductions, Innovative, business, strategy, Possibility, of, shareholder, return, Regional, economic, and, job, growth, Change, management, to, ease, transition, to, time-based, rates, Lower, energy, bills, and, improved, bottom, line, Use, of, new, and, efficient, technologies, Cost, effective, improvements, to, homes, and, businesses, Improved, long, and, working, conditions, Positive, employee, satisfaction, Reinforcement, of, savings, in, other, investments.

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- 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?

The Foundation.
Energy efficiency has a long track record of delivering value.

Helping the U.S. optimize our use of energy resources.
For decades, energy efficiency has enabled the United States to squeeze the most value out of every kilowatt-hour of electricity produced without sacrificing features or performance. People and businesses who've taken steps to use less energy enjoy benefits including lower energy bills, increased comfort, enhanced productivity, and an improved environment.

- 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?

Energy efficiency delivers much more than meets the eye.

<p>Enabler of Growth</p> <p>Our customers love energy efficiency. It provides a variety of benefits, not the least of which is lower energy bills.</p> <p>The broader economic effects—what our customers do with that extra money—depend on regulations and other stakeholders. Businesses can enhance productivity and retain workers. With the cost savings they reinvested in other projects or grew the bottom line. Residential customers can better manage bills and might spend that money on other things. Homeowners might see increased home resale value.</p> <p>Plus, energy efficiency is delivered by local businesses—retailers, HVAC contractors, home builders—so much of the funding stays in the community, creating local jobs.</p> <p>For our shareholders, energy efficiency has the potential to yield direct shareholder returns. It also can improve the business case for grid modernization projects and other capital investments that help us meet our obligations to specific locations. Regulation and distribution all have their own important utility investments that deliver energy efficiency benefits.</p>	<p>Mitigator of Risk</p> <p>Our business is all about the long game. Accounting for risk is baked into every decision. Regulatory compliance is part of it. Energy efficiency helps us balance risk by diversifying our energy resource portfolio, spreading investments across technologies and locations and easing the risk that they will fail.</p> <p>Energy efficiency is a smart, time-tested element of a smart investor's distributed energy (DER) strategy. It helps defer costly investments in infrastructure when we better leverage our assets in rapidly changing technology landscapes. It helps reduce the impacts of grid congestion as well as avoid power from toxic waste distribution (e.g., CO₂) and enables smooth, the transition to time-based rates by giving customers tools to manage their energy use.</p> <p>Energy efficiency can help right-size renewable investments, reducing the scale and footprint of renewable generation and the related infrastructure needed for a clean energy future. Energy efficient technologies are being bundled with other DERs to deliver grid services beyond traditional load reduction, including storage, charging, and curtailment—all of which help us get the most out of renewables and ensure system reliability.</p> <p>Energy efficiency is also important for reliability planning. Load-shedding and managing demand helps us to ensure that backup resources can stretch further and longer.</p>	<p>Protector of the Public Good</p> <p>At its core, energy efficiency is a commonsense solution that feels good too. It's about saving, not wasting. It's about getting the most mileage out of resources so they go farther.</p> <p>Energy efficiency frees up kilowatt-hours so more people can benefit from renewable energy. And, as renewables grow to make up a greater portion of the nation's energy supply, energy efficiency technologies will be there in lockstep with other distributed energy resources to help reduce, shift and even store energy when needed.</p> <p>In the meantime, fossil fuels still supply much of our energy, and energy efficiency is our first, best strategy for reducing greenhouse gas emissions.</p> <p>Everyone, including vulnerable populations with the highest energy burden, can benefit from the lower bills and improved air quality efficiency delivers.</p> <p>It's getting harder to ignore the impacts of a changing climate and more extreme weather events. Energy efficiency empowers us with things we can do now to protect our families and community.</p>
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Helping the U.S. optimize our use of energy resources.
For decades, energy efficiency has enabled the United States to squeeze the most value out of every kilowatt-hour of electricity produced without sacrificing features or performance. People and businesses who've taken steps to use less energy enjoy benefits including lower energy bills, increased comfort, enhanced productivity, and an improved environment.

- 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.

Protector of the Public Good: Value Pillar Text

At its core, energy efficiency is a commonsense solution that feels good too. It's about saving, not wasting. It's about getting the most mileage out of resources so they go farther.

Energy efficiency frees up kilowatt-hours so more people can benefit from renewable energy. And, as renewables grow to make up a greater portion of the nation's energy supply, energy efficiency technologies will be there in lockstep with other distributed energy resources to help reduce, shift and even store energy when needed.

In the meantime, fossil fuels still supply much of our energy, and energy efficiency is our first, best strategy for reducing greenhouse gas emissions.

Everyone, including vulnerable populations with the highest energy burden, can benefit from the lower bills and improved air quality efficiency delivers.

It's getting harder to ignore the impacts of a changing climate and more extreme weather events. Energy efficiency empowers us with things we can do now to protect our families and community.

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- 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.

5. IDENTIFY KEY STAKEHOLDERS, SAMPLE STORYLINES BY VALUE PILLAR AND TALKING POINT

Introduction

The following section outlines the process we recommend to help identify the key stakeholders (KStOs) and resonant stories for the key value streams being pursued for each of our energy efficiency (EE) programs. It also provides the EE program team with a checklist to ensure a KStO is both a key stakeholder and a potential customer. The section highlights opportunities and challenges to be aware of.

In this section, there are several key activities and opportunities to identify the motivations of your KStOs, and other aspects that determine how they may be most resonant to energy efficiency of your EE program.

Key activities include:

- **Identify key stakeholders:** Many of the KStOs you will be addressing are different customer segments and, therefore, may not be familiar to other stakeholders. You may need to do some research to identify key stakeholders.
- **Identify key value streams:** Many of the KStOs you will be addressing are different customer segments and, therefore, may not be familiar to other stakeholders. You may need to do some research to identify key value streams.

Opportunities to Tell Stories

There are several key activities and opportunities to identify the motivations of your KStOs, and other aspects that determine how they may be most resonant to energy efficiency of your EE program.

- **Local News:** Your region is experiencing a heat wave and the heat stress shows up in other ways. This is a great opportunity to highlight the importance of energy efficiency in reducing energy costs and improving indoor air quality.
- **Customer Focus on Safety:** Customers who want to understand why energy efficiency is important to their safety.
- **Home Equipment Planning:** The goal of an energy efficiency program is to help customers understand the benefits of energy efficiency and how it can be integrated into their home.
- **Regulatory:** Many of the KStOs you will be addressing are different customer segments and, therefore, may not be familiar to other stakeholders. You may need to do some research to identify key stakeholders.

Promoter of the Public Good – Value Pillar Text

At its core, energy efficiency is a collaborative effort that benefits society as a whole, not just the individual customer. Energy efficiency programs can benefit society in many ways, including:

- **Reducing greenhouse gas emissions:** Energy efficiency programs can help reduce greenhouse gas emissions, which is a key goal of many governments.
- **Improving air quality:** Energy efficiency programs can help improve air quality, which is a key goal of many governments.
- **Reducing energy costs:** Energy efficiency programs can help reduce energy costs, which is a key goal of many governments.

Customers, including vulnerable populations with the highest energy needs, can benefit from these programs and improved energy efficiency.

EE programs can also benefit the public good in other ways, including:

- **Improving energy security:** Energy efficiency programs can help improve energy security, which is a key goal of many governments.
- **Reducing energy poverty:** Energy efficiency programs can help reduce energy poverty, which is a key goal of many governments.

Talking Point	Sample Storyline
Energy efficiency programs can help reduce energy costs, which is a key goal of many governments.	John, a homeowner, is looking for ways to reduce his energy costs. He has heard that energy efficiency programs can help, but he is not sure where to start. He is looking for a program that can help him understand the benefits of energy efficiency and how it can be integrated into his home.
Energy efficiency programs can help improve air quality, which is a key goal of many governments.	John, a homeowner, is looking for ways to improve the air quality in his home. He has heard that energy efficiency programs can help, but he is not sure where to start. He is looking for a program that can help him understand the benefits of energy efficiency and how it can be integrated into his home.

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.

Exploring Opportunities

After you have identified key stakeholders, opportunities, program elements and their core motivations, you can use the logic model 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.

Take stock of EE program elements → **Foundational Elements & Strategic Opportunities**

Find inefficiencies when changes can occur → **Process, Stakeholder Actor & Policy Action**

Identify key actors central to these inefficiencies & their motivations → **Organization & Audience**

Match resonant stories to organizations & audiences

Objectives

In this step, take stock of your energy efficiency program's current and potential objectives. Key objectives include:

- **Foundational Elements:**
 - Saving energy costs
 - Improving air quality
 - Reducing greenhouse gas emissions
 - Improving energy security
 - Reducing energy poverty
 - Improving energy efficiency
 - Improving energy security
 - Reducing energy poverty
- **Business:**
 - Customer awareness
 - Business case for EE
 - Customer engagement
 - Business case for EE
 - Business case for EE
 - Business case for EE
 - Business case for EE
 - Business case for EE
- **Strategic Plan:**
 - Energy efficiency program
 - Energy efficiency program
 - Energy efficiency program
 - Energy efficiency program
 - Energy efficiency program
 - Energy efficiency program
 - Energy efficiency program
 - Energy efficiency program

Action Planning Elements

After you have identified key stakeholders, opportunities, program elements and their core motivations, you can use the logic model 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.

I. Objective	II. Inefficiency Point
III. Influential Actor & Drivers	IV. Resonant Stories

- **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:
 - An employee working with income-qualified customers might share a powerful human story.
 - An employee working in finance might share a story about financial benefits.
 - Customer thank-you letters and positive statements to news outlets or field employees could be another lead for stories.
 - 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?

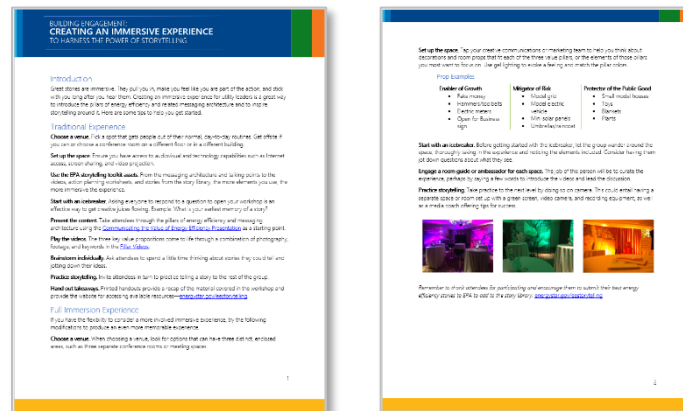
Internal

- 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.