Welcome to Apogee Institute Webinar!

EE: Sell them what they want!
Today is about messaging

Who?
What?

How?
With What Impact?

Suzanne Shelton, President & CEO
Shelton Group

Susan Gilbert, President & CEO
Apogee Interactive, Inc.
Apogee….

23 years in business

95%+ client retention rate

Serving 600+ utilities

“Apogee’s Customer Engagement Platform is the most comprehensive in the industry.

It reaches customers in so many ways by educating and providing personalized and meaningful information…. NAVIGANT®

RESNET®

Green Button Download My Data

Certified WBENC Women’s Business Enterprise

Microsoft CERTIFIED Partner
Seeing Declining Interest…
We Shifted to POP!

Personalized
Outbound
Proactive
Proactive and Personalized Study Results

- 16% Boost
- ~100 point increase
- No negative impacts

Year-End Reports

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:

- Your Annual Electric Cost
  - Cooking: 37.0%
  - Heating: 35.5%
  - Water Heating: 14.4%
  - Cooling: 4.7%
  - Refrigeration: 6.3%
  - Lighting: 3.9%
  - Appliances: 3.1%

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 there. 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 program 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 short showers instead of baths. This greatly reduces the amount of hot water used.
- Use ENERGY STAR® qualified compact fluorescent light bulbs (CFLs) 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.

Self-Service Energy Survey

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

LOGIN NOW

CONDUCT SURVEY
“A 20 to 50 point bump is noodling around the edges”

Jeff Conklin
Energy Utility Practice Leader

“Anything that produced a 100 point bump is very significant”
100 Points on JD Power Scale…

Moving from 600 to 700 = Last to First!

Source: J.D. Power 2018 Electric Utility Residential Customer Satisfaction Study™
This Ain’t New…

“People don’t read anymore.”

Steve Jobs
January 2008
Video Messaging
46% open rate

~ 2x Industry Average 21%
30% click rate

~14x Industry Average 2.14%
94% of viewers found videos useful.
found the information easy to understand
72% want the video every month

27% want the video every quarter
99%

Want more videos!
“OUTSTANDING – very informative.”

“Excellent – very helpful in presenting the reasons for changes in the bill month to month.”

“Loved it! Amazed. Very cool. Fantastic!”

“Surprised – never received a video presentation before. I thought it was creative and proactive.”

“Super and very helpful. Congratulations on an innovative user friendly approach to customer service.”
Growing Content Library

- Bill Explanations
- Storm Alert
- Beat-the-Peak
- Any Character or Voice
How to Get Their Attention?

# 1 Most Requested Info?
Weather

**ENERGY FORECAST - ELECTRIC COST**

YOUR PROJECTED ELECTRIC COST FOR THIS WEEK IS $22

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**TODAY'S WEATHER**

**WARNER ROBINS, GEORGIA**

**ELECTRIC COST: $3**

**TODAY'S WEATHER**

**ELECTRIC COST: $3**

**TODAY'S WEATHER**

**ELECTRIC COST: $3**

**TODAY'S WEATHER**

**ELECTRIC COST: $3**

**TODAY'S WEATHER**

**ELECTRIC COST: $4**

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**WEEKLY FORECAST**

- **Mon, Apr 10**: 81°F, Electric Cost: $3
- **Tue, Apr 11**: 84°F, Electric Cost: $3
- **Wed, Apr 12**: 84°F, Electric Cost: $3
- **Thu, Apr 13**: 86°F, Electric Cost: $3
- **Fri, Apr 14**: 87°F, Electric Cost: $4
- **Sat, Apr 15**: 85°F, Electric Cost: $4

*Costs are estimates based on a typical home and the current forecast.*
Provide Weather AND Energy Cost

Add it to Website AND Push it to Customers
• Something Cared About
• No Flashing Ads
• Give More
Drill down for more information...
Thermostat Savings
Adjusting your thermostat is an easy way to Save $$$$.
Use the thermostat below to see how much.

1. Click the up or down buttons to adjust your thermostat and see your savings!

Update My Home Profile Settings

Show them how to save
Make it Easy and Intuitive

- Degree-by-degree
- Give customers control
- Show them the real cost of their comfort
HOME EFFICIENCY RATING

POOR AVERAGE GREAT

Explain how my rating is calculated

WARNER ROBINS, GEORGIA

Today 78/51° $78

WEEKLY ELECTRIC ENERGY FORECAST

WAYS TO SAVE
Proactive Alerts

80% Want Alerts

Source: Pew Research Center 2015
Mid-Cycle Bill Alert
Show You Care
Continuous Improvement with...

Progressive Personalization

Get just a little more information every time you interact
Progressive Personalization

TELL US ABOUT YOUR HOME 📜
What’s Next?

Personal Health Monitoring

...to add
Personal Home Monitoring
Web Service APIs in Cloud Environment

HVAC PERFORMANCE

SHELL PERFORMANCE

BEHAVIORAL PERFORMANCE

Customer Experience

Blue Tooth

Your Logo & Branding Here
## Personalized, Relevant Information

### Your Home Energy Opportunity Report

<table>
<thead>
<tr>
<th>Room for Improvement</th>
<th>Little</th>
<th>Moderate</th>
<th>Much</th>
<th>Explanation</th>
<th>Potential Savings</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Thermostat</strong></td>
<td></td>
<td></td>
<td></td>
<td>Upgrading your thermostat can produce substantial savings.</td>
<td>$150</td>
</tr>
<tr>
<td>Control Range</td>
<td>★★</td>
<td>★★★★</td>
<td>★★★★</td>
<td>The thermostat is holding 2 degrees cooler than the actual air temperature which could be costing as much as $150.</td>
<td>$75</td>
</tr>
<tr>
<td>Accuracy</td>
<td>★★</td>
<td>★★★★</td>
<td>★★★★</td>
<td>A high performance thermostat will hold a more consistent temperature. Your is allowing the temperature to vary.</td>
<td>$224</td>
</tr>
<tr>
<td><strong>HVAC Performance</strong></td>
<td></td>
<td></td>
<td></td>
<td>Upgrading to a new, high-efficiency (16 SEER) air conditioner can produce these savings:</td>
<td>$124</td>
</tr>
<tr>
<td>Operating SEER</td>
<td>★★</td>
<td>★★★★</td>
<td>★★★★</td>
<td>Your HVAC system is over-sized. A properly sized unit will run more frequently for longer periods at better humidity control.</td>
<td>$52</td>
</tr>
<tr>
<td><strong>Water Heater</strong></td>
<td></td>
<td></td>
<td></td>
<td>You are using 7% less hot water than your base period, which equals to a savings of about $7.</td>
<td>$7</td>
</tr>
<tr>
<td>Hot Water Use</td>
<td>★★★★</td>
<td>★★★★</td>
<td>★★★★</td>
<td>Lowering your water heater temperature setting saves money.</td>
<td>$30</td>
</tr>
<tr>
<td><strong>Shell Performance</strong></td>
<td></td>
<td></td>
<td></td>
<td>Weatherstrip your doors and windows, close drapes to keep sun out, and add insulation to your attic to save money.</td>
<td>$205</td>
</tr>
<tr>
<td>Thermal Efficiency</td>
<td>★★★★</td>
<td>★★★★</td>
<td>★★★★</td>
<td>Be sure to turn off unneeded lights and electronics.</td>
<td>$55</td>
</tr>
<tr>
<td><strong>Behavior</strong></td>
<td></td>
<td></td>
<td></td>
<td>Holding 78F in the summer and 68F in winter can save money.</td>
<td>$90</td>
</tr>
<tr>
<td>Holding settings</td>
<td>★★★★★</td>
<td>★★★★★</td>
<td>★★★★★</td>
<td>Savings at full participation estimated at:</td>
<td>$225</td>
</tr>
<tr>
<td>Aggressive DR</td>
<td>★★★★</td>
<td>★★★★</td>
<td>★★★★</td>
<td>Using less hot water saves money on energy bills.</td>
<td>$39</td>
</tr>
<tr>
<td>Hot Water Use</td>
<td>★★★★</td>
<td>★★★★</td>
<td>★★★★</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
Personalized, Outbound, Proactive, & Relevant

1. At 3:00 pm each day, there is a temperature spike. Check to be sure west-facing windows are covered.

2. Heat build up from an under-ventilated attic can cause the home to heat up late into the evening.

3. Check to be sure your attic is well ventilated and insulated.

TIPS

FREE Programmable Thermostat

LEARN MORE

1. Check filters to be sure they are not causing reduced performance.

2. Loss of refrigerant can cause decreased performance.

3. Having your unit serviced provides maximum efficiency performance and prolongs the life-span of the equipment.
In Summary

• Personalized – Use Video
• Outbound – Make it Relevant
• Proactive – Show you Care
Upcoming Apogee Institute 2:00 pm EST Webinars:

**May 4th**
Five Lessons for Utilities From Telecom About Managing Pre-Pay

**May 24th**
Managing Low Income Customers