

**APOGEE<sup>®</sup>**  
**INSTITUTE**

**ENERGY**  
**WEBINAR**

**Customer Engagement & the Segment of One**

# Brought to you by:



Karen Morris, Marketing Manager



Ashley England, Sr. Project Manager



# 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**

The Segment of One takes customer engagement to the next level...

## 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...



**25% INCREASE**  
in customer satisfaction



More than  
**3 TIMES AS LIKELY**  
to recommend their provider



**37% INCREASE**  
In signups for energy products  
and programs



Engaged  
Customers...  
a Valuable Asset

# Apogee brings utilities closer to the Segment of One

The image displays several digital devices showcasing Apogee's utility services:

- Top Left (Laptop):** "Your Energy Summary Report" for Dear Bob Johnson, showing a pie chart of energy usage: Heating (36%), Cooling (27%), Water Heating (14%), Cooking (4%), Transportation (4%), Lighting (4%), and Appliances (3%).
- Top Middle (Tablet):** "Your Mid-Month Energy Use Report is ready..." with a family photo and a bar chart of "ELECTRIC USAGE COST".
- Top Right (Tablet):** "HOME EFFICIENCY RATING" showing a score of 51 and a "WEEKLY ELECTRIC ENERGY FORECAST" of \$51.
- Bottom Left (Tablet):** "YOUR ANALYSIS SUMMARY" showing "Weather: \$46" and "The weather impact on your bill is \$46 More".
- Bottom Middle (Tablet):** "LIGHTING CALCULATOR" showing a table of lighting savings and costs.
- Bottom Right (Tablet):** "Email Alert" from Apogee Electric & Gas Co. regarding a weather forecast and energy usage.
- Bottom Left (Smartphone):** "Ready for Winter Storms?" with a house illustration.
- Bottom Middle (Smartphone):** "AEG Power Usage Alert. You've used \$120 so far this month. Based on the weather in your area, you are projected to use \$210 for the month." Includes a session key: 1234.com.
- Bottom Right (Smartphone):** "Capital Credits" with a play button icon.

### LIGHTING CALCULATOR

Select the incandescent wattage: 75 | Fluorescent: 36W | Number of bulbs: 3 | Hours per day: 4

	Incandescent	CFL	LED	Incandescent
Equivalent Watts per bulb	53 W	19 W	16 W	75 W
Watt Savings	94 watts	245 watts	202 watts	
Use CO2 Savings	144 lbs	367 lbs	304 lbs	
Annual Savings	\$19	\$49	\$52	

### From: Your Utility Customer Care

Dear Bob Johnson,

Our most recent records indicate that you've used: **\$120** about 50% through the month.

Based on the weather, you're forecasted to use **\$210** for the entire month.

Learn more about how the weather affects your energy bill. [My Energy Forecast](#)

For your convenience, here is a simple tip to help you save energy and money:

Adjust your thermostat by one degree and save \$10

For more information about other money savings tips please visit our web site at [www.yourutility.com](http://www.yourutility.com)

[Budget Bill](#) is a free billing option that takes your annual energy bill and divides it by 12 whereby you pay the same amount each month. [Learn more about Budget Bill](#)

Our mailing address is:  
Your Utility, P.O. Box 123, Anytown, GA 10109, USA  
To unsubscribe or change your preferences, [click here](#).



# Engaged Customers...a Valuable Asset



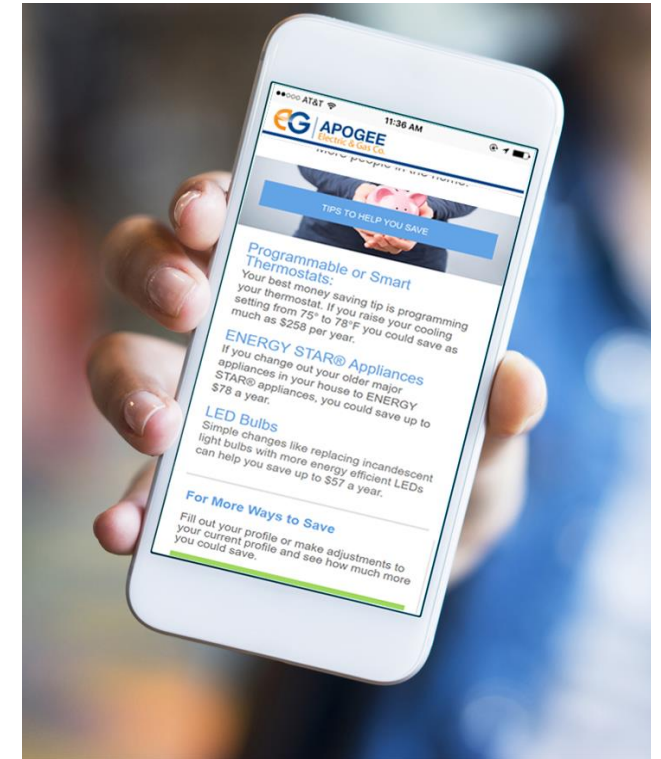
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**37% INCREASE**  
In signups for energy products  
and programs



Digitally engaged customers are more satisfied, and more involved\*

\*Accenture utility consumer survey



# About Milepost



## 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

# About Milepost



## 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

ASHLEY ENGLAND, MSW

*what we see in the market*

...

# the **value** of tailored engagement



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

*the problem we see*



# 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



*how we do it differently*

# our process



*the first step*



# landscape **assessment**

## 4 C'S ANALYSIS

**CUSTOMER**  
**COMPETITION**  
**CHANNELS**  
**CAPABILITIES**

## ESTABLISH

**MARKET SEGMENTS**  
**BRIGHT SPOTS**  
**PAIN POINTS**  
**THEMES**



*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**

*the third step*



# engagement strategy **refinement**

**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**

*the result*

# tailored engagement strategy

**AN INVESTMENT IN YOUR PRODUCT, PROGRAM  
OR SERVICE THAT WILL GENERATE A HIGHER  
RATE OF SUCCESS AFTER LAUNCH**

*why this matters*

# benefits

**CUSTOMER  
RETENTION**

**EFFICIENT  
IMPLEMENTATION**

**STRATEGIC  
DECISION-  
MAKING**

**ENHANCED  
REPUTATION**

**LOWER  
COSTS**

**INCREASED  
CAPACITY**

**VALUE-ADDED  
USER  
EXPERIENCE**



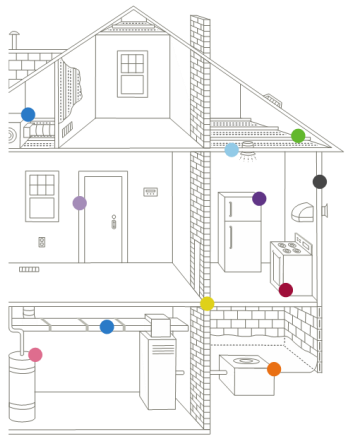
**\$163** OR **7¢**  
SQUARE FOOT  
 Your Home's MONTHLY AVERAGE Energy Cost



**SCORE CARD**

Category	eScore
Air Sealing	4
Attic Insulation	5
Duct System	3
Lighting	4
Heating / Cooling Systems	6
Appliances / Electronics	5
Water Heating	7
Refrigerator	8
Windows & Doors	4
Wall Insulation	10

09/14/13 eScore **6**



**YOUR HOME CAN BE A 10**  
 Make your home as energy efficient as possible. Complete the list of energy upgrades on the back of this card and your home will score a 10. Turn the page and start saving!

**10** eScore FOR **20%**  
 Average Valley Homes that achieve a 10 can expect up to 20% savings on energy costs.

*our experience*

...  
**in action**

## 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.





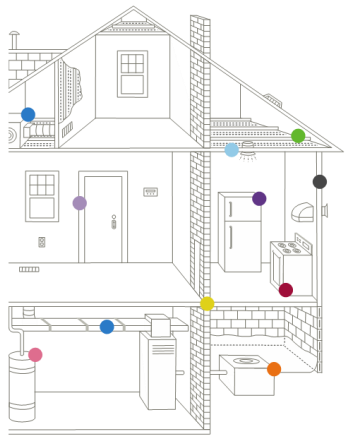
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our experience

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## 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.



**64.7**  
EUI

Energy Use Intensity (EUI) is your building's annual energy use (all fuel types) divided by square feet (sf) in kBtu/sf.

## SAMPLE OFFICE BUILDING ENERGY PERFORMANCE PROFILE

999 SEATTLE AVE SEATTLE, WA 98124 | Benchmarking ID: 12345 | EPA Building ID: 9999999 | Square Feet: 95,000

Thank you for benchmarking your **mid-size office building's** energy use with the City of Seattle! This energy performance profile shows how your building is doing **year to year** and how it compares to **similar buildings** in Seattle. Our goal is to help you identify opportunities to reduce operating costs, attract tenants and increase your building's energy performance.

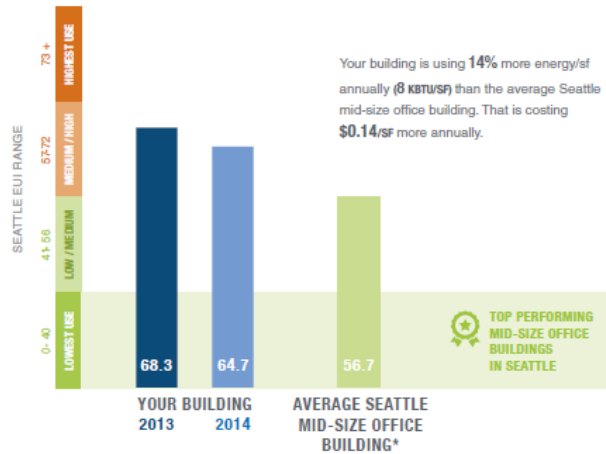
### YOU CURRENTLY SPEND

**\$1.11** / SF

ANNUALLY ON ENERGY\*  
or \$105,800 per year.

↓ Your building's EUI decreased by **3.6 KBTU/SF** from 2013 to 2014.

\*The information in this report is self-reported and subject to verification. Costs and potential savings are estimated at \$0.017 per kBtu using the average mix of fuel sources (electric, gas, steam) for mid-size office buildings. Average EUI is based on Seattle median EUI.



### HOW YOUR BUILDING STACKS UP

THERE ARE **321** SIMILAR MID-SIZE OFFICE BUILDINGS IN SEATTLE

TYPE: Mid-size Office Building  
SQUARE FEET: 20-100k

OF THESE, **180** USE LESS ENERGY THAN YOUR BUILDING

Reduce your building's EUI by **12.4%** to get to the average.

SAVE UP TO **\$13,100** EACH YEAR BY REDUCING YOUR BUILDING'S EUI TO THE SEATTLE AVERAGE

GET STARTED



[www.seattle.gov/energybenchmarking](http://www.seattle.gov/energybenchmarking)

Questions?  
[energybenchmarking@seattle.gov](mailto:energybenchmarking@seattle.gov)  
206.727.8484

Report prepared: 11/02/15

99999-12345-9999

our experience

in action

## 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.



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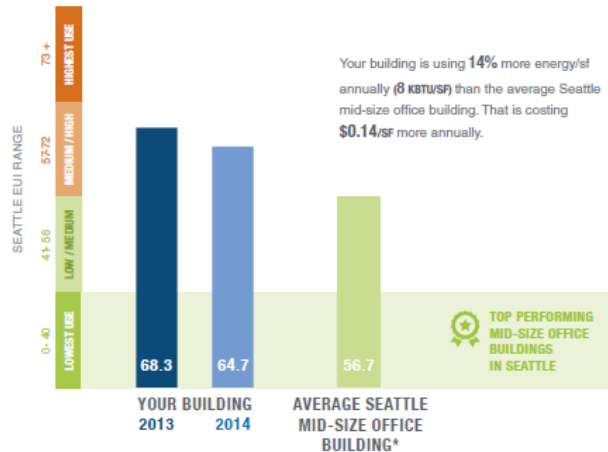
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our experience

...  
**in action**

## 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.

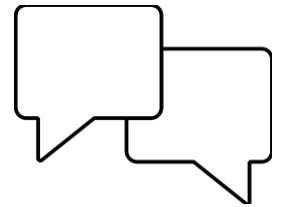


# QUESTIONS?

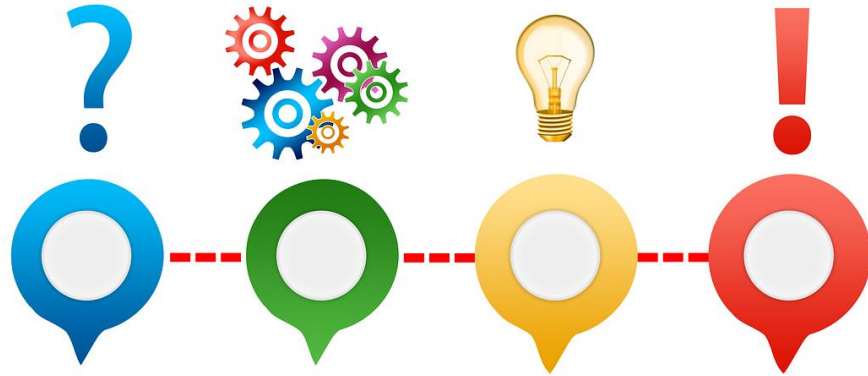
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# Questions



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# Upcoming Webinars

May 17<sup>th</sup> 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!



**APOGEE** <sup>®</sup> **25**  
INTERACTIVE  
ANNIVERSARY  
1993-2018

Your Trusted Partner in Customer Engagement

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INSTITUTE