

**Welcome to  
Apogee Institute Webinar!**  
***EE: Sell them what they want!***



# Today is about messaging

Who?  
What?

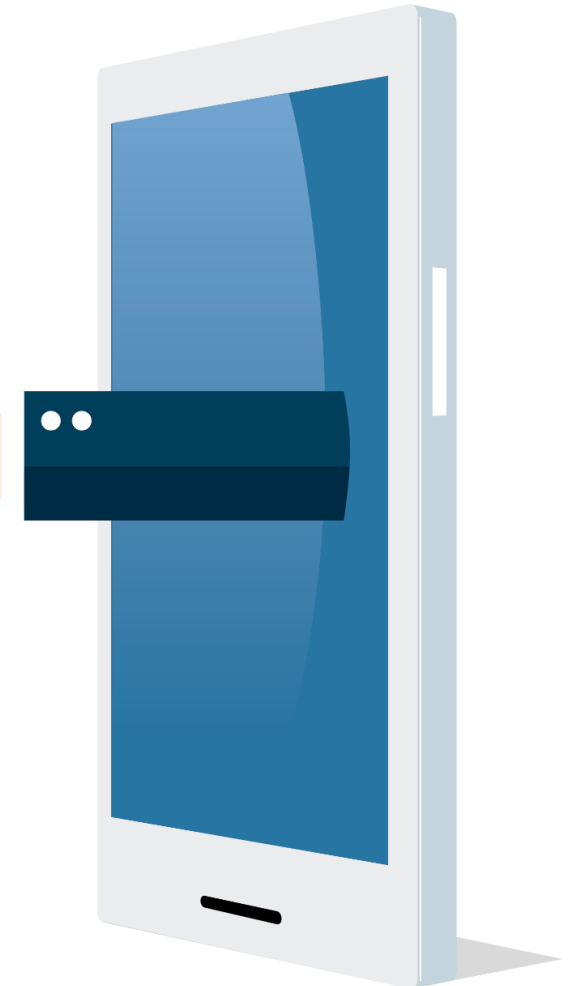
How?  
With What Impact?



Suzanne Shelton,  
President & CEO  
Shelton Group



Susan Gilbert,  
President & CEO  
Apogee Interactive, Inc.



Apogee....

23

years in business

95%+

client retention rate

Serving 600+ utilities

*“Apogee’s Customer Engagement Platform is **the most comprehensive in the industry.**”*

*It reaches customers in so many ways by educating and providing **personalized and meaningful information....***

NAVIGANT®



# Seeing Declining Interest...





We Shifted to  
**POP!**

Personalized  
Outbound  
Proactive



# Proactive and Personalized Year-End Reports

## Study Results

- 16% Boost
- ~100 point increase
- No negative impacts



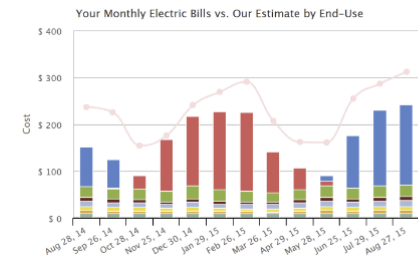
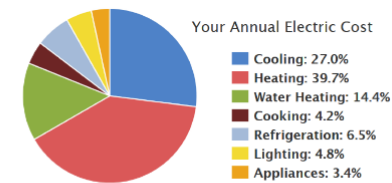
Having trouble viewing this email?  
[Click here](#) for online version.

## Your 2015 Year-End Summary

Dear Bob Johnson,

Thank you for being our valued customer. For your convenience, we've prepared this year-end summary of your energy use along with top tips for saving energy in your home. We hope you'll find it helpful. Please feel free to call us at 800.123.4567 with any questions.

### Here's where your energy dollars are going:



### Here are some easy tips and recommendations to lower your energy costs in your home:

- Set your thermostat at 78°F in the summer and 68°F in the winter and leave it alone. With each degree decrease on your thermostat in the winter and increase in the summer, you can immediately realize a 3 to 4 percent decrease in energy use.
- Turn down your water heater thermostat. A setting of 120°F is fine for most homes.
- Install and preset an ENERGY STAR® programmable thermostat to automatically reduce energy usage when you are away or sleeping. Constantly changing the temperature causes your system to work harder.
- Take quick showers instead of baths. This greatly reduces the amount of hot water used.
- Use ENERGY STAR® qualified compact fluorescent light bulbs (CFL) or LED light bulbs. They use three-quarters less electricity, generate 75 percent less heat and last up to 10 times longer than standard incandescent lighting.

### My Account


Track your Daily usage and sign up for alerts when your daily or monthly usage hits certain levels.

[LOGIN NOW](#)

### Self-Service Energy Survey

For a more precise and personalized energy report, log in and give us details about your household.

[CONDUCT SURVEY](#)



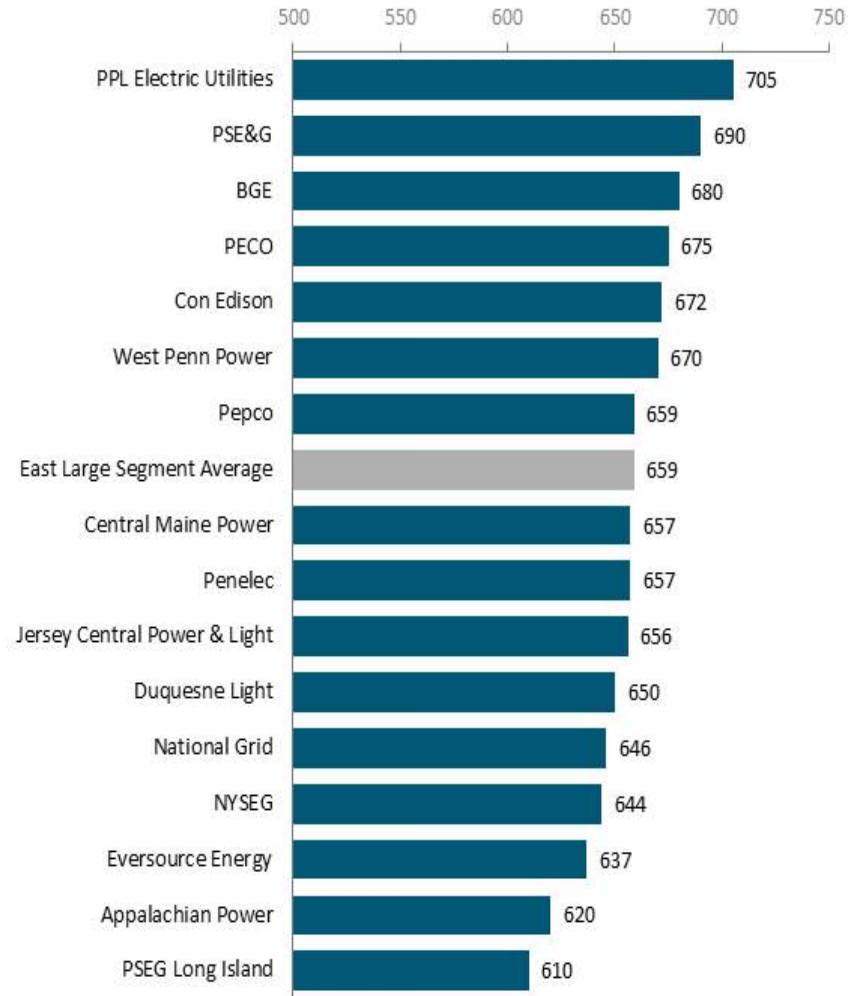
*“A 20 to  
50 point  
bump is  
noodling  
around the  
edges”*



Jeff Conklin  
Energy Utility Practice Leader

*“Anything that produced  
a 100 point bump is  
**very significant**”*

# 100 Points on JD Power Scale...



Moving from 600 to  
700 = *Last to First!*



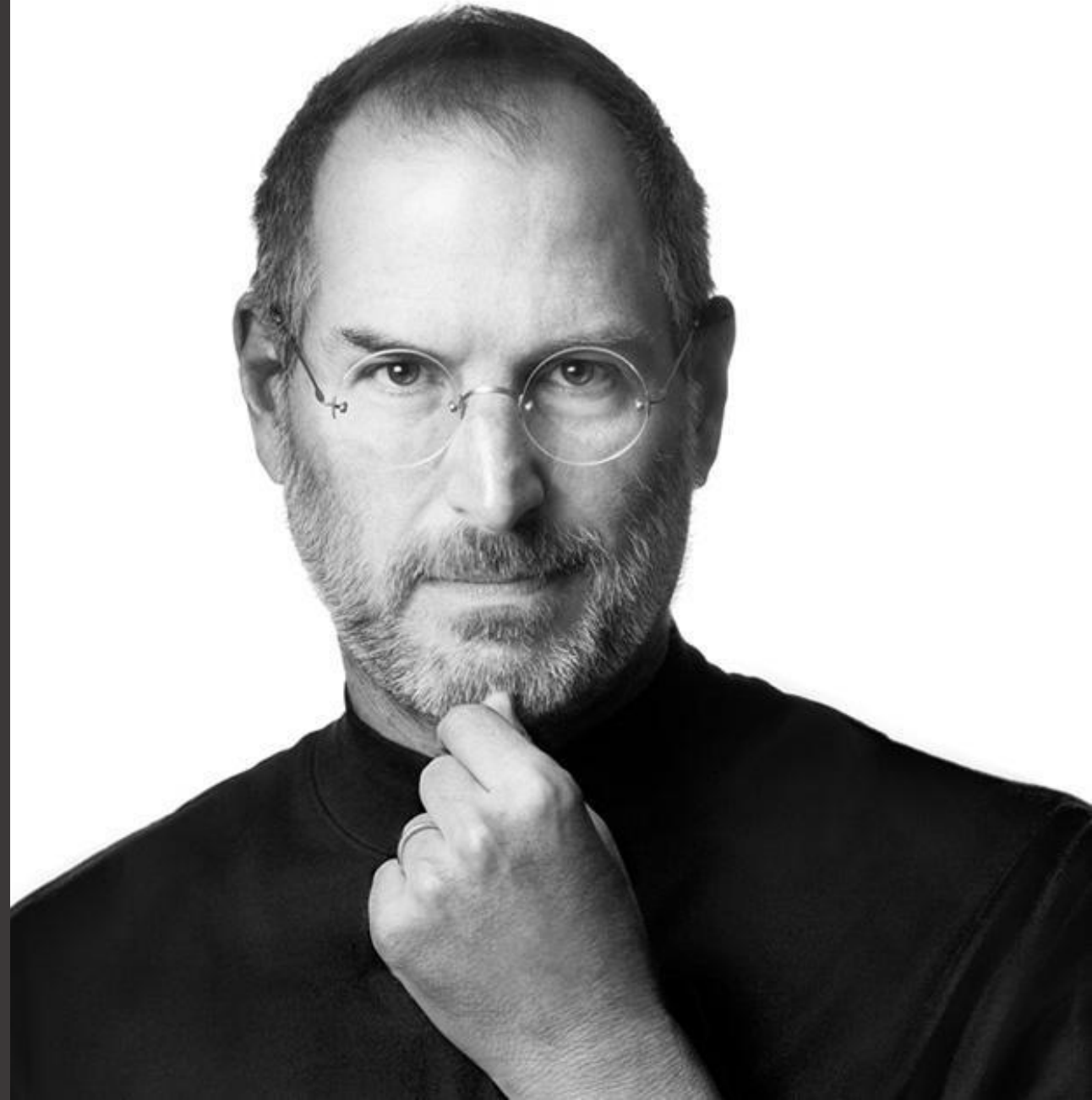
This Ain't New...

“

*“People  
don't read  
anymore.”*

Steve Jobs

January 2008



# Video Messaging





**46%**  
open rate

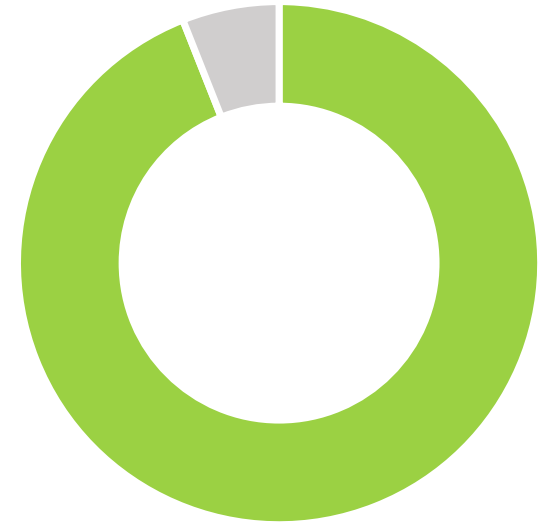
~ **2x** Industry Average 21%



**30%**  
click rate

**~14x** Industry Average 2.14%



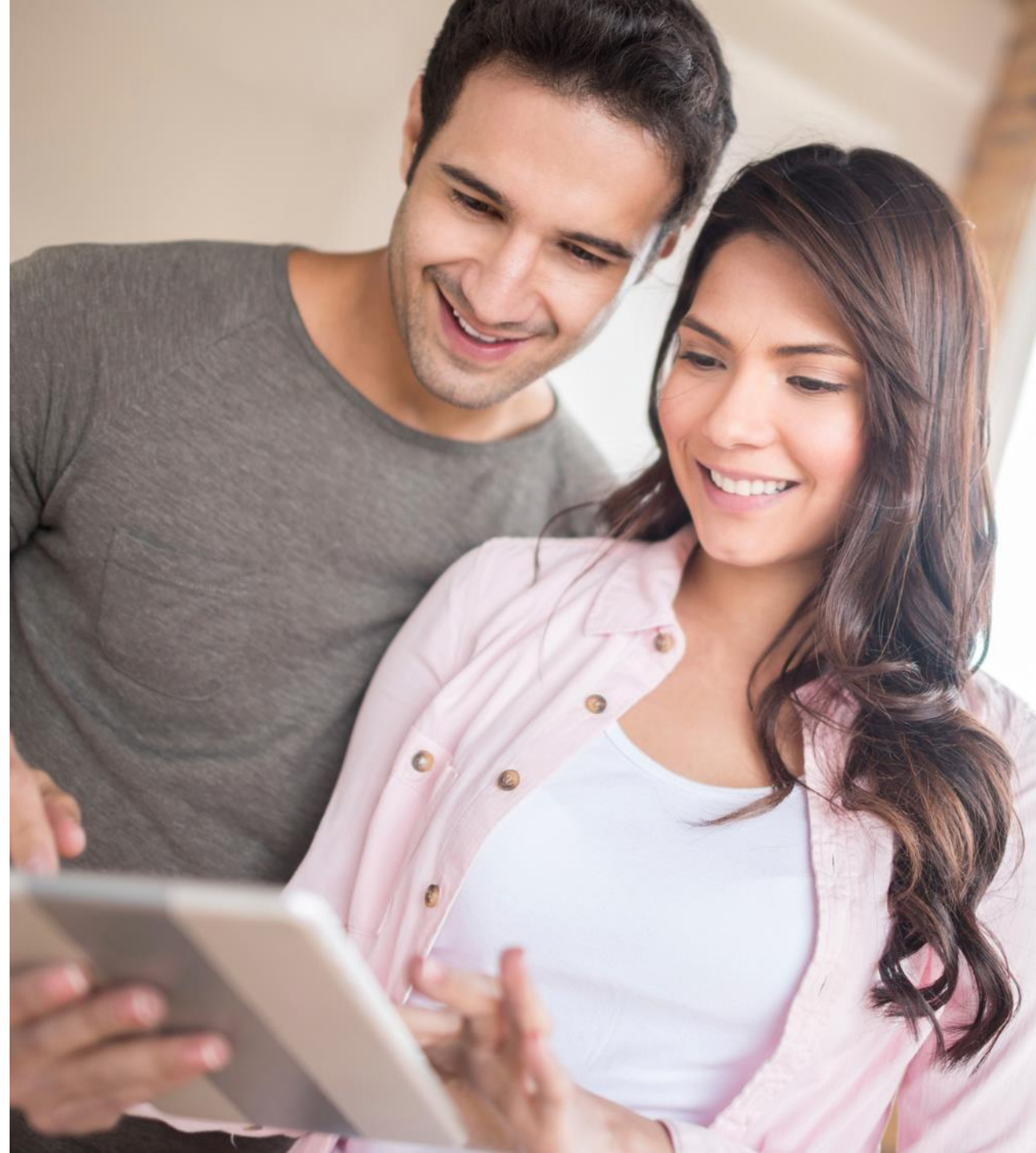


**94%**  
of viewers  
found videos  
useful





found the  
information  
easy to understand







want the video every month



want the video every quarter

99%

Want more videos!



*“OUTSTANDING –  
very informative.”*

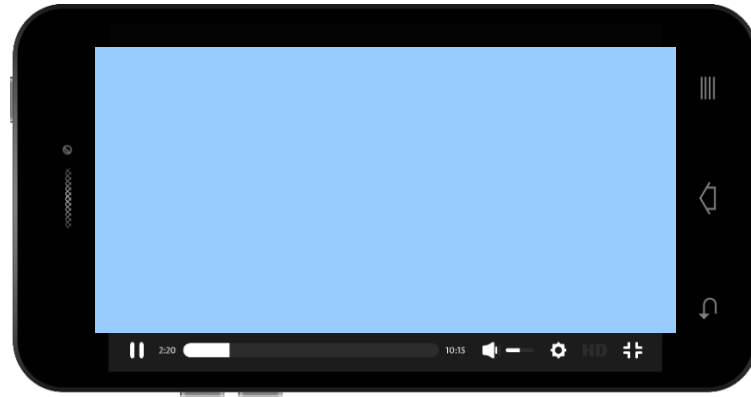
*“Excellent – very helpful in  
presenting the reasons for  
changes in the bill month to  
month.”*

*“Surprised – never received a  
video presentation before. I  
thought it was creative and  
proactive.”*

*“Super and very helpful.*

*Congratulations on an innovative  
user friendly approach to customer  
service.”*

*“Loved it! Amazed. Very cool. Fantastic!”*



# Growing Content Library

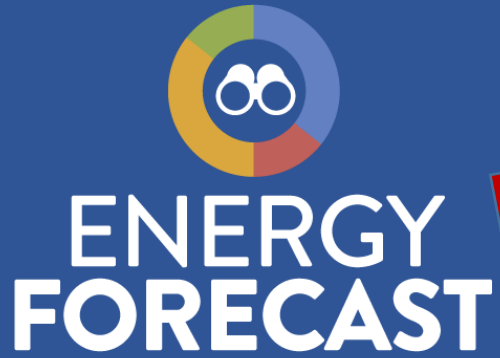
- Bill Explanations
- Storm Alert
- Beat-the-Peak
- Any Character or Voice

# How to Get Their Attention?

# 1 Most Requested Info?



# Weather



ENERGY FORECAST - ELECTRIC COST  
YOUR PROJECTED ELECTRIC COST FOR THIS WEEK IS \$22





# Provide Weather AND Energy Cost

## Add it to Website AND Push it to Customers

- Something Cared About
- No Flashing Ads
- Give More

### ENERGY FORECAST

The screenshot displays the Flint Energies website interface. At the top, the logo "Flint Energies" is accompanied by the tagline "Your Tomorrow's Energy Cooperative" and a navigation menu with links: "MY HOME", "MY BUSINESS", "MY COMMUNITY", "MY COOPERATIVE", "CONSIDERING SOLAR?", and "NEWS CENTER". A search icon is located on the right.

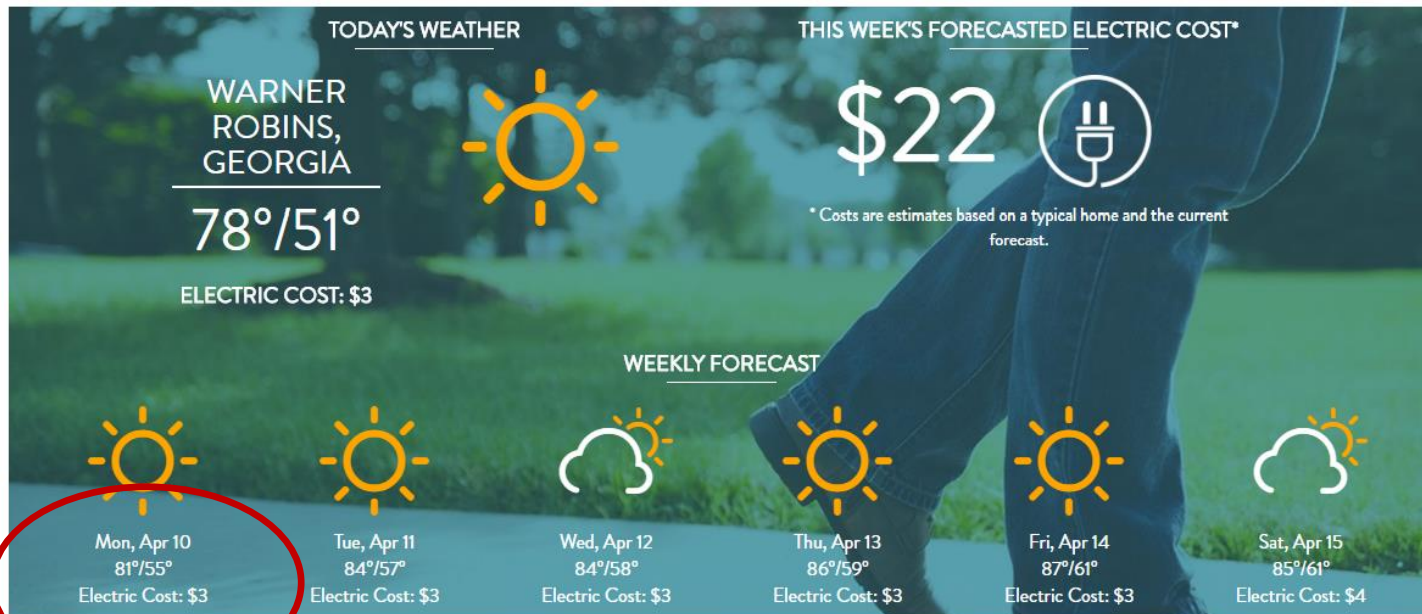
Below the navigation, there are three main content areas:

- Facebook:** A post from Flint Energies dated April 7 at 12:13pm. The text reads: "Thanks to Kings Chapel Elementary School for allowing us to help today with your Egg Drop project. We had a great time seeing how creative and innovative your students are. As you can tell from this photo, students were thrilled to see if their eggs survived a fall from our bucket. Some survived and some met a fate similar to Humpty Dumpty." Below the text is a photo of children participating in the egg drop project.
- Twitter:** A list of tweets from @flintenergies. The first tweet says: "Thanks to Kings Chapel Elementary School for allowing us to help today with your Egg Drop project. We had a great... fb.me/62KTAOINW". The second tweet says: "It's a beautiful spring day, why not have a giveaway? Flint Energies is celebrating 80 years of service to our... fb.me/SUGcdSQo". The third tweet says: "Meet the newest members of the geese".
- Weather:** A weather forecast widget for Warner Robins, Georgia. It shows "Today's Weather" with a sun icon, a temperature of "78/51°", and "Electric Cost: \$3". This widget is circled in red.

At the bottom of the page, there is a dark banner with the text: "LEARN MORE ABOUT THE POWER OF YOUR CO-OP MEMBERSHIP. TOGETHERWESAVE.COM". A button on the right side of the banner says "LEARN MORE ABOUT ENERGY SAVINGS".

# ENERGY FORECAST - ELECTRIC COST

YOUR PROJECTED ELECTRIC COST FOR THIS WEEK IS \$22



Drill down for more information...

### Thermostat Savings

Adjusting your thermostat is an easy way to Save \$\$\$.  
Use the thermostat below to see how much.

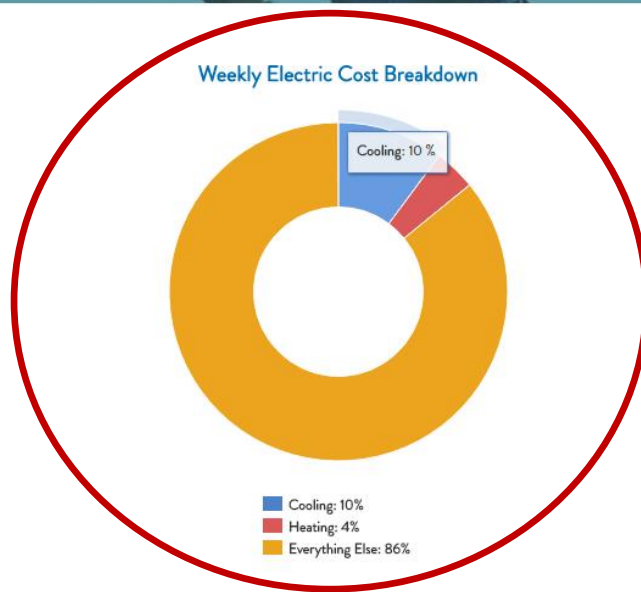
Click the up or down buttons to adjust your thermostat and see your savings!

Update My Home Profile Settings



\$0.00

### Weekly Electric Cost Breakdown

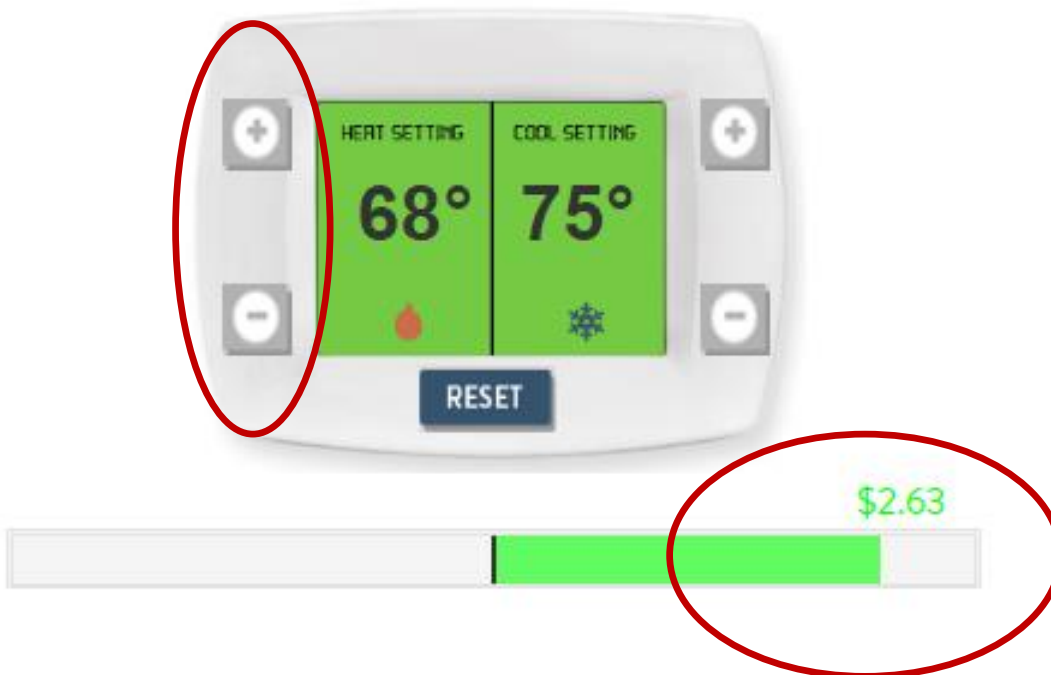


## Thermostat Savings

Adjusting your thermostat is an easy way to Save \$\$\$.  
Use the thermostat below to see how much.

Click the up or down buttons to adjust your thermostat and see your savings!

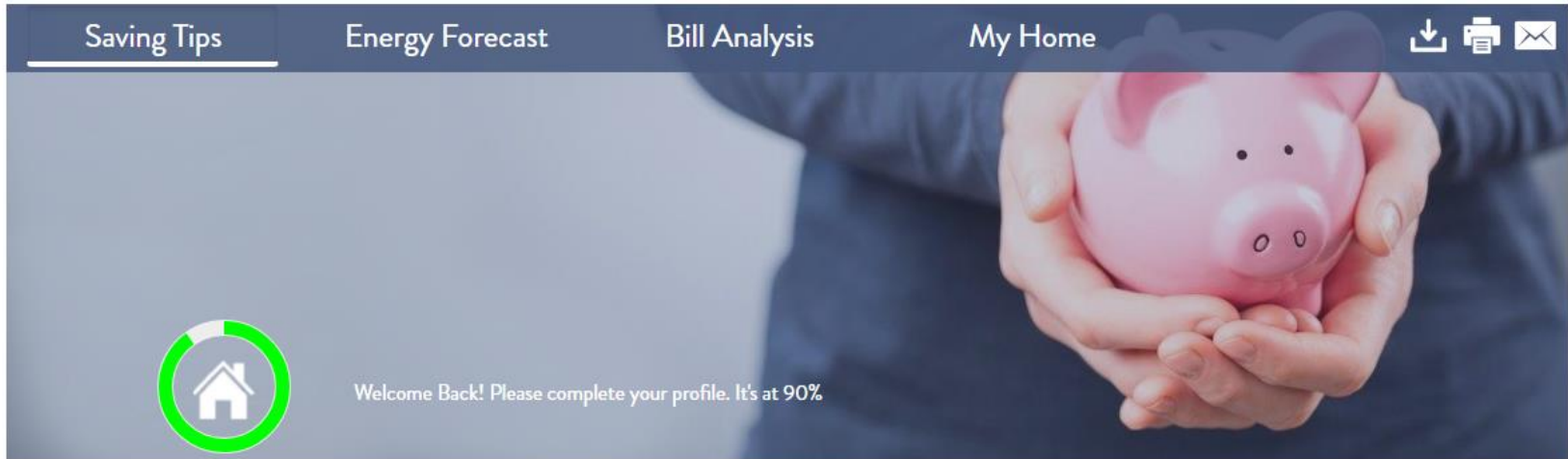
Update My Home Profile Settings



# Show them how to save

## Make it Easy and Intuitive

- Degree-by-degree
- Give customers control
- Show them the real cost of their comfort



Record ID: 3906165

F  
E  
E  
D  
B  
A  
C  
K  
▶

Home Efficiency Rating




### HOME EFFICIENCY RATING



POOR AVERAGE GREAT

[Explain how my rating is calculated](#)

Energy Forecast

 WARNER ROBINS, GEORGIA	 WEEKLY ELECTRIC ENERGY FORECAST
Today 78/51° 	\$78



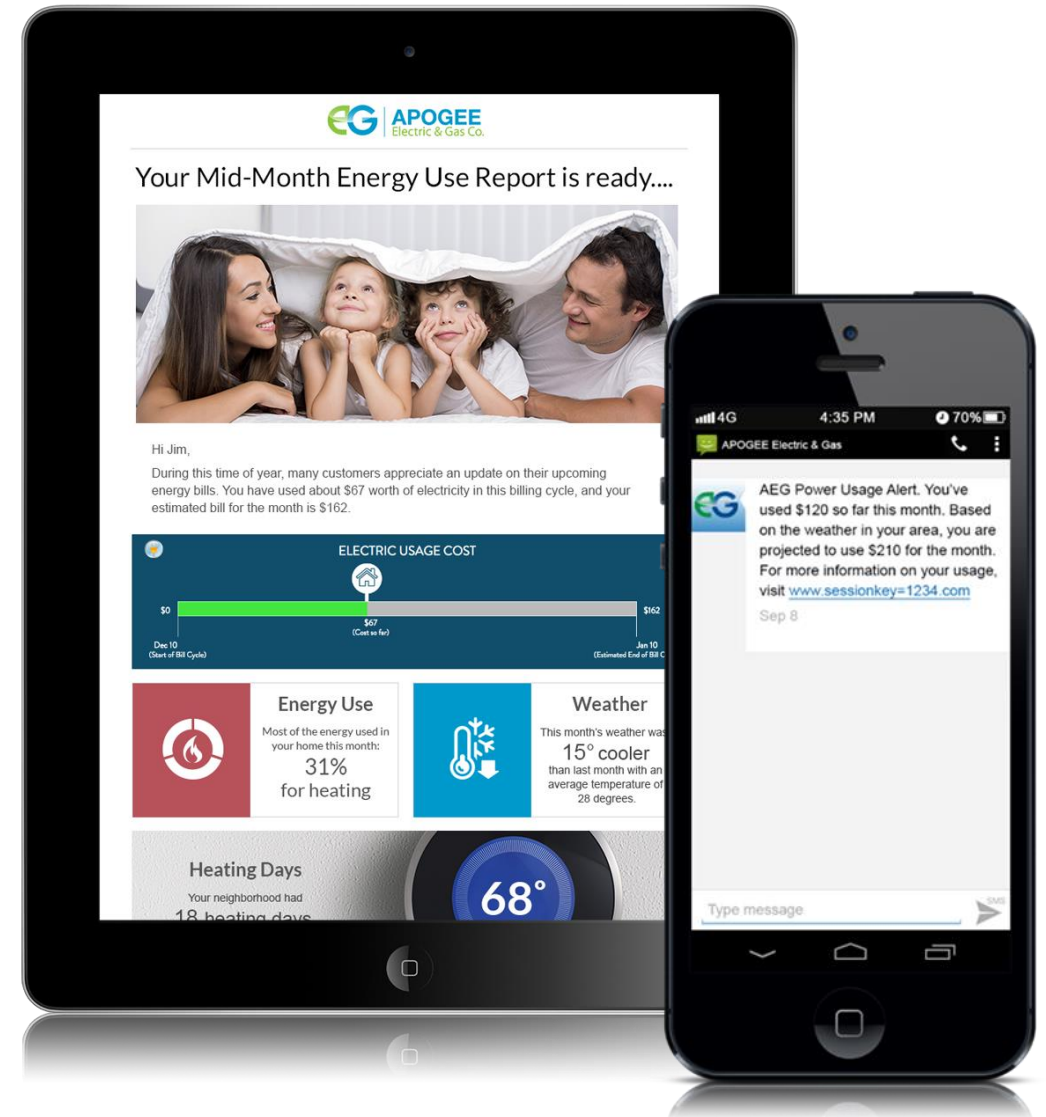
## WAYS TO SAVE



# Proactive Alerts

# 80%

# Want Alerts



Hello, Jonathan

ACCT#:1234567890

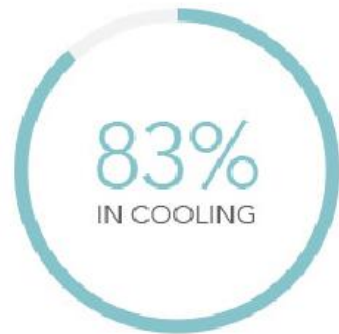
\$423

YOUR ESTIMATED BILLING FOR THIS MONTH

\$415

\$430

MAJOR BILLING FACTOR

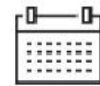


↑ UP 14% SINCE AUG

WHAT HAS CHANGED?



93° AVG Temp  
5% HIGHER



17 Days Hotter  
2 MORE SINCE AUG

SOME TIPS TO IMPROVE



LEARN MORE



Adjust Your Thermostat

It is a long established fact that a reader will be distracted by looking at its layout.



LEARN MORE



Adjust Your Thermostat

It is a long established fact that a reader will be distracted by looking at its layout.

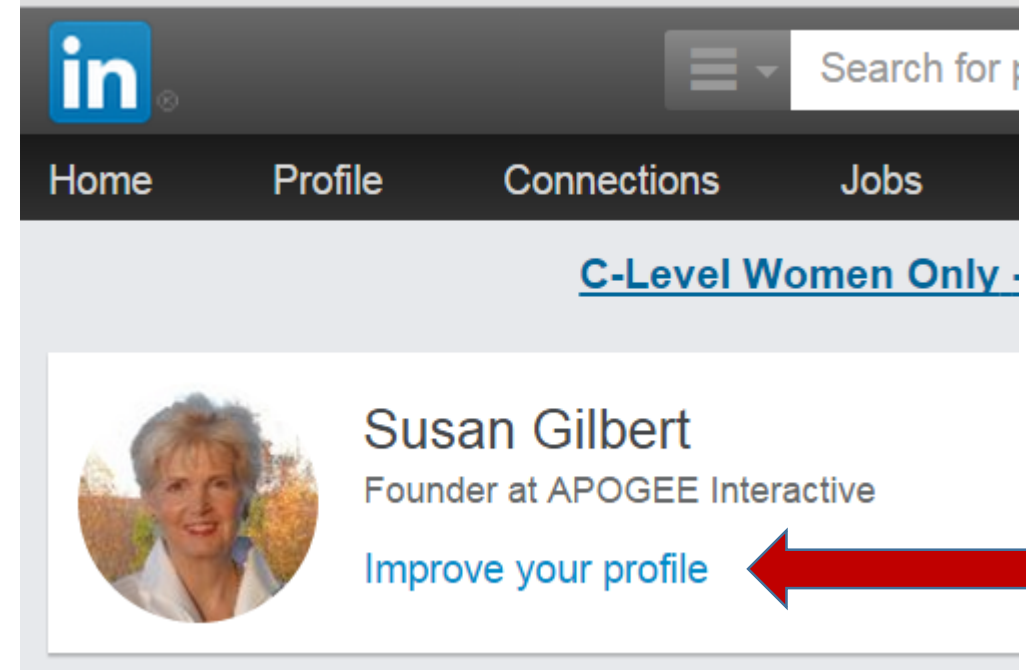
# Mid-Cycle Bill Alert

## Show You Care

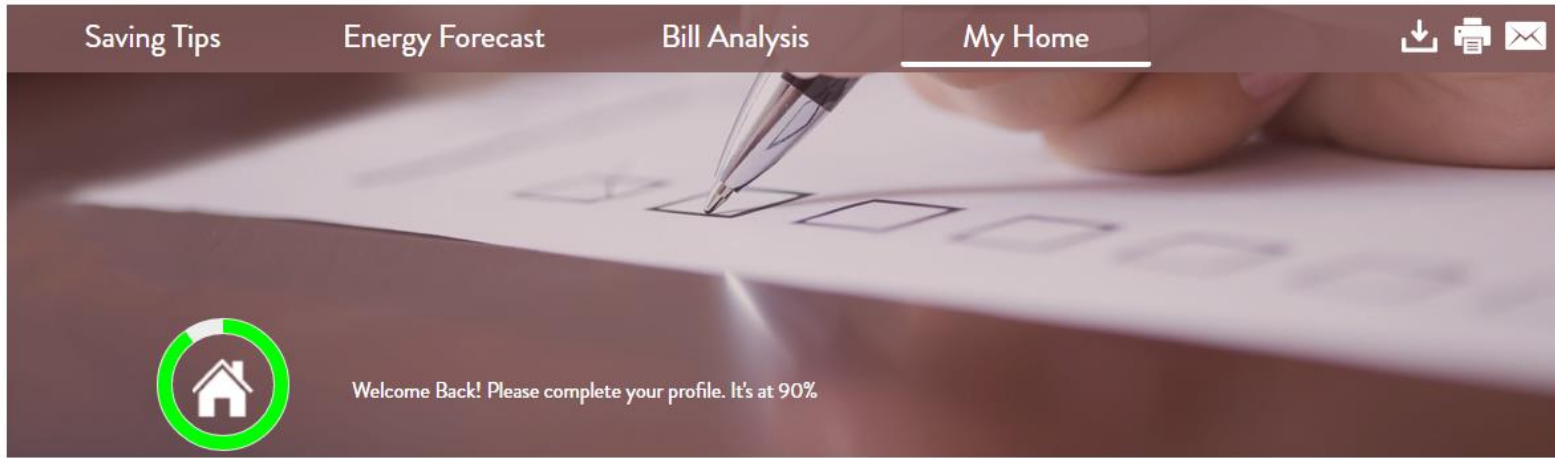


Continuous  
Improvement with...

Progressive  
Personalization



Get just a little more information  
every time you interact



TELL US ABOUT YOUR HOME ?

# Progressive Personalization



# What's Next?

Personal  
Health  
Monitoring



*...to add*  
Personal Home Monitoring

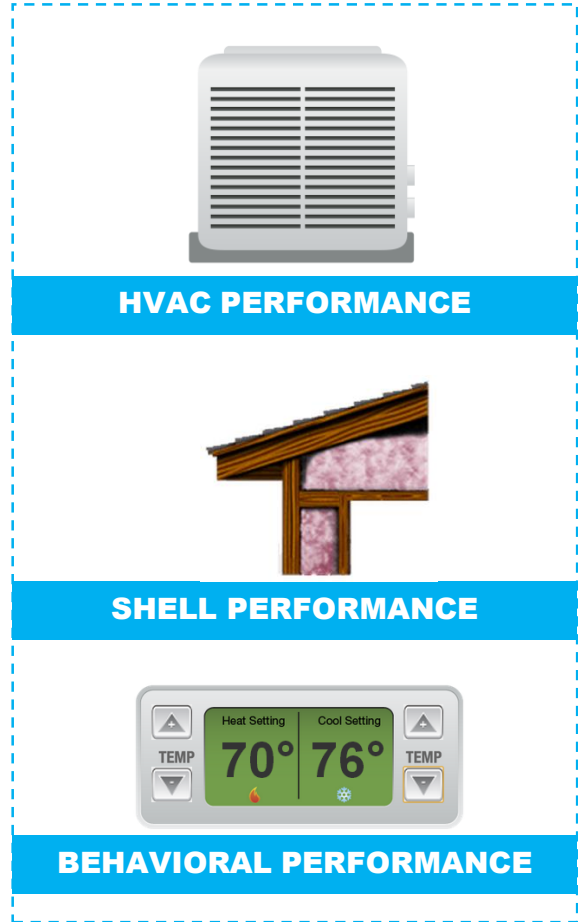




Home Intelligence








**Customer Experience**



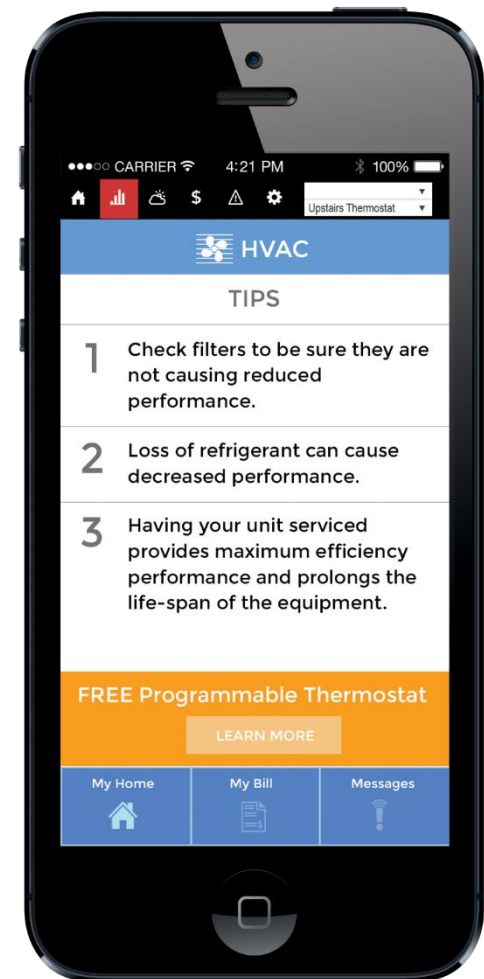
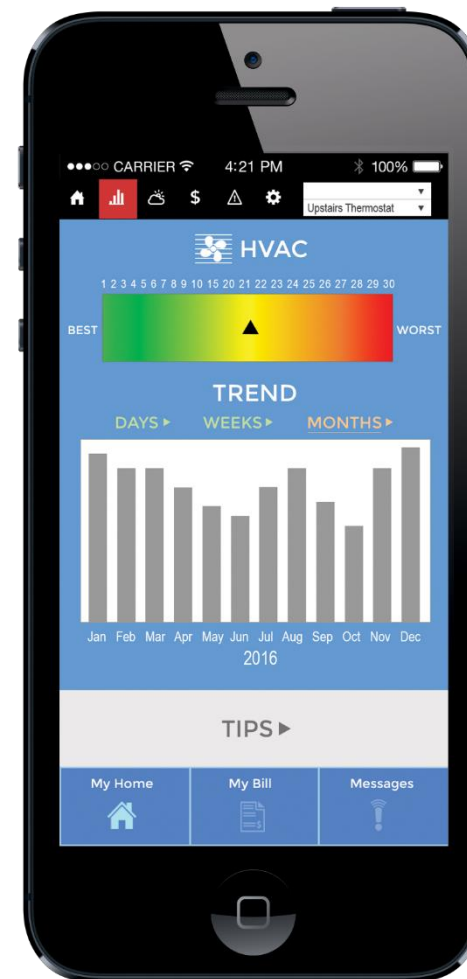
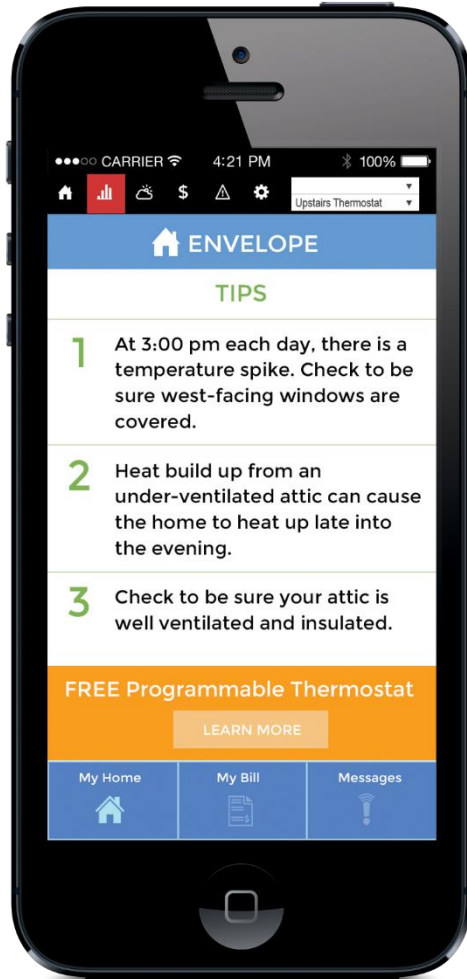
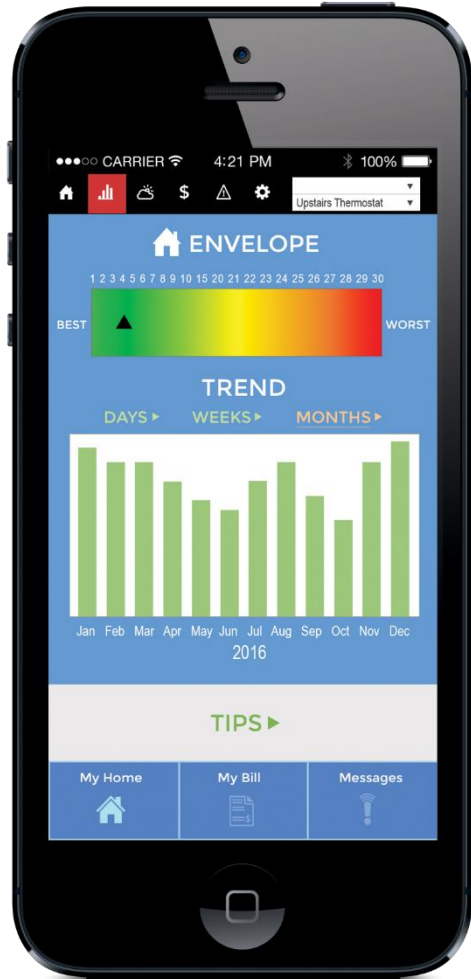


# Personalized, Relevant Information

## Your Home Energy Opportunity Report

Room for Improvement:	Little Much	★★★★★	Explanation	Potential Savings
 <b>Thermostat</b>				
Control Range	★		Upgrading your thermostat can produce substantial savings.	\$150
Accuracy	★		The thermostat is holding 2 degrees cooler than the actual air temperature which could be costing as much as \$150.	\$75
Consistency		★★★★	A high performance thermostat will hold a more consistent temperature. Yours is allowing the temperature to vary.	\$224
 <b>HVAC Performance</b>				
Operating SEER		★★	Upgrading to a new, high-efficiency (16 SEER) air conditioner can produce these savings.	\$124
Size Performance		★★★★	Your HVAC system is over-sized. A properly sized unit will run more frequently for longer periods better humidity control.	\$52
 <b>Water Heater</b>				
Hot Water Use		★★★★★	You are using 7% less hot water than your base period, which equates to a savings of about this amount:	\$7
Temperature Setting	★		Lowering your water heater temperature setting saves money.	\$20
 <b>Shell Performance</b>				
Thermal Efficiency		★★★★	Weatherstrip your doors and windows, close drapes to keep sun out, and add insulation to your attic to save money.	\$205
Internal Gains		★★★★	Be sure to turn off unneeded lights and electronics.	\$55
 <b>Behavior</b>				
Holding settings		★★★★★	Holding 78F in the summer and 68F in winter can save money.	\$96
Aggressive DR		★★★★	Savings at full participation estimated at:	\$225
Hot Water Use		★★★★	Using less hot water saves money on energy bills.	\$39

# Personalized, Outbound, Proactive, & Relevant



# In Summary

- **P**ersonalized – Use Video
- **O**utbound – Make it Relevant
- **P**roactive – Show you Care





# questions

Upcoming Apogee Institute 2:00 pm EST Webinars:

**May 4<sup>th</sup>**

Five Lessons for Utilities From Telecom About Managing Pre-Pay

**May 24<sup>th</sup>**

Managing Low Income Customers

