

CASE STUDY



The Power of Connection

CoServ faced challenges in effectively communicating with members about energy-saving programs until partnering with Brillion to enhance their outreach.

CHALLENGE:

In 2014, CoServ struggled to meet members where they were in their energy saving journey. The challenge was how to communicate better with their members to educate them on program offerings and the benefits of being part of a cooperative.

“Prior to Brillion (formerly Apogee), we had very few digital avenues to interact and engage with our members,” said Caitlin Creed, CoServ’s Director of Marketing and Communications. “Especially when it came to their usage and personalized recommendations. Aside from their monthly statements or other billing processes, they weren’t really hearing from us.” Creed remembered, “There were two major communication pieces that we wanted to offer our members but we didn’t have the resources to effectively execute them.” They wanted to offer Welcome Series emails to new members and send personalized annual outage reports specific to member’s service address.

They also wanted to improve member education about energy savings. Members were curious about how their home was performing, how their home compared to their neighbors, and what the best rate for them was.



Profile:	CoServ
Total Members:	470,000
Location:	Texas
Primary objective:	Enhance communication and engagement with members regarding personalized energy-saving programs.

BEFORE

- Inefficient home assessments
- Few digital engagement methods
- Lack of customer education

AFTER

- Guided home assessments
- Targeted email campaigns
- Self-serve special calculators

(Continued)

While these were challenges they wanted to address eventually, their initial reason to seek out a solution stemmed from the need to enhance their energy assessment program. This program helped customers find and correct inefficiencies in their home, but the overall process was inefficient and unstandardized. “Our energy assessment recommendations and reports were taken on pen and paper, then mailed to the member. We moved to an in-house spreadsheet on a laptop so we could at least email the report. Both ways were okay at the time, but we knew there was something better out there, and then we discovered Brillion,” recalled Josh Sterling, Manager of Energy Solutions at CoServ.

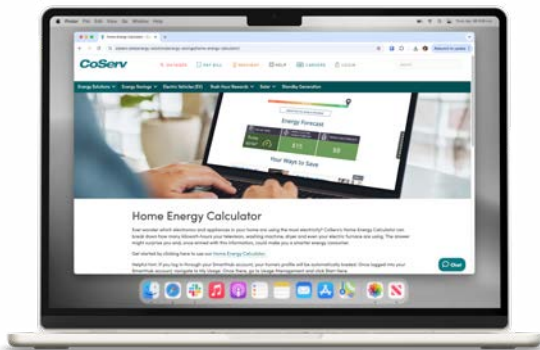


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JOSH STERLING,
MANAGER OF ENERGY SOLUTIONS

SOLUTION:

CoServ’s partnership with Brillion marked a significant step forward in enhancing energy assessments and member communication. By implementing tools like energy advisor and various digital resources, CoServ aimed to provide members with personalized insights into their energy usage and improve overall engagement.



▲ *Utility members have access to customized household reports, and calculators.*

CoServ’s first pilot with Brillion Educate implemented Energy Advisor to improve their energy assessments. Sterling said, “Through Energy Advisor, Brillion allowed us to move to tablets which gave us the ability to show members how their bills were being made up by the way they consume energy. This gave a lot of validity to the conversations we were already having with members.”

“We have the Home Energy Calculator on our website that allows members to get recommendations and benchmark their home performance on their own,” Sterling explained. They also have calculators that educate members on how EV charging could impact their bill and rate selection.

CoServ then deployed Brillion Engage’s video bill explanations, end of year summaries, mid-bill cycle alerts, and seasonal videos. Brillion also stood up their welcome series and personalized annual outage reports, two of the big pieces they were missing before. “Being able to showcase our reliability in a way that is directly tied to their service has been a great addition to our communication tool belt,” said Creed. Sterling added, “Being able to proactively communicate with our members if their usage is going above ‘normal’ helps to call out a high bill before it’s a bigger issue.”

RESULTS:



Build Connection

KEY METRICS:

- 7** Targeted email campaigns deployed
- 5** Energy calculators implemented

"Brillion Engage really helped open the door for us as far as how we're communicating and what we're able to communicate," Caitlin Creed said. "It's vital to be able to connect with our members and do it early to reinforce a positive experience with us." CoServ provides seven targeted email campaigns and five self-serve energy calculators to their customers so they can be proactive with their energy use. Creed said, "We've gotten feedback directly from our board members about how much they have enjoyed getting their personalized emails about their bills and the positive impression it left on them." CoServ's Senior Vice President of Customer Care & Engagement Denise Smithers shared, "By embracing innovative technology and connecting with our members through their preferred platforms, we are able to foster a sense of connection and engage with our members in a meaningful way."



Increase Productivity & Reduce Consumption

KEY METRICS:

32,808
Completed online audits (2023)

Brillion Educate's energy advisor helped CoServ massively increase their productivity. In 2023, CoServ completed 32,808 online audits. It gave them a better guideline on how to move throughout the home and allowed them to be more detailed in their assessment. Josh Sterling said, "When the members can see what their usage is going towards, we can make a recommendation on how to reduce that. This then guides the member to make a change in their habits which can lead to reduced consumption and helps the overall load on the grid."



Improved Customer Satisfaction

KEY METRICS:

98.7%
Customer satisfaction rating

"On the marketing and communications side, since we started using more of Brillion's offerings, we've seen our J.D. Power score increase each year, specifically in the Communications and Customer Care segment. In 2018, our year-end score was 706 and in 2023 it was 739, which is a 33 point increase," said Creed. Customer Care went from 797 to 806. On the email marketing front, their team consistently gets extremely high read rates on their Brillion emails with an average open rate of 72% and click through of 7.1%. In 2023, CoServ had an average of 98.7% customer satisfaction rating.



ABOUT COSERV

CoServ is an electric and gas distribution company serving North Texas for over 87 years. They are one of the fastest growing co-ops in the country, with over 470K combined electric and gas meters. Brillion has been their customer engagement partner for 14 years.

coserv.com

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