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EDP Serviço Universal Rebranding Communication Plan

Rita Figueiredo de Carvalheira Almeida

Master in Marketing

Supervisor:

PhD Mónica Mendes Rocha Ferreira, Invited Assistant Professor
ISCTE-IUL

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BUSINESS
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Department of Marketing, Strategy and Operations

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Abstract

The objective of this project is to develop a communication plan for the rebranding of EDP Serviço Universal.

EDP Serviço Universal is the regulated market company. At the end of 2017, the Energy Services Regulatory Authority (ERSE) imposed on the EDP group to make a total separation of designation and image between the companies in the group providing regulated services - that is, they have a specific function in the electricity sector and are remunerated for this through electricity tariffs - and those operating in the liberalized market, such as EDP Comercial.

At the beginning of 2020, EDP Serviço Universal had to make the brand change. Being a regulated market company, there are several restrictions on how it can communicate with their customers, being this one of the main obstacles. The communication of the name distinction between the other companies of the EDP group is another factor that had to be taken into account.

The communication strategy integrates mostly traditional tools. It is a customized strategy dedicated to each customer segment. Before the implementation and definition of objectives, all external and internal factors were analyzed, using several members of the project team to align the information with the company's expectations.

The project was developed and implemented. During twelve months and after several meetings with the Board of Directors of the current SU ELETRICADE, it was possible to implement this communication plan. After completing the rebranding project, the company decided to create a customer experience area where the author is currently responsible for the entire communication strategy.

Key-Words: Rebranding; Communication

JEL Classification Systems: M31- Marketing, M37- Advertising

Resumo

O objetivo deste projeto é desenvolver um plano de comunicação para o rebranding da EDP Serviço Universal.

A EDP Serviço Universal é a empresa do mercado regulado. No final do ano de 2017, a Entidade Reguladora dos Serviços Energéticos (ERSE) impôs ao grupo EDP que fizesse uma separação total de designação e imagem entre as empresas do grupo que prestam serviços regulados - ou seja, têm uma função específica no sector elétrico e são remuneradas por isso através das tarifas da eletricidade - e aquelas que atuam no mercado liberalizado, como a EDP Comercial.

A EDP Serviço Universal, no início do ano de 2020 teve obrigatoriamente que fazer a mudança de marca. Sendo uma empresa do mercado regulado, existem várias restrições a nível das formas como pode comunicar com os seus clientes, sendo este um dos principais obstáculos. A comunicação da distinção de nome entre as demais empresas do grupo EDP é outro fator que se teve que ser em conta na implementação da estratégia.

A estratégia de comunicação integra maioritariamente ferramentas tradicionais. É uma estratégia personalizada e dedicada a cada segmento de cliente. Antes da implementação e definição de objetivos, foram analisados todos os fatores externos e internos, recorrendo a vários membros da equipa de projeto para que a informação fosse alinhada com as expectativas da empresa.

O projeto foi desenvolvido e implementado simultaneamente aquando a construção da tese. Durante doze meses e após várias reuniões com o Conselho de Administração da atual SU ELETRICIDADE, foi possível implementar este plano de comunicação. Após a conclusão do projeto rebranding, a empresa decidiu criar uma área de experiência de cliente onde a autora é atualmente responsável por toda a estratégia de comunicação.

Key-Words: Mudança de Marca, Comunicação

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1. Context and problem definition

EDP Serviço Universal, is a company of the EDP group, is the last resort Trader for electricity in mainland Portugal. It is a company regulated by the Energy Services Regulatory Authority (ERSE), which performs the following essential functions for the electricity sector: purchase of energy production under Special Regime (PRE) with administratively fixed prices, including distributed manufacturing, and sale of said energy on the market; purchase in the market of the electricity needed to meet the demand of its customers; electricity to end customers, based on the transitional tariffs published by ERSE.

ERSE has a significant role in the company. It is the one who supervises and establishes all the conditions for the sale of energy. At the end of 2017, the regulatory authority defined in the Commercial Relations Regulation article 80(b) the need for an unambiguous separation of name and image, symbology, and colour of the regulated market trader with the other companies of the EDP Group in particular, the distributor and market marketer – assuming itself as an independent brand, without any links to the EDP brand.

Although in 2011, the last rebranding of the EDP Group, where it presented its new logo and company positioning for "*The new brand is flexible, open and innovative, translating the values of EDP; it's more than a brand, it's a new language. Clear, inclusive, and comprehensive.*" (António Mexia, 2011) EDP Serviço Universal, in 2020, will even have to differentiate itself and create an entirely different image.

EDP Serviço Universal will need to define a communication plan for rebranding to succeed and that the entire customer portfolio knows how to recognize the company's name and image after the whole process is implemented. It will have several challenges. The main challenge will be to assure the customer that the company will be the same and it will continue to ensure the confidence of always.

2. Literature Review

2.1. Brand

American Marketing Association defines (1960) brand as “*a name, term, design, symbol, or a combination of them, intended to identify the goods or services of one seller or group of sellers and differentiate them from competitors.*” According to Aaker (1998, p. 7), “*a brand is a distinct name and/or a symbol that aims to identify a seller’s goods or services and differentiate these goods and services from its competitors.*”

In 2006, Neumeir affirmed that a brand is much more than its elements, that a brand is “a gut feeling about a product, service or company”. In fact, over time, the way products and services are sold has changed. In the early trading burrows, such as merchants' skills, friendliness, and how he sold the product were the most valued things. However, due to the growth of the market and the diversity of business areas, companies' need to differentiate themselves, create an entity, and a personality, was born. Thus, as Neumeir argued, each individual creates his version of a brand. In other words, as each person is different and has his own experiences and background, his perception of a brand may differ from another’s.

On the other hand, for Tomiya (2010, p. 26), logo, name, packing, communication, and design are consequences of a branding strategy in the organizational culture, in the objectives, in the articulation of positioning, and the brand's differential.

Nowadays, there is a huge range of products with the same features and functionality. The brand is the one that helps consumers organize their knowledge about products and services, clarifying decision making, and ultimately bringing value to the company. Kotler and Keller, in 2012, defined the brand as “*endowing products and services with the power of a brand. It’s all about creating differences between products.*”

2.1.1. Brand Identity

A strong brand must have a clear and valuable identity meaning a set of associations that the brand marketer wishes to create and induce and maintain in the consumers' mind.

Kapferer (1995) refers to the brand's identity as a definition of the issue and projection of itself to a given target audience. Furthermore, the corporate identity is represented through its values, commitments, mission, and vision, along with the local elements of the company, such as its disposition, modernism, appearance, decoration, internal and

external communication, and also the visual aspects that contribute to the for the construction of your corporate image.

A brand is perceived to have a strong and appealing identity when its identity is seen as singular and renowned than others (Bhattacharya & Sen, 2003). Moreover, brand identity is inspiring and may require modifications to grow, representing what the organization wants it to symbolize, making it less vulnerable to external attacks by similar products and/or services with more attractive prices (Aaker & Joachimsthaler, 2000).

The identity of a brand can be understood as a psychological process that occurs in consumers during their recognition. According to Alina Wheeler (2003), identity supports, expresses, communicates, and visualizes the brand, with three fundamental elements that allow its recognition: "*Shape – color – content.*" The human brain is more comfortable recognizing and memorize the forms at first glance. Then the consumer's mind perceives colours, which can awaken sensations, emotions, and associate these colours with a particular brand. The last element to be recognized is the content, that is, the words that form the message transmitted by the brand take longer to process, as they still need to be decoded by the receiver.

However, according to with Iglesias *et al.* (2013), over time, corporate brand identity, and its core values, are organically co-created by multiple stakeholders, potentially in different directions to the one intended by founders.

2.1.2. Positioning and Image of the Brand

Brand positioning is regarded as a vital tool for brand implementation in competitive markets (Kotler, 2000). Positioning is the act of designing an organization's offering and image to occupy a distinctive place in the target market's mind (Kotler, 2000). Essentially, the notion of brand positioning is an offshoot of differentiation, whereby the researcher attempts to explore the differentiated dimensions of positioning in terms of consumer or managerial/organizational perspectives through several approaches. (Wang, 2015)

In agreement, Aaker (1998) argues that the positioning of the brand corresponds "*to the part of identity and value proposition, which is actively communicated to the target audience and represents advantages over competing brands.*"

The positioning appears both on a tactic level within the marketing mix framework, besides price, place, and promotion, and the product to be positioned (Kotler & Keller, 2013). Simultaneously, positioning is considered a strategic concept within marketing,

over and above the marketing mix concerning segmenting and targeting. It is a concept that adds consistency and coherence to the marketing mix elements.

Brand image can change in different ways. What quickly comes to mind are changes in the constellation of associations linked to a brand. This could be caused by incorporating new associations in brand image or omitting existing salient associations in the brand's image. However, a brand image might also change without alterations in the actual constellation of brand associations but through changes in the degree of associations (Gaustad *et al.*, 2019).

Moreover, brand expectations play an essential role in the formation of various brand elements, including a brand image. The composition of a favourable brand image is often dependent on the positive dis-confirmation of consumers' brand expectations (Krishnamurthy & Kumar, 2018).

2.1.3. Logo

Logos are visual and textual brands used to identify brands and their products and are ubiquitous brand elements (Luffarelli, 2019). Schechter (1993) presents a methodology that allows measuring the additional value of the logo for the brand, through two levels: 1) Contribution of the image: degree by which the logo design influences consumer perception stemming from confidence, reputation, product quality/service and product/service adaptation to consumers' current lifestyle of a given brand; 2) Recognition/Association: degree by which the visual elements of the logo are associated with a particular company or brand.

It is at the moment that the customer looks at the logo that recognizes the brand or not also, it can improve brand attitude and facilitate brand recognition. When creating the logo, the brand needs to know what message and image it wants to convey. Well-designed logos can offer substantial benefits to brands and, in particular, boost brand equity. Extant work shows that the fonts, colours, designs, and forms of stimuli such as logos can affect brand equity by eliciting specific brand impressions.

Logo recognition happens at two levels inside the consumers' mind: first comes the memory of seeing the logo called 'correct recognition' followed by the remainder of the company or brand name (recall). The latter is closely linked to design; therefore, a more memorable design will more easily be recognized (Henderson & Cote, 1998).

Emotional responses to a logo's likeability can be transferred from the logo to the brand. A positive affective reaction towards a brand can come from two origins: evoked by the logo's initial design and can also be developed over time due to increased exposure to the logo (Henderson & Cote, 1998).

Creating a positive relationship between the consumer and the brand is understandably hard to achieve, so going through a rebranding process can have a dramatic effect on the consumer's evaluation of the brand, especially since brand familiarity leads to favourability in relations to brands.

Furthermore, a poor selection of the logo can have a dramatic effect for the company such as low brand recognition and negative associations which can be the result of creating logos that are difficult to store or access in memory, not likable or that fail to generate any sense of meaning or connection with the public. (Henderson & Cote, 1998).

2.2. Rebranding

Muzellec and Lambkin (2006) define rebranding as "*the creation of a new name, term, symbol, design, or a combination of them for an established brand to develop a differentiated new position in the minds of stakeholders and competitors.*" This definition suggests that rebranding initiatives involve changes in the corporate name and/or visual elements, which are different forms of brand identity. Moreover, this definition indicates that rebranding efforts, to some degree, strive to develop or reinforce a new market position.

The positioning efforts are usually accomplished by changing brand strategy, which can include targeting new customers, updating the value proposition, and renewing brand promises (Muzellec *et al.*, 2003; Muzellec & Lambkin, 2006). Hence, we posit that rebranding has two fundamental dimensions: brand identity change and brand strategy change.

The on-going confusion with the rebranding definition happens because rebranding is a continuing action and involves steps that can be referred to as changing a brand identity and its image (Goi, 2011).

Since brands are often viewed as a fixed asset and a source of competitive advantage, outdated brand identity and brand strategy can undermine a firm's competitive advantage. Rebranding initiatives are usually undertaken to rebuild that competitive advantage (Wheeler, 2003).

In fact, what happens is that brands are not, or should not be, static, but they should monitor modernisation and market trends, using a rebranding strategy. The relevance of applying the rebranding theme is related to the current reality of brands and the numerous scientific research conducted in this field.

A rebranding may reveal an opportunity for a particular brand to readjust its discourse, its image, the way it presents itself to the market, and its relation to customers, making it closer and adapted to the public.

According to Muzellec *et al.* (2003), the term rebranding is used to describe the change of the name, aesthetics of the brand (color, logo), and its repositioning, thus representing "*a differentiating position in the minds of stakeholders and an identity of its consumers.*"

2.2.1. Reasons for Rebranding

Muzellec (2003) presents us with the reasons leading to a rebranding, stating that "*the main purpose of rebranding is to modify the image, or perception of the image, and reflect the change in brand identity*", and grouping them into four categories: changes in corporate strategy (diversification or divestment; internationalization or location); changes in the administrative structure (mergers and acquisitions; privatization, spin off/split); changes in competitive position (outdated image; lack or accuracy of positioning; reputational problems) and changes in the external environment (crises; catastrophes; laws and regulations).

Furthermore, as the culture, values and images of a company evolve and change over time, rebranding can be a way of communicating these changes. A key feature of rebranding is that it relates to stakeholders that something about the organisation has changed, such as a change in strategy, structure or redesign (Muzellec *et al.* 2003).

On a more generic point of view, Delattre (2002) presents with the changes that can lead to a rebranding, from which we highlight changes in the corporate image of the brand, management or shareholder structure, core activities and technical issues and legal.

On the need to revitalize a brand, Aaker (1996) reinforces this idea, stating that competitiveness between brands has increased brutally, resulting in increased price pressure, falling profit margins and market shares. Many brands are saturated, not betting on innovation and diversity of products or services, and it is necessary to 'energize' them and differentiate them.

2.2.2. Strategic objectives of Rebranding

After defining the rebranding strategy, the strategic objectives outlined by an organization reflect its direction and future growth, in the various areas in which it operates. An organization sets objectives primarily to increase its profits, gain market share, and win as many customers and other stakeholders as possible.

The objective of rebranding is usually to strengthen a current position or to reposition a brand in the minds of their target customers, which is accomplished through brand strategy change, including revising the brand positioning, redefining brand values and promises, updating brand architecture, and targeting new customers (Muzellec *et al.* 2003; Muzellec & Lambkin 2006).

Even though prior rebranding research has not directly modelled brand strategy change or its effects, it has implied that brand strategy change is an inseparable aspect of rebranding. While identity changes often accompany brand strategy changes, it is possible that the degree of change on each of these elements can significantly vary and have differential effects on the returns associated with rebranding efforts (Wheeler, 2003).

In fact, rebranding must be taken into account to rejuvenate a brand and disrupt the original consumers' associations of the brand and, consequently, reshape consumers' perceptions about the company (Jayashree & Babu, 2012).

2.2.3. Process of Rebranding

Juntunen *et al.* (2009) presents the rebranding as "a process of planning, creating and maintaining a new image more favourable and consequently of a reputation also more favourable for the whole organization, transmitting signals to all stakeholders and managing behavior, communication and symbolism with the aim of acting or reacting to change." The author proposes six phases for the construction of a rebranding: 1) discussion; 2) analysis and decision; 3) planning; 4) preparation; 5) launch; 6) evaluation and continuity.

Hence, since these four sub processes represent a critical area for every corporate rebranding process, they will be described in more detail for a better understanding of how those events unfold, evolve and materialize.

- Repositioning: the positioning of a brand should be a dynamic process, being rethought and adjusted over time, following the trends of the market and its

stakeholders, as well as other events external to the brand. This is the phase of setting objectives in which a decision is made to try to create a new position in the minds of its customers, competitors or other stakeholders (Muzellec & Lambkin, 2003). Besides, according to the authors, many name changes are raised to change the image of the existing brand.

However, an external factor, such as a change in the regulatory environment, does not necessarily suggest any positioning. Creating a new name includes brand repositioning, and this means rejecting repositioning as an independent subprocess. However, it is essential to refer and mention it as a central aspect to keep in mind from the beginning of the process.

- Renaming: or changing the name is the most discussed issue in corporate rebranding studies. The brand is the central indicator of the brand and is a basis for awareness and communication. It is a means by which a company sends signals about its corporate identity to its stakeholders (Muzellec & Lambkin, 2006). Moreover, as is defended by Kapferer (1995), the name defines and represents the brand's identity and image, being a mighty instrument. The name of a strong brand is a precious asset. The names have two strands, one more descriptive and the other more conceptual: Descriptive names facilitate communication and associate the brand with their core business. The most abstract names may be considered more reliable in terms of trademark registration and use in other regions.
- Redesigning: resorting to changing the brand's image has become a critical differentiation strategy. The brand's 'drawing' matches your visual identity, including graphics such as the logo. This process is quite complicated, because the change in the design of the brand occurs in all elements of the organization, such as stationary, annual reports and accounts, brochures, and advertising campaigns.

A unique and robust image becomes fundamental to position and differentiate the brand in the minds of consumers to the theme of the redesign. In terms of the change of the logo, Kohli *et al.* (2002) refer relatively that "*if the logo is changed, this change must be made at the level of content (...) and the style*", reinforcing the aspect of the coherency.

- Relaunching: this subprocess was initially mentioned by Kaikati (2003) in this study "*Lessons from Accenture's 3Rs: rebranding, restructuring, and repositioning*".

However, at this stage, an apparent restructuring involves employee changes, which is most often highly correlated with rebranding drivers, for example, change in ownership structure such as acquisitions, mergers, and spin-offs.

2.2.4. Risks and Tensions

As with all the challenges that companies face daily, rebranding is no exception to the rule and has its risks. One of the crucial steps to make it a success case is to identify your motives and rebranding objectives concisely. Even behind a rigorous structure, the process itself will always face some risks and challenges.

According to Miller (2014), understanding significant barriers to corporate rebranding is critical for its efficient implementation and success. For instance, corporate rebranding is considered expensive and time-consuming (Stuart & Muzellec, 2006). Furthermore, according to the same authors (2004), the principal risks of rebranding are adverse reaction of external stakeholders such as customers and shareholders, low morale, lack of motivation and resistance to the new brand name by the current employees.

On the other hand, Miller *et al.* (2014) also identified four potential issues that could represent significant risks for the rebranding: an autocratic rebranding approach: that means when leaders impose the revised brand on key stakeholders with little consultation in developing the revised brand. The leadership role is determinant to manage the vision and direction of rebranding in the most definite way; stakeholder tensions across groups with different interests. In response, action research should be developed. That means analysis based on a collaborative approach with multiple stakeholders through workshops. It provides an in-depth study of stakeholders' brand understanding and better management of stakeholder relations, narrow brand re-vision that limits the potential to achieve a compelling and differentiated value offer, inadequate research, and customer consideration.

2.3. Communication

Kapferer (1995) presents the theme of brand communication with the perspective that *"the brand is a being of speech. It only exists through communication. Since the mark sets out the products or services, you must necessarily take the floor,"* i.e., to exist (re)knowledge, it is necessary that there is also communication. According to this approach, it is not enough just to set objectives, it is necessary to communicate them together with the brand's new identity.

Effective communication is central to administrative success (business management) and (Dawson, 1996; Kreitner & Kinicki, 1995) and can be understood as "an individual's perception of the way information is presented" (Johnson *et al.*, 1994).

From this perspective, communication can be thought of as a process in which those who communicate exchange coded messages (symbols, words, images), through different means, creating a specific reaction in the other communicator.

2.3.1. Communication strategy

Fill (2009) presents three main marketing communication strategies known as the 3 Ps. The first is the **pull-position** strategy that aims to influence end customers (consumers and B2B), encouraging them to "pull" products through the channel network. The communication flow is directed to the customer and is carried out through the use of mass media advertising and sales promotions.

A **push-positioning** strategy consists of presenting information directly to wholesalers and distributors to influence them to take stock or to allocate resources. The aim is to push the product down the channel towards the end-user.

A **profile-positioning** strategy is used to influence a wide range of stakeholders, besides customers and intermediaries, by providing information that helps them perceive and position the organisation.

Fill (2009) believes that to understand strategy it is necessary to answer the following questions: "*First, how are the communication goals that have been set going to be achieved? Second, how are they going to be accomplished in terms of complementing the business and marketing strategies? Third, can current resources and opportunities support the strategy and do they encourage target audiences to respond to the communications?*". For these issues raised, the author states that it is crucial to have an agreement between all those involved in the development of marketing communication campaigns and also prioritize activities.

The essential principles that allow an organization to combine communication means and actions in an effective way to establish good communication are proposed by Dioníso *et al* (2009):

- **Simplicity** – "*The more complex the message issued, the fewer opportunities it has to be perceived, understood and retained by the recipient.*"

- Repetition and Redundancy - *“It is necessary to repeat (...) the same message so that it has a chance to impose itself on a competitive universe.”*
- Continuity and Duration – *“All the great examples of communication achieved are virtue ... The same positioning, the same promise, the same style, the same media and agencies. (...) The continuity facilitates the conquest of the territory of communications.”*
- Global Coherence – *“It is necessary to ensure the unity or consistency of the messages issued, which should be convergent or complementary”*
- Obligation to Truth - a promise must be respected: *“Its form may be exaggerated but it cannot be completely false.”*

2.3.2. Tone of voice

The tone of voice of the brand is the personality that your company expresses through communication channels. It needs to remain consistent on the site, social media profiles, emails, product descriptions, and everywhere you use to interact with your customers.

Holland & Lam (2014), support that a brand can express these values and demonstrate its objectives through various channels, such as their products, interior spaces, uniforms, visual elements such as the logo or website, or even through verbal elements such as the tone of voice.

Online, audiences expect their communication experiences to be more transparent and authentic, such as personal inter-social interactions. (Xifra & Huertas, 2008) By interacting directly with the public, organizations and their communications can be humanized to provide a sense of interpersonal communication. The conversation a human voice has been considered as a strategy that organizations can use to boost the positive online communication experience (Sung & Kim, 2014).

According to Kelleher (2009), a conversational human voice indicates *“an engaging and natural style of organizational communication as perceived by an organization’s publics based on interactions between individuals in the organization and individuals in publics”*. In other words, the fundamental concept of conversational voice is to provide an online communication experience to audiences that they can perceive as having a conversation with a real human being rather than an impersonal organization.

Furthermore, researchers found that the use of conversational voice is positively correlated with relational results, including trust, mutual control, commitment and

satisfaction (Kelleher, 2009; Kelleher & Miller, 2017). Even in a crisis situation, conversational voice messaging has improved relations between organizations and the public by providing quick updates (Sweetser & Metzgar, 2007). In addition, perceived positive attitudes toward organizations and the intention to engage in positive communications were influenced by the human voice of organization (Smith, 2010). Along these lines, Sweetser and Kelleher (2016) proposed the conversational human voice as one of the main communicative strategies that organizations should make use of in a context of organizational-public relationships.

2.3.3. Message

In order to establish effective communication, it is crucial to build a message that impacts the defined target and is aligned with the company's communication objectives. Kotler (2013) says that it is possible to recognize three fundamental aspects that contribute to the elaboration of the message: a) message strategy: *What is meant*, using rational, emotional and moral factors to reach the target audience more efficiently; b) message creativity: *How to say*. Includes the structure and format, as well as the symbols and other elements used; c) message content: *What is actually said*.

Analysing the factors that can influence the communication process, receiving a message involves perception, interpretation and meaning. Perception depends on expectation and involvement, being based on previous experience and an emotional association.

In order to justify the high investments in communication, Dionísio *et al.* (2009) proposes a number of reasons that are influenced by: a) economic factors, b) market developments; c) different forms of communication associated with the emergence of new technologies and; d) more demanding needs and current perceptions of consumers. According to the authors: communication costs are directly proportional to competition, and it is necessary to overcome it in this respect; the greater the communication on the market, the greater the need to communicate; the trivialization of products/services creates a need for companies to invest in strong, solid, distinct and durable brands; "*innovation will continue to be the best weapon of marketing*", that is, it becomes central to investing in communication to attract customers and impose itself on the market; "*the power of distribution comes from the power of the brand. A strong and recognized brand can achieve more profitable trades.*"

Moreover, to choose, in an effective way, which tools of communication to use it is indispensable to define exactly what you want to communicate. There are several media, among which are advertising, sales force, promotion, digital communication, merchandising, sponsorship, public relations and direct marketing and the communication mix should be built in order to improve the communication objectives defined with the different targets.

2.3.4. Tools of communication

There are several communication tools that include advertising, sales promotion, public relations, direct marketing and personal sales. These tools can be used in isolation or can be combined in different ways, using different levels of intensity, depending on the target audience.

In terms of traditional communication, it is important to consider the following tools that are defined by Fill (2009):

- Advertising: are paid messages to build or maintain awareness of a brand or product. It is the main form of mass persuasion, so emotions play a crucial role. These messages are used to present compelling opportunities and therefore engage the public.
- Sales promotion: consists of an incentive to encourage the audience to buy. It persuades customers to behave and stimulates the action of purchasing. In the short-term, it induces trial of new products.
- Public relations: are people who give face to the brand and help develop and maintain relationships with a wide range of stakeholders. It is a way to convey a message reliably and proactively that increases brand identification and understanding and allows you to achieve media visibility and mediate relationships.

Regarding digital communication, Batra and Keller (2016) highlight six options that include:

- Search ads: process by which companies create appealing content and change the design of your website so that search engines consider it appealing, thus ensuring a high position on the in the ranking. The more optimized a company's website is, the higher its position in search results Miller (2012).
- Display ads: it is the purchase of an online space on the search results pages in

order to promote the brand, product or service before the users Miller (2012). Knowing that Internet users only spend 5% of their time looking for information, display ads - that should be more appealing, influential, better targeted and closely tracked to understand their potential - seem to be a better option than search ads (Urban *et al.*, 2014).

- Websites: it is the face of the company, the brand and the products in the online environment. It is the center of all the company's online activities, all other channels will be a kind of complement Miller (2012). Fill (2009) highlights that design is crucial in determining the length of the visits to the website, the actions undertaken (such as consulting information, ordering or purchasing products) and propensity to return.
- E-mail: which is a form of direct marketing. has a certain frequency (daily, weekly or monthly) and its success depends on its content, i.e. it has to be beneficial and relevant to the consumer Miller (2012). It's a quick way to communicate content in detail It allows firms to build awareness, to reinforce brand messages, to induce action (trial or purchase) and to retain customers (Fill, 2009).
- Social Media: consisting of networks known as Facebook, Twitter, Instagram, are sites that, through the creation of a profile, allow user interaction with other users and makes it possible to share text, videos and images "*Three fundamental characteristics of the content generated by the company – valence, receptivity and customer susceptibility – have been demonstrated to positively affect customer spending, cross-purchase and profitability, although the effect of receptivity proved to be the greatest.*" (Batra & Keller, 2016).
- Mobile: the majority of people have access to the Internet through their mobile phones, this means that companies have to develop applications in order to meet this new trend Miller (2012). It has been proven that mobile consumers are more likely to go directly to the website or application of companies instead of using a search engine. In addition, they deliberate less and buy more on impulse than carefully analyzing product resources (Hwang *et al.*, 2015).

3. Methodology

The main objective of this chapter is to explain how the information was collected, what techniques were used and how it was analysed. During the development of the communication plan, some changes and additional studies were made in order to improve the communication plays and the customer experience.

In my work as a Customer Experience at EDP, I have access to numerous sources of information that will help to conduct this investigation. Considering always the importance of the concepts explained before, it will match different sources of information in order to fully investigate the performance of the brand.

To understand the company and its limitations interviews may be conducted with members of the Board of Directors or project leaders.

In order to understand how companies, behave nowadays, in face-to-face care, a benchmarking was performed. This benchmarking was based on companies in the telecommunications sector, since these companies have a close relationship with their clients. Several visits were made to the stores and the aspects analysed were the form of service, the uniform and the concept of store.

For the decision of the choices of the communication plan, the topic of voice tone studied in the literature review was considered. As EDP Universal Service is a regulated market company, the way of communicating was extremely law-based and had a very formal tone of communication. After analyzing several communications to the customer, this need arose to change the tone of the company's voice.

Also, for the communication plan came the need to divide communication into two phases: the first phase to alert the customer of the brand change and the second phase, the opening of the new stores. The change in the uniforms of the store assistants was in line with the above-explained benchmarking. Finally, the decision to do a radio campaign was made due to the difficulty of customers to say the name of the company.

4. EDP Serviço Universal 's rebranding communication plan

After doing a literature research and analysing the benchmarking results, it is now possible to start executing EDP Serviço Universal 's rebranding communication plan. The structure of the plan will be divided into four different parts: external analysis, internal analysis, rebranding, and finally, the communication plan.

4.1. External Analysis

4.1.1. PESTEL analysis

Political Context

The energy market has a very strong political context both at national and European level. The new European Commission that took office in November 2019 recently presented an ambitious plan called the European Green Deal on 11 December 2019 to reaffirm global leadership in combating climate change and become the first continent to have a climate-neutral impact by 2050. Among other actions, the plan includes the objective of publishing a European Climate Law that firmly pledges to achieve climate neutrality, the establishment of a plan to increase the ambition of the European Union's 2030 targets, the revision of several pieces of legislation (such as the Renewable Energy Directive, the Energy Taxation Directive, the emissions allowance mechanism) , among others), and the development of various industrial strategies. The revision of the 2030 targets will take into account the National Energy and Climate Plans submitted by the various Member States, as well as possible revisions that may be necessary to align the decarbonisation paths with the objective of carbon neutrality. To achieve the existing objectives of the 2030 Climate-Energy Package, the European Commission estimates that an additional €260 billion of annual investment is needed compared to a scenario without these climate targets, which is equivalent to around 1.5% of European GDP in 2018. To support these and additional funding needs to put the European Union on the path of climate neutrality, the European Commission will present in early 2020 the Investment Plan for a Sustainable Europe, counting on dedicating at least 25% of the European Union's long-term budget for climate action and transforming the European Investment Bank into the European Climate Bank, in order to provide extra support. To support the private sector to finance the climate transition, the European Commission will present the Green Financing Strategy in 2020. (EDP, 2020). Recognising that climate change is a plan of society as a whole, but that there are disparities between regions and Member States, the European

Commission will set up a Fair Transition Mechanism. This mechanism will support high-carbon regions as well as citizens most vulnerable to climate change by creating programmes to develop new skills and employment opportunities in new economic sectors.

In Portugal, in recent years' sustainable development policies have been promoted, through the approval of various programs and strategic plans aimed at implementing sustainable growth measures, as well as tourism dynamism at national and regional level. The policy is of enormous force to keep companies in this sector implementing and following the recommendations of the European Commission.

Economic Context

Marked by the economic recession, the evolution of the national economy has shown difficulties due to the decrease in global national product (GDP) and domestic demand and increased unemployment.

Internalisation in energy markets has been a strong bet in recent years due to the environmental and social costs caused by carbon emissions, for example through a price associated with these emissions, allows to provide the price signal needed to foster investment in energy efficiency and low carbon technologies. This strategy has already been implemented in some countries, notably European, although its implementation is sometimes complex. In order to ensure that the price of carbon does not distort energy markets by reducing their efficiency, it should be designed with the widest possible geographical scope and across the economic sectors and energy vectors, taking into account the emissions associated with each energy vector, in principle the polluter pays. The potential negative economic and distributive impact should be minimised or even reversed with efficient recycling of tax revenues by creating funding lines for low-carbon technologies and reducing other rates (e.g. income taxes). The possible loss of competitiveness of industries facing international competition should be combated through compensation (e.g. with fixed rents) or the taxing of imported products on the basis of associated emissions. The need to implement decarbonization policies was marked in 2019 through worldwide protests to require world governments to act to significantly reduce greenhouse gas emissions. Activist Greta Thunberg was one of the most visible faces of this mobilization, having led to the organization of school strikes worldwide. However, it is imperative that decarbonisation policies take into account a comprehensive perspective that includes economic and social aspects in order to reduce

disparities in the distribution of efforts, including the creation of carbon taxes and fuel rate increases, and thus avoid the social discontent demonstrated in various demonstrations that occurred in 2019.

Social Context

At the level of the social context we can analyse in two parts. The first is the point that companies in this sector increasingly have to become more sustainable using renewable energies. The second, which can be examined is access to electricity and the need for social equality.

In fact, the concern for a more sustainable and environmentally friendly world is not only present in society. In order to preserve environmental and cultural resources for future generations and contribute simultaneously to the strengthening of the company's image, corporate social responsibility is today a behavior that companies voluntarily adopt, with lasting positive impact on working conditions, product quality and economic development of the community.

On the other hand, in most countries, there is a huge disparity between the cost structure of the electricity sector, which is mostly composed of fixed costs, and the tariff structure in force, mostly composed of variable costs. This allocation of costs to consumers on the basis of their consumption provides cross-subsidisation and largely favours consumers with the economic capacity to invest in decentralised generation and necessarily leads to cost increases for other consumers, which mainly affects vulnerable consumers. Reviewing the tariff structure, increasing the fixed component, and transferring renewable financing to the State Budget are examples of measures that promote socially responsible decarbonisation. The allocation of the Social Tariff for families with needs is something that families have been asking more and more to have the possibility to pay and enjoy this essential good.

Technological Context

Through the technological developments worldwide, companies have at their disposal technology systems that improve their competitiveness, productivity and dissemination, allowing better performance and interactivity with reduced costs. Companies can take on a more flexible role by exploring new ways of reaching consumers, more effectively meeting their needs and acting sustainably.

The energy sector has invested in renewable energies, in forms of technologies that allow to increase their consumption. Also, and with the purpose of satisfying and improving the day to day of the customer, companies have bet on the features of both the site and the reserved area (app. Companies want to turn their customers into digital customers so they can solve all their problems at a click away.

Another paradigm that EDP has been investing in is data processing through Machine Learning and Artificial Intelligence techniques, taking advantage of cloud tools and new digital technologies.

Digital Innovation is a cross-cutting area for the entire EDP Group value chain:

- Energy commercialization: applying computer vision techniques to automate business processes involving photographs, such as in the electrification services of the client's home;
- Energy distribution: developing algorithms and systems that allow identifying and monitoring vegetation that grows together from overhead power lines, as well as supporting the development of projects to forecast electrical consumption in a hundred thousand network assets;
- Energy production: promoting predictive maintenance techniques and solutions that can be incorporated into its portfolio of decision support systems;
- In several units and projects in the use of IoT, Machine Learning and Cloud in the development of projects that promote energy efficiency and new services of value for the energy client.

In a way, it can be supposed that EDP is the energy sector company that invests the most in technology, distinguishing itself nationally and internationally.

Environmental Context

Although renewable energy sources in terms of primary energy are expected to account for only 21% of consumption in 2040, the same is not the case for the electricity sector. Indeed, the contribution of renewable energy sources to electricity generation is expected to grow from 26% in 2018 to 44% in 2040 in the IEA's Announced Policy Scenario. The Sustainable Development Scenario estimates that it will be necessary to achieve a contribution of 34% in energy consumption and 67% in electricity generation. On the other hand, the other sectors have much lower contributions to the use of renewables, with the transport sector being the fastest growing, derived from the use of biofuels. In

the buildings sector there is even an expectation of reduction, motivated by the increasing electrification and consequent reduction of the use of biomass.

Legal Context

In Portugal, the energy market is regulated by the Energy Services Regulatory Authority. All companies in this field are obliged to submit quarterly reports on their entire activity. EDP Universal Service, being the regulated market company has several laws that have to follow. It can be said that it is the companies that have laws and legal guidelines to follow. It is obliged to comply with the Standards of Quality of Commercial Service contained in the Quality of Service Regulation (published by ERSE - Regulatory Authority of Energy Services), which establishes the quality references of the services provided, being evaluated periodically through performance levels. General and individual quality of service indicators are established.

In this context, EDP Serviço Universal is prevented from attracting customers and all communication it makes to the customer and how it does so is controlled by the regulator. The company can only make communications under the contract and regulatory communications, such as labelling communication and social tariff.

Also, at the legal level, General Regulation on Data Protection is one of the focuses of companies in this sector. Increasingly, care for the processing of customer data is central. In 2020, and with the implementation of the new commercial system, a review was made of how customer data appears in the system and whenever a store assistant or a company employee wants to consult customer data has to give a justification that is recorded.

Consecutive audits, it is another way for the regulator to ensure that all its standards are being met. Thus, it can be affirmed that this is a sector that is quite regulated in Portugal.

4.1.2. Industry analysis

The Portuguese Energy Market

Areas of the National Electric System

The National Electric System (SEN) contemplates six distinct areas: production, transmission, distribution, marketing, operation of the electric market, and logistics operations in the change of marketer. Most of these areas operate at an independent level on legal, organisational, or decision-making matters.

The principles governing these activities are developed, taking into account the rationality and efficiency used at all stages that constitute the value chain, together with the laws of competition and environmental sustainability aimed at fostering the level of competition and effectiveness in this system.

Energy Regulatory Organisms

In markets that are powerfully concentrated in energy markets, close, effective, and adaptable monitoring is required to the current and future context of this sector.

Bodies regulate the energy sector, with the mission of protecting consumers' interests concerning prices, quality of service, access to information and security of supply. These bodies act in a context of liberalisation of production and marketing activities.

The Energy Services Regulatory Authority (ERSE) is responsible for regulating the natural gas and electricity sectors. ERSE is independent in its duties, complying with the law and respecting the guiding principles of energy policy set by the Government.

ERSE guarantees regulated companies the economic and financial balance through adequate management, promoting the efficient use of energy, competition in the sector and the defense of the environment and energy consumers, and framing the information of energy prices in the context of political and economic developments, to inform and update the consumer of energy prices.

Free Market and Regulated Market

In the regulated market, the tariffs applied are defined by the Energy Services Regulatory Authority (ERSE), which reviews them annually. In the natural gas and electricity sectors, ERSE exercises economic regulation, in which it is responsible for setting the economic conditions for the provision of activities under monopoly, taking into account technical or legal specificities (such as the transport, distribution and marketing of last resort of electricity and natural gas). Economic regulation by an independent entity is one way of regulating activities carried out on a monopoly.

The free (or liberalized) market allows consumers to choose their electricity and natural gas supplier, opting for the solution that best fits their needs.

In the free market, energy prices are determined by each supplier and not by the Regulatory Authority for Energy Services (ERSE), as was the case before liberalization.

4.2. Internal analysis

4.2.1. EDP

On 30 June of 1976, there was the nationalization and merger of 13 companies in the electricity sector Portuguese, which came to form EDP. Initially, EDP was constituted as a public company, under Decree-Law No. 502/76, and subsequently transformed into a public limited company.

Between 1977 and 1989, EDP met one of its objectives related to the distribution of electricity, leading to up to 5380 villages, covering 97% of the national territory, and ensuring 80% of the supply of low-voltage electricity. These objectives complemented the recovery of areas further to the country's interior, allowing more excellent fixation of populations and higher viability of equipment and infrastructure stemming from the development of these regions.

EDP's activities expanded through Macau and Cape Verde. The Group began its internationalization phase in 1996 in Brazil, in the areas of production, distribution, and commercialization of electricity through EDP- Energias do Brazil.

Meanwhile, EDP's privatization phase began in June 1997, with the sale of 30% of the company's capital. In 1998, the electric company lived two more stages of privatization, in which, in this last phase a strategic partnership with Iberdrola was implemented. The 3rd privatization phase took place in 1998, with the sale of more than 16.2% of its Share Capital. Two years later, EDP's 4th privatization phase was held, in which 70% of EDP's capital was held by mostly private companies.

In 2001 EDP is present in Spain, where two years later enters the gas market. In 2007 there was a new phase of internationalization of the Group for the United States, through EDP Renováveis, with the purchase of one of the largest wind power producers in the world, Horizon Wind Energy.

Furthermore, between 2005 and 2007, the company Parpública - Participações Públicas (SGPS), S.A. launched an issue of obligations of EDP. EDP's 8th privatization phase was marked by the selection of China Three Gorges Corporation by the board of ministers of the Portuguese Government to acquire 21.35% of EDP's share capital in December 2011.

The internationalisation phases expanded to some European countries, namely the United Kingdom, Italy, Belgium, Poland, Romania, and China and Angola.

Due to these changes over the years, EDP has undergone several changes in the image itself, creating a new identity that reflects this natural evolution of the company and the market, making it a global and uniform brand to be recognized in all geographies it is present.

Energias de Portugal is today the largest producer, distributor and electricity trader in Portugal. It is the third-largest electricity production company and one of the largest gas distributors in the Iberian Peninsula, also being the world's third-largest wind energy operator, with wind farms distributed across the globe. It counts for more than 10 million electricity customers and 1.2 million gas connection points. The EDP Group employs more than 12,000 employees worldwide.

It is the only Portuguese company that integrates the Dow Jones Sustainability Indexes, emphasizing commitments of transparency, sustainability, and excellence in environmental, economic management and social communication that characterize EDP. Finally, according to Brand Finance, EDP is the most valuable national brand, also occupying the 14th place in the world in 2019 in the utility sector worldwide.

4.2.2. EDP Serviço Universal

EDP Serviço Universal is the last resort supplier for electricity in Portugal Continental. It is a company regulated by the Energy Services Regulatory Authority (ERSE), which performs the following functions essential to the electricity sector:

- Purchase of all energy production in Special Regime, including Distributed Production (micro-production, mini production, small production units and self-consumption production units, and sale of such energy on the market;
- Purchase in the electricity market needed to meet customer demand;
- Commercialization of electricity to end customers, based on the transitional tariffs published by ERSE.

EDP Serviço Universal is a company of the EDP Group that sells and sells electricity, performing its activity as a last resort trader.

The company holds a last resort marketing license issued by the Directorate-General for Energy and Geology and is subject to a set of public service obligations, in particular: universal provision of electricity supply to all eligible Customers who request it; consumer protection; energy acquisition, under the conditions laid down in the legislation, to ensure the satisfaction of the consumption of its Customers; information to

the competent authorities; observation of an independence framework according to legally defined criteria.

Furthermore, at the end of 2019, EDP Serviço Universal had more than one million customers, the corresponding sales volume of 2,7 TWh. (SU ELETRICIDADE, 2020)

4.3. Rebranding

4.3.1. Identity and values

The new brand SU ELETRICIDADE reflects the company's new positioning. Through a new name and a new image, it continues to ensure the confidence that all its stakeholders have become accustomed to. Faithful to his past, but with a more agile attitude, following the demands of the market.

The SU ELETRICIDADE brand is based on three values:

- Simplicity - a company that wants simplicity in processes and in the relationship with its stakeholders.
- Proximity - one in proactive and attentive prey, which anticipates the needs of its customers.
- Continuity - the company always, which maintains the same rigor and focus on the customer.

It is about these three values that both the communication strategy and the business strategy. SU ELETRICIDADE wants to pass on a fresher, younger and digital image but wants to assure its customers that the level of trust is the same.

4.3.2. Logo and visual universe

For the graphic concept served as inspiration the entrances of an electrical outlet that turns into the pins of an electrical plug. It is this graphic that, together with the company's designation, form the logo.

The construction of the visual universe encompasses 2 facets:

- purely pictorial facet restricted to vector elements – recommended for smaller formats.
- conjugation of pictorial elements with real image, where the light source is the main connecting element that acts as a color mask, highlighting the central visual message. This is the main message: SU Electricity is the one that illuminates;

The logo and identity live practically from a color that is assumed as the main: the teal. A mixture of green and blue refers to sustainability, one of the company's strategic objectives.

4.3.3. Tone of voice

The tone of communication aims to give life to the values of the brand. This should live with the brand's identity as a whole - expanding it on the brand's visual foundation. Whenever a message is issued - written, spoken, or graphic - the brand speaks and establishes a relationship with customers, partners, and the organization itself.

In this sense, it is essential that the tone is consistent with the brand it represents and that it can contribute to the strengthening of the values that the brand defends.

In this context, brand values must be reflected in a set of communication principles.

Clarity, Proximity and customization are the three principles of communication. Customer orientation should be the center of our attention and the reason for our activity. It is important to always communicate with you in one voice.

Clarity, proximity and personalization: it is with these principles that the company wants to communicate with the new brand. Clear, close, and personalized communication helps to earn customer trust and distinguish as a trustworthy, innovative, transparent, and customer-satisfaction-centric company.

4.3.4. Segmentation and positioning

Segmentation

Before defining specific communication ideas, it is necessary to know exactly to whom they should be directed. So, in this case, segmentation will be made both in B2C and B2B perspectives. The company wants to communicate to buyers and end-consumers, following the strategy illustrated in the scheme presented below.

As a merchant of last resort, SU ELETRICIDADE holds a license to commercialize electricity, and its obligation is the universal provision of the electricity supply service to the following customers:

- end customers with active contracts, whose current traders do not have regulated tariffs or the transitional tariffs legally provided for by ERSE;
- economically vulnerable customers;

- customers whose market trader has been prevented from carrying on the activity;
- customers in places where there is no offer from market-based electricity traders.

However, within the company and the objective of creating homogeneous customer groups to communicate and differentiate its customers, SU ELETRICIDADE segments as follows: individual, business, state, and autarchy. For each group of clients, there are different forms of communication and procedures.

Interestingly, this segmentation is relatively recent for both the company and the EDP group. Five years ago, all customers were energy consumers, and the customer experience did not exist and did not matter. As such, segmentation is not yet fully implemented, and one of the group's primary goals is to target all its customers.

Positioning

SU ELETRICIDADE is the regulated market trader, which assumes itself more agile, closer, clearer, and more digital.

4.4. Communication strategy

As SU ELETRICIDADE a regulated market company, there are several restrictions on form and media. One of the significant limits is that you cannot raise customers, which prevents the company from making mupis, billboards or television ads.

The communication plan will be divided into two phases. The first will be communicated before rebranding to alert customers of future changes and the significant impacts. The second phase of communication will begin on rebranding and will be different for each customer.

In terms of segmentation for both phases, the communication will be divided by individual customers, business customers, and state and autarchy.

4.4.1. 1st phase of communication

Individual Customers

As mentioned above, the communication message to this type of customer is quite simple: warn the brand worldly on January 15, 2020, and anticipate the main issues that the customer could have. The main objective is for the customer to know that this brand change is mainly visual and that nothing will change in their contract or the company and that SU ELETRICIDADE continues to belong to the EDP Group.

To achieve the communications goals, it is necessary to communicate in all communication tools that SU ELETRICIDADE can use

- **Invoice corner:** in this promotional space you must communicate with the graphic language of the new brand. Being this tiny piece of communication, the message should be brief as "*The EDP Serviço Universal will change. A new name, the same company. Learn more in edpsu.pt*" (proposal at appendix 1)
- **Flyer:** this should answer the main questions that the customer may have as soon as they start to see the brand change communication, such as "why is EDP Serviço Universal going to change brand?"; "when is EDP Serviço Universal expected to change brand?"; "what will happen concretely?"; "will I have any changes to my contract?"; "will I have any additional cost with these changes?" and still the question that many can raise "Will SU ELECTRICIDADE cease to belong to the EDP group?". On a visual level, the brochure should have in front a declination of the poster image and on the back the questions to be something short. It is also necessary to ensure that the brand's tone of voice is applied in the flyer. The flyer must be present in all EDP stores and still be sent to the email marketing and letter. (proposal at appendix 2)
- **Poster:** will be present throughout the EDP store network. Despite being a traditional means of communication, the volume of customers heading to stores is high, and it makes sense to communicate the notice of the brand change. The poster's big challenge will be at the graphic level: combine the old brand with the new brand. Ideally, one should divide the poster in half, and at the top of the poster should be the old /current brand with the message "*The EDP Serviço Universal will change*"; at the bottom the key message of this phase of the campaign "*From January, a new brand, a new image, the same company*". To visually show the brands' differences, one must use the same elements in both parts of the poster. The red iconography and a real image and the color of the mark present in the iconography should be evident at the top. (proposal at appendix 3)
- **Email marketing or letter:** to ensure that the message is passed to all customers, one should send an email to all customers that in the database, the company has the email. For those who do not have email, a letter should be sent. The content and message of both communication pieces should be the same: explain that EDP Serviço Universal will change and why. In this communication, the only one

possible to carefully explain the brand change must be that everything is explained to the customer. Still, it is crucial to send the message that this change will be something positive "We change together to do more and better" and that the company continues to be part of the EDP group. Finally, the company must direct the customer to the site if they have further questions. Next to this letter/email should go to the flyer described above. (proposal at appendix 4)

- **Promotional video:** SU ELETRIDADE should make a promotional video that could be disseminated using different means. This video should start by showing frames of the brand EDP Serviço Universal. The image of EDP Serviço Universal is only with red iconography, and the use of real and color images will create impact. A lamp should then appear that goes off and turns on repeatedly, showing the phrase "*The EDP Serviço Universal will change*". From this frame, the video's entire image should already be with the SU ELETRICIDADE image, that is, with real photos. From this moment on, the idea is that communicate what will change in the brand and the new positioning "Now simpler, more agile, more digital". To finalize, and after presenting your positioning, must be shown the name and logo. A-frame should appear with a background image with the color of the brand, the teal, the white logo, and the phrase that marks this phase of communication "*A new brand, a new image, the same company*".

Videos are among the most popular types of communication tools because they transmit an idea efficiently and effectively. Hence, and as consumers have shown interest in it, the brand could create short videos showing how to filet the fish, cut it, prepare it, and cook it. These videos must have a concise duration (no more than 1 minute), visually appealing, yet clean, to the sound of a classy instrumental jazz song. The type of music chosen should be sophisticated, modern, and upbeat, reflecting the brand personality. The video should be present both throughout the store network and on the company's website.

- **Interactive Voice Responses (IVR):** although it is an unusual form of communication, it is an easy way to communicate with customers. The idea here is whenever the customer call hears the message, "*The EDP Serviço Universal will change. From January, a new brand, a new image, the same company.*" A simple message to arouse customer attention. On the other side of the line, if there are questions, the contact center assistant will know how to respond.

- **Website:** since the current site is old and has some limitations, it should create small news to explain the brand change at this communication stage. The news content should be the same as the letter, and one should add the questions put in the leaflet. In visual terms, one should create a banner with the new graphic language communicating "The EDP Serviço Universal will change. A new brand, a new image, the same company" (proposal at appendix 5)

Business Customers

For business customers, it is suggested to use some of the communication pieces described above, such as **invoice corner**, **IVR** on their helpline, and **letter** or **email marketing**. Although they are clients with a different status, they are customers who are used to receiving communication. In this way, it makes sense to put the invoice corner and send the letter. Still, these customers have an exclusive service line, and it also makes sense for the IVR to communicate "*The EDP Serviço Universal will change. From January, a new brand, a new image, the same company.*"

State and Autarchy

In this first phase, that is only intended to alert the change of brand, it is not justified to make a communication for this segment of customers. These are exclusive customers with a completely different service line from individual and business customers, and will not be impacted by any media described above. In the second phase of communication, it will communicate with this restricted segment of customers on the day of the rebranding.

4.4.2. 2nd phase of communication

For the second phase of communication, the challenge is entirely different. Communication with customers, in addition to having to be segmented by different types of customers, will also have to be segmented by the district. SU ELETRICIDADE on January 15 will open its exclusive store network, which on the one hand, can be a positive thing on the other, can be a rather negative thing.

Currently, EDP customers are all served in the same store without distinction which company they belong to. What will happen is that the three companies, under ERSE's obligation, will have to separate and instead of the customer going to a single store to solve all their problems, at best will have to go to two stores: the distributor (EDP Distribuição) and the merchant (SU ELETRICIDADE or EDP Comercial).

However, the opening of a new chain of stores can be seen as something positive. For the first time, the company will be able to make a more dedicated service and transpose its values and positioning to a physical space. SU ELETRICIDADE will have one store for each district capital, totaling eighteen stores. The store concept will reflect the brand's positioning and values: simple without excessive decoration or with the marble that is currently visible in EDP stores and close with the idea feels like home.

The significant challenges and the main messages that this second phase of communication should have been opening the store network and the change of brand.

Individual Customers

- **Invoice corner:** it is a piece that must be changed once the previous one communicated that the brand was going to change. At this stage, the brand has changed, and the message that must be passed is "EDP Serviço Universal is now SU ELECTRICIDADE". In this invoice, the logo has already changed and it is necessary to include the name of the old brand so that the customer can make the relationship between the two brands. The invoice corner should be replaced for this one on January 15. (proposal at appendix 6)
- **Flyer:** the leaflet will be the real challenge of this second phase of communication. Several messages are important. At this stage, it makes sense to create 18 different brochures, one per district so that touch is as personalized as possible. The flyer communicates the new service solutions, dividing the brochure into 5 communication blocks. This piece of communication's main objective is to make sure that the customer does not miss the EDP chain of stores that is quite vast and is present in practically the country's municipalities.

Initially, a small paragraph should explain the change of brand to make a small framing to the customer. The first section of the brochure should be "*Loja SU ELETRICIDADE*" of the district. This section should contain the address, a small map in iconography, the store's opening hours, and what operations the customer can solve in that service channel. The second section must communicate the service line, your schedule, and the available procedures. In a third section and with an alert displaying that it is something new, the new automatic answering line and the operations available on this channel are only sending readings and obtaining references for payment of the invoice. The fourth section of the leaflet

should be communicated to digital channels. The company should take advantage, whenever possible, to use its media to push digital channels.

Finally, in selecting more than 4500 Payshops agents, you should choose one per county using various selection criteria such as: location, visual appearance of the agent, relevance of the Payshop agent. This selection should be taken care of because the company in this piece of communication is recommending the customer's going to that location.

The flyer must be present throughout the EDP store network and in SU ELETRICIDADE stores. This should be delivered at the end of each service and briefly explained to the customer to ensure that all information is passed on. Furthermore, as was done in the first phase of communication, the flyer should follow in the annex with the letter or with the email marketing. (proposal at appendix 7)

- **Poster:** the graphic language of this poster should be fully SU ELETRICIDADE. It should reflect the company's new values and positioning, a fresh image, alive and ready to face change. (proposal at appendix 8) The message this poster should contain is something quite simple like "*A new brand, the same company*". The poster must be present in all SU ELETRICIDADE stores and EDP group stores while serving the company's customers.
- **Email marketing or letter:** these communication pieces will have to be customized to the customer. Initially, we should divide customers into two segments: customers who will have a store opening in the district at the time of the brand change and customers who will only have the brand change on January 15. This last letter or email should communicate what changes on this day, all the service solutions that the customer has at their disposal, and still warn that soon the customer district will have an exclusive store of the company. For customers who on January 15 will be impacted by the change of brand and the opening of the store, the letter should be identical to the previous one with the customization of the address of the new store in the district and with a brief explanation about the period in which EDP stores still serve customers SU ELETRICIDADE. Whenever a store opens, customers in that district receive this last letter/email along with the brochure. In total, nineteen cards will be required. (proposal at appendix 9)

- **SMS:** this is one of the fastest means of communication that SU ELETRICIDADE can use. Although content is reduced, it's an easy and effective way to communicate. SU ELETRICIDADE must send two SMS addressed to the store opening. The first should display the following message adapted to the district, and the store opening date: *"Your SU ELETRICIDADE store opened today, January 15, in the Lisbon district in the Loja do Cidadão das Laranjeiras. Discover more in sueletricidade.pt."* The second SMS, sent 1 month after the opening of the store, should indicate that EDP stores no longer serve customers SU ELETRICIDADE and that from now on, only the exclusive stores are doing service: *"The Store SU ELETRICIDADE in Coimbra is now on Avenida Fernão de Magalhães, 132. From now on, EDP stores and agents stop serving SU ELETRICIDADE customers. You can continue to pay your invoices at CTT stores and Payshops agents. Find out which ones are close to you in sueletricidade.pt."*
- **Magazine article:** the company should prepare eighteen different articles. Firstly, the company should choose the newspaper with the most impressions per district and request to be evident on the cover to make sure a large percentage sees it of readers. Later, as stores open you should write a short article that the brand has changed and now has an exclusive store network. It should also explain that the stores are located in each district's capital and that EDP stores will no longer serve customers SU ELETRICIDADE. In the same article, you must communicate all alternative solutions to the store such as the service line, CTT and Payshop stores, and also the site and customer area (app).
- **Promotional video:** this promotional video, unlike that proposed in the first communication phase, should communicate only the brand SU ELETRICIDADE. It should start with the creation of the logo. After presenting the brand, frames with the brand's values *"now simpler, more agile, more digital"* should appear. Finally, a frame with a background image with the color of the brand, the teal, with the logo in white and the phrase that marks this phase of communication *"A new brand, a new image, the same company"*. The video should not have more than 30 seconds and should be present on the website, SU ELETRICIDADE, and EDP stores' network while attending the company's customers.
- **Website:** one of the pillars of SU ELETRICIDADE's positioning is digital. It makes perfect sense to change the site to something simpler and more agile. The

site should reflect the graphic language and values of the company. All content on the previous site should be reviewed to align with the tone of voice. There should be news to communicate at the level of communication whenever there is a store opening and to communicate all alternative service channels. Still, a banner should be placed to communicate, "*EDP Serviço Universal is now SU ELECTRICIDADE*".

- **Mobile app:** it is suggested that SU ELETRICIDADE develops a Mobile App exclusively directed to individual clients. This application should allow the client to be as autonomous as possible, should be able to manage their contract at a click, check their invoices and send readings, reducing the need to take off to a store. If one of the brand's new pillars is to be more digital, your digital tools should be easy to use.
- **Radio:** to increase brand awareness, and taking into account the company's communication limitations, it is suggested that a radio campaign be run. Below is described as a suggestion of briefing with the main messages and target that this campaign should address:

Target

Main: current customers of EDP Serviço Universal (1 million), micro producers (30k, many of which will be customers) and producers (about one thousand)

Looking only at electricity consumption customers, although there is still not much sustained information, one can assume the following (see attached detail):

- Customers over the average age group
- Customers with a more conservative nature and greater inertia (result of the connection to EDP)
- Possibly less price-sensitive/slightly higher economy class (which explains increased, almost spontaneous, direct debit support)
- Customers only interested in the base service (electricity)
- Residential customers above all (which explains higher weight of lower powers compared to average)
- Less digital customers (lower access to electronic invoicing and customer area)
- Geographical distribution similar to the market average, although with a slight lower weight in districts with a higher urban nature such as Lisbon, Porto and Setubal

Secondary: customers who are already in the liberalized market, to which the current communication plan does not touch, if they ever need to resort to the regulated market trader

Campaign objectives:

Main message:

Main: help know how to say the new brand name

Secondary: Help connect continuity to EDP Serviço Universal and EDP Group

Communication objectives: complement ongoing communication plan with verbal component (which current plan only provides in store and on the helpline)

Marketing objectives: create brand awareness with customers and non-customers

Specific KPIs in terms of business and media plan:

In surveys to be made to customers after the communication plan (end of phase II):

- Spontaneous notoriety should be more than 30%, faced with the question of what the new brand of EDP Universal Service
- Assisted notoriety should be more than 50%
- 80% should be able to say the brand name correctly
- **Merchandising**: the items should be used by the company's staff and be offered to clients after each in-store service and the company's employees to embrace the new brand. The items should be pens, notebook, umbrellas, mouse pad, pocket socket, water bottle, a tape to put the employee card. (proposal at appendix 10)
- **Working clothes**: changing them is a challenge the company must-have. Currently, the uniforms that assistants wear are old-fashioned and very formal uniforms. The ladies wear a white shirt, a skirt, a blazer, a neck scarf, and high heels. Men wear a suit and tie. The EDP uniform does not identify with the new positioning and the store concept. SU ELETRICIDADE must then change its uniform idea to something more informal and close to the customer. There should be no significant differences in women and men's uniforms, both of which should wear relaxed grey pants, a white shirt for winter, or a white polo in summer. There should also be a knitted jacket and for shoes, some informal white sneakers. (proposal at appendix 11)

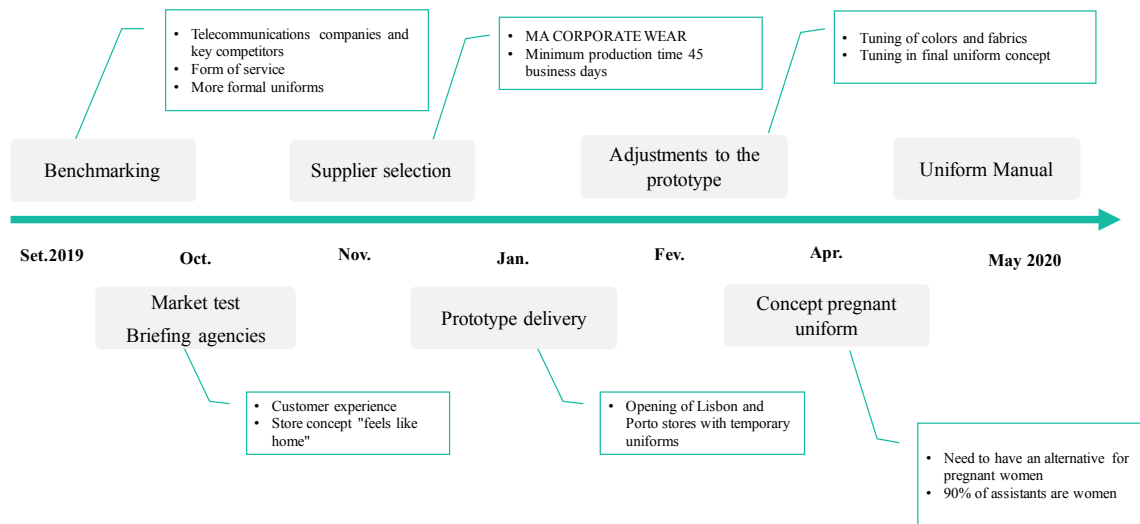


Figure 1- process of changing working clothes (own elaboration)

Business Customers

Once again, it is suggested for business customers to use some of the communication pieces described above, such as invoice corner, IVR on your line of service, and letter and email marketing. Besides, there needs to be a prepared explanation if there are doubts about the brand change and new stores' opening.

State and Autarchy

As explained earlier, this customer segment is exceptional and dedicated. To do so, there must be a piece of communication, a reliable letter and a telephone call from the people responsible for this segment of customers.

The letter should be written in a more formal tone of voice than the voice tone communicated to individual customers and businesses. On January 15, EDP Serviço Universal changed the brand and is now SU ELETRICIDADE, which the company remains the same, continuing to belong to the EDP group. Still, it should explain the store opening in the district to which they belong. The letter should be simple and straightforward to the subject.

Later, in the dedicated phone call, everything must be explained again. The call is intended to show the proximity and uniqueness that this client has for the company. The letter should be written in a more formal tone of voice than the voice tone communicated to individual customers and businesses. On January 15, EDP Serviço Universal changed the brand and is now SU ELETRICIDADE, which the company remains the same,

continuing to belong to the EDP group. Still, it should explain the store opening in the district to which they belong. The letter should be simple and straightforward to the subject.

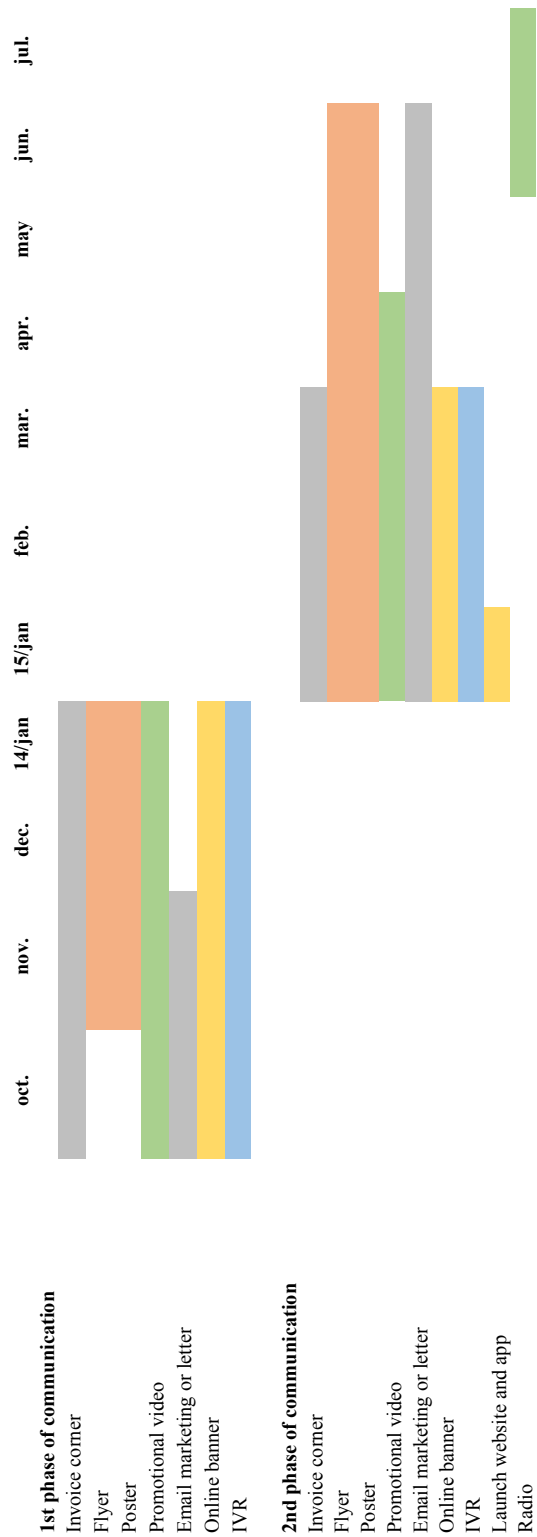
Later, in the dedicated phone call, everything must be explained again. The call is intended to show the proximity and uniqueness that this client has for the company.

4.5. Budget

1st phase of communication	
Flyer	14 000,00 €
Poster	2 500,00 €
Promotional video	4 500,00 €
Email marketing	1 500,00 €
Online banner	250,00 €
Total cost of 1st phase of communication	22 750,00 €
2nd phase of communication	
Flyer	9 722,00 €
Poster	2 571,00 €
Promotional video	4 500,00 €
Email marketing	3 000,00 €
Website and app	50 000,00 €
Online Banner	300,00 €
Magazine article	30 000,00 €
Spot radio	44 654,17 €
Merchandising	11 449,00 €
Working clothes	39 617,92 €
Total cost of 2nd phase of communication	195 814,09 €
TOTAL	218 564,09 €

Table 1 - budget of the communication plan

4.6. Schedule



Below is the detailed communication submission plan for the second phase of communication. Due to its complexity and the different store opening dates, it has become essential to develop a plan:

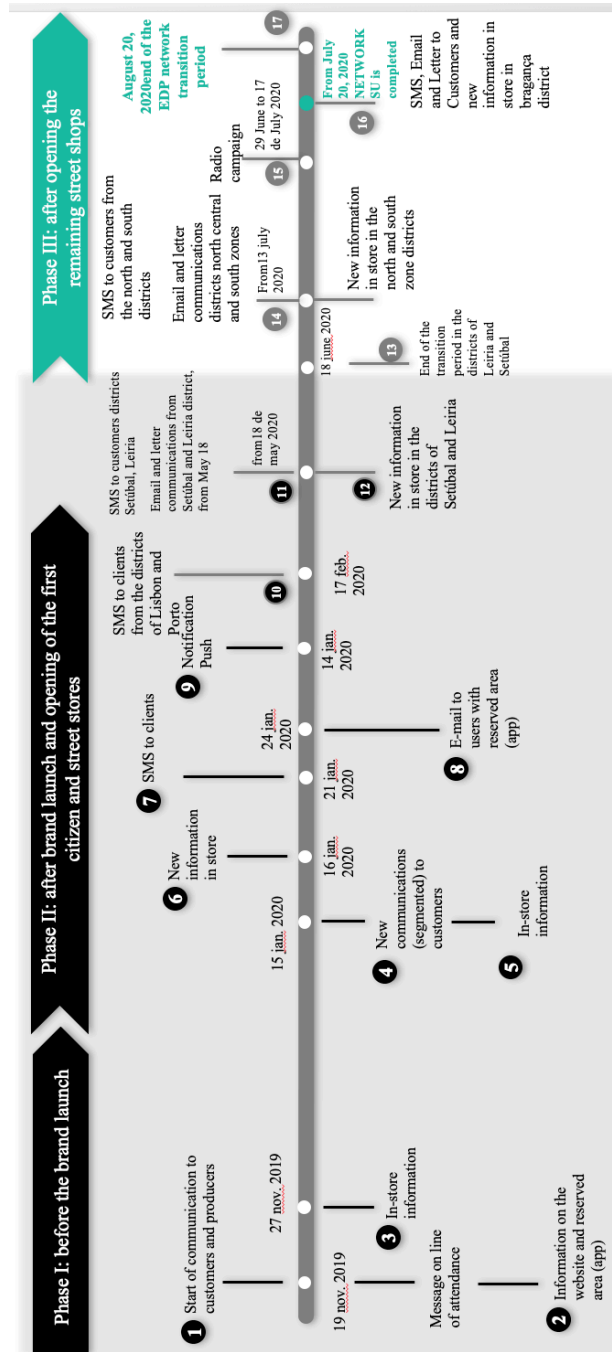


Figure 2 - schedule of communications

5. Conclusion and limitations

This master's project's objective was to create and propose a communication plan to EDP Universal Service. This company, during the year 2020 passed a multidisciplinary project that involved the change of brand.

The researcher began by reviewing the literature covering important brand concepts and how changing the brand should be understood before executing a communication plan. Being rebranding a sensitive topic for a company, it has become essential to study its process and critical risks, although this rebranding has been a regulator's requirement. The communication plan was then developed according to the steps and recommendations made by the authors studied.

The **first part** of the communication plan consisted of a context analysis divided into two perspectives: external and internal. The external analysis covered market trends at all levels, and it is essential to understand the evolution of the energy sector. The internal analysis included an overview of the company's group and an overview of EDP Serviço Universal.

The **second part** of the communication plan presents a new brand. The company has changed its image, values, and positioning to become a company closer to the customer and more digital. The big goal here has always been to change the customer's view of a regulated market company. Still, the voice tone of SU ELETRICIDADE is presented, a more clear, closer, and personalized voice.

In a **third phase**, the communication strategy per client segment is presented. The strategy adopted was to make a communication before and communication after the rebranding. The first phase is intended only to alert customers that something will happen and that the main changes are only visual. The second phase, after rebranding, is a bit more complicated. The main objectives of communication are the change of brand and the opening of new stores. Due to the delay of the works, as the opening of the stores was not on the same day, communication besides dedicated had to be phased.

This project **provides an efficient communication strategy** that includes specific communication tools meant to implement EDP Serviço Universal. The work developed is supported by recent benchmark studies. Moreover, this paper had an essential contribution, because most of the suggestions proposed were implemented, thus being recorded in the life of the regulated market company. Throughout the rebranding, the

paper's ideas were discussed so that this project was the most real and the most appropriate for the company.

During the execution of this project, the researcher faced **some challenges**. The research part was challenging to find information about the sector because it is a sector with many laws involved. Many of the developments are confidential at the technological level since any action can become a competitive advantage in an industry that is an essential good for any citizen.

On the other hand, can consider as a challenge and difficulty the communication tools that this company is allowed to use. In the middle of 2020, it seems to be an untruth to develop a communication plan and not make any in-depth strategy for social networks. Still, the regulator does not allow SU ELETRICIDADE to have social networks or publish content on the digital platforms of the EDP group.

Despite the limitations, and after the implementation of the communication plan, it can be observed that the number of complaints or requests for information about the rebranding of EDP Universal Service was relatively low. The main complaints were related to the end of face-to-face service in EDP stores and the fact that the customer had to go to the district capital.

Concerning the new logo, the new way of communicating, and the brand's positioning, the level of customer satisfaction increased. They stated that they felt safe and informed throughout the brand change process, affirming that the communication plan was well structured.

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5. Website banner



6. Invoice corner



www.suelectricidade.pt

leitura e dados para pagamento
800 205 000 (serviço ao cliente, 24h - chamado grátis)
apelo comercial
808 505 505 (para clientes, de 9h às 17h - custo chamado local)

EDP Distribuição
avarias elétricas
800 506 506 (24h - chamado grátis)

U602214011601184

JOAQUIM CARVALHO PIRES
STJO CAVERNÃO ALMEIDA
6350-211 ALMEIDA

1/3

Cód. Ident. Local - 0 025 201 481

JOAQUIM CARVALHO PIRES
Id. Fiscal - PT207070059
STJO CAVERNÃO ALMEIDA
6350-211 ALMEIDA

Tarifa Contratada - BTU-Simples 3,43 até 20,7 kVA
Ciclo Horário - sem ciclo
Prestação Contratada - 10,25 kVA
Conta Contrato - 102930148001
Contrato - 252014801
Zona de Qualidade de Serviço - Eletricidade - C
Cód. Ponto Entrega - PT 0002 000 025 201 481 FQ

Eletricidade

Valor a debitar	€ 34,55
A partir de	2020-01-20
Período de faturação	2019-10-30 a 2020-12-31

A ERSE aprovou as tarifas e preços para 2020. As tarifas dos clientes do mercado regulado com contrato em vigor terão normal basear em média 0,4%, a partir de janeiro de 2020. Consulte as novas tarifas em suelectricidade.pt

A  **serviço universal**

AGORA
É SU
ELETRICIDADE



Uma nova marca, uma nova imagem,
a mesma empresa.
[Saiba mais em suelectricidade.pt](http://suelectricidade.pt)

Coabrança por Débito Direto
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IBAN: PT500045402640**0806068**6

Mandato - P0510000157557
ID Credor (IK) - PT46101632

10/2020


7. Flyer


NOVAS SOLUÇÕES DE ATENDIMENTO

Por exigência da Entidade Reguladora dos Serviços Energéticos (ERSE) a **EDP Serviço Universal** teve de aprofundar a diferenciação da sua imagem das restantes empresas do grupo EDP. Além da nova marca, criámos também uma rede de lojas própria, com um novo conceito de atendimento.


Conheça aqui os meios que temos ao seu dispor sempre que precisar de nos contactar:


 **Loja SU ELETRICIDADE** NOVO

A SU ELETRICIDADE passará a ter uma loja em cada capital de distrito. Em Vila Real, poderá encontrar-nos na seguinte morada:


 Rua de Santa Iria | Prédios Pinto e Marques, Loja 1

Horário: dias úteis - 8h30 às 12h30 e das 13h30 às 16h30
Operações disponíveis: todas



 **Linha de atendimento**

Poderá contactar-nos através do **808 505 505** (custo de chamada local)
Horário: dias úteis - 8h00 às 22h00
Operações disponíveis: todas


 **Atendimento automático gratuito** NOVO

Poderá contactar-nos através do **800 205 000**. Basta identificar-se com o seu NIF - e com o Código de Identificação do Local (CIL), caso tenha mais do que um contrato.

Horário: todos os dias, em qualquer horário


Operações disponíveis:

- envio de leituras
- obtenção de referência MB para pagamento da fatura.

 **Área reservada SU ELETRICIDADE**

Registe-se na **app SU ELETRICIDADE** ou em sueletricidade.pt e comece a gerir com toda a facilidade o seu contrato, quando e onde quiser - no seu computador, smartphone ou tablet.

Operações disponíveis: todas (exceto contratos eventuais)


 **Agentes Payshop, lojas CTT e rede Multibanco**

No distrito de Vila Real existem 90 agentes Payshop e mais de 10 lojas CTT, para além da rede Multibanco. Consulte abaixo alguns agentes Payshop ou aceda ao nosso site sueletricidade.pt para encontrar o agente ou a loja mais próxima de si.

- **Alijó** | Café da Paz
Lg. do Pelorinho, nº 15
- **Boticas** | Bar Fernandes
R. do Sangunhedo, nº 9
- **Chaves** | Biquinho Doce
R. Stª. António, s/n, Lg.
- **Mesão Frio** | Livraria Zé
Av. Conselheiro José Maria Alpoim, nº 508
- **Mondim de Basto** | Letras & Ca.
Av. da Igreja, nº 3
- **Montalegre** | Loja Vieira
R. Dr. António J. de Moraes Caldas, nº 3
- **Murça** | Versátil
R. Militão Bessa Ribeiro, Edif. D. Manuel I, Lj. 1
- **Peso da Régua** | Casa Borrajo
R. dos Camilos, nº 4
- **Ribeira de Pena** | Quilosque da Fátima
R. Manuel José de Carvalho, s/nº, Quilosque

- **Sabrosa** | Café Marjô
Pç. D. António Valente da Fonseca, s/n
- **Stª Marta de Penaguão** | Café Nicole
Av. 1ª de Maio, nº 27
- **Valpaços** | Agência Seguros Ari
Av. 25 de Abril, nº 1
- **Vila Pouca de Aguiar** | Livr. Papel. Aguiarense
R. Comendador Silva, nº 44


Operações disponíveis: pagamento de faturas




8. Poster



9. Letter or email marketing





Assunto: A marca EDP Serviço Universal já mudou para SU ELETRICIDADE!

Caro(a) Cliente,

Já mudámos para SU ELETRICIDADE: uma nova marca, a mesma empresa

Tal como lhe comunicámos antes, a partir de agora a nossa marca passa a ser SU ELETRICIDADE, mas continuamos a ser a mesma empresa e a pertencer ao grupo EDP.

Porquê esta mudança?

Por exigência da Entidade Reguladora dos Serviços Energéticos (ERSE), a EDP Serviço Universal teve de aprofundar a diferenciação da sua imagem relativamente às outras marcas do grupo EDP. Uma das medidas para evidenciar essa diferenciação passa pela criação de espaços de atendimento exclusivos e separados da atual rede de lojas e agentes EDP.

Como vai sentir esta mudança?

O seu contrato não vai sofrer qualquer alteração, não sendo necessária nenhuma ação da sua parte, nem terá qualquer custo adicional para si. Esta mudança vai ser implementada de forma gradual, por isso, numa fase inicial, pode encontrar ainda as duas marcas – SU ELETRICIDADE e EDP Serviço Universal.

Uma nova rede de lojas próprias SU ELETRICIDADE

Ao longo do primeiro trimestre de 2020 vamos abrir novas lojas em cada uma das capitais de distrito de Portugal continental. Aproveite para conhecer a loja que já abrimos no seu distrito. Consulte o folheto em anexo para mais informações. Para além desta nova loja, tem ao seu dispor:

- a rede Multibanco, os mais de 4.600 agentes **Payshop**, espalhados pelo país e próximos de si e as cerca de 500 lojas CTT, para pagar as suas faturas;
- a nova linha gratuita de atendimento automático – 800 205 000 – que criámos para enviar as suas leituras ou obter uma referência Multibanco para pagamento da sua fatura;
- a nossa linha de atendimento – 808 505 505 – que continua disponível todos os dias úteis, das 8h às 22h, para esclarecer dúvidas ou realizar qualquer tipo de operação (custo de chamada local).

Com a abertura do novo espaço próprio, as atuais lojas e agentes EDP presentes no seu distrito deixarão de prestar serviço aos clientes SU ELETRICIDADE.

Use a área reservada SU ELETRICIDADE

Registe-se na app SU ELETRICIDADE ou em sueletricidade.pt e comece a gerir o seu contrato, com toda a facilidade, quando e onde quiser - no seu computador, smartphone ou tablet. Se já estiver registado na nossa área reservada, os seus dados de acesso continuam os mesmos.

Estamos disponíveis para esclarecer as suas dúvidas

Através do site sueletricidade.pt, na linha de atendimento 808 505 505 ou na nossa loja.]

Com os nossos cumprimentos,

Pedro Fernandes
Diretor

EDP Serviço Universal, S. A. Sede Social: Rua Camões/Castelo Branco 41-1350-04 Lisboa, Portugal
Registo Comercial: B-1-000000000/000000000, Capital Social: € 13.194.000
Comunicação realizada no âmbito do artigo 80º - nº3 b) do Regulamento das Relações Comerciais

10. Merchandising



11. Working clothes

