Customer Engagement & the Segment of One
Apogee Is…

• Software as a Service (SaaS)
• Focused on:
  - Customer Engagement
  - Customer Satisfaction
  - Program Participation
• Best-in-Class Data Analytics
• Known for Innovation

Entering our
25th Year
Serving
Hundreds of Utilities
Achieving Extraordinary Client Retention
What is it?

Using machine learning, data analytics, and automation through omnichannel communications to improve the customer experience by providing useful and relevant information.

Treating your customers like individuals…
Why Should Utilities Care?

- **Customer Expectations:**
  - More customer choice – omnichannel tools
  - Personalized timely and relevant information

- **Digitally Engaged Customers**
  - Cost less to serve
  - Are more satisfied
  - Participate in more programs

- **Utilities Have Data**… Lot’s of relevant customer data

- **Utilities Have Unique Opportunities to Engage**
  - Unprecedented Open Rates
  - Increase program offerings
  - Online Marketplaces
  - Public Service Announcements
  - Outage communications
Apogee’s tools are designed to take you there…

Engaged Customers…
a Valuable Asset

25% INCREASE in customer satisfaction

More than 3 TIMES AS LIKELY to recommend their provider

37% INCREASE in signups for energy products and programs

UNLOCKING THE VALUE OF CUSTOMER ENGAGEMENT
Apogee brings utilities closer to the Segment of One
Engaged Customers…a Valuable Asset

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Digitally engaged customers are more satisfied, and more involved*

*Accenture utility consumer survey
Mission Driven Organization

- We help organizations adapt and thrive in a world challenged by environmental and social change
- We are a certified B Corporation and Social Purpose Corporation
- Founded in 2006 in Seattle, WA; offices in Nashville, TN and Northern California
Our Expertise

- ENERGY EFFICIENCY
- BEHAVIOR CHANGE
- STRATEGIC PLANNING
- BUILDING PERFORMANCE
- CUSTOMER OUTREACH & ENGAGEMENT
- CHANGE MANAGEMENT
- FOOD SYSTEMS
- DESIGN & BRANDING
- CLIMATE ADAPTATION
About Milepost

Our Clients
- Utilities
- Corporations
- Municipalities
- Non-profits
- Agricultural Producers
Building a tailored engagement strategy
the value of tailored engagement

what we see in the market

Behavior change best practices + Engagement strategy experience + Consumer product development process

A concept that has been “pre-accepted” by your target audience, increasing the likelihood of success
we think we know

Engineers and product designers do not understand the customer’s unique viewpoint when it comes to engagement and messaging.

They’re too close to the product to determine what will actually appeal and use jargon the customers can’t relate to…

and end up missing the boat
Building a tailored engagement strategy
the first step

landscape assessment

4 C’S ANALYSIS

CUSTOMER
COMPETITION
CHANNELS
CAPABILITIES

ESTABLISH

MARKET SEGMENTS
BRIGHT SPOTS
PAIN POINTS
THEMES
Building a tailored engagement strategy

the second step

concept discovery and development

FEATURES
WHAT APPEALS TO THE CUSTOMER AND WHAT IS UNIQUE ABOUT YOUR PRODUCT OR SERVICE

BENEFITS
HOW YOUR PRODUCT OR SERVICE IMPACTS YOUR CUSTOMER’S WORK OR LIFE AND WHAT CHANGES AS A RESULT OF USING YOUR PRODUCT OR SERVICE

INSIGHTS
WHY THE CUSTOMER WOULD CHOOSE YOUR PRODUCT OR SERVICE

ITERATIVE FOCUS GROUPS WITH TARGET GROUPS OF CUSTOMERS
We take the winning concepts from the focus groups and develop messaging frameworks and customized recommendations for implementation to ensure you utilize the right channels, mediums and frequency of touches to inspire action.
the fourth step

communication and launch support

BUILD A COMMUNICATIONS PLAN

DEVELOP VISUALLY-ENGAGING BRANDED MATERIALS

HELP YOU KEEP THE LINES OF COMMUNICATION FLOWING
tailored engagement strategy

AN INVESTMENT IN YOUR PRODUCT, PROGRAM OR SERVICE THAT WILL GENERATE A HIGHER RATE OF SUCCESS AFTER LAUNCH
Building a tailored engagement strategy

why this matters

benefits

- CUSTOMER RETENTION
- EFFICIENT IMPLEMENTATION
- STRATEGIC DECISION-MAKING
- ENHANCED REPUTATION
- LOWER COSTS
- INCREASED CAPACITY
- VALUE-ADDED USER EXPERIENCE

Building a tailored engagement strategy
BUILDING A TAILORED ENGAGEMENT STRATEGY

**THE CLIENT**

Tennessee Valley Authority’s EnergyRight® Solutions for Home

**THE NEED**

TVA wanted to redesign their popular, yet costly in-home energy efficiency retrofit offer. Demand was high, and they needed to support more customers to implement more measures with the same budget. They were interested in deepening the relationship with homeowners, adding a customized scorecard and reducing costs through simplified systems, processes and contractor delivery.
our experience

in action

OUR APPROACH

Milepost conducted a feasibility study and focus groups to determine the value of a customized scorecard to customers. We then worked with stakeholders to identify bright spots and pain points in the existing offer. Applying behavior change and communications expertise, we designed a personalized scorecard, and partnered with consumer product development experts to design eScore™, a market-tested retrofit program.

RESULTS

Over 20,000 homeowners participated in eScore in its first year with an upgrade implementation rate of 84% and customer satisfaction ratings above 98%. eScore™ enabled TVA to achieve a 45% increase in energy savings for the same cost as the previous program.
THE CLIENT

City of Seattle Office of Sustainability and Environment (OSE)

THE NEED

OSE, a national leader in building energy benchmarking policy, sought to use benchmarking data to motivate building owners to take action to optimize energy performance. Previous versions of the scorecard were one-way information delivery tools and lacked a call for engagement. The city’s goals included development of tailored messaging, a visually compelling template, a streamlined way to populate individual building scorecards using benchmarking data, and a tracking protocol to evaluate responses.
OUR APPROACH

Milepost utilized pilot focus group results and market research to segment the target population and craft both overt and subtle motivational messages and clear calls to action aligned with local utility incentive programs. We re-envisioned the scorecard to include simple, compelling graphics to encourage stakeholders to engage with the performance data and explore options for improvement.

RESULTS

Market testing indicated excellent response to the new scorecards as demonstrated by impressive 38% view rates overall, with 82% in the “high performers” category. The utility also reported increased calls to Energy Advisors after the scorecards’ release.
Questions

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Upcoming Webinars

May 17th 2:00 PM Eastern
ERDM Corporation, Ernan Roman
The Voice of the Customer

Soon To Be Announced
JD Power, Andrew Heath
2018 Utility Digital Experience Study
Thank you!