

TOOL: MAKING LEAFLETS TO EDUCATE THE CUSTOMERS

What is it?

New products and services require a learning and adaptation process by the customer. A short and concise leaflet which can be placed in their home can help the customer and ease and shorten the process of learning and adapting. This way the customer can consult the basic and most important used features and functions of the new product or service. The leaflet itself is only one piece of the customer support and refers to the available support and information materials that have been delivered to the customer.

The template is designed as a (magnetic) fridge leaflet. Recent studies have shown, that the kitchen and the foyer are ideal location to place persuasive information (Kluckner *et al.*, 2013). The leaflet itself can easily be adapted to specific needs and the different designs.

When to use?

First and foremost the FAQ-leaflet should be used when new appliances, devices or services are introduced to the customer, for example with a smart meter roll out or together with the installation of smart home appliances or automated control devices. The introduction of a new product or service can be accompanied by an information campaign to inform the customers about new opportunities and possible obstacles. As with most new products, problems with the understanding of the functionalities and the handling will arise.

Those problems should be addressed early with the leaflet introduced in this tool description. The content and design of the leaflet should therefore be finished at a very early stage of the project to introduce new services and products to the customer and to explain the main functionalities.

What do you need to do?

Define the content

At first you should be clear about the main obstacles which users could have with the new device or service. In case of a new device a list of the (new) main functions and control elements can be a good start to become aware of possible upcoming problems for the customer. It is important to take into account the customer's perspective to find possible problems for the handling of the devices. Try to make your collection as concise as possible. To shorten the content of your leaflet you should write very short and precise hints. For further information you can refer to the

more detailed instruction manual or the product or service website (e.g. with small QR-Codes).

- The wording chosen for the leaflet has to be carefully selected to guarantee, that your customers understand the language easily. In order to adapt the language to the audience, it is necessary to know your customer well. More information on how to learn about your consumer can be found in [Getting to know your target group](#).
- The basic concept for defining the content is to create a very short and minimalistic FAQ.

The selection of the most important problems for users and the development of a very short and precise answer is probably the most difficult task for the creation of the leaflet.

Inform your customer with stickers and magnets – The Irish Electricity Smart Metering Customer Behaviour Trial

The customer behavior trials (CBT) were undertaken to provide robust statistical information on the impact of electricity smart metering enabled initiatives (in the form of time-of-use tariffs in combination with various demand side management informational stimuli). In the first phase of the Irish Customer Behavior Trials (CBT) (2007 – 2011) different methods to inform and persuade customer have been tested. Additionally to other information materials the participants also received supporting information in the form of a fridge magnet and sticker. The design of the fridge magnet (and sticker) was designed like a clock, which showed the participants the different timebands and costs for all hours of the day. Within the project those magnets (and stickers) were customized for all different groups of participants (who had particular time-of-use prices).



Different times, different prices

DAY 8am - 5pm	PEAK* 5pm - 7pm	DAY 7pm - 11pm	NIGHT 11pm - 8am
14c	20c	14c	12c

* Peak rate applies Monday to Friday only excluding Public Holidays.
Time of Use pricing will apply from 1st January - 31st December 2010.
Rates may be subject to change in line with ESB Customer Supply tariff changes.
Prices exclude VAT.

Figure 1 Fridge Magnet from the Irish Customer Behavior Trials (source: CER 2011b, 177)

The magnet and sticker helped to introduce the new (and before unknown) time-of-use prices to the customers. The concept was, that the participants place the magnets and sticker prominently on their fridge and use it as a memory aid.

In a survey after the trial the participants were asked to rate the magnet and sticker. Some only received the magnet, some only the stickers and some received both. The result was, that 63% of the respondent found the stickers useful and even 75% found the fridge magnet useful (Stromback 2011; CER 2011a; CER 2011b).

More information: Stromback 2011, CER 2011a & CER 2011b

Adjust to your Corporate Design

Adjust the leaflet to the Corporate Design of your company or project. The use of your brand colours makes it easier for the customer to find the leaflet. On the last pages of this document you'll find a template for the leaflet that can be directly filled with content, adapted to your Corporate Design and handed out to the customers.

Find a structure for your leaflet

To structure the leaflet, you should at first find one topic or issue for every page. The following structure is a proposal to structure the leaflet, but can of course be changed according to your needs

Page 1 (front cover)

There are several opportunities for the first page: you can give it a nice design, so it can look good in every part of the flat. Or you can put your logo or brand on it with your corporate design. Or you can put the most important information or tips right on the first page.

Page 2 and 3 (inlet)

This is the heart of your leaflet. Here you should insert the help section. Frequently asked questions, description of main functions, etc. This is the place where all of those information belongs to. It is even possible to add more pages to the inlet, but it is recommended to reduce it to a minimum.

Page 4 (back cover)

On the back cover you can put the contact of the support team.

Do's and don'ts

- **Use short sentences and an easy to understand language.** Use short sentences or even bullet points to offer the information concisely. Use only as much text as needed. Too much or complicated text could prevent people from reading the offered support texts. It is not helpful to use a technical language that most of the people won't understand.
- **Focus your information.** Limit your advice to the most interesting information for the end user.
- **Give advice on further support.** In any case the contact information of the support team should be on the leaflet. Additional advice should be given on where further information can be found (FAQ, manuals, forum, support team...).
- **Equip the leaflet with a magnet or a loop.** A magnet or a loop on the leaflet helps people to easily stick it to different places within their home. That makes it more useful and the chance that people will place it somewhere within reach will increase. Different studies have shown that the best place for information is the kitchen – on the fridge would be perfect!
- **Add an open space for comments.** An open space for comment of the customer is very helpful. By this the customer can customize the information that is important for his or her usage of the device and can add additional information which is only important for him/her.
- **Use visualisation or pictures for the explanation.** Graphics and visualisations will better kept in mind than just text. A good example for a visualisation that contains the explanation of a whole tariff structure within one page can be found in the best practice example above. This task can be very difficult. Hence it is necessary to prioritize the most relevant problems and explanations (visualisations do need some space). Additionally the help of a designer can be necessary.

- **Use big letters.** The text must be readable without wearing glasses, even for seniors.

Further reading

- CER – Commission for Energy Regulation (2011a) Electricity Smart Metering Customer Behaviour Trials (CBT) Findings Report. Dublin: CER. [PDF: [http://www.cer.ie/docs/000340/cer11080\(a\)\(i\).pdf](http://www.cer.ie/docs/000340/cer11080(a)(i).pdf)]
- CER – Commission for Energy Regulation (2011b) *Appendices. Electricity Smart Metering Customer Behaviour Trials (CBT) Findings Report*. Dublin: CER. [PDF: [http://www.cer.ie/docs/000340/cer11080\(a\)\(ii\).pdf](http://www.cer.ie/docs/000340/cer11080(a)(ii).pdf)]
- Kluckner, P.M. Weiss, A., Sundström, P. and Tscheligi, M. (2013) Two Actors: Providers and Consumers inform the Design of an Ambient Energy Saving Display with Persuasive Strategies. In: Proceedings of the First International Workshop on Behavior Change Support Systems – BCSS. [PDF: <http://ceur-ws.org/Vol-973/bcss6.pdf>]
- S3C Consortium (2014) D3.4 Report on case analyses, success factors and best practices. [<http://www.s3c-project.eu/Down.asp?Name={HYADKPEKMW-630201493832-FBPRIFTPZK}.pdf>]
- Stromback, J., Dromacque, C. and Yassin, M.H. (2011) Empower Demand - The potential of smart meter enabled programs to increase energy and systems efficiency: a mass pilot comparison. Vaasa: Global Energy Think Tank. [PDF: http://esmig.eu/sites/default/files/2011.10.12_empower_demand_report_final.pdf]

This guideline was developed in the S3C project, and is freely available from www.smartgrid-engagement-toolkit.eu.

S3C paves the way for successful long-term end user engagement, by acknowledging that the "one" smart consumer does not exist and uniform solutions are not applicable when human nature is involved. Beyond acting as a passive consumer of energy, end users can take on different positions with respective responsibilities and opportunities. In order to promote cooperation between end users and the energy utility of the future, S3C addresses the end user on three roles. The *smart consumer* is mostly interested in lowering his/her energy bill, having stable or predictable energy bills over time and keeping comfort levels of energy services on an equal level. The *smart customer* takes up a more active role in future smart grid functioning, e.g. by becoming a producer of energy or a provider of energy services. The *smart citizen* values the development of smart grids as an opportunity to realise "we-centred" needs or motivations, e.g. affiliation, self-acceptance or community.

S3C performed an extensive literature review and in-depth case study research in Smart Grid trials, resulting in the identification of best practices, success factors and pitfalls for end user engagement in smart energy ventures. The analysis of collected data and experiences led to the development of a new, optimised set of tools and guidelines to be used for the successful engagement of either Smart Consumers, Smart Customers or Smart Citizens. The S3C guidelines and tools aim to provide support to utilities in the design of an engagement strategy for both household consumers and SMEs. The collection of guidelines and tools describe the various aspects that should be taken into account when engaging with consumers, customers and citizens. More information about S3C, as well as all project deliverables, can be found at www.s3c-project.eu.

Short information for your new device

Here you can place a nice picture or a comic strip or a logo. You should know your customers best, so decide, what could fit for them. If you like to learn more about your customers use our segmentation tool and [guideline](#)

Maybe here could be your **BRAND-LOGO**

And your **SLOGAN**

Here you can place the logos of your partners etc.

This is the main space for your information to the customer.

Structure

The structure of the information should be logical and understandable at a glance.

Content

Try to find out before, which information is the most important for your customer. This information belongs here. Remember: that this is not a manual, but a collection information that should be a solution for the most common problems the users could have

Try to avoid a technical language and find an easy to understand language for the text.

Graphics

If you like to explain functionalities of devices, it could help to use pictures or graphics to show how to handle the devices.

Text Size

Your brand colour

Your Logo

As big as possible. The content should be readable without glasses.

Here you can place the logos of your partners etc.



Continuation of page 2.

The last page is for the information on how to reach the support or any other instance that could be a help for the customer.

You can reach the support by phone:

+1 23 45 56 89

or by mail:

support@yourproject.com