Moving Utilities Beyond Engagement Toward Empowerment

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Brenda supports utilities in the Southeast and parts of the Midwest. Prior to joining Apogee, Brenda was a Technical Account Manager in manufacturing. Brenda’s approach to serving her clients is: real relationships, real value, and big return. Brenda holds a degree in International Business from the University of Dayton.

Sabrina, CEO of Milepost, has worked in and around energy services for over 14 years. Sabrina helps develop innovative solutions to organizational challenges in engagement strategies.
Who We Are: Apogee Interactive

Software as a Service (SaaS) provider focused on three major utility initiatives:

- Best in class Data Analytics
- Providing Consistency, Building Customer Trust
- Customer Engagement
- Customer Satisfaction
- Program Participation

Leading the market in customer engagement

In our 26th year

Serving hundreds of utilities, reaching millions of customers
Who We Are: Milepost

...three core strategies...

- Strategic Solutions to Business Challenges
- Engagement Plans That Empower
- Beautiful, Compelling Visual Communications

Our expertise:
- Project Management
- Team Development
- Strategic Planning
- Engagement Strategy
- Strategic Communications
Agenda

I. Current State of Affairs
II. Utility Initiatives
III. Apogee Solutions
IV. Tailored Engagement
V. Results of Effective Tailored Communication
Engagement in a Digital Communications World
What does the utility customer want?

• Choice
• Control
• Personalization
• Relevant and proactive
Moving from Engagement to Empowerment

We have to consider the customer journey as we think about engagement and empowerment.
Utility Initiatives

- Engagement and Communications
- Rate Transformation
- Self-Service and Cost Avoidance
- Customer Satisfaction
- Revenue Enhancement
  - Market Place
  - Beneficial Electrification
- Operational Efficiency
- Behavioral Impact
- Low and Moderate Income
Apogee Solutions
Tailored Engagement

the value of tailored engagement

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

A concept that has been “pre-accepted” by your target audience, increasing the likelihood of success
What it has looked like

Dear Customer:

The energy management systems of our company noticed an increase in your daily and/or hourly kilowatt-hour (kWh) usage above your current pre-set threshold(s).

Account Number: Xxxxxxxxxx
Usage: 13.0
Date/Time: 4/1/19 12:00 AM - 4/2/19 12:00 AM

Account Number: Xxxxxxxxxx
Usage: 1.0
Date/Time: 4/1/19 1:00 AM - 4/1/19 2:00 AM

Account Number: Xxxxxxxxxx
Usage: 0.0
Date/Time: 4/1/19 2:00 AM - 4/1/19 3:00 AM

Account Number: Xxxxxxxxxx
Usage: 1.0
Date/Time: 4/1/19 3:00 AM - 4/1/19 4:00 AM

Account Number: Xxxxxxxxxx
Usage: 1.0
Date/Time: 4/1/19 4:00 AM - 4/1/19 5:00 AM
Hi John Smith,

This is a notice that you have exceeded your monthly threshold amount of XX kWh. You have used about $XX worth of electricity in this billing cycle, and your total bill is projected to be between $XXX and $XXX. Your bill for the same month last year was $107.

You have used about $130 worth of electricity in this billing cycle, and your total bill is projected to be between $197 and $267. Learn more...

Your bill for the same month last year was $107.

Here is some information on how the weather is affecting your bill...

Energy Use
76% of your energy used this bill cycle is estimated to be for heating. Learn more...

Weather
We estimate that your neighborhood has 31 days that require heating this bill cycle. Learn more...

* This is an estimate based on your past usage and the weather forecast. If you have made changes in your usage patterns like vacations, guests or how you use major appliances it will affect the accuracy of the estimate.
## Engagement Impact

<table>
<thead>
<tr>
<th></th>
<th>Bill Explanation</th>
<th>Baseline</th>
<th>Difference</th>
<th>Industry Standard*</th>
</tr>
</thead>
<tbody>
<tr>
<td>Open Rate</td>
<td>50%</td>
<td>30-35%</td>
<td>15-20%</td>
<td>26%</td>
</tr>
<tr>
<td>CTR</td>
<td>14%</td>
<td>2-4%</td>
<td>10-12%</td>
<td>3.5%</td>
</tr>
</tbody>
</table>

*IBM Case Study: 2016 Email Marketing Metrics Benchmark Study (see appendix)
Measuring Engagement

Ability to track:

- Opens
- Click throughs
- Sends
- Home profile data
eScore™: Designing for Success and Savings
Energy Upgrades the Right Way

Connect with TVA-trained, approved contractors in your area and have confidence through our free inspection that your home energy upgrades were installed the right way, so you can live more comfortably.
A Trusted Energy Advisor:

- Profit, stakeholders, ratepayers
- Decision-making
- Minimal investments
- Non-effective solutions

- Leading energy provider
- Provide customers with value and exceptional care
- Customers at center of strategy
- Your investments meet your customers where they are
• Value
• Relationships
• Empowerment
• Operational Goals
• ROI
Contact

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Upcoming Webinar

➢ April 25th, 2019
  Customer-Driven Rate Design is the Wave of the Future

STAY TUNED
Thank You!

&

Your Trusted Partner in Customer Engagement

milepost