



**APOGEE® 2017**  
*Sizzlin' Summer Sessions!*

Summer Sessions: Mastering Customer Engagement  
June – August, 2017







**APOGEE® 2017**  
*Sizzlin' Summer Sessions!*

Summer Sessions: Mastering Customer Engagement  
June – August, 2017



# Mastering Customer Engagement

Tuesday & Thursday  
2:00 – 2:30 PM

June 6<sup>th</sup>

Empower Engagement Platform

June 8<sup>th</sup>

Energy Advisor

June 13<sup>th</sup>

Call Center Solutions

**June 15<sup>th</sup>**

**Energy Envoy**

June 20<sup>th</sup>

Personal Video Messaging

June 22<sup>nd</sup>

Energy Alerts

July 18<sup>th</sup>

Energy Summary Reports

July 25

Energy Forecast

Aug. 1<sup>st</sup>

Field Audits

Register: [www.apogee.net/webinars](http://www.apogee.net/webinars)

# Our Presenters



**Susan Gilbert, CEO**

- Co-founded APOGEE Interactive, Inc.
- Devoted to utility success delivering energy education
- Committed to promoting responsible energy use
- Leveraging technology for cost effective impacts



Cindy Smallwood



Rand Kirkus





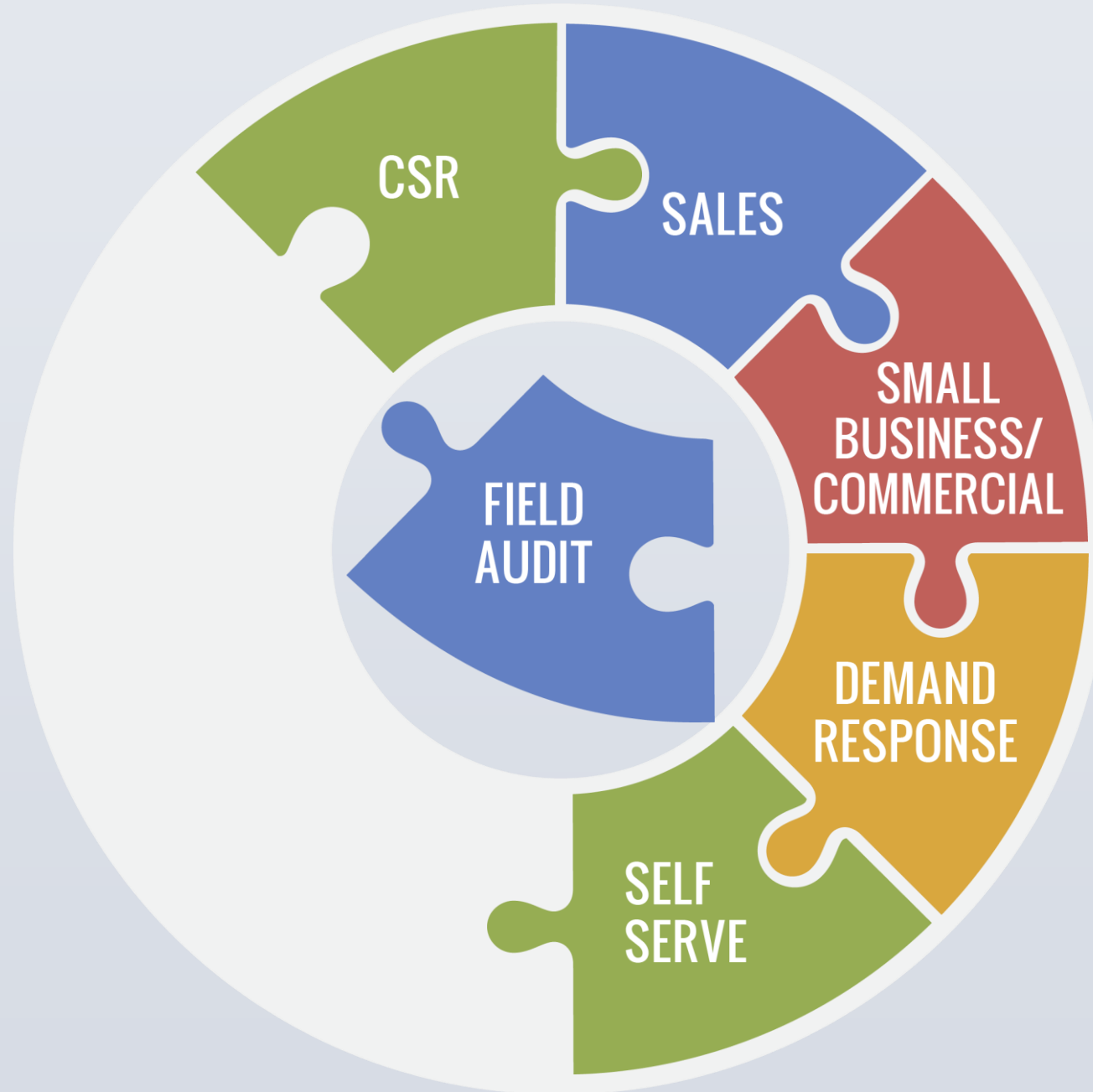






















# EMPOWER



ENERGY ENVOY

# Our Four Point Agenda

1. Monthly e-mails
2. Summary Reports
3. Alerts
4. Personalized Videos





# Credit to Kroger

- Small profit margins
- Must be cost effective
- Moved in the 80s from mass marketing to personalization
- Enter your code for discounts
- Enables predictive analytics
- **ENGAGEMENT!**








# From Creepy to Caring




# American Express

- Personalized e-mails get attention
- But THEY have your information
- So do you!
- Let's get personal....

**MEMBERSHIP  
REWARDS**

Susan Gilbert  
MEMBER SINCE 1980





Hello, Susan!

Sunny June rewards, selected just for you.

YOUR POINTS BALANCE AS OF 9:30 AM

348,964



**20%**

It's the perfect  
time to use points

For a limited time, use points for eGift Cards and save 20%. Terms Apply.\*  
Offer ends 6/30/2017.

Get eGift Cards

June Picks For You



# Highly Competitive Businesses...

- MUST Personalize!
- Let's Learn from Them

HI SUSAN | POINTS : 5,870 | TIER : BLUE

[account login](#)



**earn**  
**85,000 points**  
**after spending**  
**\$3,000 in 3 months¹**

**AMERICAN EXPRESS**  
**HILTON HONORS**  
3759 876543 21001  
Member Since 95  
C F FROST

terms apply

Hilton Los Cabos Beach & Golf Resort, Mexico

## earn 12x bonus points

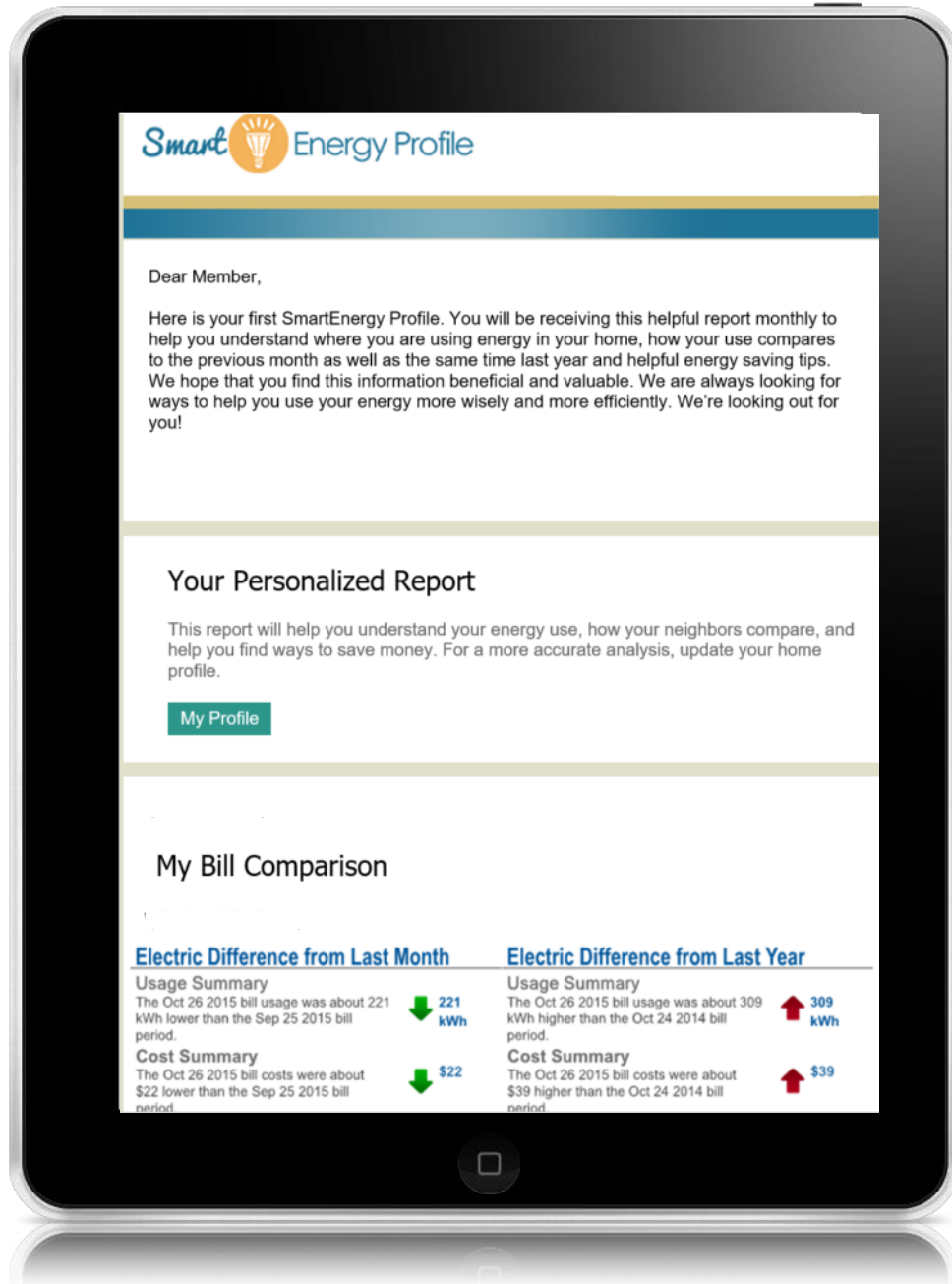
per \$1 of eligible purchases  
charged on your card  
directly with a participating  
Hilton hotel or resort

## earn 6x bonus points

per \$1 of eligible purchases  
at U.S. restaurants,  
U.S. supermarkets &  
U.S. gas stations

## earn 3x bonus points

for other purchases  
on your card²



# Proactive Personalized Messaging

## Monthly Emails

## Personalized Message

## Use Their Billing Information

## Comparisons:

- Last month
- Last year



View in browser.

YOUR HOME ENERGY RATING

HOME EFFICIENCY RATING



GREAT

AVERAGE



USAGE

+50 kWh



WEATHER  
IMPACT

+3° F



DAYS OF  
SERVICE

+2 Days



RATE/kWh  
2016 | 2017  
\$0.10 | \$0.12



Using appliances more.



Cooking at home more often.



TIPS TO HELP YOU SAVE

**Programmable or Smart Thermostats:**

Your best money saving tip is programming your thermostat. If you raise your cooling setting from 75° to 78°F you could save as much as \$258 per year.

**ENERGY STAR® Appliances**

If you change out your older major appliances in your house to ENERGY STAR® appliances, you could save up to \$78 a year.

**LED Bulbs**

Simple changes like replacing incandescent light bulbs with more energy efficient LEDs help you save up to \$57 a year.

**More Ways to Save**

Update your profile or make adjustments to your current profile and see how much you could save.

LEARN MORE

**Ways to Pay Your Energy Bill**

We have more convenient ways you can manage and pay your bill. Find one that fits your busy lifestyle.

LEARN MORE

Our account and usage information to make assumptions about your home that are typical of most homes in the area. To reflect the actual equipment or living preferences about your home cooking, lighting, etc. If you would like to reflect the specifics of your home, please refer to the online Home Energy Monitor tool in the email and file.

Visit our website at [apogee.net](http://apogee.net)

[Unsubscribe](#) | [Change Preferences](#)



# Proactive Personalized Relevant Messaging

- Explain bills before arrival
- Promote programs
- Educate

# Energy Summary Reports

- Personalized bill analysis
- Promote relevant programs
- Annually or seasonally
- Print or email



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

Proactive  
(Your Logo)

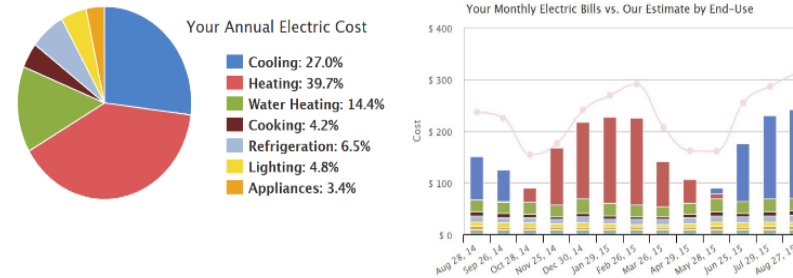
## Your Energy Summary Report

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.

Personal

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



Categorize  
Spending

### 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.
- Turn down your water heater thermostat. A setting of 120°F is fine for most homes.
- 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.
- 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.

Educate

### 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

Next?



# Impacts

✓ Satisfaction  
Up 16%

✓ = 100 pts.  
JD Power

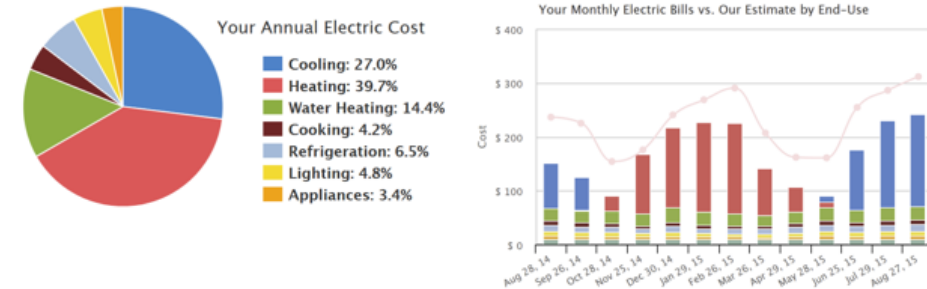
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[Click here](#) for online version.

## Your 2016 Year-End Summary

Dear Barbara Berry,

As a registered attendee of the 2016 EMACS Conference, Apogee Interactive has prepared this customized energy summary report for you. Email [info@apogee.net](mailto:info@apogee.net) to learn more about how Apogee Interactive provides advanced tools that help utilities engage residential and commercial customers.

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



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

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[CONDUCT SURVEY](#)

# Energy Alerts

- Sent email or text mid-cycle
- Current bill and forecasting final bill
- While there is time to affect it!
- Puts customer in control



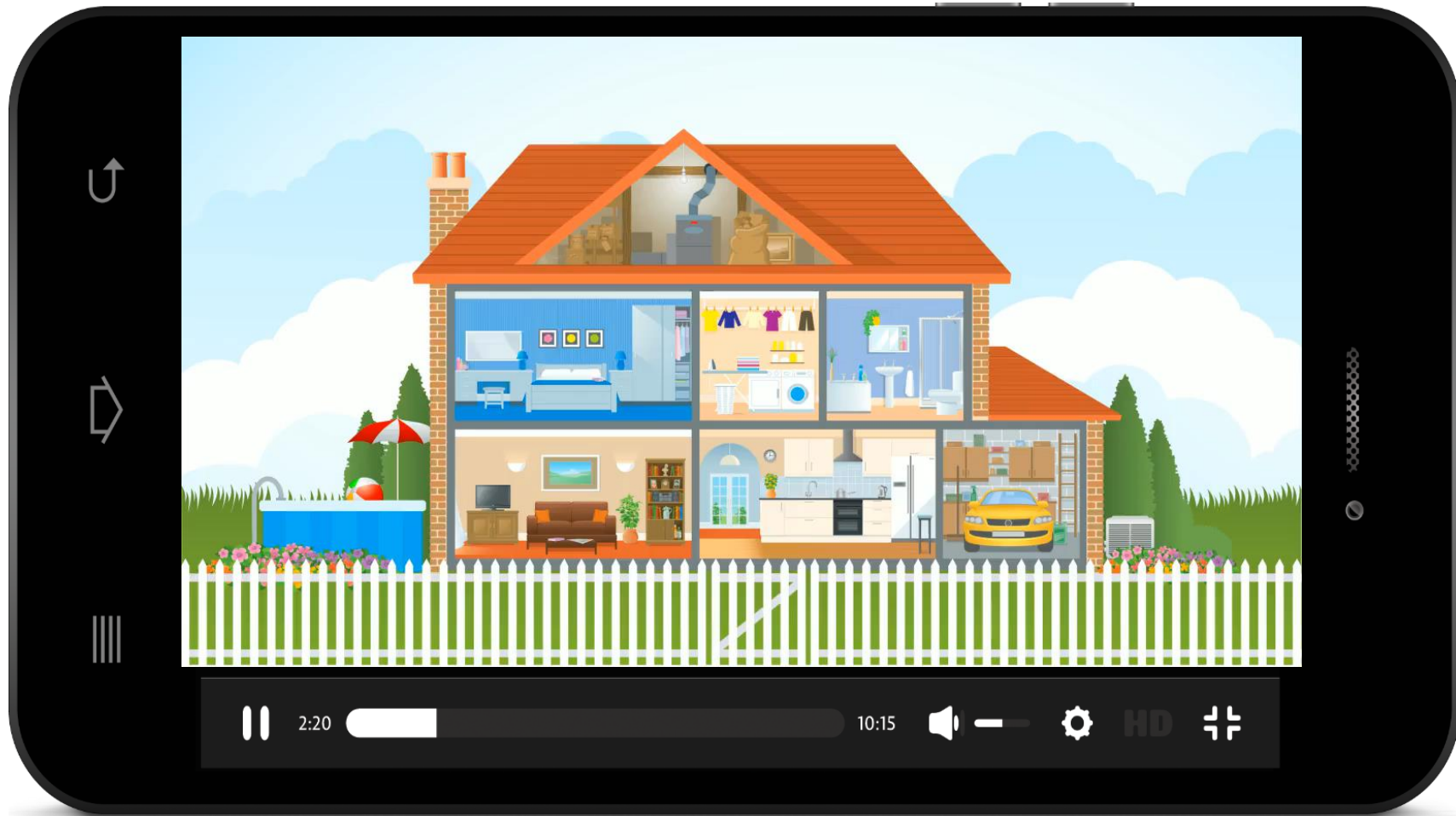


# Personalized Video Messaging

- Timely, useful videos
- Provide bill explanations, alerts, program offers, or notifications
- Combining energy information, creating value



# Energy Summary Report Video



# Personal Video Messaging...Bill Explanation

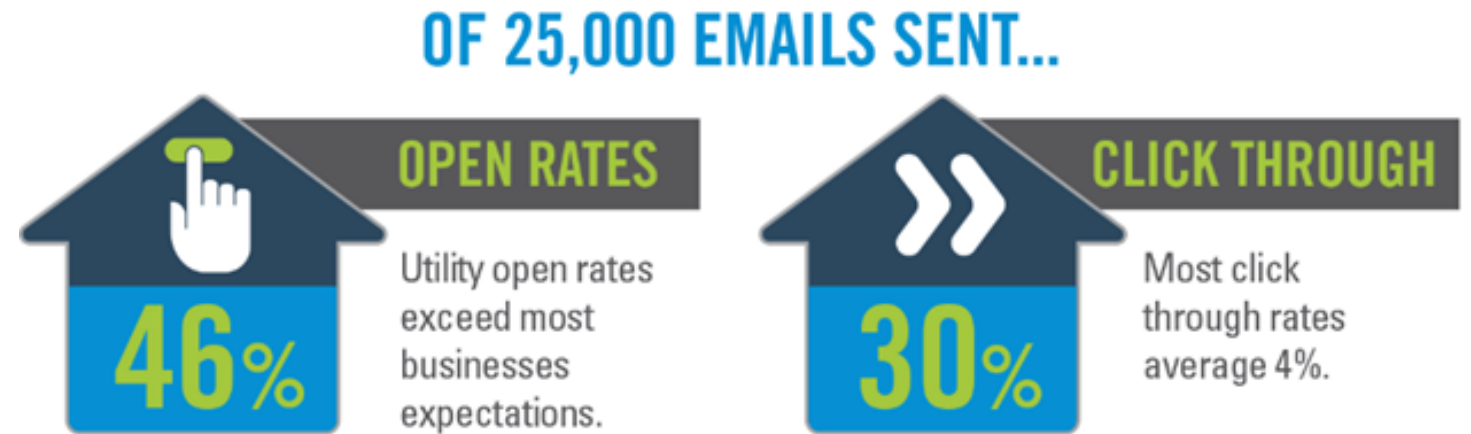


# Impacts

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

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

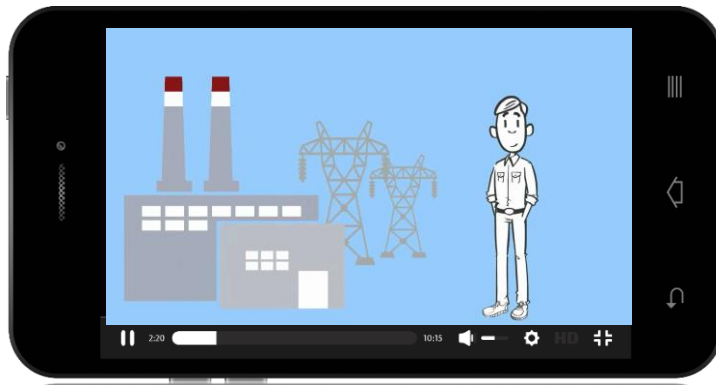
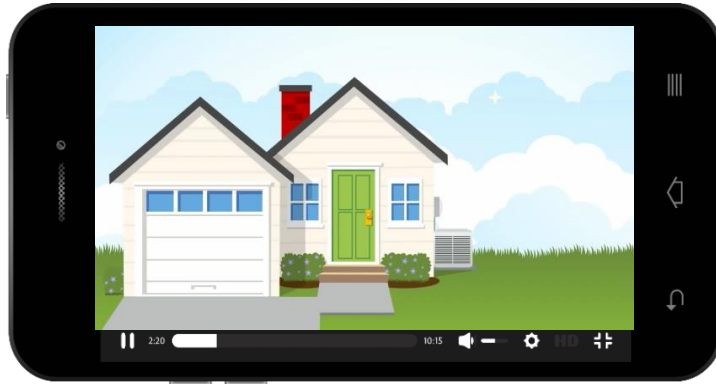
*“Loved it! Amazed. Very cool. Fantastic!”*



**95%** found  
**Useful and Easy to Understand**

**99%** want to  
**Continue** receiving videos



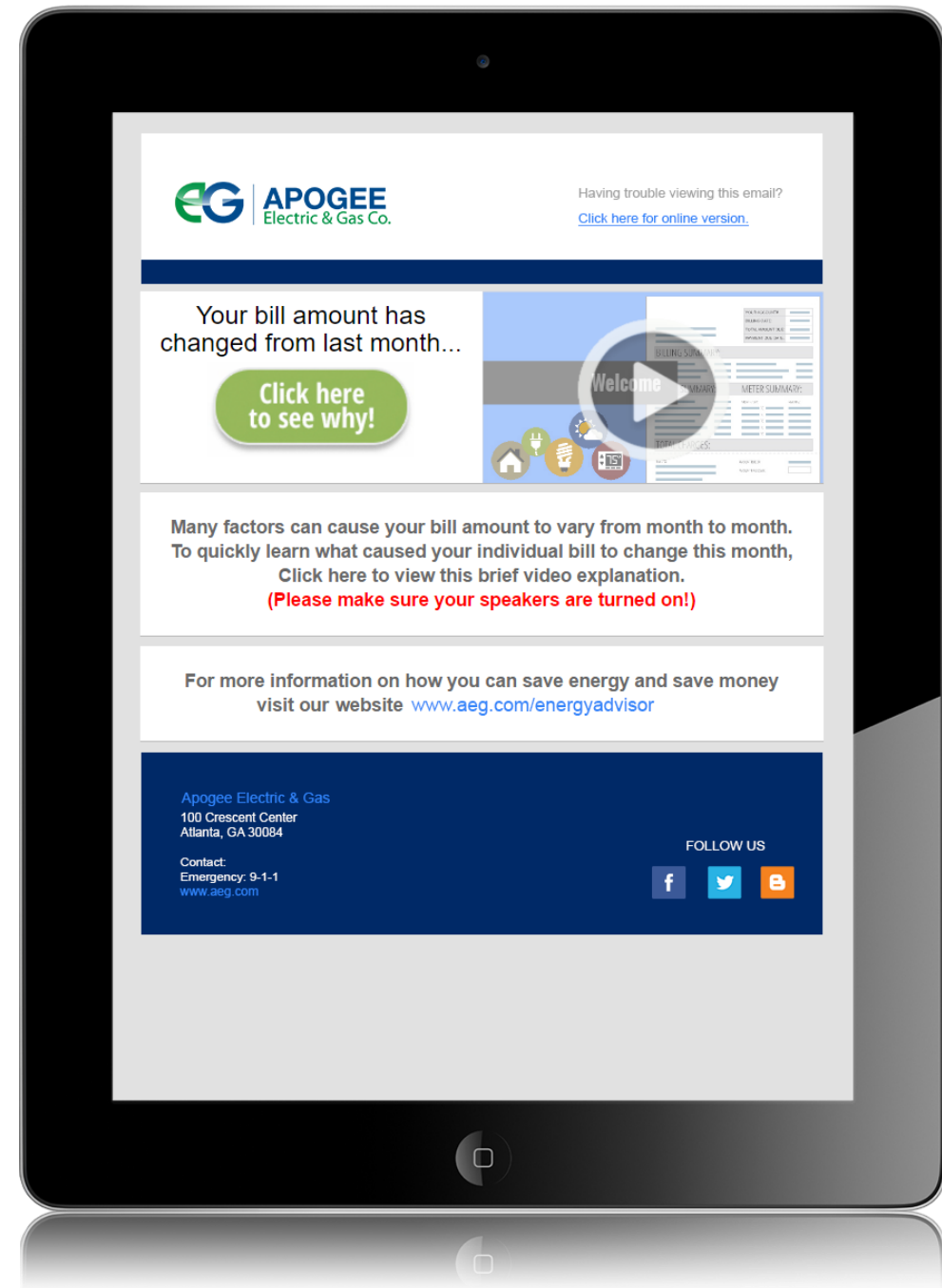


# Growing Content Library

- Bill Explanations
- Storm Alert
- Beat-the-Peak
- Any Character or Voice

# Proactive Engagement

Video Emails Proving to  
**WOW**  
Customers!



# Summary



# Use:

Monthly e-mails  
Summary Reports  
Alerts  
Personalized  
Videos

# Summary

- **Proactive + Personal = Engaging & Impactful**
- **Monthly messages create ongoing dialogue**
- **Use customer information to express caring**
- **Put customers in control**

## Use:

1. Monthly e-mails
2. Summary Reports
3. Alerts
4. Personalized Videos



# Any questions?



# Join us...

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