



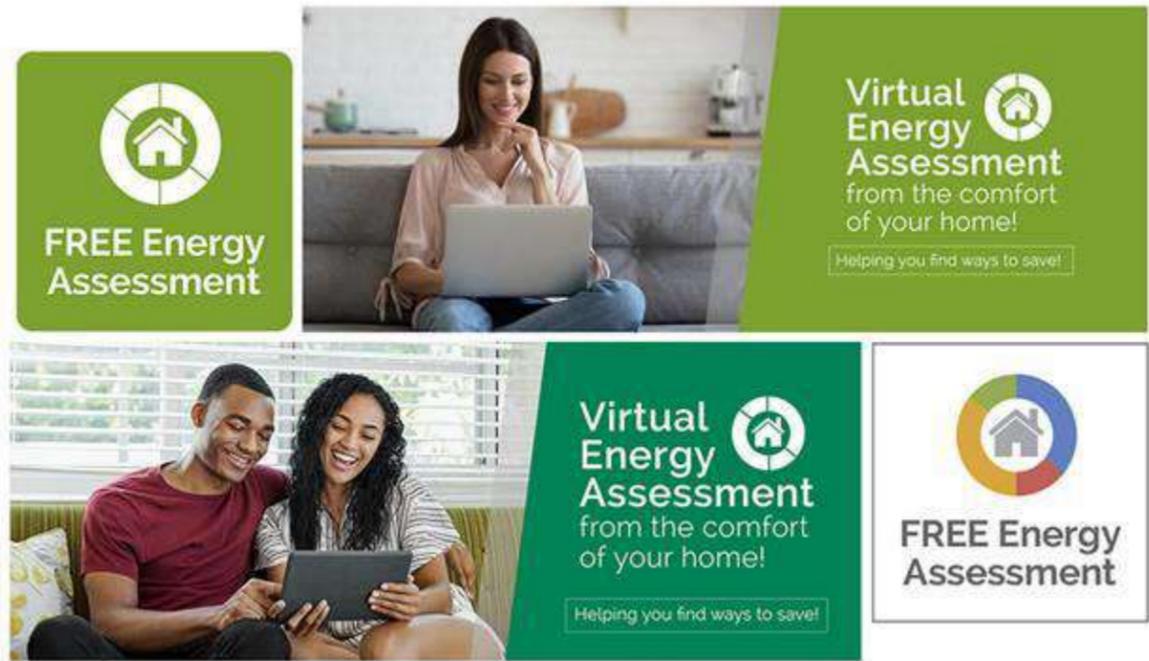
A Message from Susan Gilbert, CEO

### Virtual Audits Are Becoming Vital

Who would have predicted we'd be where we are today trying to help customers without visiting their homes? Well, two relevant sayings come to mind:

1. *Necessity is the mother of invention, and*
2. *Luck is when preparation meets opportunity*

Out of necessity, our utility clients are now, once again, delivering field energy audits - but not by visiting the home in person. Instead, some are providing what they call “**Virtual Assessments.**” It’s as close to being in the home as possible without stepping foot in the door. They do this using the most accurate, comprehensive, and easy-to-use energy modeling application available, Apogee’s Energy Advisor. Lucky for them, they had it all set-up! Billing, weather, and meter data are already integrated and allows for a highly accurate and personalized analysis. And it’s easy to locate for customers, CSRs, and Energy Auditors.



A Virtual Assessment is one of the most cost-effective ways of helping customers use energy wisely and influence their behavior. An added benefit is the profile data captured for thousands of your customers’ homes virtually audited, providing insights you have on their resident’s lifestyles and flexibility. These profiles are a rich data source that can be mined for targeting customers with certain characteristics like those holding high or low thermostat settings, ones with pools, ones with EVs, etc.

Going one step farther, more and more, our utilities are moving to outbound messaging, so they don’t have to wait for a customer to call with a question. The answers are pushed to them in personalized videos that explain their bills, compute dollar and carbon savings for recommended measures, and links them to programs matching their profiles or a more detailed audit should they want to run that.

We typically get our customer engagement platform up and running in 6 to 8 weeks. If helping customers with their energy bills is becoming a necessity for your utility, we are ready to spring into action, so you are prepared for the opportunity to serve.

Our extensive Marketing Resource Kit is filling up with banner ads, icons, advertisements, and social media posts to make it easy to let customers request their virtual audit.

In case you missed it, you can view Apogee’s recent “**Are Field Audits Dead?**” [webinar here](#) or read our recent blog post [▶ Getting Back to Work Upgrading Homes and Buildings](#)

### Breaking News! RateAdvisor™ now Available for Alpha Testers

Apogee has now developed the Alpha Version of the “Holy Grail” in electric rate modeling for customers and rate designers. After years of development and testing, it is ready for utility trials. Several are already in the planning stages, and we can accept a few more who want to see how accurately it predicts electric bills on standard, TOU, and demand rates.

Never before have utilities been able to tell new customers what their bills are likely to be on these rates. Typically, customers would have to wait for a year of AMI data. Nor have utilities been able to predict which customers are losers on the rates and how they can best manage and message them.

Customers simply profile their home, lifestyle, and flexibility to see an annual and monthly bill forecast showing how each rate performs. The advantage of seeing the monthly and yearly predictions is that seasonal disbenefits can be kept in perspective, avoiding the opt-outs. Customers can see on each rate how the annual benefits far outweigh any month-to-month cost increases.

Please let Karen Morris or your account manager know if you are interested in test driving the new model. [kmorris@apogee.net](mailto:kmorris@apogee.net)

[▶ Read our recent blog post about the RateAdvisor™ here.](#)





## Ariel

If you haven't seen the adventures of Apogee's very own Ariel, you are missing some hilarious industry humor. In her June post, she shared her energy savings tip while sheltering at home. Thanks, Ariel, for your light-hearted spirit at a time we can all use a good laugh. [Click here to see her current post](#) and visit our [Facebook](#) page for previous adventures.

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## Meet Karen Morris

One of the most familiar names in our industry space belongs to **Karen Morris**. For almost 20 years, Karen has served as Apogee's marketing manager and communication contact. Since joining the company in 2001, she has organized and conducted hundreds of informative APOGEE Institute webinars at the rate of 15 -20 per year.

That's a big job in itself, but in addition, she prepares and sends our announcements and press releases, organizes our participation in conferences, and keeps Apogee visible throughout the industry.

As if that were not enough, in her spare time, Karen creates marketing plans and provides marketing resources for hundreds of Apogee's clients, helping them leverage their investment in our applications to drive use and keep customers aware of these valuable tools.

If you need help achieving program goals, lifting customer satisfaction, reducing high bill calls, drop Karen an e-mail at [kmorris@apogee.net](mailto:kmorris@apogee.net). Like everyone at Apogee, we are here to assist, knowing that we look good when you do.

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