

CASE STUDY



Starting from the Beginning

As Peninsula Clean Energy (PCE) began its journey as a Community Choice Aggregator, the organization faced the challenge of scaling its rebate programs efficiently while ensuring accessibility for customers.

CHALLENGE:

When Peninsula Clean Energy (PCE) was starting as a Community Choice Aggregator, staff wanted to run rebate programs to benefit customers and make electrification more accessible, but as a new organization with limited experience, they faced challenges in managing programs at scale.

Before Brillion, they used a third-party vendor to manage one program, but while the data was manageable in spreadsheets, creating reports was difficult.

“We knew we wanted to have a project management platform and CRM before we launched programs at scale,” said Alejandra Posada, PCE program manager. “We didn’t want to manage programs on spreadsheets. We wanted to set a platform up right away, so incentive programs weren’t going to be launched until we had a solution in place.”

One specific program they planned from the start was midstream rebates for electric vehicles and e-bikes, which require collaboration with bike shops and car dealers to offer discounts to pre-approved customers; without streamlined systems, managing the budget and giving dealers visibility to eligible customers would have been too time-consuming for such a small department.



Profile: Peninsula Clean Energy (PCE)

Total Customers: 300,000

Location: California

Primary objective: Create a scalable rebate program that was easy to manage, as PCE faced challenges with data and program efficiency.

BEFORE

- One, small third party program
- Difficulty reporting on data

AFTER

5 residential and commercial programs

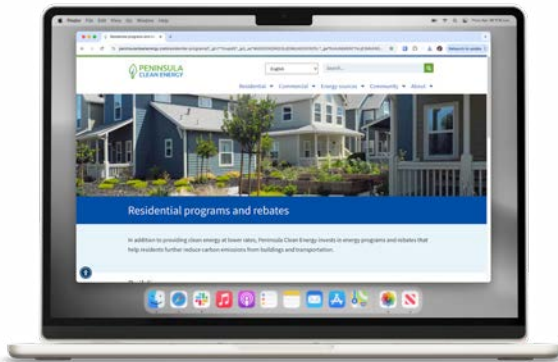
Easy reporting

Quick rebate processing

(Continued)

SOLUTION:

Brillion configured a solution that enabled Peninsula Clean Energy (PCE) to scale their electrification programs effectively. Brillion Fulfill allowed staff to track customer data, analyze program performance, and manage budgets, ensuring no limitations. For the midstream EV rebate programs, Brillion set up a community portal for dealers and retailers to upload sales data and access pre-approved customer information, streamlining the process.



▲ *Utility customers have access to several electrification programs and rebates.*

Brillion configured a solution for PCE that enabled them to start and grow their electrification program portfolio successfully. Brillion Fulfill gave PCE staff the ability to take customer and project notes, analyze stats, report on program successes, and more.

The software also significantly eased managing program budgets by allowing funds to be reserved in advance for successful measures, guaranteeing there were no shortages. Specific to the midstream EV rebate programs, Brillion set up a community portal and gave portal access to car dealers and retailers to upload their sales data.

"I think the portal is most beneficial for our dealerships and bike shop partners," said Posada. "The portal is used for projects that require pre-approval, so the partners can look for customers that have already been approved. They can then upload the document to the correct project by searching for projects in the 'funds reserved' status. The documentation automatically goes to that project and then the project will automatically go to final review so we know it's time to review after the partner does the steps they're supposed to," explained Posada.



We knew we wanted to have a project management platform and CRM before we launched programs at scale. We didn't want to manage programs on spreadsheets. We wanted to set a platform up right away, so incentive programs weren't going to be launched until we had a solution in place."

ALEJANDRA POSADA, PROGRAM MANAGER, PCE

RESULTS:



Seamless Experience for Staff and Partners

The community portal solution allows partners to upload their documents with no back and forth. PCE staff see real-time project updates, so they know exactly what step a project is in. "The portal has been helpful for our partners. With the portal, they just go in and search for a name," Posada said. "Before, they would have needed to use a specific link and reference a specific email to make sure they're uploading the documents for the correct customer. The portal is a less clunky user experience."



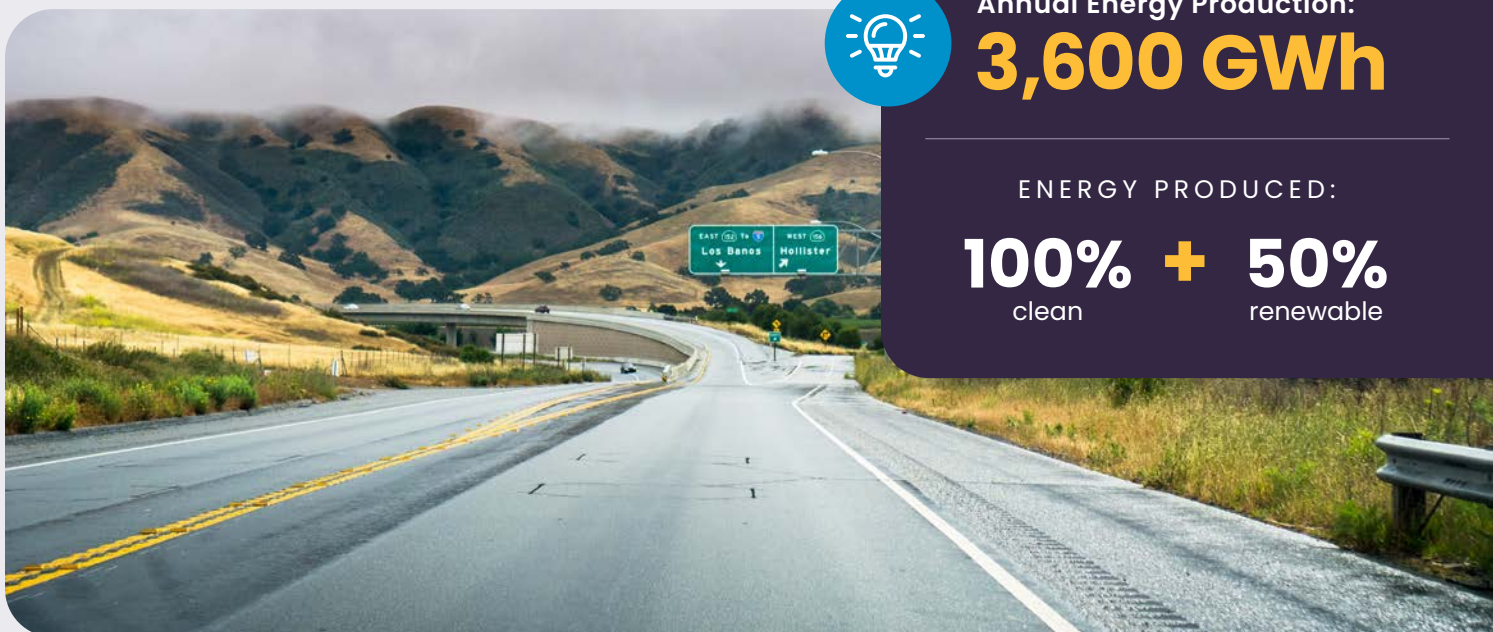
More Rebates Processed, Less Customer Questions

The PCE team now processes large volumes of rebates at a level they never could before. They're able to automate status emails to customers, drastically reducing customer questions in the call center. "Brillion Fulfill allows us to run programs more quickly—and more precisely submit rebate requests to the finance team. Without it, it wouldn't be as easy or efficient to run large volume programs," said Posada.



No Pivot Tables Needed

With Brillion Fulfill, PCE can quickly pull reports to track key program success indicators (KPIs). "Being able to look at metrics and analyze different aspects of programs and participation data is easy because of reports and dashboards," Posada said. "Without that we'd spend more time creating reports and finding answers to certain questions."



Annual Energy Production:
3,600 GWh

ENERGY PRODUCED:

100% + **50%**
clean + renewable



ABOUT PENINSULA CLEAN ENERGY

PCE is a California-based Community Choice Aggregation agency. It is the official electricity provider for San Mateo County and for the City of Los Banos. With a mission to reduce greenhouse gas emissions, the agency serves a population of 810,000 by providing more than 3,600 gigawatt hours annually of electricity that is 50 percent renewable, 100 percent clean and at lower cost than PG&E.

peninsulacleanenergy.com

800.811.0883 • sales@brillion.ai • brillion.ai