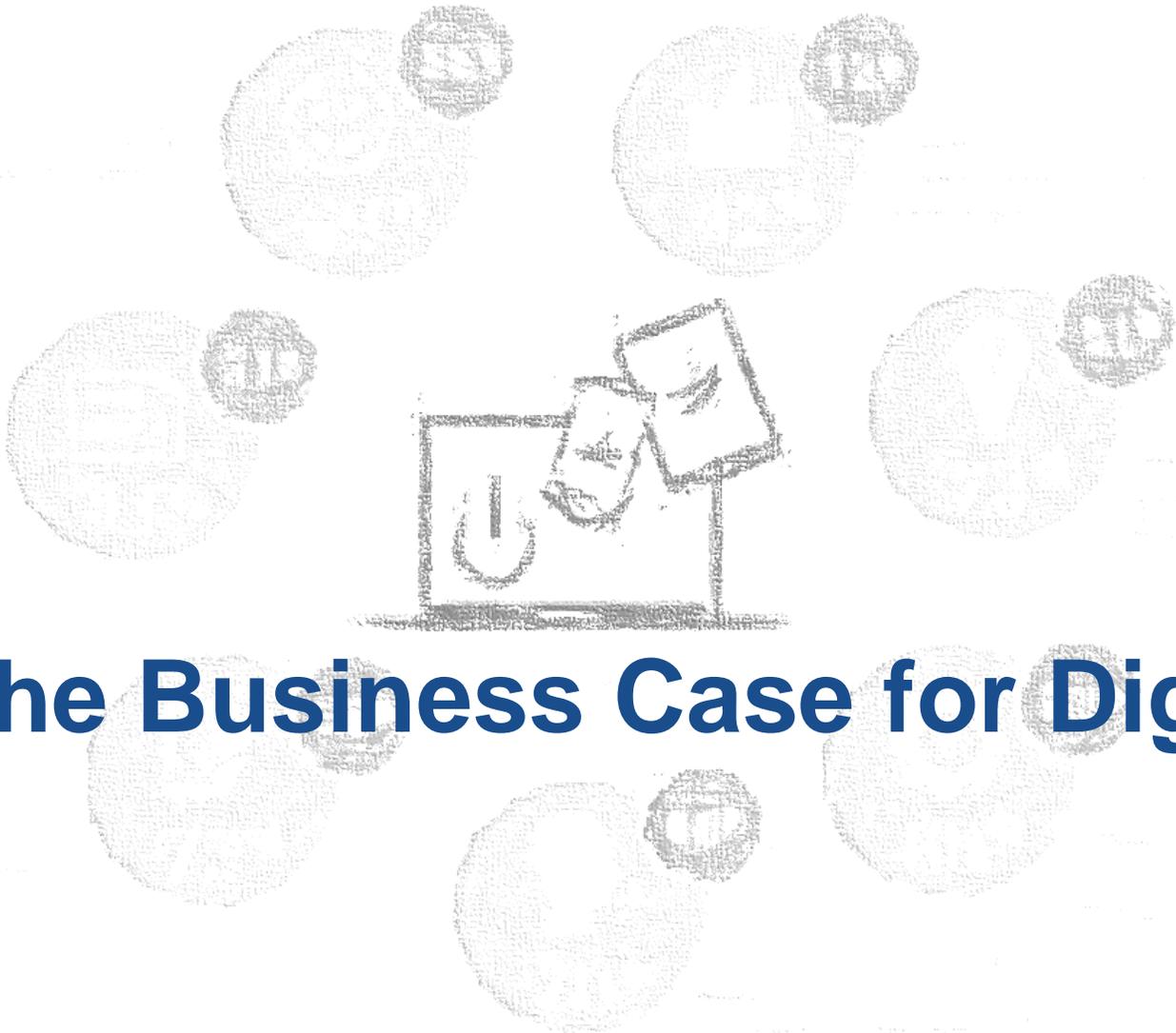




# Successful Digital Engagement Strategies

June 30, 2016





# The Business Case for Digital

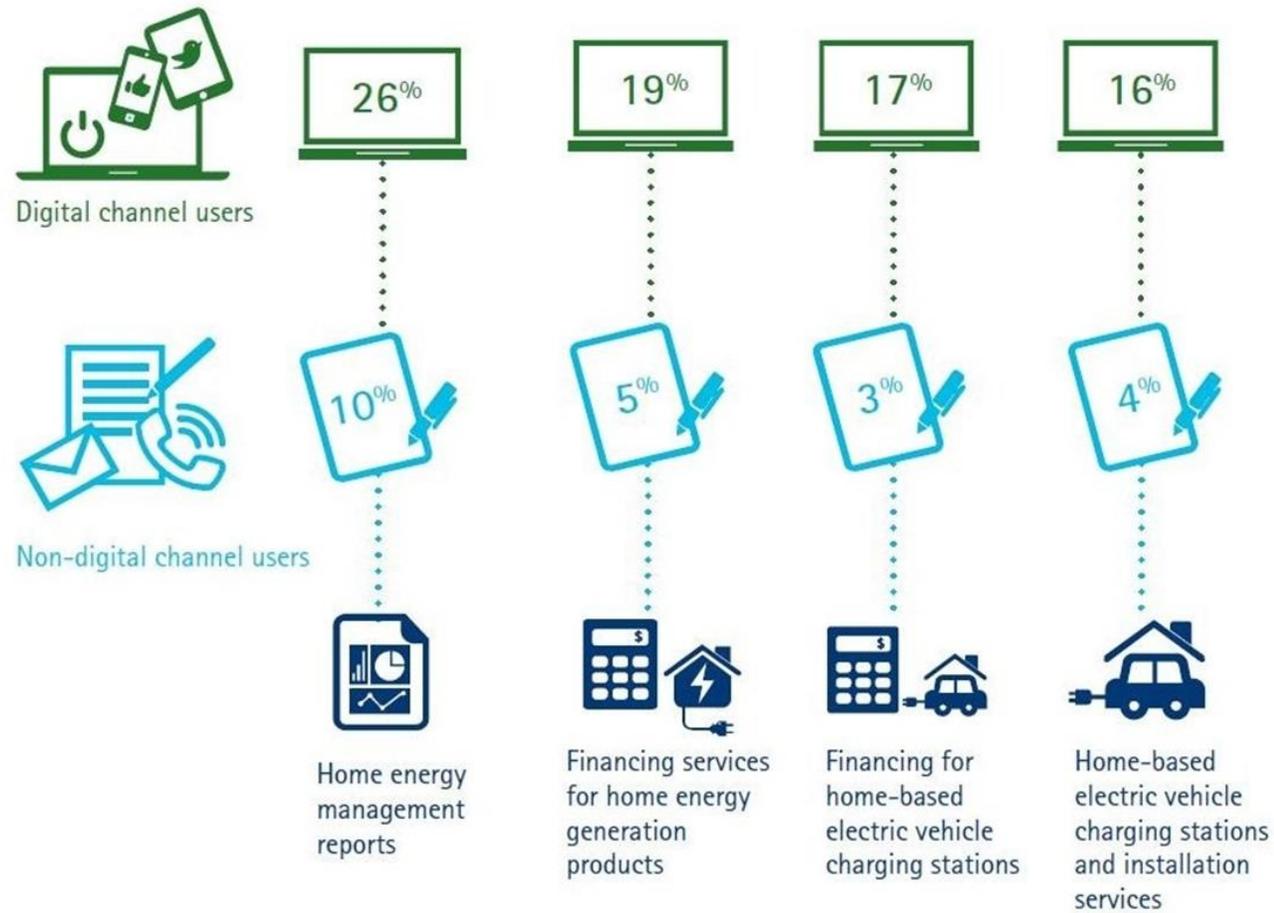
# Engagement: Digital Users vs. Non-Digital Users



● Digital users  
● Non-digital users

Base: All respondents.  
Source: Accenture, New Energy Consumer research program, 2015 consumer survey.

Digitally engaged customers are significantly **more** likely to purchase or sign up for revenue generating products and services in the next 12 months.



Source: Accenture, New Energy Consumer research program, 2015 consumer survey

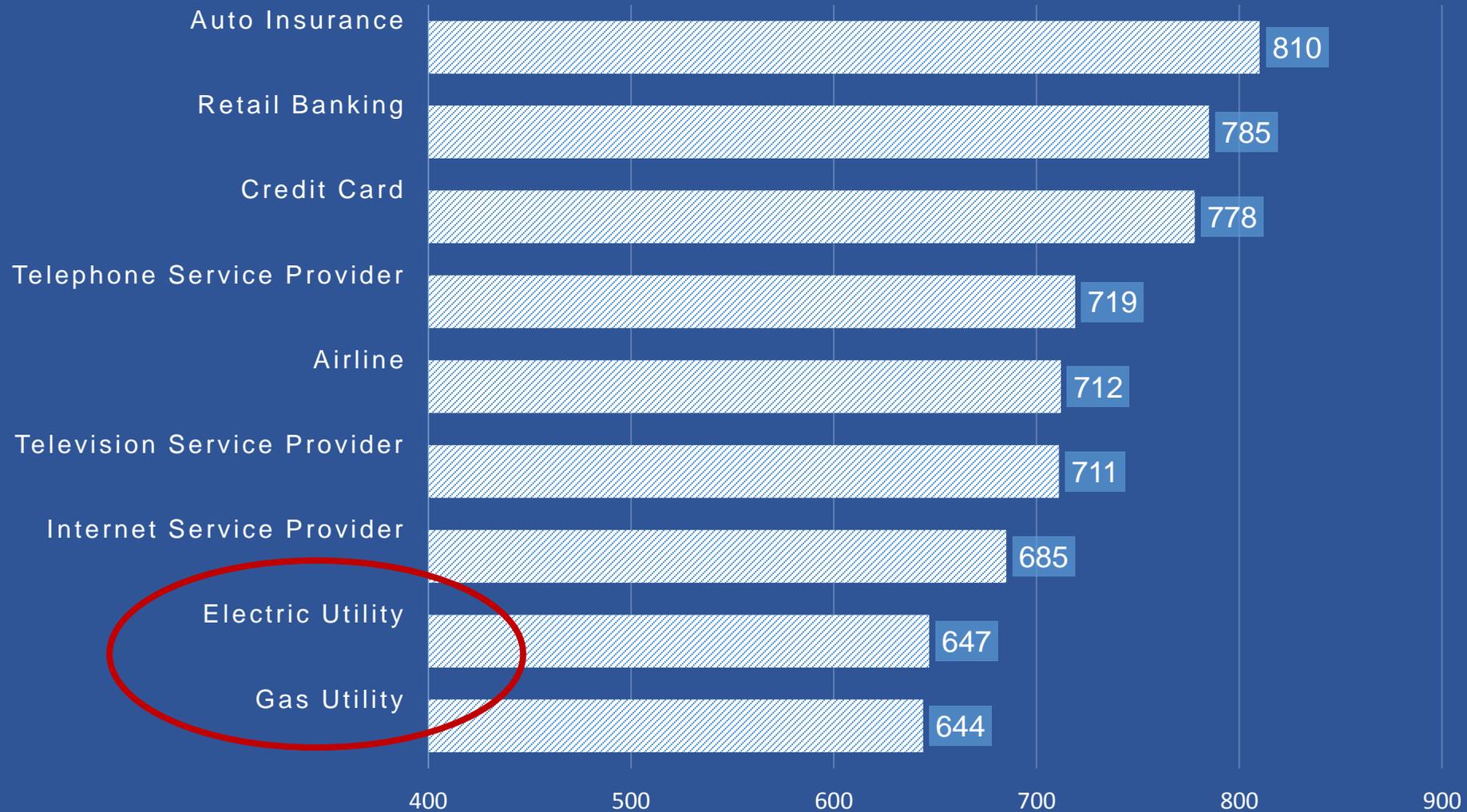
# Key Demographics



*19 to 35 years of age in 2016*

- ✓ Inclined to take control of their energy use
- ✓ Inclined to take control of their energy use
- ✓ Much more likely to notice messaging received via digital channels.
- ✓ Will make up as much as 75% of the workforce by 2025
- ✓ Now at 75.4 million strong surpassing Baby Boomers

# 2015 Overall Customer Satisfaction Index



Source: J.D. Power 2015 Electric Utility Residential Customer Satisfaction Study<sup>SM</sup>

# Benefits Beyond Customer Satisfaction



- The average cost of a live phone call is \$2 to \$5 – Chartwell 2014 Survey
- Cost to send auditor to the home...\$100's
- Renewable Energy Credits where applicable
- Regulatory Compliance where applicable
- Public Relations: positioning your brand as an expert
- Driving program participation
- Data Analytics – target & increase ROI



What does digital  
engagement look like?

# Opportunities for Digital Engagement

- Responsive website with opportunities for online engagement
- And more... that's just the basics



# Opportunities for Digital Engagement

- Responsive website with opportunities for online engagement
- Email Correspondence



**eMails + PLUS**

**Traditional media advertising**

**Digital advertising**

**Post cards**

**PSAs**

**Bill stuffers**



# Opportunities for Digital Engagement

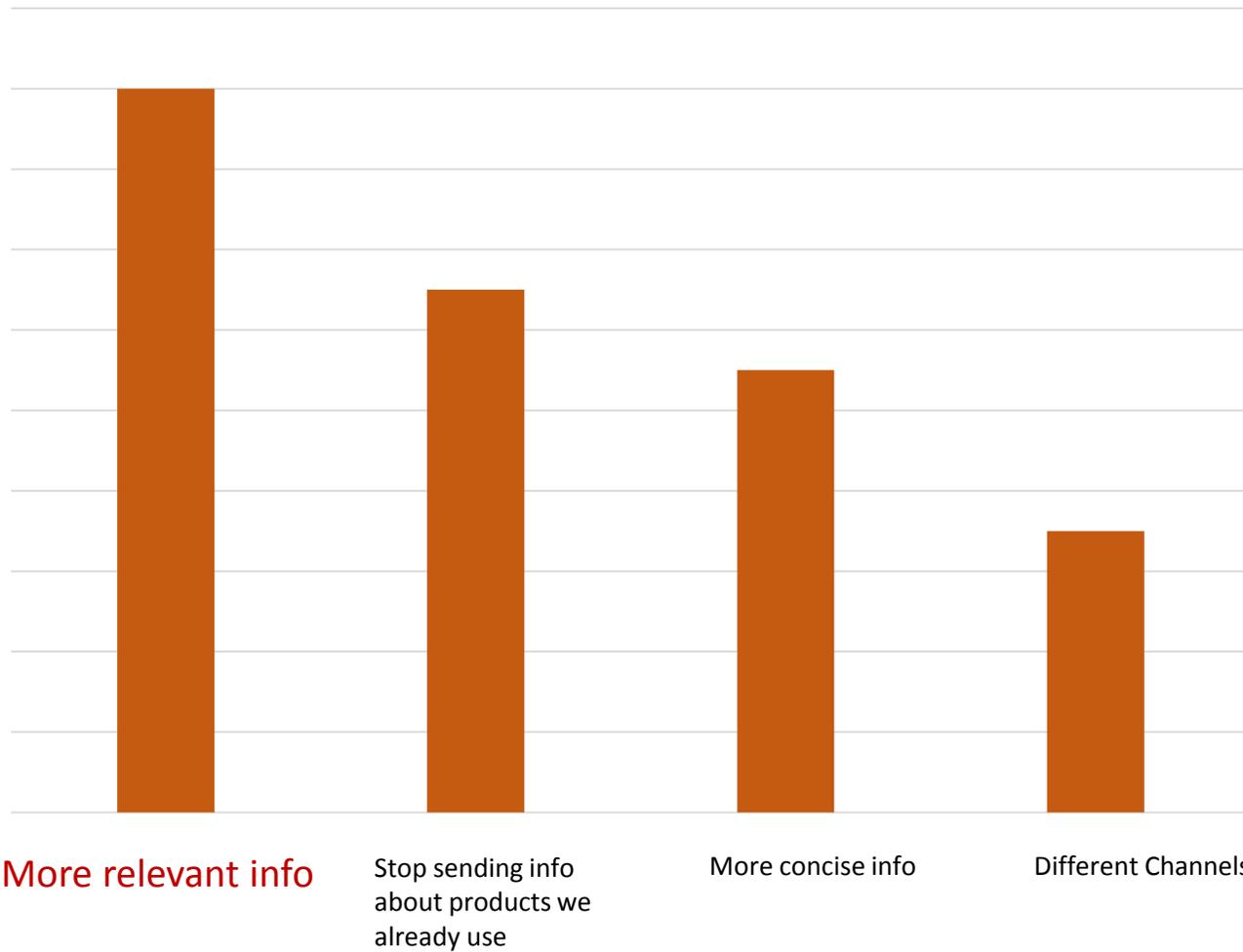


- ✓ **Bill Alerts** – high usage text or email
- ✓ **Personalized Energy Summary and Progress Reports**
- ✓ **Energy Calculators** – collect profile information for further targeting
- ✓ **Feedback Opportunities**
- ✓ **Energy Forecasting** with weather
- ✓ **Personalized Video Messaging** – Bill Analysis or Demand Response Events
- ✓ **Digital Newsletters**
- ✓ **Digital Advertising** – local media and digital radio – linking to programs and service
- ✓ **Social Media**



How Do We  
Engage  
Customers?

# What one thing could utilities do to improve communication?



More relevant info

Stop sending info about products we already use

More concise info

Different Channels



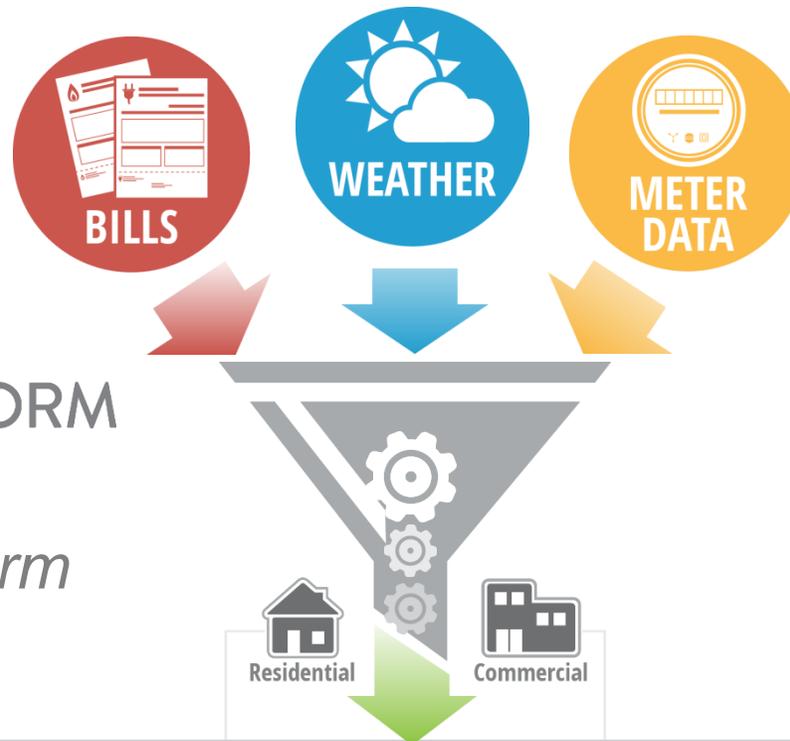
# What do customers want?

More relevant information!

Source: KSV Marketing

# EMPOWER PLATFORM

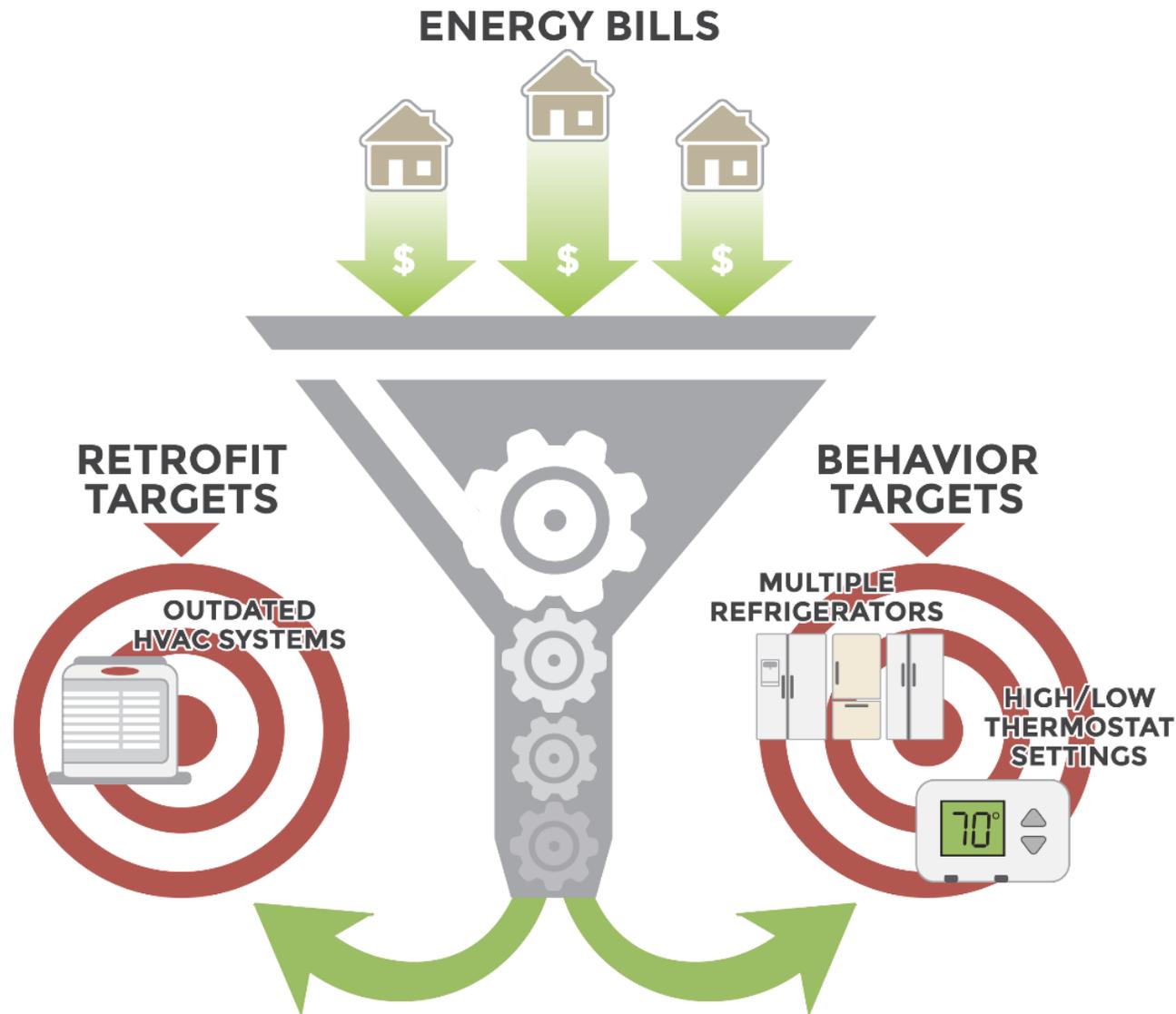
Apogee's Comprehensive Digital Engagement Platform



DIGITAL ENGAGEMENT PLATFORM					
UTILITY CUSTOMER		UTILITY DEPARTMENT			
 <b>SELF SERVE</b> ..... On-line Video CSR IVR / Text Mobile	 <b>OUTBOUND</b> ..... Field Audit Video Alert Social Media Email/Direct Mail School Programs	 <b>MARKETING</b> ..... EE Target Conversion Target Deemed Benefits Program Promotion	 <b>POWER DELIVERY</b> ..... Operation Efficiency Surgical DR Volunteer Peak Load Reduction	 <b>COMMUNICATION</b> ..... Social Media CSS Customer SAT Customer Engagement	 <b>CUSTOMER SERVICE</b> ..... High Bill Resolution Call Resolution

# Program Targeting Improves Yield

- Using bills and weather
- Pin-point retrofit targets
- Locate behavior opportunities





We Enable  
POP!

Personalized  
Outbound  
Proactive

TELL US ABOUT YOUR HOME ?

1) WHAT IS THE LOCATION OF YOUR HOME? ?

Your Home's Location

Enter City or Zip

2) HOW BIG IS YOUR HOME? ?



Advanced House Details



Small House (500-1600 Sqft.)



Medium House (1600-3500 Sqft.)



Large House (3500-8000 Sqft.)

3) HOW MANY PEOPLE LIVE IN YOUR HOME? ?



Num. Occupants: 3

4) HOW MUCH INSULATION DO YOU HAVE? ?



Advanced Insulation Details



Don't Know



Thick Insulation



Some Insulation



No Insulation

5) WHAT TYPE OF HEATING AND COOLING SYSTEM IS IN YOUR HOME? ?



Advanced HVAC Details



Nat. Gas w/Central Air



Heat Pump



Nat. Gas w/o Central Air

RESET PROFILE

SHOW ANALYSIS



# Energy Advisor Online Check-up

- ~ Minute completion
- Mobile friendly
- Weather and Alerts
- Saving recommendations
- Program Promotion
- Collect Profile Data
- Offers Feedback Opportunity

TELL US ABOUT YOUR HOME ?

1) WHAT IS THE LOCATION OF YOUR HOME? ?

Your Home's Location

Enter City or Zip

## HOME EFFICIENCY RATING



POOR

AVERAGE

GREAT

Explain how my rating is calculated



ATLANTA, GEORGIA



WEEKLY ENERGY FORECAST

TODAY

57/54 °F



\$26

No Insulation

5) WHAT TYPE OF HEATING AND COOLING SYSTEM IS IN YOUR HOME? ?



Advanced HVAC Details



Nat. Gas w/Central Air



Heat Pump



Nat. Gas w/o Central Air

RESET PROFILE

SHOW ANALYSIS

# Empower Platform

- ✓ YOUR Home Ratings
- ✓ Weather Feature
- ✓ Energy Cost Forecast
- ✓ Easy to Understand
- ✓ Provides Progressive Engagement

# Behavior Based Emails

50%

Steady open rates

2x

Industry Average

Your personalized report below will help you understand your energy use, how your neighbors compare, and help you find ways to save money.

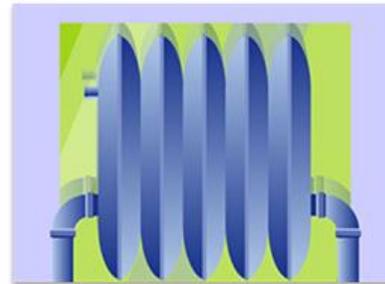
Update your home profile for an even more accurate analysis.

## What's Your Resolution?

If it's to lower your heating costs, we can help:

- Upgrade your heating system and get rebates to \$1,000
- Lower your heating and cooling costs by up to 30%

LEARN MORE



Tip #16: Reduce heat loss by placing a reflector between the radiator and the wall.

## Beat the Winter Blast

- Try our [programmable thermostat calculator](#) to learn how small changes can equal BIG savings
- Reduce the impact of high heating costs with our [level payment plan](#)
- **Smell Gas? Act Fast!** Call 911 or 1-800-75-CONED to report a gas leak

LEARN MORE



Install a qualifying programmable thermostat and we'll give you \$85.

**EG APOGEE**  
 Electric & Gas Co.  
SUPERIOR SERVICE. AFFORDABLE RATES.

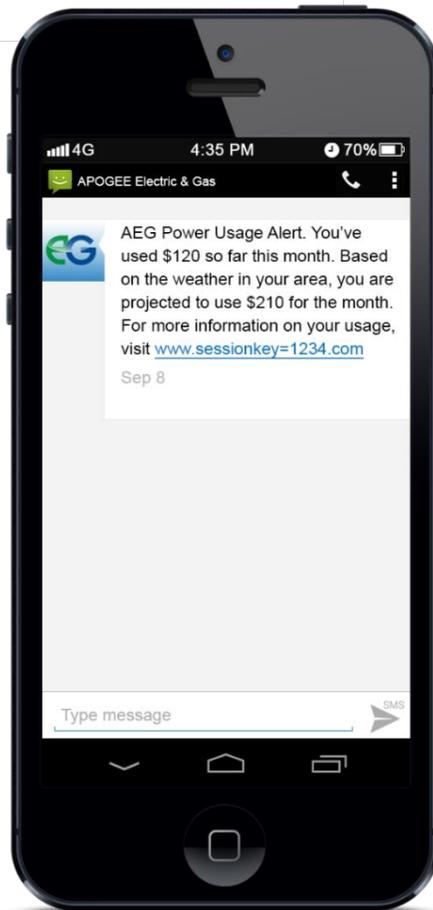
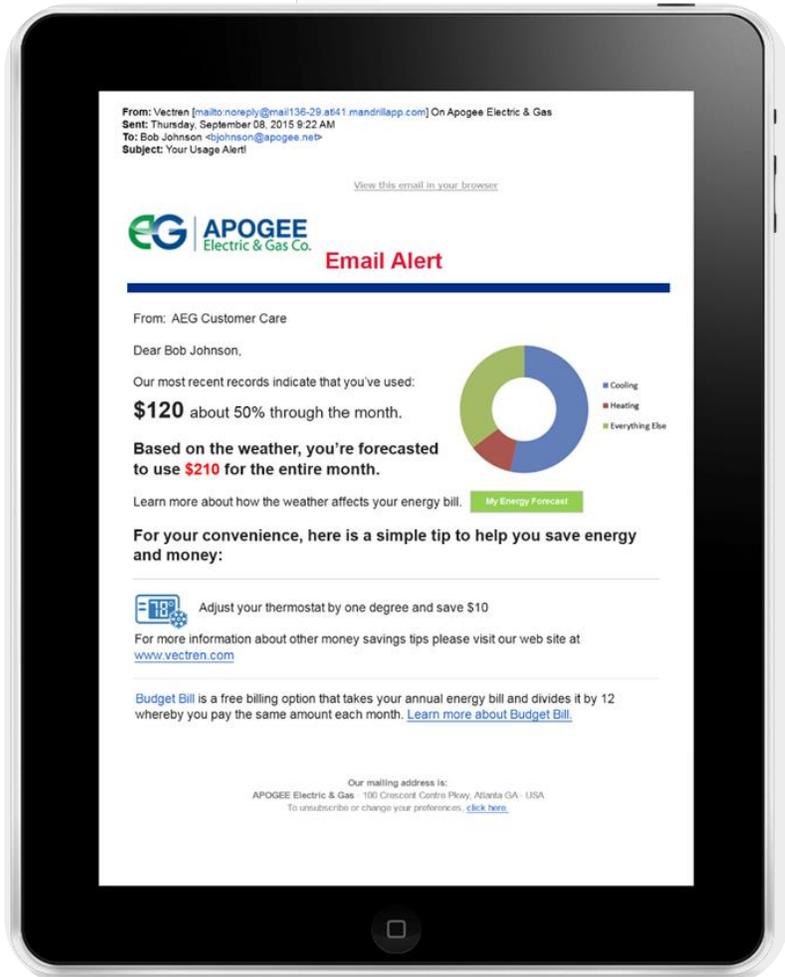
**EZHome Checkup**  
 Record ID: 1531

My Saving Tips  
 My Weather  
 My Usage Details  
 My Alerts  
 My Profile

**Sign up for usage alerts:**  
 Email:   
 or  
 Mobile:

**Alerts you would like to receive:**  
 Mid cycle alert  
 When my usage reaches \$  
 Unusual usage

FEEDBACK



# Mid-Cycle Billing Alerts

Proactive Alerts  
 Quantified Recommendations  
 Weather and Energy Cost Forecast



# Case Studies and Proven Results

[Click here to view this in a browser](#)



Welcome to AG&E Power's online energy efficiency tool "My Energy Report." You will now receive regular energy progress reports to your inbox. These reports will track your energy savings progress and show you recommended ways save.

Here's how to get started:

You can revise or review your home profile at any time. This will help us provide an accurate analysis of your energy use.



We will email regular energy reports that will analyze your energy use. View your results online at anytime.



Create a savings plan. Review home upgrades, pledge the actions that are right for you, and instantly see your potential savings.



That's just how easy it is. We hope you enjoy the "My Energy Report" service!

Energy Services Team

Our mailing address is:

[unsubscribe from this list](#)

# Case Study

## Digital Engagement Tool:

### Energy Progress Reports

- 20,000 energy reports emailed each month
- Only 98 opt-outs since the program began in 2014

# Personalized Energy Progress Reports

- ✓ Personalized content
- ✓ Timely- just prior to the bill
- ✓ Opportunity for positive change
- ✓ Program promotion
- ✓ Increased customer satisfaction

## Customize Your Message Here

Energy Services Team

## Your Personalized Report

This report will help you understand your energy use, how your neighbors compare, and help you find ways to save money. For a more accurate analysis, update your home profile.

[My Profile](#)

## My Bill Comparison

### Electric Difference from Last Month

#### Usage Summary

The Sep 16 2015 bill usage was about 1,362 kWh lower than the Aug 17 2015 bill period.

↓ 1362 kWh

#### Cost Summary

The Sep 16 2015 bill costs were about \$137 lower than the Aug 17 2015 bill period.

↓ \$137

#### Weather Summary

The average temperature for the Sep 16 2015 bill period was 3.1 degrees colder than the Aug 17 2015 bill period.

↓ 3.1°F

#### Weather and Bill Cycle Impact

 The combined effect of 3.1°F lower temperature and 4 days shorter saved \$91 and 897 kWh

#### Other Impact

 Other factors saved about \$46 and 465 kWh

### Electric Difference from Last Year

#### Usage Summary

The Sep 16 2015 bill usage was about 107 kWh lower than the Sep 16 2014 bill period.

↓ 107 kWh

#### Cost Summary

The Sep 16 2015 bill costs were about \$6 higher than the Sep 16 2014 bill period.

↑ \$6

#### Price Summary

The average price in the Sep 16 2014 bill period changed from \$0.0964 per kWh to \$0.1019 per kWh in the Sep 16 2015 bill period. This change cost you \$17.

↑ \$0.006 /kWh

#### Weather Summary

The average temperature for the Sep 16 2015 bill period was 1.2 degrees warmer than the Sep 16 2014 bill period.

↑ 1.2°F

#### Weather and Bill Cycle Impact

 The combined effect of 1.2°F higher temperature and 2 days shorter cost \$5 and 56 kWh

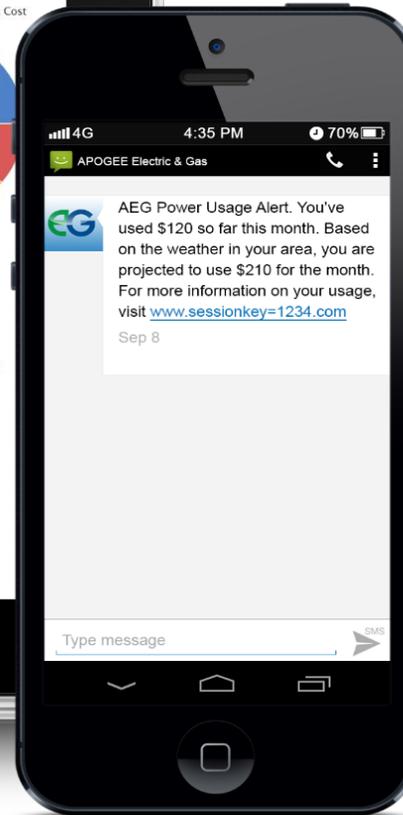
#### Other Impact

 Other factors saved about \$16 and 163 kWh

# Other Digital Engagement Initiatives

This utility is adding other digital tools to their campaign – now in play...

- Personal Video Messaging
- Energy Forecaster
- Alerts



# Results

- ✓ Online Energy Audit usage **jumped 300%**
- ✓ They achieved **a steady 50% email open rate** that is twice the general industry average of 26%
- ✓ Each member enrolled to receive the personalized energy reports, **counts for 345 kWh toward the required 10% goal by 2018** to fulfill Renewable Energy and Energy Efficiency credits



# ACSI



American Customer  
Satisfaction Index™

## 2015 Q3-Q4



RETENTION



SATISFACTION

**Our Utility**

**80**

**84**

Touchstone Energy

76

74

Municipal Utilities

75

68

Investor-Owned Utilities

74

69

Energy Utilities

74

69

**Personalized Video Bill Analysis – 90%**  
Positive Response

Beat The Peak Video Campaign  
Demand Response Alerts = ½ water heater  
on first round!

Other Videos Sent

***Storm Alerts, Capital Credit Explanation,  
AC Switch all well received.***

# Case Studies

Personal Video Messaging

Ongoing programs are  
currently being monitored

# Personalized Video Messaging

**94%** Found useful

**95%** Found Easy

**99%** Want more  
videos



# Survey Says..

## Now Sending

40,000+ a month for 1+ year

**46%** Open Rate

**97%** Easy to Understand

**90+%** Useful



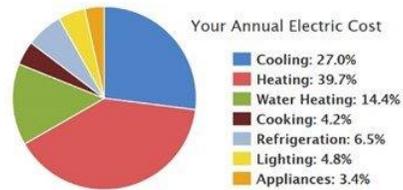
Having trouble viewing this email?  
[Click here](#) for online version.

## Your 2015 Year-End Summary

Dear Bob Johnson,

Thank you for being our valued customer. For your convenience, we've prepared this year-end summary of your energy use along with top tips for saving energy in your home. We hope you'll find it helpful. Please feel free to call us at 800.123.4567 with any questions.

### Here's where your energy dollars are going:



### Here are some easy tips and recommendations to lower your energy costs in your home:

- Set your thermostat at 78°F in the summer and 68°F in the winter and leave it alone. With each degree decrease on your thermostat in the winter and increase in the summer, you can immediately realize a 3 to 4 percent decrease in energy use.
- Install and preset an ENERGY STAR® programmable thermostat to automatically reduce energy usage when you are away or sleeping. Constantly changing the temperature causes your system to work harder.
- Turn down your water heater thermostat. A setting of 120°F is fine for most homes.
- Take quick showers instead of baths. This greatly reduces the amount of hot water used.
- Use ENERGY STAR® qualified compact fluorescent light bulbs (CFL) or LED light bulbs. They use three-quarters less electricity, generate 75 percent less heat and last up to 10 times longer than standard incandescent lighting.

### My Account

Track your Daily usage and sign up for alerts when your daily or monthly usage hits certain levels.

[LOGIN NOW](#)

### Self-Service Energy Survey

For a more precise and personalized energy report, log in and give us details about your household.

[CONDUCT SURVEY](#)

# Case Study: Major IOU

## Energy Summary Reports:

- ✓ Powerful
- ✓ Proactive
- ✓ Personal
- ✓ Mail or eMail
- ✓ Quarterly/Annually
- ✓ Bumped Satisfaction 16%
- ✓ **100 pts.**  
**JD Power**

# Small Business Energy Summary Reports

## Major IOU

- Being received now
- Phone interviews
- Results will be shared
- Expect Similar Results

## Your 12-month Business Energy Use Summary

Saving energy starts with understanding how it's being used.

Rizzuto/Rizzutom  
928 E. Imperial Hwy.

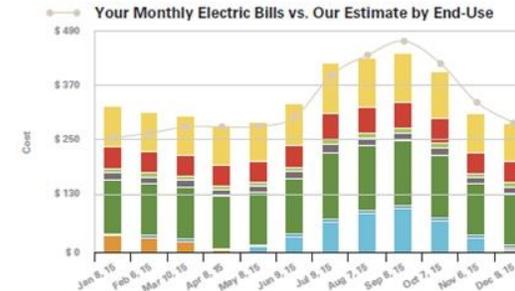
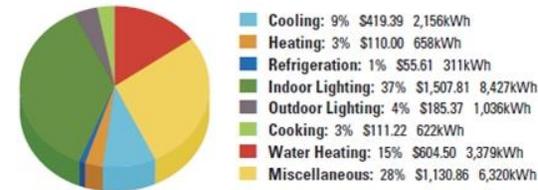
PIT1



Dear Valued Business Customer,

We are pleased to provide you with this 12-month summary of your recent business energy use. By understanding how your business uses energy, we can help you identify areas where your business can be more energy efficient — helping you reduce costs, while saving time and resources.

**Here's a breakout of how energy is being used, based on your annual electricity costs and usage:**



### 24/7 Access to Energy-Saving Recommendations Customized for Your Business

Our online Business Energy Advisor tool will provide you with:

- Recommendations to help reduce your energy usage, customized for your business profile
- Available incentives for lighting and equipment upgrades to help lower your operating costs
- Your energy-use history, which identifies when and where your energy is being consumed
- Your energy plan to track your short- and long-term energy goals

### Here are some quick and easy tips and recommendations to manage your energy costs:

- Optimize your HVAC. Benefit from lower unplanned repair costs, cost-covering incentives, lower energy bills, and improved air quality and system reliability.
- Charge batteries and battery-operated equipment prior to TOU On-Peak hours, then use only pre-charged equipment during TOU On-Peak hours.
- Upgrade to energy-efficient equipment. ENERGY STAR® models can have a significant impact on costs.
- Reduce lighting levels and take advantage of daylighting from store windows.

### Manage Your Business Energy Online with My Account at myaccount

- Analyze hourly, daily, and monthly usage
- View projected bills and plan your usage
- Set monthly spending goals
- Compare rates to find the best option
- Make online payments quickly

Start saving energy today. For a more detailed and customized energy report, enroll in My Account at access the Business Energy Advisor tool.

The estimates shown in the table reflect your last 12 months of energy use billing data. Additionally the energy use by HVAC, lighting, and other equipment is shown based upon your building's NAICS classification and with industry-accepted norms for the way energy is used in those building types, climate zones and daily temperatures. Last year's usage was used to estimate annual costs. Values reflect past usage and assume no operational changes. Your future usage and costs may be different. C-9363

# Case Study: Energy Forecaster

- We saw a four-fold increase in web traffic after bill stuffers announced the weather forecaster tool.
- A local media article garnered another 40% increase.
- As an added benefit the relevant and personalized information encouraged repeat traffic.

## Energy Forecaster



Coming Soon...

July 21<sup>st</sup>

Increasing Digital Adoption  
with Billing and Payment  
Options

July 28<sup>th</sup>

Engaging Small to Mid-  
Sized Business Customers

Contact Us

info@apogee.net  
678-684-6801

# Questions

- Schedule now to provide summary reports for a January send.
- To discuss digital engagement strategies that are right for you.