GUIDELINE: ENGAGING PEOPLE THROUGH TELLING STORIES

Abstract

This guideline describes how narratives or stories can be applied in an energy context as an effective tool for customer engagement. It can be used as a method of communication for example in recruitment and marketing. The guideline offers an insight into the different forms and respective uses of narratives as well as best practice examples from the field to dissemination and marketing manager new to the topic.

What is it?

Telling stories is a communication tool that can be used either for recruitment, marketing, or educational purposes in smart energy ventures. By using narratives, knowledge or experiences are transferred through individual stories that aim to engage the listener and make the content more tangible and understandable. Personal experiences are described in the form of testimonials, making use of metaphors or situational contexts that facilitate the listeners' understanding of the issue at hand. Through stories, you can reach different groups of listeners such as end users, policy makers, energy companies etc. It is an easy, intuitive, participatory and multi-purpose method.

Telling their story offers a voice to the individual and can highlight best practice examples from the user point of view. In recruitment and marketing, storytelling is commonly used, as people tend to better relate to stories told by their peers than to technical or factual information. Personal stories from staff members on the other hand give a face to a project or company that consumers can relate to. Last but not least, telling stories is a fun and intuitive way to engage people. Stories can be used as a source of (additional) qualitative information and method of outreach for a project, both when told by members of the project staff and the participants.

When to use?

Use stories or narratives when facts alone will not be interesting enough for the listener, but rather that they need something more engaging. When you want to introduce your project members to the participants, when you want to show how consumers have experienced the product or service in order to attract more customers, or in other instances where you want the target audience to be engaged with your message.

Depending on the aim of the story approach, it can be implemented in different stages during a project. To support recruitment and marketing or raise awareness, using stories in the outreach can be useful at any time in a project. Narratives in reports can help in making information stick by adding a component easy to relate to and remember.

Bob & Linda or the man in the pink tutu (Deutsche Telekom, DE)

In 2013, the Deutsche Telekom, one of the world's leading telecommunications companies, launched a TV commercial featuring "The Tutu Project", a charity project that helps women facing breast cancer, as part of their social responsibility strategy.

Under the slogan "Life is for sharing", the commercial tells the story of Bob and Linda. Linda was re-diagnosed with breast cancer in 2006. To make her laugh and as a way of coping, her husband Bob put on a pink tutu and started a series of photographs in various random locations to share with his wife and her fellow sufferers. From this, the official Tutu Project ™ charity foundation was born.

More information: http://thetutuproject.com/telekom-shares-bob-lindas-story-in-germany/ and https://www.youtube.com/watch?v=FF_m6HBPufA

What do you need to do?

Once you have decided to enhance your communication with stories, it is key to decide on the story you want to tell and how you want to tell it, i.e. you have to decide on a storyline. The ways to tell a story are innumerable. One typical type of story is a hero story. It involves a hero, a person that people can identify with. This hero will face a challenge and to overcome this challenge (e.g. behavioural change), the hero will undergo a journey and, at last, a transformation. A good hero story focuses on the transformation process of the hero. This is also the approach taken by Insero Live Labs based on the advice offered by this guideline (see below for the full best practice example), as this storyline fits nicely with the participation in a Live Lab. However, you can choose other options, when it comes to your storyline. Have a look at the further reading section for a link to the Care2's digital engagement blog has listed how classic film story lines can be adapted for non-profit projects to raise awareness. Have a look at their suggestions for further inspiration.

However, one the way, several questions have to be answered to come up with a conclusive story. It is particularly important to think about, whose stories will be told to which audience, in which format and through which communication channel(s)s? The following considerations should be taken in to mind:

- Who is the storyteller? A representatives from the project organisation, e.g. the project manager or marketing advisor, or customers making use of the smart energy product or service?

- What format will be used for the story? Will it be delivered orally, written, in images, drawings, photos, cartoons etc.
- Which communication channels will be used? A report, marketing material, a blog, a website, a video, etc.?

Decide who's story will be told, to what audience and for what purpose

In the context of smart energy ventures, stories from the perspective of staff members or from the end user perspective (consumers, customers, clients, etc.) are applicable:

- **Stories told by project staff members** can serve several purposes. The project team can use the stories as tool for process evaluation, by rating and choosing those stories, which they judge to contain the most significant change – called the Most Significant Change (MSC) technique. For more information, please refer to the tool [Monitoring and evaluation through stories – Most Significant Change](#). The project staff can also apply stories as a tool for marketing, recruitment, sharing project information, or relationship building with their customer base.
- **Stories told by end users** can also serve different purposes. Their stories can highlight exceptions and good results. They can also be used to enhance or illustrate statistical and survey data in reports (e.g. testimonials). Applying the MSC Technique to customer end user stories can help the project staff to identify goals or main issues in a project and adapt the project plan accordingly. Furthermore user stories can be used as a tool for recruitment. Positive narratives from participants ease the concerns of potential new joiners. Furthermore, offering users or participants an outlet for their stories shows them that their concerns and opinions are heard and valued, which increases the sense of mutual respect and trust.

Decide on the format(s) and communication channels to be used

The following examples represent merely a few of the possibilities that can be considered when stories are used as a communication tool in the field of smart energy.

Vignettes/ Statements/ Testimonials/ Comics

Vignettes[1], statements, testimonials, and little comic strips can embellish facts and statistics in reports and presentations. Strong personal statements remind readers that real people are behind the data. Cartoons can be a powerful way to summarise or emphasise key results.

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[1] A vignette is a short impressionistic scene that focuses on one moment or gives a trenchant impression about a character, idea, setting, or object.
https://en.wikipedia.org/wiki/Vignette_(literature)

Once upon a time the International Energy Agency decided to write their report differently (IEA)

Task 24 is a subtask of the larger IEA Demand Side Management (DSM) Programme, an international collaboration of 14 countries. Task 24 works on the subtask of Behaviour Change in DSM: From Theory to Practice. In their helicopter overview of models, frameworks, contexts, case studies and evaluation metrics, the researcher decided to use stories as format for the report in order to avoid the jargons in their multidisciplinary approach and use a communication tool that could be understood and applied easily by all stakeholders. In the report, the individual case studies were first introduced and then the main facts were summarised in a fairy-tale format: "Once upon a time..", "Every day,…" "But, one day…", "Because of that…", "And, ever since then…", "The end". Thus, each case study is broken down to the initial situation, the incident/measure that provoked a change of behaviour and the effect this change generated. This rather playful narrative approach was emphasised by attaching small comic strips to some of the individual case studies.

More information: http://www.ieadsm.org/ViewTask.aspx?ID=17&Task=24&Sort=0

Story interviews

Interviews can support narrators by providing structure and a suitable topic for their story. One-on-one interviews with project staff members or small interview groups with open-ended questions can support your narrators in choosing a story topic, e.g. "Do you think this project has helped you in changing how you consume energy?" While the interviewer can ask questions to help the story direction and flow, the interviewees should be allowed to tell it in their own time and words – which would make it a semi-structured interview. Please note that background stories, context and embellishments also contain relevant information. Such interviews can be used for multiple purposes; they can be made into case studies, or used as dissemination/marketing material (a blog, a newsletter, presentations about the project, etc.).

Video stories

Videos are an effective format to record stories, especially stories told through a semi-structured or moderated interview. Video stories present a good opportunity to integrate the customers in the project dissemination and show that 'real people' are part of your trial. Video stories can be an effective tool for marketing and recruitment; either by letting participants talk about their positive experiences in a projector or with a product. Or the company or project staff can introduce themselves to their customers and participants by telling energy stories of their own. Video stories can be disseminated on multiple channels, including websites and different social media channels or, depending on the outreach, even on local TV channels.

Experiences from being part of a living laboratory (Insero Business Services, DK)

Insero Live Labs is a project where state-of-the-art energy and ICT technology is trialled in 20 family homes in Denmark. Based on the guidance included in this guideline, Insero decided on using a hero story as this storyline fits nicely with the participation in a Live Lab. It has, in collaboration with the S3C project, asked some of their participants to share their experiences in taking part in a living lab. A video story of a couple taking part in the project was implemented. The narrators are telling the viewer how they experienced the switch to sustainable energy and how the new equipment in their house has impacted their daily lives. Their story was structured via loose questions (i.e. a semi-structured interview).

Before we joined the project, we used different apps to look at the consumption of electricity in the house.

More information: http://inserolivelab.dk/en/2014/08/peer-and-jette-share-experiences-frominsero-live-lab/

Photo stories

One approach to collect stories is asking participants to document their participation in the project through pictures. This approach can, in some cases, be combined with a monetary incentive, e.g. a tablet or smartphone could be a feasible incentive, especially if an online feedback or information channel is to be tested as well as part of the trial.

The photos can be put together to form a collage, poster or a photo story, etc.
Such photo stories can fulfil multiple purposes. Apart from gathering data about the participants' daily lives, it can also serve as a tool to stimulate dialogue and deliver materials for the project dissemination.

Scrap/Story books

The next step from a photo story can be a scrap or story book. The customers or participants are provided with a book or album for documenting their participation in the project though pictures, little artefacts, mementos and written statements. In a scrap book, participants can document the challenges they face in the project and how they overcome them, can talk about their activities within project framework and thus deliver a visual as well as narrative account over the whole period of the project. The data from the scrap books can be quantified and evaluated or it can be used to highlight best practice examples from the customer level.

Apps for telling stories digitally

With the increasing presence of mobile devices such as smart phones and tablets, a variety of storytelling apps emerges in households. These enable users to easily and intuitively merge their pictures, videos, music and commentary into their own digital stories. Examples of storytelling apps are Storehouse Visual Storytelling, ThingLink and Nokia StoryTeller.

Combining narrators, communication channels and goals

Below you can find a table that refers to the applicability of story tellers and formats for the different purposes that telling stories might hold. Please note: The table above merely provides a recommendation on which narrators and story formats are best suited for the purposes of data & knowledge collection and / or outward communication & dissemination. However, what a story can be used for and how it can be disseminated strongly depends on how the collected material is prepared and edited. Example: A story interview might be too long and "texty" for some of the more common social media channels like Facebook or twitter (140 characters per post only). However, a story interview could be edited into an entry for an online-blog or as a news feature for a website, which could then be shared via e.g. Facebook and twitter.

Combining narrators and story formats with storytelling goals		Data & knowledge collection		Communication & dissemination			
		Qualitative analysis	Quantitative analysis	Printed marketing material	Website	Blogs	Social media
Narrator	Staff member	-	-	+	+	+	+
	Participant	+	+	+	+	+	+
Story formats	Vignette, Statement, testimonial, comic	+	-	+	+	+	+
	Story interviews	+	o	+	+	+	o
	Video stories	+	o	-	+	+	+
	Photo stories	+	-	+	+	+	o
	Scrap/story books	+	-	-	-	-	-
	Storytelling apps	+	+	o		+	+

Table 1: Overview of which story formats and narrators are suitable in regard to the two main purposes for telling stories in the context of energy described in this guideline: data & knowledge collection and communication and dissemination

Do's and don'ts

- **Identify your storytellers**. For recruitment and marketing, it is important to identify the gifted narrators amongst you. Stories are not just about the content, but also about the way they are presented.
- **Put the story in the right frame**. The story should be easily relatable and of interest to your target group. Central in the stories should be the experience of the end user. The product or service should not take the centre stage, rather what this product or service does for the consumer. So the story based on an in-house display should not be about how often they use it and what functions they use, but rather why they find it much easier now to control their energy use or plan the smart washing machine.
- **Include personal details and anecdotes.** They make a story lively, believable and help people identify with the narrator.

- **Choose a compelling incentive.** Apart from investing time, telling a story requires revealing personal information. To get your end user on board, additional monetary and non-monetary incentives may be necessary, e.g. awards for the best stories, smartphones/tablets with storytelling tools, a book coupon for a submitted scrap book, etc. For more information, please refer to the S3C guideline Choosing and combining monetary and non-monetary incentives.
- **Pay attention to privacy issues.** Be transparent. Inform your narrators what their stories, pictures, etc. will be used for, how and where they will be published and shared. Make sure to get a written consent for using and disseminating the material you collect.

Further reading

- Community Sustainability Engagement Evaluation Toolbox: http://evaluationtoolbox.net.au/index.php?option=com_content&view=article&id=61&Itemid=157
- Davies, R. & Dart, J. (2005). *The Most Significant Change (MSC) Technique – A Guide to Its Use.* http://www.mande.co.uk/docs/MSCGuide.pdf
- Mourik, R., Rotmann, S. (2013). *Task 24: Closing the Loop – Behaviour Change in SDM: From Theory to Practice.* Deliverable 2 for IEA Implementing Agreement DSM Task 24. http://www.ieadsm.org/Files/Tasks/Task%2024%20-%20Closing%20the%20Loop%20-%20Behaviour%20Change%20in%20DSM,%20From%20Theory%20to%20Policies%20and%20Practice/Publications/Task%2024%20Subtask%20I%20Final%20Report.pdf
- Sukop, S., Tobin, J., Fischman, G. E. (2007). *Storytelling Approaches to Program Evaluation – An introduction.* The California Endowment. http://www.tcfv.org/pdf/prevention/Storytelling%20Approaches%20to%20Program%20Evaluation%20-%20CA%20Endowment.pdf
- Care2's digital engagement blog on how classic film story lines can be adapted for non-profit projects to raise awareness: http://www.care2services.com/care2blog/nonprofitstorytelling.

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.

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SMART **CUSTOMER**
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