



Customer Experience Energy Conservation Procedures

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Customer Services Conservation Process

Revision History

Date	Version	Description
January 13,2024	1.0	Initial Document
March 3, 2024	2.0	Revised with Reorg



Customer Services Conservation Process

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Summary

Generation Dispatch continuously monitors reliability of the Bulk Electric System (BES) and assesses resource availability to ensure LG&E-KU is prepared to handle capacity and energy emergencies under a variety of system conditions. Should forecasted extreme weather conditions cause forecasted load to exceed a target percentile within the LG&E-KU Balancing Area, Generation Dispatch will issue a series of alerts through email.

The Customer Experience (CE) Section Chief(s) are responsible for developing, maintaining, and executing the Energy Conservation Response Plan addressing the communication processes and protocols to be followed during an LG&E-KU Energy Capacity Event. The CE Organization Chart for Energy Conservation Events can be found in [Appendix A](#).

Emergency Preparedness, Planning and Response

CE Section Chiefs will receive non-automated notification of each alert level. Directors, and others (as necessary) will receive an automated email notification when Generation Dispatch issues one of the following Alerts. There are five (5) alert levels. The Customer Communication matrix for each level can be found in [Appendix B](#). Details for each alert level can be found in [Appendix C](#). The alert levels are:

Forecast
Watch
Warning
Emergency
All Clear

CE section chiefs will notify CE directors who will notify their team to execute their appropriate tasks based on the alert level. See the Appendices for details on task execution.

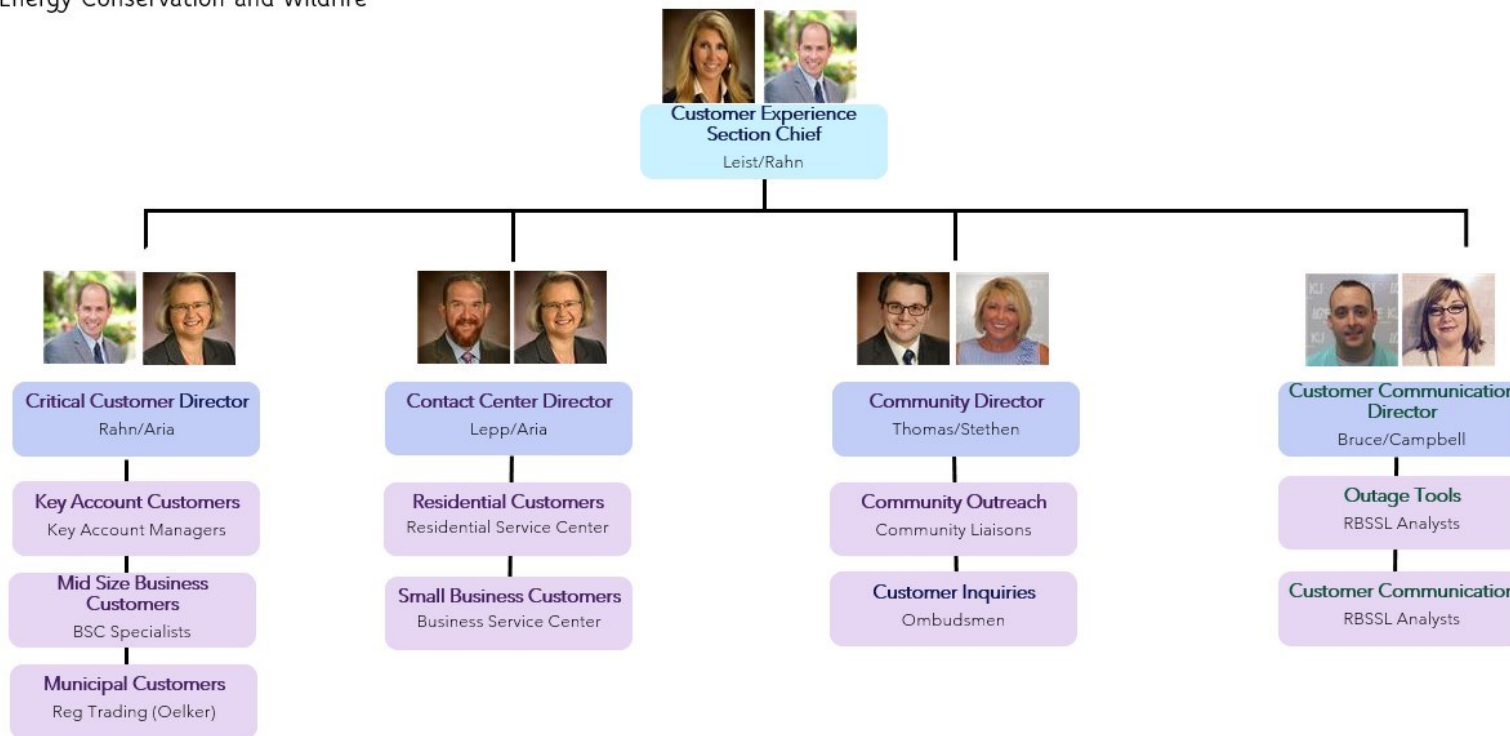
- Critical Customer Director ([Appendix D](#))
- Contact Center Director ([Appendix E](#))
- Community Director ([Appendix F](#))
- Customer Communication Director ([Appendix G](#))



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Appendix A: Customer Experience Organization Chart

Customer Experience Organization Chart
 Energy Conservation and Wildfire



Business Use

Business Use



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Appendix B: Customer Communication Matrix

Direct messaging assumes vendor product/service is available to communicate to large number of customers otherwise dependent on social, tv and radio media.

Level	Trigger	Sample Message	Residential & Small/Midsize Business (Leist)	Key Account and DSM Actions (Rahn)	Communications and Corporate Responsibility (Phillips/Collins)
Forecast	Weather forecast for extreme temps that will cause forecasted load to exceed a target percentile (e.g., 5 th percentile of annual peak, 1.5 standard deviations from the mean, etc.)	On [date(s)], temperatures are forecasted which may significantly increase electricity usage. Please use energy wisely and be alert for future updates regarding the system of the power system.	Direct message customers via text, email, or phone with Forecast message – due to forecasted extreme temperatures, you can find tips on how to conserve energy on our website at (URL). Utilize IVR messaging.	Key account managers (KAM) issue a courtesy email to customers and ask for possibility of operational flexibility, including ensuring customers have tested back-up generators, etc. KAMs would explain the next possible trigger point of “Watch” status. Remind Curtailable Service Rider (CSR) customers of their responsibilities	Post messaging on the company’s social media channels to encourage customers to use energy wisely and direct people to our hot weather EE tips page. If extreme temperatures are forecasted to persist, issue an e-blast to customers. Be ready to field media inquiries – not to sound an alarm at this stage but to reassure customers that we’re working 24/7 to safely and reliably meet energy demands and reiterate our EE tips.



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Level	Trigger	Sample Message	Residential & Small/Mid Business (Leist)	Key Account and DSM Actions (Rahn)	Communications and Corporate Responsibility (Phillips/Collins)
Watch	<p>Generation in 'alert' status.</p> <p>Contemplating using load reduction tools except for CSR physical curtailment.</p> <p>Purchasing day ahead firm transmission to maintain reserves.</p>	<p>On [date(s) / [times], temperatures are forecasted to significantly increase electricity usage. Please reduce non-essential electricity use during this time, by limiting use of washers, dryers, ovens, dishwashers, and EV chargers. We also encourage customers to adjust thermostat a couple of degrees [up or down depending on the season].</p> <p>Peak Time Rebate (PTR) – pay attention for possible event.</p> <p>Demand Load Conservation (DLC) customers – direct load control is expected to be used override is unlikely.</p>	<p>Direct message customers via text, email or phone with Watch message - due to extremely high electric demand, please conserve and reduce non-essential electricity usage. Visit our website for more information (URL).</p> <p>Utilize IVR messaging.</p> <p>Community Liaisons reach out to local communities asking for conservation (i.e., adjust thermostat, reduce lighting where does not compromise safety- Christmas trees, unnecessary building lighting (outside, inside, on top, etc.).</p>	<p>Call and inform key and sensitive accounts such that a voluntary shutdown of equipment saves damage and inventory losses.</p> <p>Inform CSR Customers that physical curtailment is probable.</p> <p>Inform Peak Time Rebate customers (if DSM plan approved) of a possible event they can/should participate in.</p>	<p>Launch an alert bar on our website (available on any page a customer visits) that directs customers to visit a special landing page (we'd launch lge-ku.com/conserves) where the latest info on the event and instructions on what to do would be updated as the situation evolves.</p> <p>Post messaging on the company's social media channels to ask customers to use energy wisely by actively following our EE tips.</p> <p>Issue a press release to reiterate key messaging.</p> <p>Ensure CS reps, management and employees have talking points that are updated as the situation evolves.</p>



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Level	Trigger	Sample Message	Residential & Small/Mid Business (Leist)	Key Account and DSM Actions (Rahn)	Communications and Corporate Responsibility (Phillips/Collins)
Warning	<p>CSR Physical curtailment likely or in progress.</p> <p>Power purchases likely needed to serve load or maintain reserve margin.</p>	<p>On [date(s) / [times], system conditions are such that we are requesting <u>ALL CUSTOMERS</u> to reduce electricity use during this time, and until further notice.</p> <p>Key Account customer message – please implement voluntary electricity reduction plans.</p>	<p>Direct message customers via text, email or phone with Warning message - due to extremely high electric demand, we are asking all customers to reduce electricity usage during (specified time period) to minimize potential service interruptions. Visit our website for more information (URL).</p> <p>Utilize IVR messaging.</p> <p>Community Liaisons reach out to local communities requesting all conserve.</p>	<p>Ask customers to reduce loads for the benefit of the system if they're able. Inform the next step may be an involuntary shed that is more unpredictable.</p> <p>To the extent possible, proactively inform CSR customers of physical curtailment.</p>	<p>Issue a press release and proactively call members of the media to inform them of the situation (note: often elected officials call press conferences at stages like this and we would be a key participant).</p> <p>Issue paid social media, radio, and television conservation messages.</p> <p>Ensure CS reps, management and employees have talking points that are updated as the situation evolves.</p> <p>Update alert bar language on corporate website and My Account landing page, directing customers to our special landing page for the latest information.</p>



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Level	Trigger	Sample Message	Residential & Small/Mid Business (Leist)	Key Account and DSM Actions (Rahn)	Communications and Corporate Responsibility (Phillips/Collins)
Emergency	Load shedding is imminent or in progress.	Rolling blackouts are likely or in progress. Please take immediate action to reduce your electricity usage until further notice.	<p>Direct message customers via text, email and phone with Emergency message - rolling blackouts are likely/in progress. Take immediate action to reduce electricity usage and minimize potential service interruptions. Visit our website for more information (URL).</p> <p>Utilize banner on outage map and IVR messaging.</p> <p>Community Liaisons reach out to local communities requesting immediate action.</p>	KAMs begin calls to customers per distribution circuit or transmission load shed plan.	<p>Immediately begin paid social, radio and television crawls advising customers of the situation.</p> <p>Participate in press conferences, field ongoing media requests and issue tailored press releases to the appropriate areas of our service area as needed.</p> <p>Post to our social media channels frequent updates as the situation evolves.</p> <p>Ensure internal audiences and PPL communications are kept informed with updated talking points.</p> <p>Direct all customers to our special landing page with the latest information.</p>



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Level	Trigger	Sample Message	Residential & Small/Mid Business (Leist)	Key Account and DSM Actions (Rahn)	Communications and Corporate Responsibility (Phillips/Collins)
All Clear	Load shedding has concluded	Rolling blackouts are over. Appreciate your efforts in conservation and apologize for any inconveniences this may have caused.	<p>Direct message customers via text, email and phone with message - rolling blackouts have concluded. Thank them for conserving energy. Apologize for inconvenience. Visit our website for more information (URL).</p> <p>Utilize banner on outage map and IVR messaging.</p> <p>Community Liaisons reach out to local communities.</p>	Direct message customers via text, email or phone with All Clear message – appreciate your conservation efforts and apologize for inconvenience this may have caused – energy conservation effort for this event has concluded.	After the event, follow up with all stakeholders.



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Appendix C: Energy Conservation Alert Status and CE notification email examples

Generation Dispatch will send a new notification as follows at the start of any Alert status change: Each Section Director will be responsible for ensuring this distribution list is correct for their section.

Forecast

Weather forecast for extreme temperatures that will cause forecasted load to exceed a target percentile (e.g., 5th percentile of annual peak, 1.5 standard deviations from the mean, etc.):

The example email that will be sent from Generation Dispatch will state,
"Generation Dispatch is issuing a **Forecast** alert effective 15:35 12/22/2023. Please take the appropriate action."

Watch

Any combination of:

- Generation in 'alert' status.
- Contemplation of load reduction tools except for CSR physical curtailments.
- Purchasing day ahead firm transmission to maintain reserves.

The example email that will be sent from Generation Dispatch will state,
"Generation Dispatch is issuing a **Watch** alert effective 05:10 12/23/2023. Please take the appropriate action."

Warning

Any combination of:

- All available generation has been committed.
- Curtailment Service Rider (CSR) customers have been notified by Generation Dispatch of physical curtailment.
- Purchasing non-firm hourly power.

The example email that will be sent from Generation Dispatch will state,
"Generation Dispatch is issuing a **Warning** alert effective 09:00 12/23/2023. Please take the appropriate action."

Emergency

Any combination of:

- All available generation has been committed.
- CSR customers have been notified of physical curtailment.
- Purchasing non-firm hourly power.
- Load shed is imminent or in progress.

The example email that will be sent from Generation Dispatch will state,
"Generation Dispatch is issuing an **Emergency** alert effective 16:45 12/23/2023. Please take the appropriate action."

All Clear

Any combination of:

- When energy conservation is no longer needed or anticipated.
- This alert can be issued any time after the Forecast alert.

The example email that will be sent from Generation Dispatch will state,
"Generation Dispatch is no longer issuing alerts effective 10:00 12/26/2023. Please take the appropriate action."



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Appendix D: Critical Customer Director – LG&E-KU Energy Capacity Event Alert Level Tasks

Non-Alert Days

The Critical Customer Director(s) will maintain a contact list of customers who should be targeted upon a LG&E-KU Energy Capacity Event. Critical customers in one of the 3 groups below, will be addressed by the group noted below:

- Key Accounts (handled by KAM)
- Small and Midsize Accounts (handled by BSC Specialist)
- Municipal Accounts (handled by Generation Dispatch and Trading)

In the event of an LG&E-KU Energy Capacity Event alert, the Critical Customer Director(s) are responsible for obtaining a list of critical customers to receive the LG&E-KU Energy Capacity Event Alert emails.

Alert Days

Upon receipt of an LG&E-KU Energy Capacity Event alert email, the following actions should be taken:

Forecast Alert

- Direct message critical customers via text, email, or phone, providing the following message:

“Effective [date(s) / time(s)], system conditions are forecasted which may impact electric usage significantly. Please use energy wisely and be alert to future updates regarding the state of the power system. If you have flexibility, consider reducing non-essential electric usage during this time. Please visit our website for more information (URL) or reach out directly to your account representative.”

- If possible, identify critical customers with backup generation capabilities, if known.
- KAMs will contact customers on the Curtailment Service Rider (CSR) and review their responsibilities and requirements.
- Share any talking points regarding the event, as appropriate.
- Discuss potential actions to be taken if “Watch” alert status occurs.

Watch Alert

- Direct message TCL customers via text, email, or phone, providing the following message:

“Effective [date(s) / time(s)], system conditions are forecasted which may impact electric usage significantly. Please reduce non-essential electric usage during this time. Be advised, Demand Side Management (DSM) and Curtailable Service Rider (CSR) customers may be called upon at this time. Please visit our website for more information (URL) or reach out directly to your account representative.”

- To the extent possible, KAMs will proactively reach out to appropriate Key Account customers with sensitive equipment and processes informing them that voluntary shutdowns can often save damage to equipment and inventory loss.
- Inform Peak Time Rebate (DSM) customers of a possible event they can/should participate in.
- Inform CSR Customers that physical curtailment is possible if the alert progresses to the warning level.
- Share additional talking points regarding the event, as appropriate.
- Discuss potential actions to be taken if “Warning” alert status occurs.



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Appendix D: Critical Customer Director (cont.)

Warning Alert

- Direct message critical customers via text, email, or phone, providing the following message:
“Effective [date(s) / time(s)], system conditions are such that we are requesting ALL CUSTOMERS to reduce electric usage during this time, and until further notice. Be advised, Demand Side Management (DSM) and Curtailable Service Rider (CSR) customers are likely to be called upon. Please visit our website for more information (URL) or reach out directly to your account representative.”
- Continue to ask customers to reduce loads for the benefit of the system. Remind customers that involuntary load shed is more unpredictable and could take longer to restore.
- To the extent possible, proactively inform CSR customers of the likelihood of a physical curtailment with no buy-through option.
- If/When a physical CSR curtailment with no buy-through option is issued, reach out directly to impacted customers via a phone call.
- Share additional talking points regarding the event, as appropriate.
- Review actions to be taken if “Emergency” alert status occurs.

Emergency Alert

- Direct message critical customers via text, email, or phone, providing the following message:
“Effective [date(s) / time(s)], rolling blackouts are likely or in progress. Please take immediate action to reduce your electric usage until further notice. Please visit our website for more information (URL) or reach out directly to your account representative.”
- In the event a CSR Physical Curtailment has yet to be called prior to an Emergency Alert issuance, to the extent possible, notify CSR customers a physical curtailment with no buy-through option is imminent (unless annual hour limit has been reached per tariff).
- Begin reaching out directly, via phone, to customers impacted by the Distribution or Transmission Load Shed plan as deemed necessary.
- Share additional talking points regarding the event, as appropriate.

All Clear Alert

- Direct message critical customers via text, email, or phone, providing the following message:
“Effective [date(s) / time(s)], system conditions are in an All Clear. Please visit our website for more information (URL) or reach out directly to your account representative.”
- Attempt to identify and call critical customers with backup generation capabilities, if otherwise unknown.
- Contact customers on the Curtailment Service Rider (CSR) and review their responsibilities and requirements.
- Share any talking points regarding the event, as appropriate.
- Discuss potential actions to be taken if “forecast” alert status occurs again.



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Appendix E: Contact Center Director – LG&E-KU Energy Capacity Event Alert Level Tasks

Non-Alert Days

The Contact Center Director(s) will maintain a contact list of employees and ensure Everbridge is update.

The Contact Center Director(s) will update contact center employees of possible conservation events. Ensure all on-call employees are aware of the potential need to respond in the event of company called conservation actions. Ensure all contact center employees (including BSC Specialists) are reminded expectations of an “All In.”

Alert Days

Upon receipt of an LG&E-KU Energy Capacity Event alert email, the following actions should be taken:

Forecast Alert

- Message customers via the App and through a message on the Call Center IVR. Update the Call Center IVR with appropriate messaging.
Message for IVR: “On [date(s)], temperatures are forecasted which may significantly increase electric usage. Please use energy wisely and be alert for future updates regarding the state of the power system. You can find tips on how to conserve energy on our website at (URL).”
- Remind employees to review information in RIO regarding conservation event status and notify that we are in Forecast stage.
- Notify employees using email or Everbridge messaging, as appropriate, of potential need to report to work if a conservation event.
- Confirm that Corp. Comm. is posting messaging on the company internet site and social media.
- Share any talking points regarding the event, as appropriate.
- Review actions to be taken if “Watch” alert status occurs.

Watch Alert

- Message customers via those connected through the App and through a message on the Call Center IVR and online MyAccount.
Message for IVR: “On [date(s) / [times], temperatures are forecasted to significantly increase electricity usage. Please reduce non-essential electricity use during this time, by limiting use of washers, dryers, ovens, dishwashers, and EV chargers. We also encourage customers to adjust thermostat a couple of degrees [up or down depending on the season]. Visit our website for more information (URL).”
- Remind employees to review information in Retail Information Online (RIO) regarding conservation event status and notify that we are in Watch stage.
- Review if message was sent for Forecast stage. If needed, send another note, or if we have not been in a prior alert phase, send notification to employees.
- On-call supervisor/call center management should follow normal emergency response procedures. Consider paging in level 1 staff, holding staff over, or continue to watch conditions closely for further action.
- Share any talking points regarding the event, as appropriate.
- Review actions to be taken if “Warning” alert status occurs.



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Appendix E: Contact Center Director (cont.)

Warning Alert

- Message customers via those connected through the App and through a message on the Call Center IVR and online MyAccount.
Message for IVR: *"On [date(s)] / [times], system conditions are such that we are requesting ALL CUSTOMERS to reduce electricity use during this time, and until further notice. Visit our website for more information (URL)."*
- On-call supervisor/call center management should follow normal emergency response procedures. As appropriate, page in level 1 staff, hold staff over, or continue to watch conditions closely for further action. On-call supervisor/call center management will discuss action plan if "Emergency" level is activated discussion to include need for additional on-call support and/or declaration of an "all-in." Discussion should include the need for support to report to on-site call center.
- Remind employees to review information in RIO regarding conservation event status and notify that we are in a Warning stage.
- Share any talking points regarding the event, as appropriate.

Emergency Alert

- Message customers via those connected through the App and through a message on the Call Center IVR and online MyAccount.
Message for IVR: *"Rolling blackouts are likely or in progress. Please take immediate action to reduce your electricity usage until further notice. Visit our website for more information (URL)."*
- On-call supervisor/call center management should follow normal emergency response procedures. Consider paging in additional on-call support and/or declaring an "all-in" for emergency response.
- Remind employees to review information in RIO regarding conservation event status and notify that we are in Emergency stage.
- Share additional talking points regarding the event, as needed.

All Clear Alert

- Update the IVR and online MyAccount with an all-clear message.
Message for IVR: *"Rolling blackouts are over. Appreciate your efforts in conservation and apologize for any inconveniences this may have caused."*
- Review outage counts. Review calls in queue and begin to release staff per normal emergency response procedures.
- Share additional talking points regarding the event, as needed.
- Confirm with Corp. Comm. that the website and social media are being updated.



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Appendix F: Community Director – LG&E-KU Energy Capacity Event Alert Level Tasks

Non-Alert Days

The Community Director(s) will maintain a contact list of Civic Affairs/Customer Commitment employees and ensure Everbridge is updated.

The Community Director(s) will notify Civic Affairs/Customer Commitment employees of possible conservation events from severe weather, including messaging to ensure on-call employees are aware of the potential need to respond in the event of company called conservation actions.

Alert Days

Upon receipt of an LG&E-KU Energy Capacity Event alert email, the following actions should be taken:

Forecast Alert

- Notify Community Liaison Managers (CLM) to prepare for potential questions related to a possible conservation event and to make aware of communications going out.
- Collaborate internally to streamline communication.
- Remind employees to review information in RIO regarding conservation event status.
- Share any talking points regarding the event, as appropriate.
- Review actions to be taken if “Watch” alert status occurs.

Watch Alert

- CLM will reach out to a specific list of community leaders, informing them of current situations and sharing tips on how to conserve.
- Collaborate internally to streamline communication.
- Determine when to communicate with PSC, medical alert customers, and Low-Income Agencies, if necessary.
- Work on strategy with CLM as conservation efforts progress, identifying key community leaders and communication strategies.
- Share any talking points regarding the event, as appropriate.
- Review actions to be taken if “Warning” alert status occurs.

Warning Alert

- CLM will continue to update community leaders with needed information as conservation efforts progress.
- Collaborate internally to streamline communication.
- If communication to PSC is warranted and from our department, we would continue to update PSC, medical alert customers, and Low-Income Agencies.
- Work on strategy with CLM as conservation efforts progress, identifying key community leaders and communication strategies.
- Share any talking points regarding the event, as appropriate.
- Review actions to be taken if “Emergency” alert status occurs.



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Appendix F: Community Director (cont.)

Emergency Alert

- Collaborate internally to streamline communication.
- Update PSC, medical alert customers, and Low-Income Agencies, if necessary.
- CLM will provide updates to community leaders informing them of the current situation and potential impacts.
- Monitor the progression of the event and update community leaders as necessary.

All Clear Alert

- CLM will communicate with impacted community leaders to notify of event status.
- Communicate to PSC, medical alert customers, and Low-Income Agencies as necessary of event status.



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Appendix G: Communication Director – LG&E-KU Energy Capacity Event Alert Level Tasks

Non-Alert Days

The Communication Director(s) will maintain a contact list of Retail Business Systems, Strategies, and Learning (RBSS&L) and ensure Everbridge is updated (if appropriate).

The Communication Director(s) will notify RBSS&L employees of possible conservation events from severe weather, including messaging to ensure on-call employees are aware of the potential need to respond in the event of company called conservation actions.

Alert Days

Upon receipt of an LG&E-KU Energy Capacity Event alert email, the following actions should be taken:

Forecast Alert

- Message employees by email to notify of Forecast and remind them to review RIO for conservation status information.
- Prepare message templates in the event customer communication is needed.
Sample Message: *“Due to forecasted extreme temperatures, you can find tips on how to conserve energy on our website at (URL).”*
- Send preliminary notifications to customers, as directed.
- Prepare potential alerts to be added to the outage map and deploy as directed.
Sample Alert: *“On [date(s)], temperatures are forecasted which may significantly increase electricity usage. Please use energy wisely and be alert for future updates regarding the system of the power system.”*
- Share any talking points regarding the event, as appropriate.
- Review actions to be taken if “Watch” alert status occurs.

Watch Alert

- Message employees by email to notify of Watch status and remind them to review RIO for conservation event status information.
- Revise and finalize message templates in the event customer communication is needed.
Sample Message: *“Due to extremely high electric demand, please conserve and reduce non-essential electricity usage. Visit our website for more information (URL).”*
- Send preliminary notifications to customers, as directed.
- Prepare potential alerts to be added to the outage map and deploy as directed.
Sample Alert: *“On [date(s)]/[times], temperatures are forecasted to significantly increase electricity usage. Please reduce non-essential electricity use during this time, by limiting the use of washers, dryers, ovens, dishwashers, and EV chargers. We also encourage customers to adjust thermostat a couple of degrees [up or down depending on the season].”*
 - PTR – pay attention for possible event.
 - DLC customers – direct load control is expected to be used override is unlikely.”
- Work with corporate communication to get potential talking points in the event they are needed.
- Share any talking points regarding the event, as appropriate.
- Review actions to be taken if “Warning” alert status occurs.



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Appendix G: Communication Director (cont.)

Warning Alert

- Message employees by email to notify of the Warning status and remind them to review RIO for conservation event status information.
- Get list of customers to be potentially affected by load shed.
- Send notifications to customers, as directed.
 - Sample Message: *“Due to extremely high electric demand, we are asking all customers to reduce electricity usage during (specified time period) to minimize potential service interruptions. Visit our website for more information (URL).”*
- Revise alerts added to the outage map and deploy as directed for updated status.
 - Sample Alert: *“On [date(s)] / [times], system conditions are such that we are requesting **ALL CUSTOMERS** to reduce electricity use during this time, and until further notice.”*
- Publish talking points for front office employees in RIO.
- Review actions to be taken if “Warning” alert status occurs.

Emergency Alert

- Message employees by email to notify of Emergency status and remind them to review RIO for conservation event status information.
- Get list of customers affected by load shed.
- Send notifications to customers, as directed.
 - Sample Message: *“Rolling blackouts are likely/in progress. Take immediate action to reduce electricity usage and minimize potential service interruptions. Visit our website for more information (URL).”*
- Revise alerts added to the outage map and deploy as directed for updated status.
 - Sample Alert: *“Rolling blackouts are likely or in progress. Please take immediate action to reduce your electricity usage until further notice.”*

All Clear Alert

- Message employees by email to notify of All Clear.
- Prepare message templates in the event customer communication is needed.
- Send All clear notifications to customers, as directed.
- Prepare potential alerts to be added to the outage map and deploy as directed.
 - Sample Alert: *“On [date(s)], we have been released to an all-clear status. No additional action is requested from you currently. Please visit our website for more information (URL).”*