MULTI-CHANNEL C&I ENGAGEMENT: USING PERSONALIZED ANALYTICS
CHALLENGES FACING SOUTHWEST UTILITIES

ENERGY LOCALIZATION
RISING CUSTOMER EXPECTATIONS
CHANGING REGULATORY REQ’S
BUSINESS CASE FOR AMI

TWO MAJOR OBJECTIVES

1. CUSTOMER SAT / JD POWER
2. DSM SAVINGS/TARGETS
CUSTOMER INTELLIGENCE ACROSS MULTIPLE CHANNELS

DELIVERING ANALYTICAL INSIGHTS ACROSS ENGAGEMENT CHANNELS TO DRIVE CUSTOMER CARE OBJECTIVES
BETTER INTELLIGENCE TO MEET THE CHALLENGE

TECHNICALLY VALIDATED FOR ACCURACY
WHY USE DATA ANALYTICS?

Optimizing efficiency program delivery
- DSM program planning
- Scale analysis and audits
- Program participation
- Market activity
- Baselining and M&V

Improving customer experience
- Customer satisfaction
- Customer choice
- Rate & tariff education

Increasing efficiency of infrastructure
- Value from AMI
- Bytes, not wires
WHO USES DATA ANALYTICS?

“Show me all my customers who could use a lighting retrofit.”

“How can I help this customer manage their bill?”

“How can I keep the lights on with a limited budget?”

Account Managers

- Estimate savings potential
- Segment customers

Customer Support

- Address customer questions
- Understand rate impacts

Grid Ops & Planning

- Inform savings scenarios
- Manage capacity constraints
INFORMED CUSTOMERS PARTICIPATE IN DSM PROGRAMS

Digital
Interactive and engaging online dashboard

Personalized
Customer-specific insights with relevant comparisons

Useful
Direct calls to action on ways to save
AN INTELLIGENCE-DRIVEN APPROACH

PLAN
- Regional & Segment Value

TARGET
- Customer Value: Potential & Propensity
- By products/services

ENGAGE
- Customized scripts
- Personalized analysis
- Decision-focused

PROPOSE
- Energy project proposals
- Customer commitment

IMPLEMENT
- Savings/value measured & reported
Portfolio wide propensity screening and dynamic filtering leads to more cost-effective DSM programs
PERSONALIZED RECOMMENDATIONS & REPORTS

First, make it personalized…

Then, make it configurable and portable.
EXAMPLE IMPACT: INCREASE IN PROJECT SIZE

SAVINGS POTENTIAL: 1,000 MID-SIZE BUILDINGS

FIRSTFUEL: TOP DECILE SAVINGS (25.5%)

BAU: MEDIAN SAVINGS (18%)
## LESSONS LEARNED FROM 3 SOUTHWEST UTILITY DEPLOYMENTS

| DATA                                  | Working with large sets of data can be difficult  
<table>
<thead>
<tr>
<th></th>
<th>Interval data is better but monthly data is also valuable</th>
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<tbody>
<tr>
<td>MULTI-CHANNEL COMMUNICATION</td>
<td>Analytics alone is not the silver bullet – need for multi-channel engagement strategies</td>
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<td>STAKEHOLDERS</td>
<td>Utility customer service teams including Key Accounts and Call Center are key stakeholders</td>
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<tr>
<td>COORDINATION</td>
<td>Need for close coordination between utility program/marketing, implementers and trade allies</td>
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| CUSTOMERS                             | C&I customers crave personalized analysis and EE recommendations  
|                                       | Benefits of data analytics extend beyond DSM program participation |
**C&I CUSTOMER TESTIMONIALS**

"I have not heard from my utility in over 2 years…"

"Interesting data! Would be interesting to see this online when I view my bill"

"You were able to tell our operating hours. That’s exactly right."

"I'm new to the practice and looking for energy savings opportunities"
CLOSING THOUGHTS

Customer Analytics

Channels

Outcomes

- Increased Cost-Effectiveness
- Improved Customer Engagement
- Better DSM Conversion

Web & Mobile

Email

Key Accounts & Call Center

Implementers & Trade Allies
THANK YOU

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EXAMPLE ANALYTICS RESULTS

ACCELERATE YOUR SALES CYCLE BY 3X WITH PRECISION INTELLIGENCE.

75% INCREASE IN CONVERSION RATES BY USING BETTER CUSTOMER INTELLIGENCE.

4.6 OUT OF 5 AVERAGE CUSTOMER SATISFACTION SCORES.
CHALLENGES OF EXISTING CUSTOMER INITIATIVES

ENGAGE CUSTOMERS
- Rising service costs
- Raise customer satisfaction
- Create new digital channel

MEET EE GOALS
- High touch sale
- On-site audits
- Paper bills
- Call centers
- Rising costs of EE/DSM
- Increase participation
- Improve cost-effectiveness