



Top Customer Engagement Tools for Utilities



Our Presenters



Ann Fracas
Director



Cindy Smallwood
Sr. Account Manager



Brenda La
Account Manager



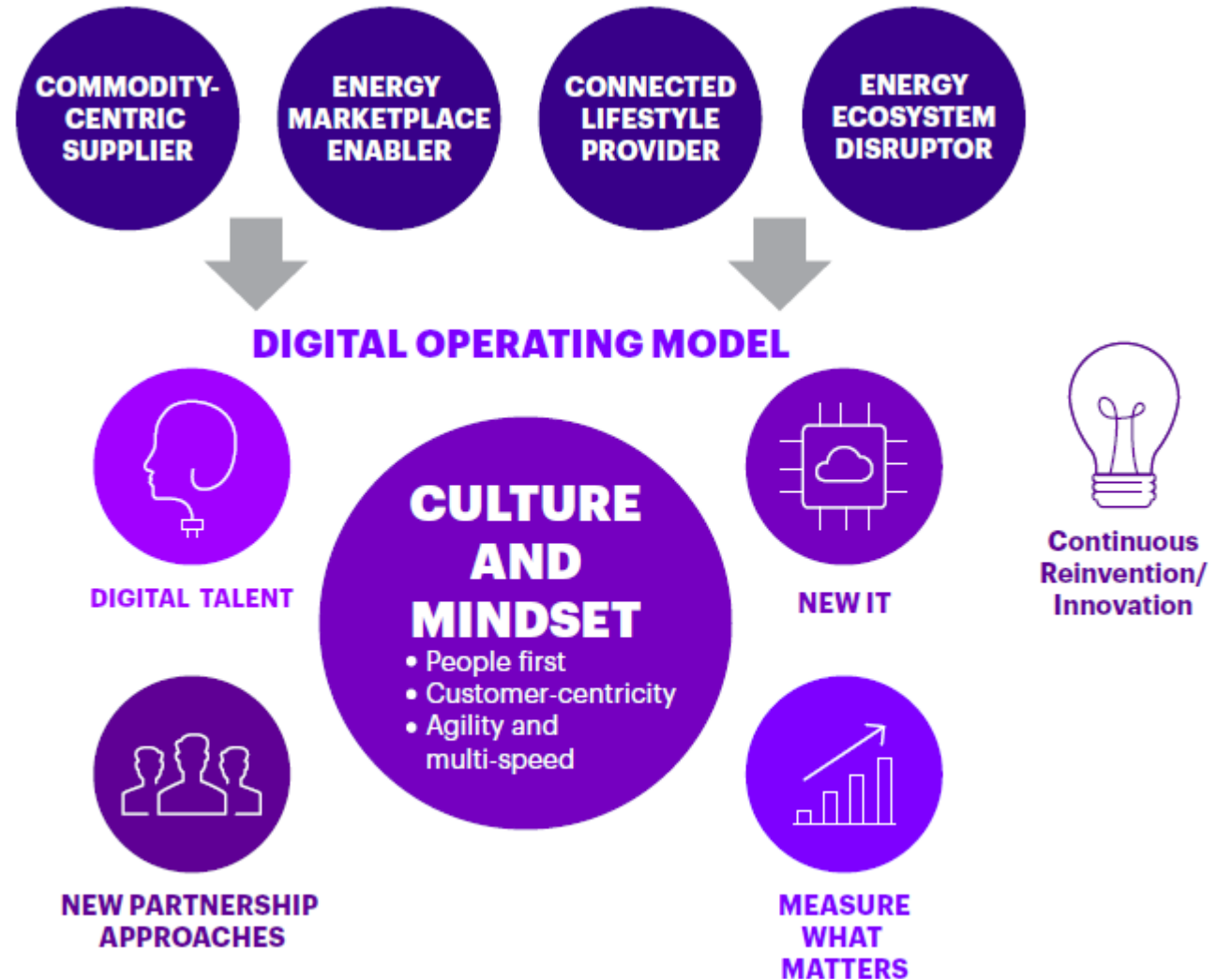
Karen Morris
Marketing

Industry Trends

“A RELENTLESS FOCUS ON THE FUTURE”

Customer expectations are now liquid, and challenging energy providers to keep pace with standards set in other industries. In this era of the digitalization of everything, and of hyper-relevant personalization, a relentless obsession with customers is no longer an option. It's a must.

*Accenture Consulting New Energy Consumer:
New Paths to Operating Agility*



Source: Accenture analysis.

A different way of doing business

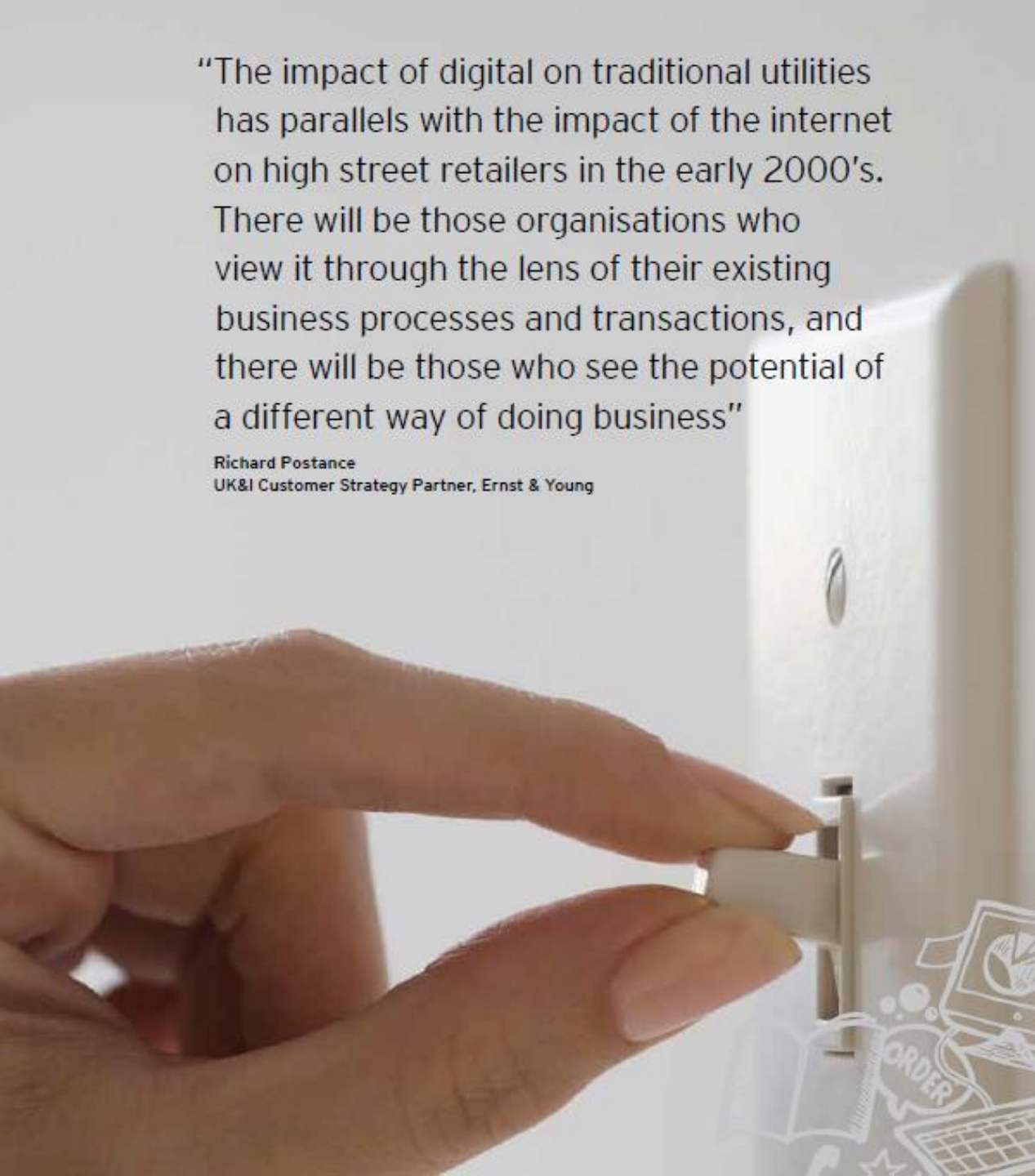
“The impact of digital on traditional utilities has parallels with the impact of the internet on high street retailers in the early 2000’s. There will be those organisations who view it through the lens of their existing business processes and transactions, and there will be those who see the potential of a different way of doing business”

Richard Postance
UK&I Customer Strategy Partner, Ernst & Young

“...digital technology, and the changes in consumer behavior and expectations which accompany it, coupled with increased regulatory pressures, are set to change that business in fundamental ways.

- Utilities have the chance to re-invent themselves
- Energy suppliers need to gain customers confidence
- Community-based customer care, provided through digital technology

Ernst & Young: A different way of doing business: Digital in utilities



Forbes 2018 Trends in Digital Marketing

Relevant to utilities...

True Understanding of the Customer Journey: Using data to understand customers better

Live / Interactive Video: Increase communications channel

Conversational User Interfaces: Amazon Alexa... changing way we interact with customers – Google – 20% of Searches are Mobile Voice

Video Marketing: “ Video is becoming the most popular and influential form of digital content” ... “if done right.” *(Mark Zuckerberg, Video is a Mega Trend” likely to be 82% of internet traffic by 2020)*

Personalization: Attention is currency. Non personalized marketing is going the way of the fax machine

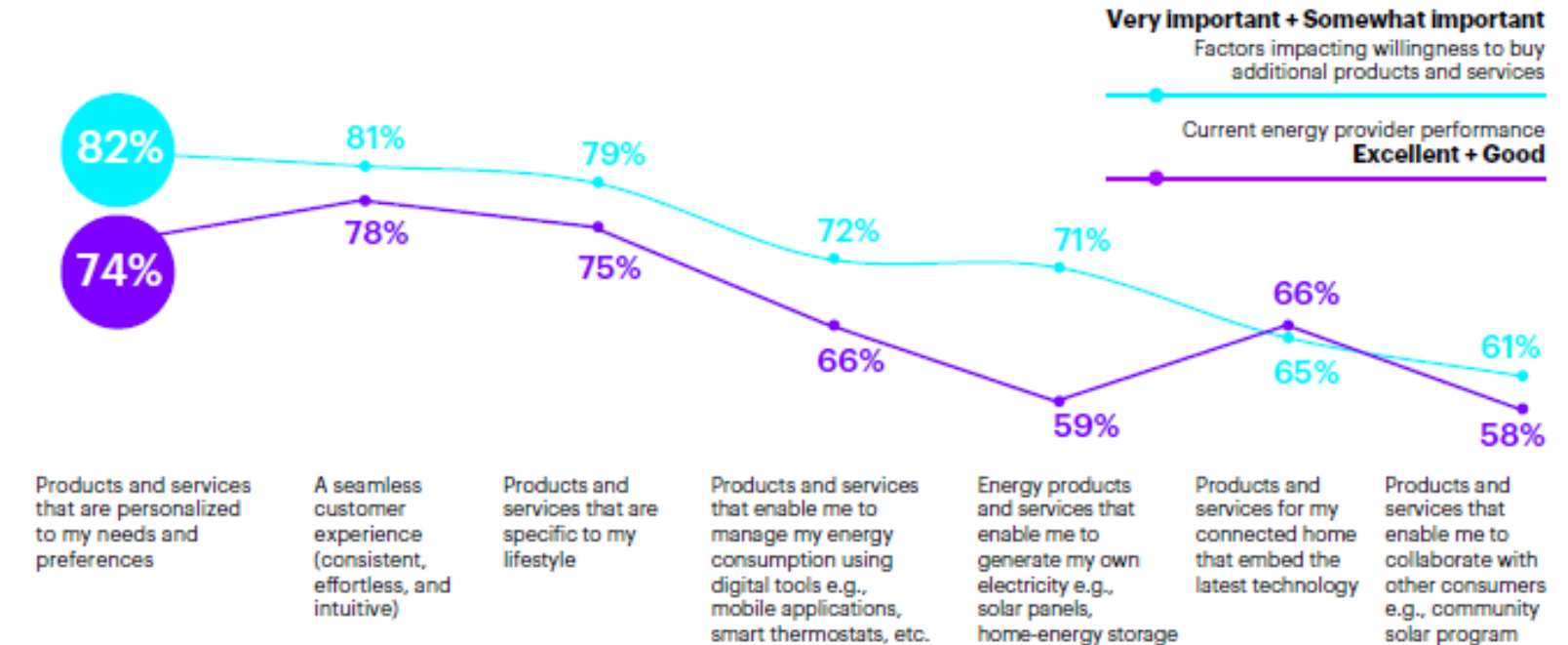
Predictive Algorithms: AI, Machine Learning



Dec. 18, 2017 Forbes: How Digital Marketing Will Change in 2018: 15 Top Trends

Encourage Digital Engagement

- Get personal
- Delight customers
- Use gamification
- Embrace innovation
- Make it easy
- Educate customers
- Train agents



Base: All respondents.

Source: The New Energy Consumer research program, 2017 consumer survey.

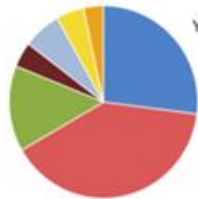
Get Personal

Your 2016 Year-End Summary

Dear Barbara Berry,

As a registered attendee of the 2016 EMACS Conference, Apogee Interactive has prepared this customized energy summary report for you. Email info@apogee.net to learn more about how Apogee Interactive provides advanced tools that help utilities engage residential and commercial customers.

Here's where your energy dollars are going:



Your Annual Electric Cost

- Cooling: 27.0%
- Heating: 39.7%
- Water Heating: 14.4%
- Cooking: 4.2%
- Refrigeration: 6.5%
- Lighting: 4.8%
- Appliances: 3.4%



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.
- 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

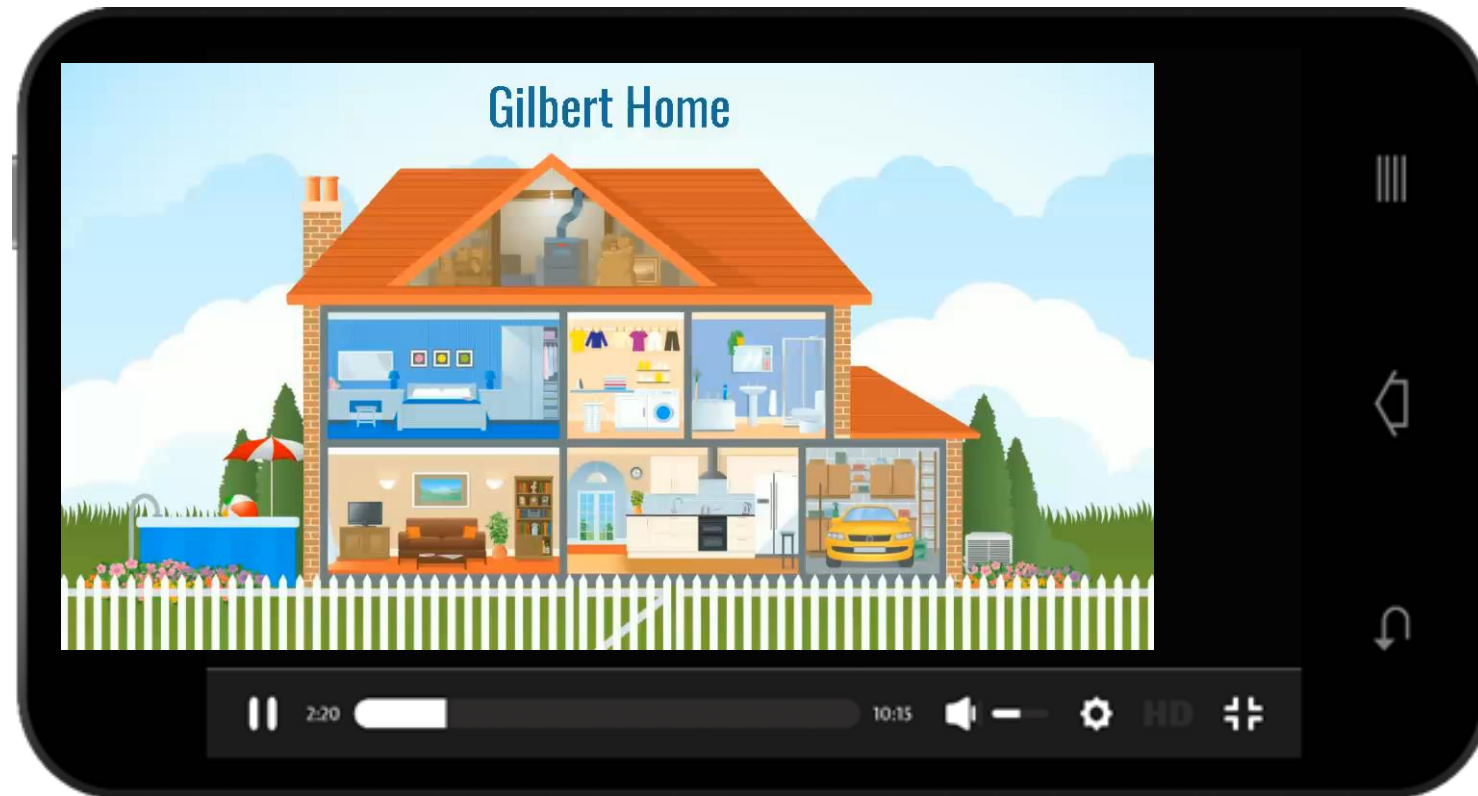
Self-Service Energy Survey

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

CONDUCT SURVEY

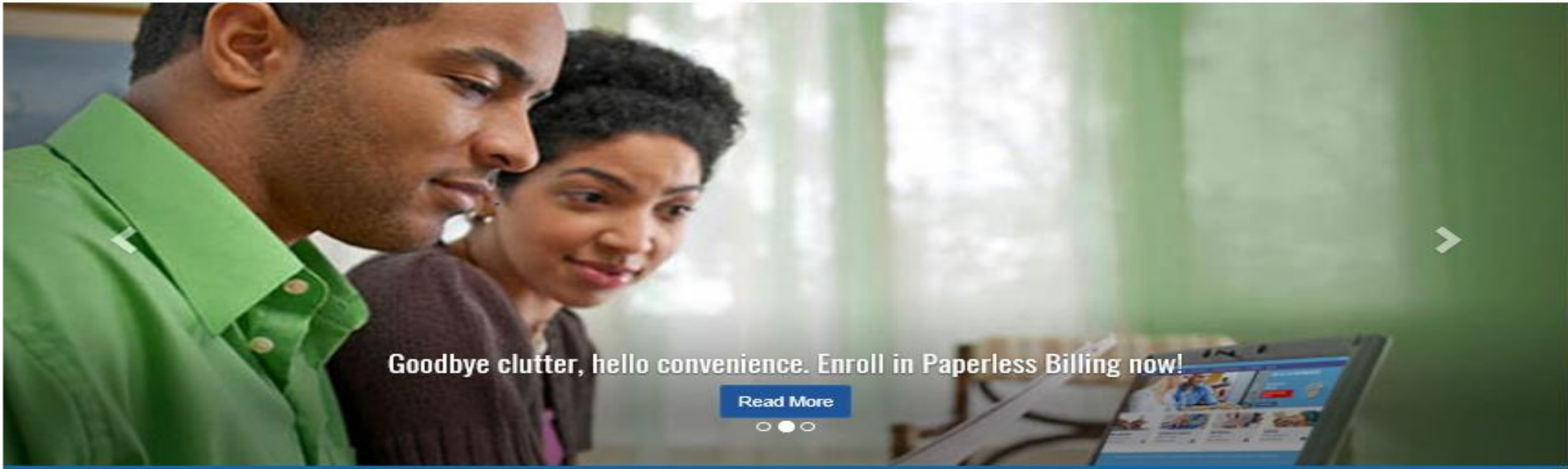
✓ Satisfaction Up 16%

✓ = 100 pts. JD Power



Get Personal

[BILLS AND PAYMENTS](#) [YOUR ACCOUNT](#) [OUTAGES AND SAFETY](#) [YOUR PROFILE](#) [MESSAGE CENTER](#)



BILLS & PAYMENTS

[UNDERSTAND MY ENERGY USE](#)



Your Balance: \$141.79

[EXPLAIN MY BILL](#)

[PAY YOUR BILL ▶](#)



YOUR ACCOUNT

Start or Stop Service

Update Bank Info



OUTAGES & SAFETY

Report an Outage

Safety information



YOUR PROFILE

CORINNE DISLER

cdisler55@yahoo.com



MESSAGE CENTER

Unread message(s): 0

View all messages



EXPLAIN MY BILL



46% Open Rates

30% Click-through

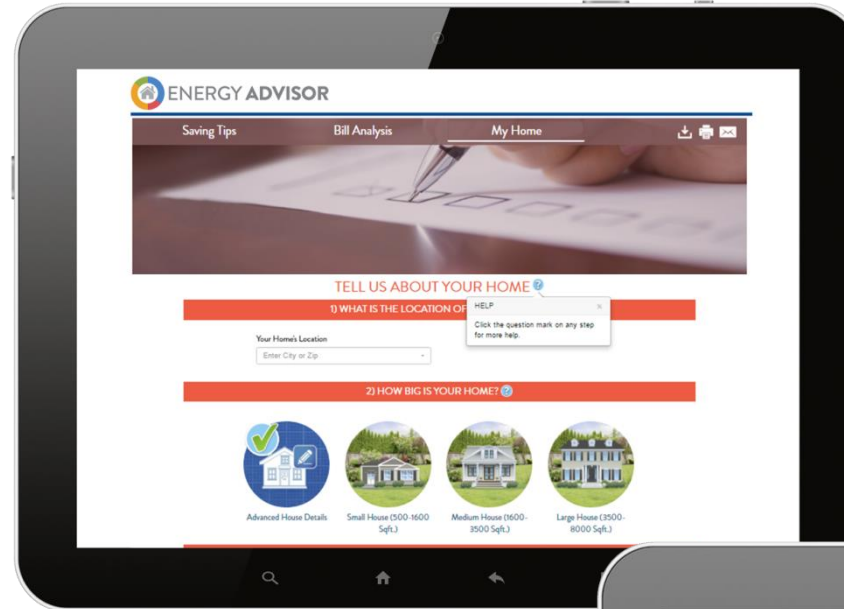
99% Positive feedback



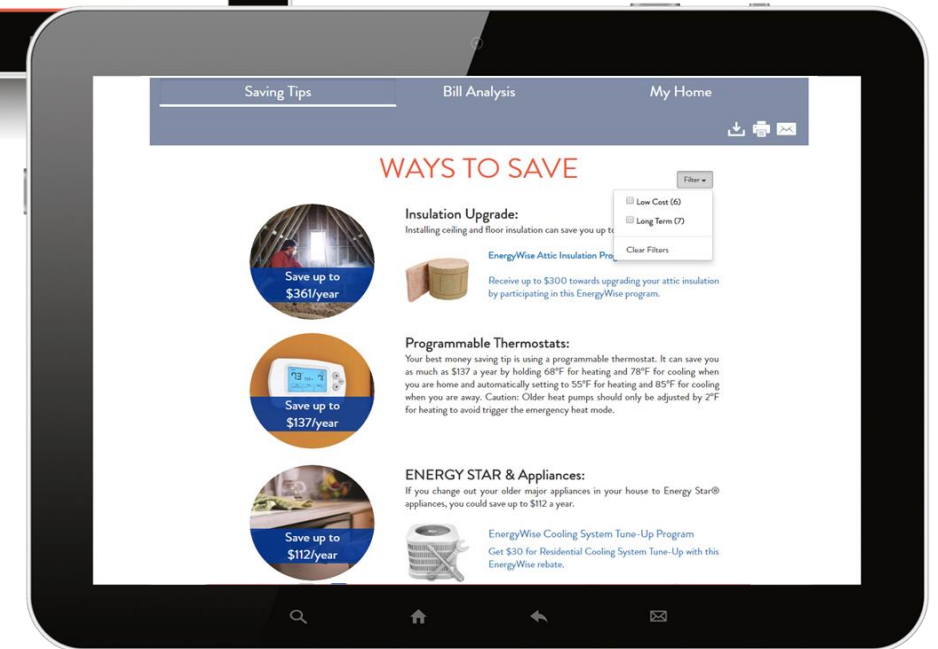
ENERGY ADVISOR

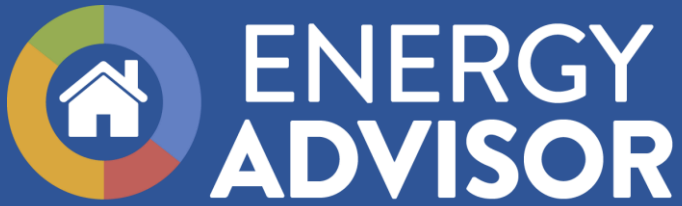
- Mobile friendly
- Captures Profile Info
- Enables Relevant Messaging
- Facilitates Target Marketing
- Dollarized energy-saving recommendations
- Links to your programs, resulting in...

UNDERSTAND MY ENERGY USE



5x
increase in
program participation





Provides Home Rating
Forecasts Weather
Predicts Energy Cost...
While time to impact bill

HOME EFFICIENCY RATING

POOR AVERAGE GREAT

Explain how my rating is calculated

ATLANTA, GEORGIA

WEEKLY ENERGY FORECAST

TODAY
57/54 °F

\$26

ENERGY FORECAST - ELECTRIC COST

YOUR PROJECTED ELECTRIC COST FOR THIS WEEK IS \$51

THE HOT WEATHER IN LAKELAND, FL IS CAUSING A LARGE PORTION OF THE COST.

CURRENT WEATHER

LAKELAND, FL
97°/75°
ELECTRIC COST: \$6

THIS WEEK'S FORECASTED ELECTRIC COST*

\$51

*Costs are estimates based on your home's profile and the current forecast.

WEEKLY FORECAST

Day	Temp	Electric Cost
Fri, Aug 12	91°/75°	\$7
Sat, Aug 13	92°/74°	\$7
Sun, Aug 14	91°/75°	\$7
Mon, Aug 15	90°/74°	\$7
Tue, Aug 16	89°/73°	\$6
Wed, Aug 17	86°/73°	\$11

Congratulations!

You have successfully conducted an online audit of your home. This personal summary report is based upon your unique evaluation. It estimates your electricity and fuel usage during the past year based on how you described your home in the home profile, your actual weather, and your utility's rates.

Summary of Your Home Inputs

Home	Home Type:	Medium House (1600-3500 Sqft.)
Occupants	People in the home:	4
Cars	Gas / Diesel	Miles Per Day Miles Per Gallon
	Electric	Miles Per Day Percent Charge
Insulation	Insulation Type:	Some Insulation
Heating and Cooling	Heating and Cooling Type:	Heat Pump
Comfort Settings	Heat Setting: Cool Setting:	71°F 73°F
Water Heater	Water Heater Type:	Electric Water Heater
Appliances	Refrigerators:	1
	Freezers:	1
	Clothes Washer:	Electric
	Clothes Dryer:	Electric
	Cooking Type:	Electric
	Dishwasher:	Electric
OxConcentrator		1
Lighting	Lighting Type:	Mix of CFL/LED and conventional
Pools & Hot Tubs	Pool:	Yes
	Pool Heated By:	Heat Pump
	Hot Tub:	No

Your Personal Savings Tips

Programmable Thermostats:

Your best money saving tip is using a programmable/SMART thermostat. It can save you as much as \$501 a year by holding 68°F for heating and 78°F for cooling when you are home and automatically setting to 55°F for heating and 85°F for cooling when you are away. Caution: Older heat pumps should only be adjusted by 2°F for heating to avoid triggering the emergency heat mode.

Save Up To
\$501
per year

Cooling Setting:

If you raise your cooling setting from 73°F to 78°F, you could save as much as \$409 per year.

Save Up To
\$409
per year

Insulation Upgrade:

Installing ceiling and floor insulation can save you up to \$264 a year.

Save Up To
\$264
per year

Cooling System Upgrade:

Replacing your cooling system with a new high efficiency heat pump can save you up to \$110 a year.

Save Up To
\$110
per year

Heating Setting:

If you lower your heating setting from 71°F to 68°F, you could save as much as \$91 per year.

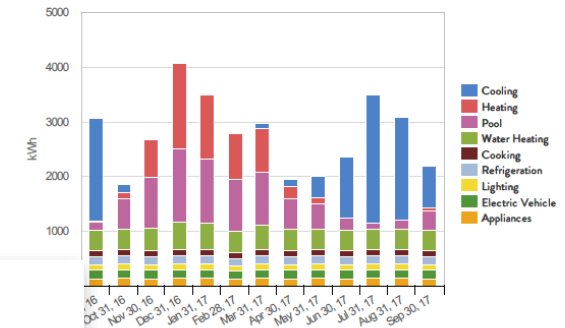
Save Up To
\$91
per year

Heating System Upgrade:

Replacing your heating system with a new high efficiency heat pump can

Save Up To

Your Monthly Estimated Electric Use by End-Use



Monthly Electric Use

Avg. Temp	Days	Cooling	Heating	Refrig.	Lights	ElectricVehicle	Cooking/ Dishwasher	Water Heating	Laundry	Other Appl.	Pool	Total
71.1F	30	785	49	153	94	160	120	372	104	12	352	2899
76.6F	31	1903	0	159	97	165	124	380	107	12	158	3105
78.2F	31	2365	0	159	97	165	124	380	107	12	106	3534
74.2F	30	1122	0	153	94	160	120	368	104	12	238	2370
68.5F	31	394	96	159	97	165	124	387	107	12	461	2002
65.0F	30	153	208	153	94	160	120	384	104	12	574	1960
55.1F	31	83	807	159	97	165	124	446	107	12	974	2973
52.9F	28	0	841	143	88	149	112	391	97	11	955	2786
49.5F	31	0	1887	159	97	165	124	476	107	12	1184	3930
45.1F	31	0	1547	159	97	165	124	504	107	12	1353	4068
55.7F	30	0	700	15								
66.4F	31	142	118	15								
76.5F	30	1883	9	15								
		365	6947	5554	188							

Electric Bill Comparison

Electric Difference from Last Month

Usage Summary:
The September 2017 usage was about 906 kWh lower than the August 2017 period.

Cost Summary:
The September 2017 costs were about \$72 lower than the August 2017 period.

Weather Summary:
The average temperature for September 2017 was 5.5 degrees colder than August 2017.

Weather And Bill Cycle Impact:
The combined effect of 5.5°F lower temperature and 1 days shorter saved \$71 and 882 kWh.

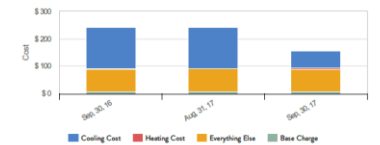
Electric Difference from Last Year

Usage Summary:
The September 2017 usage was about 860 kWh lower than the September 2016 period.

Cost Summary:
The September 2017 costs were about \$69 lower than the September 2016 period.

Weather Summary:
The average temperature for September 2017 was 5.4 degrees colder than September 2016.

Weather Impact:
5.4°F lower temperature, saved about \$69 and 859 kWh.




	Last Year 09/30/16	Last Month 08/31/17	Current 09/30/17
Avg. Temp	76.5°F	76.6°F	71.1°F
Cost	\$254	\$258	\$185
Days of Service	30	31	30

This application uses your local weather and energy rates. This is only an estimate of your actual energy use.

Delight Customers

Like Tweet +1 Share

Pay Your Bill Save Energy Power Outages About Us



be energy smart!

Knowledge is power - use your energy wisely

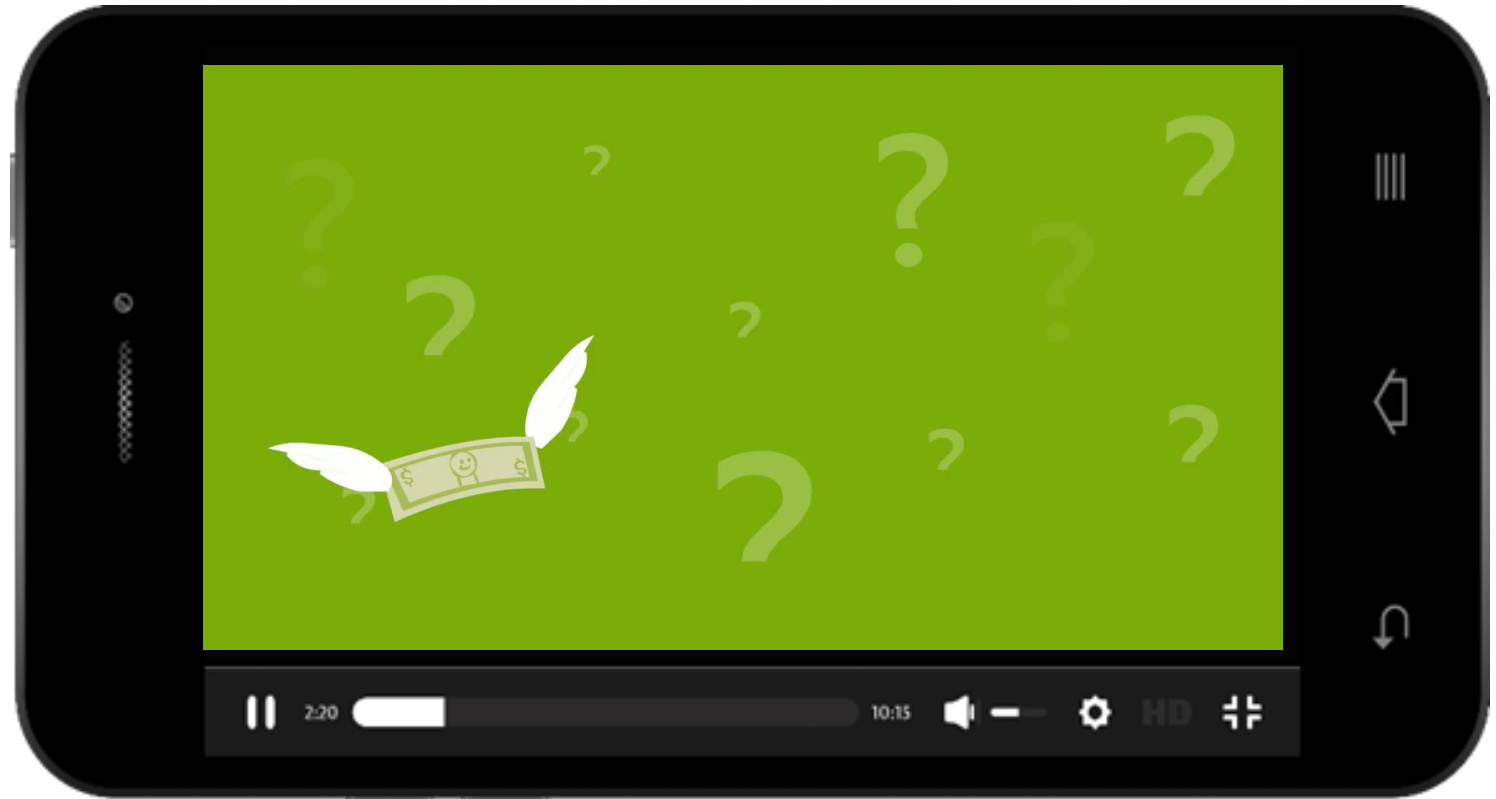
Have you ever wondered what impacts your energy use at home the most? Or what changes might impact your electric bill?

Check out this short video so you can see for yourself. Find out more in our Online Home Energy Audit along with other energy-saving tips that can help you use energy wisely.

[View Now](#)

Like this e-News Update? Share it [Like](#) [Tweet](#)

What topics would you like to see in future updates? Email suggestions to [WeCare](#).



Like Tweet +1 Share

Pay Your Bill Save Energy Power Outages About Us



Knowledge is power - use your energy wisely

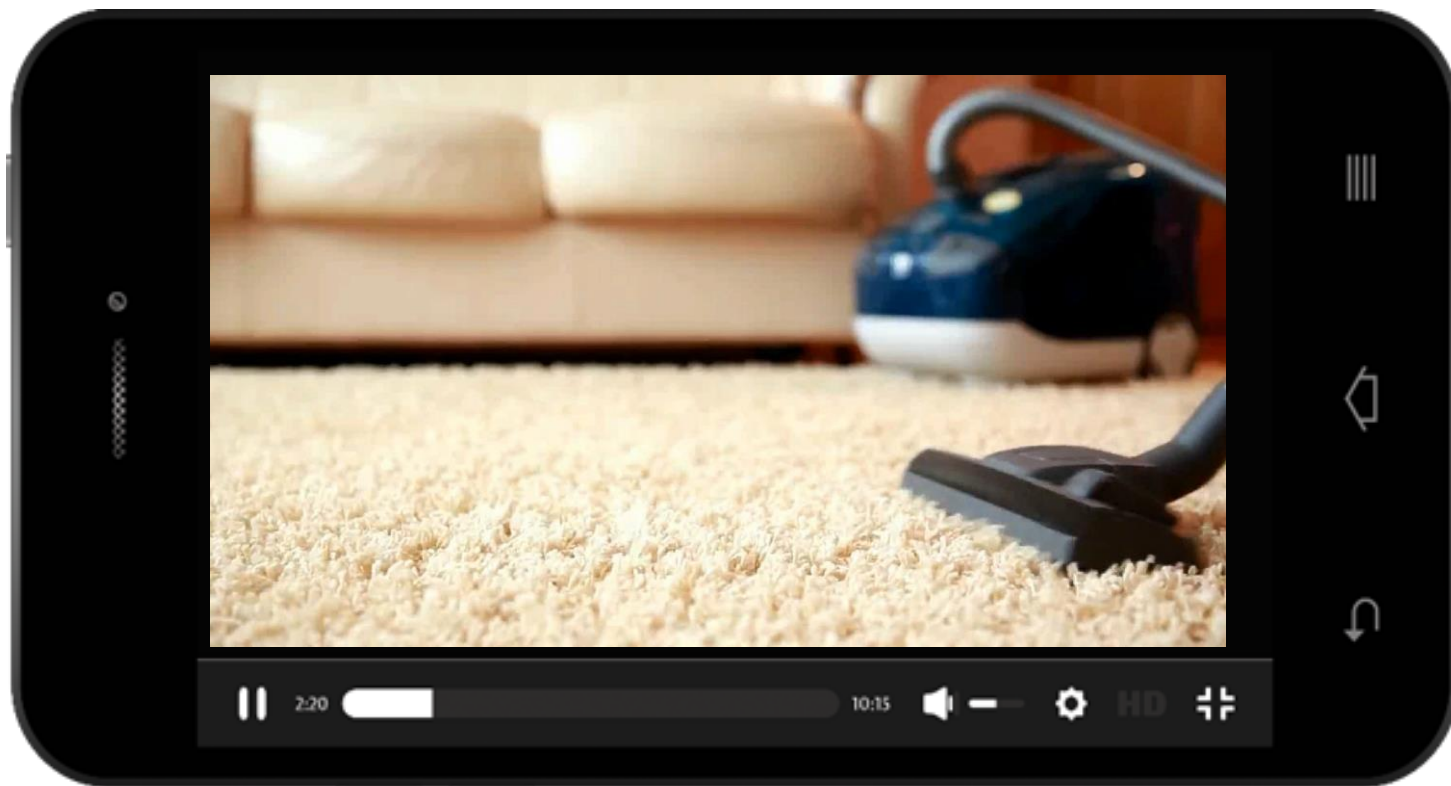
Have you ever wondered what it costs to power your ceiling fan, refrigerator or flat screen TV? Or how much it costs to leave a light on in an unoccupied room?

Check out this short video and appliance calculator so you can see for yourself. Find out more in our Online Home Energy Audit along with other energy-saving tips that can help you use energy wisely.

View Now

Like this e-News Update? Share it Like Tweet

What topics would you like to see in future updates? Email suggestions to [WeCare](#).



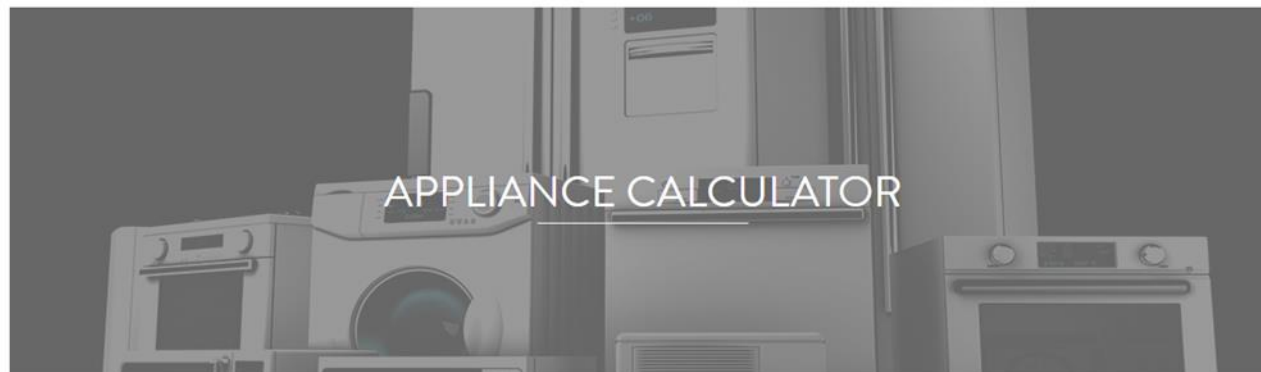


Knowledge is power - use your energy wisely

Have you ever wondered what it costs to power your ceiling fan, refrigerator or flat screen TV? Or how much it costs to leave a light on in an unoccupied room?

Check out this short video and appliance calculator so you can see for yourself. Find out more in our Online Home Energy Audit along with other energy-saving tips that can help you use energy wisely.

View Now



TOTAL

Total Annual kWh:	Total Annual Cost:
952	\$75

COMPONENTS

Television	Annual kWh: 497	Annual Cost: \$40	>																				
Kitchen	Annual kWh: 79	Annual Cost: \$7	>																				
Refrigerator	Annual kWh: 0	Annual Cost: \$0	>																				
Utility Room	Annual kWh: 0	Annual Cost: \$0	>																				
Living Room	Annual kWh: 376	Annual Cost: \$28	∨																				
<table border="0"> <tr> <td>Number</td> <td>Select Components</td> <td>Hrs/Day Weekdays</td> <td>Hrs/Day Weekends</td> <td>Annual kWh</td> <td>Annual Cost</td> </tr> <tr> <td>- 1 +</td> <td>Stereo</td> <td>- 4 +</td> <td>- 0 +</td> <td>157</td> <td>\$12</td> </tr> <tr> <td>- 2 +</td> <td>VCR/DVD</td> <td>- 2 +</td> <td>- 2 +</td> <td>219</td> <td>\$16</td> </tr> </table>	Number	Select Components	Hrs/Day Weekdays	Hrs/Day Weekends	Annual kWh	Annual Cost	- 1 +	Stereo	- 4 +	- 0 +	157	\$12	- 2 +	VCR/DVD	- 2 +	- 2 +	219	\$16					
Number	Select Components	Hrs/Day Weekdays	Hrs/Day Weekends	Annual kWh	Annual Cost																		
- 1 +	Stereo	- 4 +	- 0 +	157	\$12																		
- 2 +	VCR/DVD	- 2 +	- 2 +	219	\$16																		
Bathroom	Annual kWh: 0	Annual Cost: \$0	>																				
Bedroom	Annual kWh: 0	Annual Cost: \$0	>																				
Medical Equipment	Annual kWh: 0	Annual Cost: \$0	>																				
Office	Annual kWh: 0	Annual Cost: \$0	>																				
Heating / Cooling	Annual kWh: 0	Annual Cost: \$0	>																				
Garage	Annual kWh: 0	Annual Cost: \$0	>																				
Outdoors	Annual kWh: 0	Annual Cost: \$0	>																				

Public Service Announcement Videos

- Severe Storm
- Hurricane
- Beat the Peak
- 42 Movies and Growing!



Use Gamification

ELECTRIC VEHICLE

Tell us about your Gas vehicle



Choose Your Plug-in Electric Vehicle



Nissan LEAF

RANGE (MILES): **84** **3.45** MILES PER KWH

Your Results

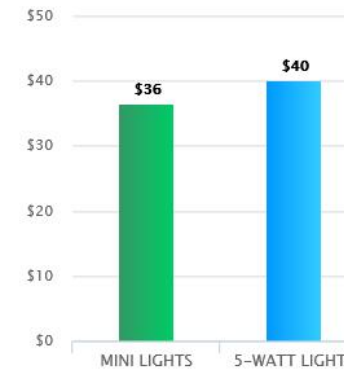
	Monthly Fuel Cost	Pounds of CO2
Current Gas Vehicle	\$129.60	707
New Electricity Cost	\$0.00	360
New Gasoline Cost	\$0.00	0
Monthly Savings	\$129.60	347

SAVING MONEY ON HOLIDAY LIGHTING

Monthly Savings From Converting to LED Lights



- Benefits of L.E.D Lights:
- Longer life (up to 50,000 hrs.)
 - Up to 90% lower electric costs.
 - Safe - very little heat.
 - No burned out bulbs to find.



Please slide the buttons below to select the number of strings of lights for each light type and hours you use per day. The monthly savings change as you adjust the sliders.

Strings of mini lights (100 Bulbs each): **23**

Strings of larger 5-watt lights (25 Bulbs each): **9**

Hours per Day: **10**

UNDERSTAND MY ENERGY USE: Home Profile



TELL US ABOUT YOUR HOME ?

1) WHAT IS THE LOCATION OF YOUR HOME? ?

Your Account Number

2100343

Your Home's Location

Tampa, Florida

2) HOW BIG IS YOUR HOME? ?



Advanced House
Details



Small House (500-
1600 Sqft.)



Medium House (1600-
3500 Sqft.)



Large House (3500-
8000 Sqft.)

Do you own your home?

No

3) HOW MANY PEOPLE LIVE IN YOUR HOME? ?



Num.
Occupants:

3

4) HOW MUCH INSULATION DO YOU HAVE? ?



The EMPOWER PLATFORM

Keys to Engagement:



Personalized



Outbound

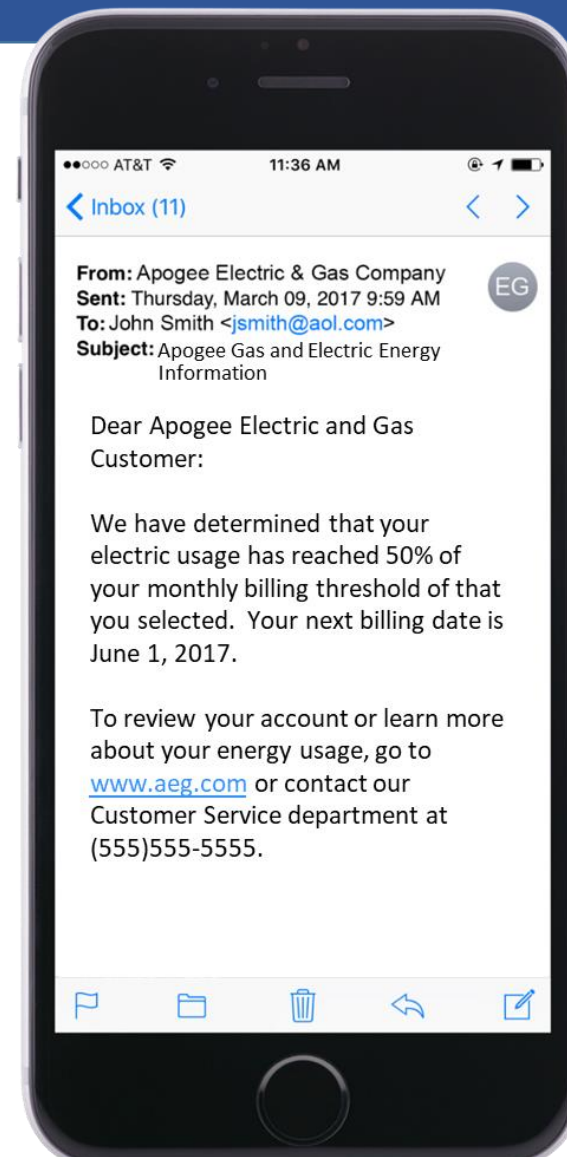
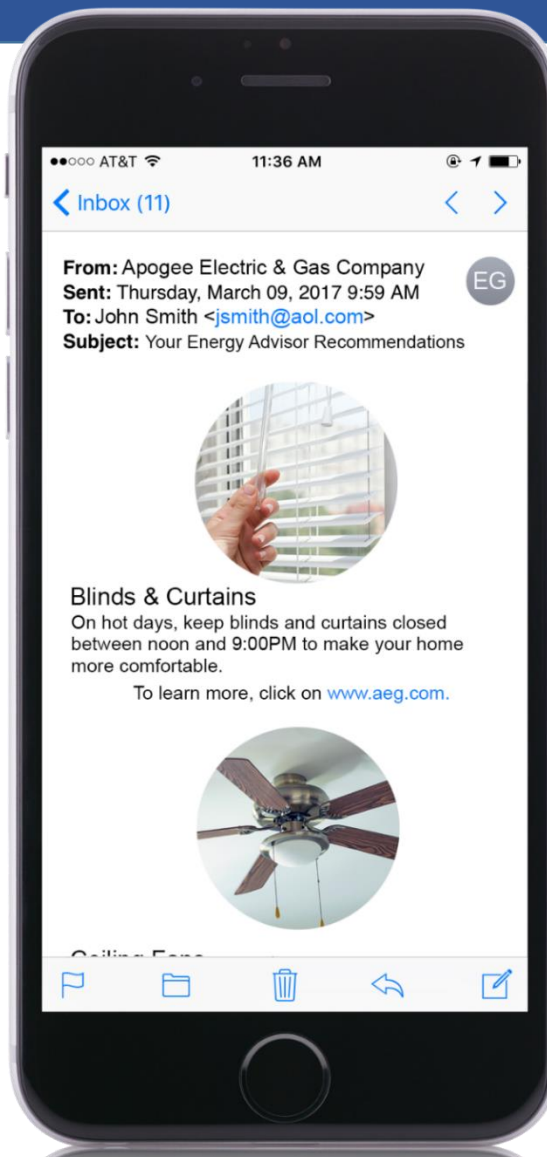
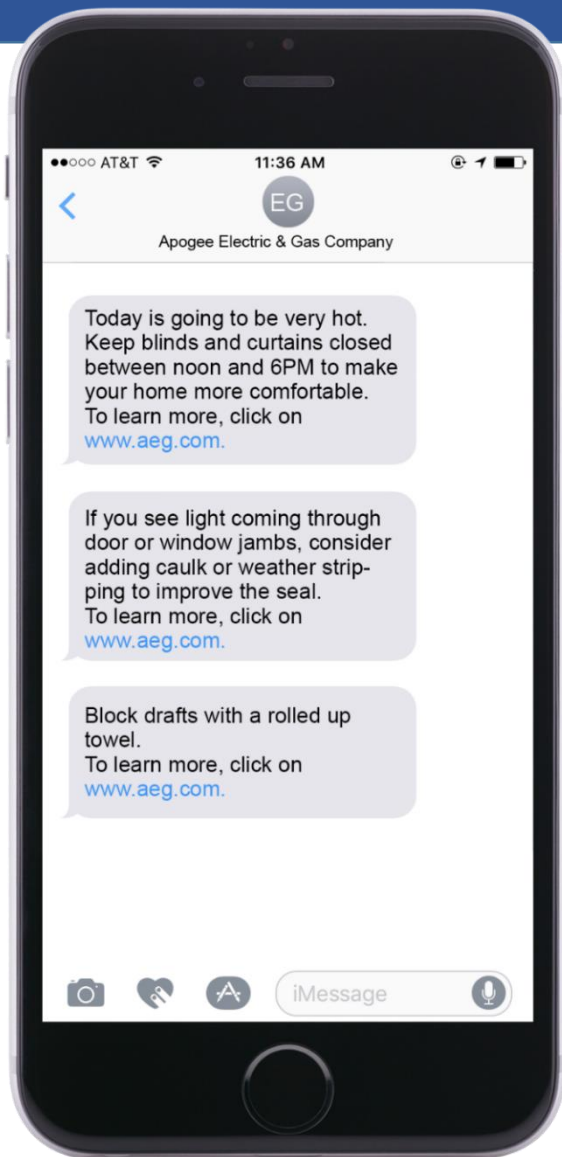


Proactive

Game-like interface
generates profiles
and powers energy
analysis

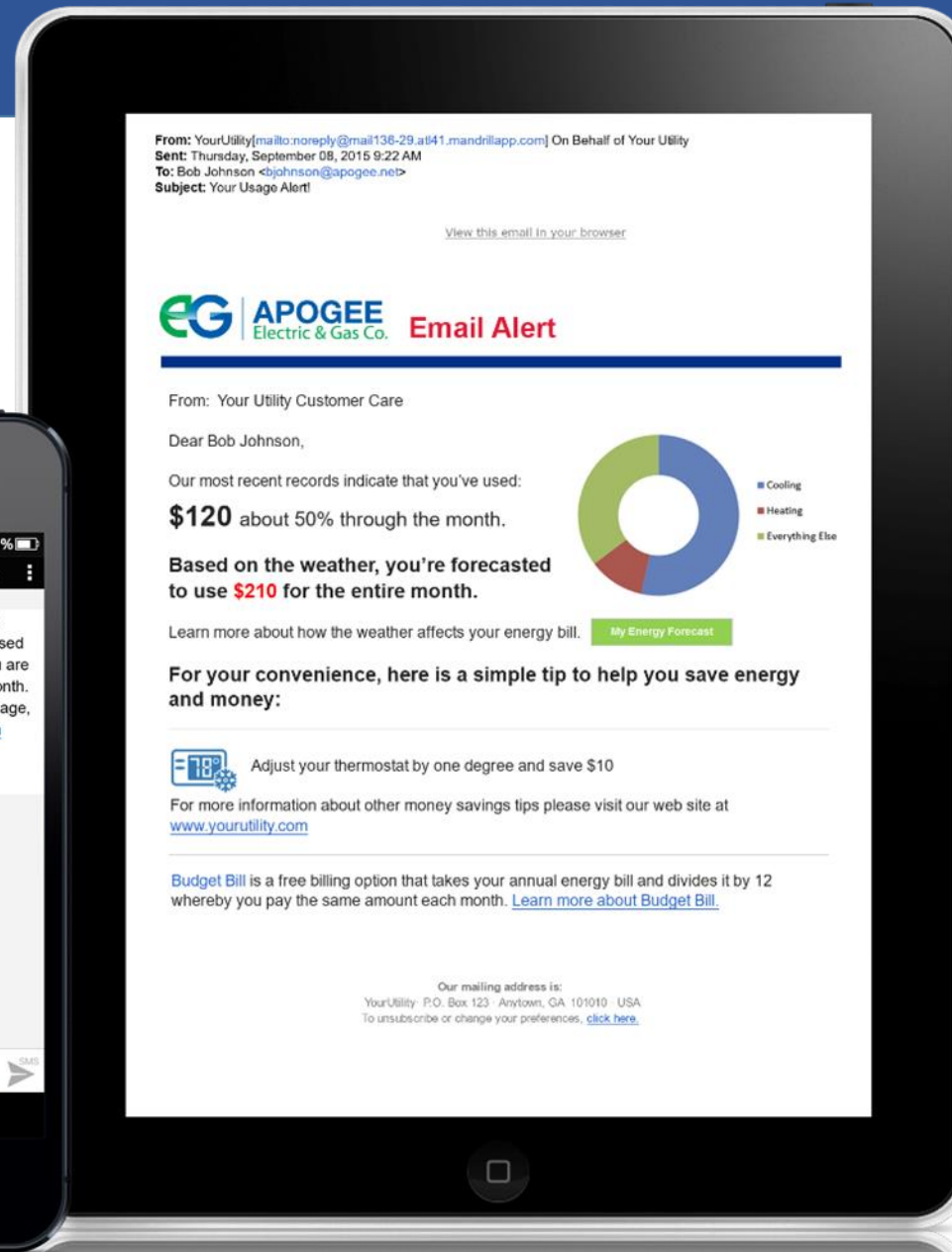
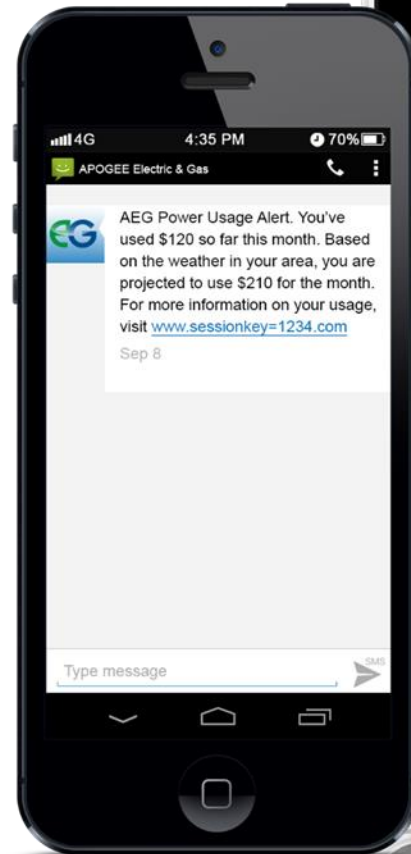


Embrace Innovation



Make it easy

- ✓ Mid-cycle or Threshold
- ✓ Text or e-mail
- ✓ Uses weather and energy use patterns to forecast bill amounts



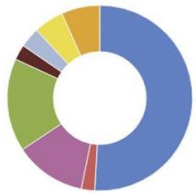
Educate customers



Electric Analysis

Cost Usage

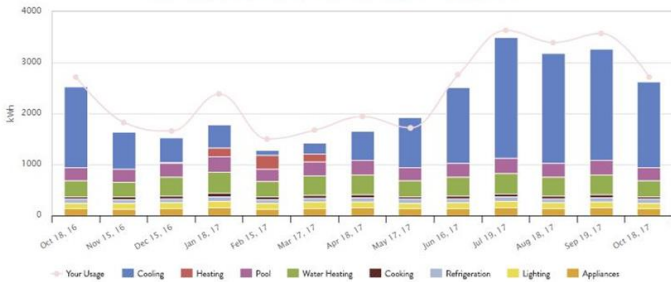
YOUR ANNUAL ELECTRIC USAGE BREAKDOWN



Cooling: 50%
Heating: 2%
Pool: 12%
Water Heating: 16%
Cooking: 3%
Refrigeration: 4%
Lighting: 6%
Appliances: 7%

Show Annual Usage Table

YOUR MONTHLY ELECTRIC USAGE BREAKDOWN

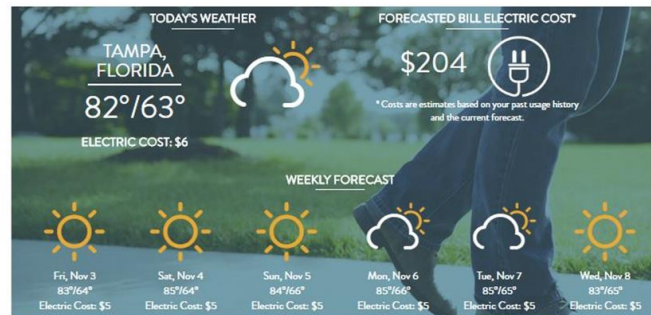
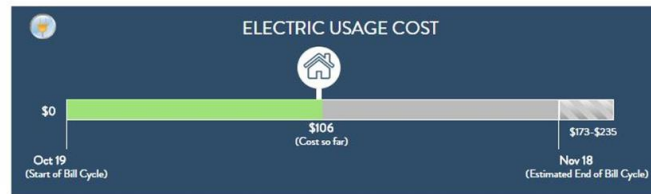


Show Monthly Usage Chart



ENERGY FORECAST - ELECTRIC COST

YOUR PROJECTED ELECTRIC COST FOR YOUR CURRENT BILLING CYCLE IS \$173-\$235



WAYS TO SAVE



Insulation Upgrade:

Installing ceiling and floor insulation can save you up to \$361/year.



EnergyWise Attic Insulation Program

Receive up to \$300 towards upgrading your attic insulation by participating in this EnergyWise program.



Programmable Thermostats:

Your best money saving tip is using a programmable thermostat. It can save you as much as \$137 a year by holding 68°F for heating and 78°F for cooling when you are home and automatically setting to 55°F for heating and 85°F for cooling when you are away. Caution: Older heat pumps should only be adjusted by 2°F for heating to avoid trigger the emergency heat mode.



ENERGY STAR & Appliances:

If you change out your older major appliances in your house to Energy Star® appliances, you could save up to \$112 a year.



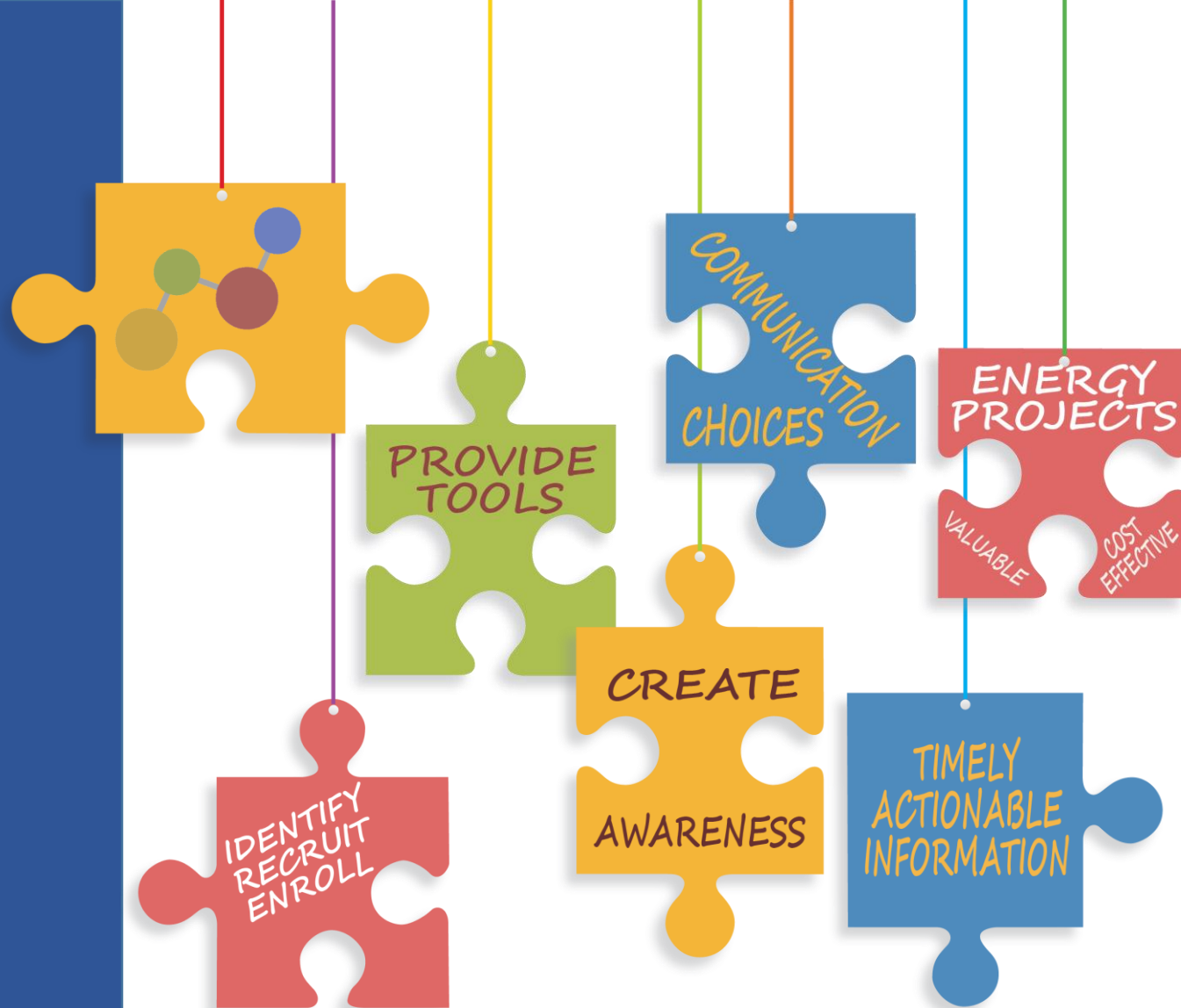
EnergyWise Cooling System Tune-Up Program
Get \$30 for Residential Cooling System Tune-Up with this EnergyWise rebate.



EPIC

For Hard to Reach Customers

- Addresses needs of income challenged
- Simple to implement turnkey solution
- Stand-alone or existing program enhancement
- Leverages current community programs
- Mobile phone focused



Train agents

Service the Customer with the information they need

Tools for CSRs:

Instant Analysis

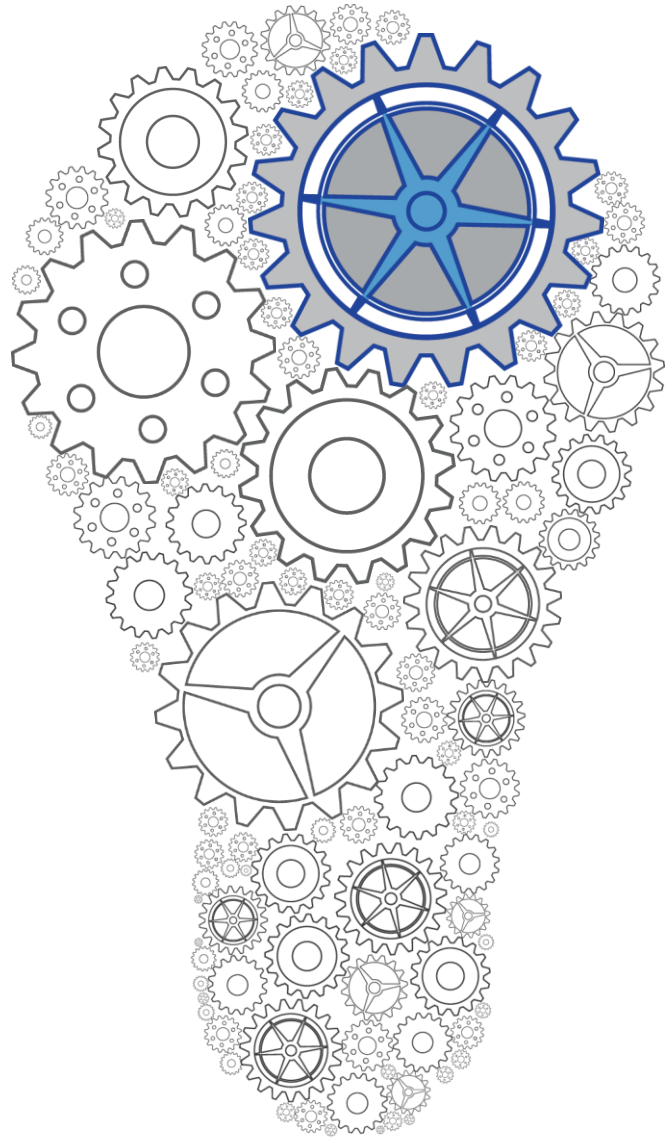
Quick Analysis

Detailed Analysis

✓ Consultative

✓ Trusted Advisor





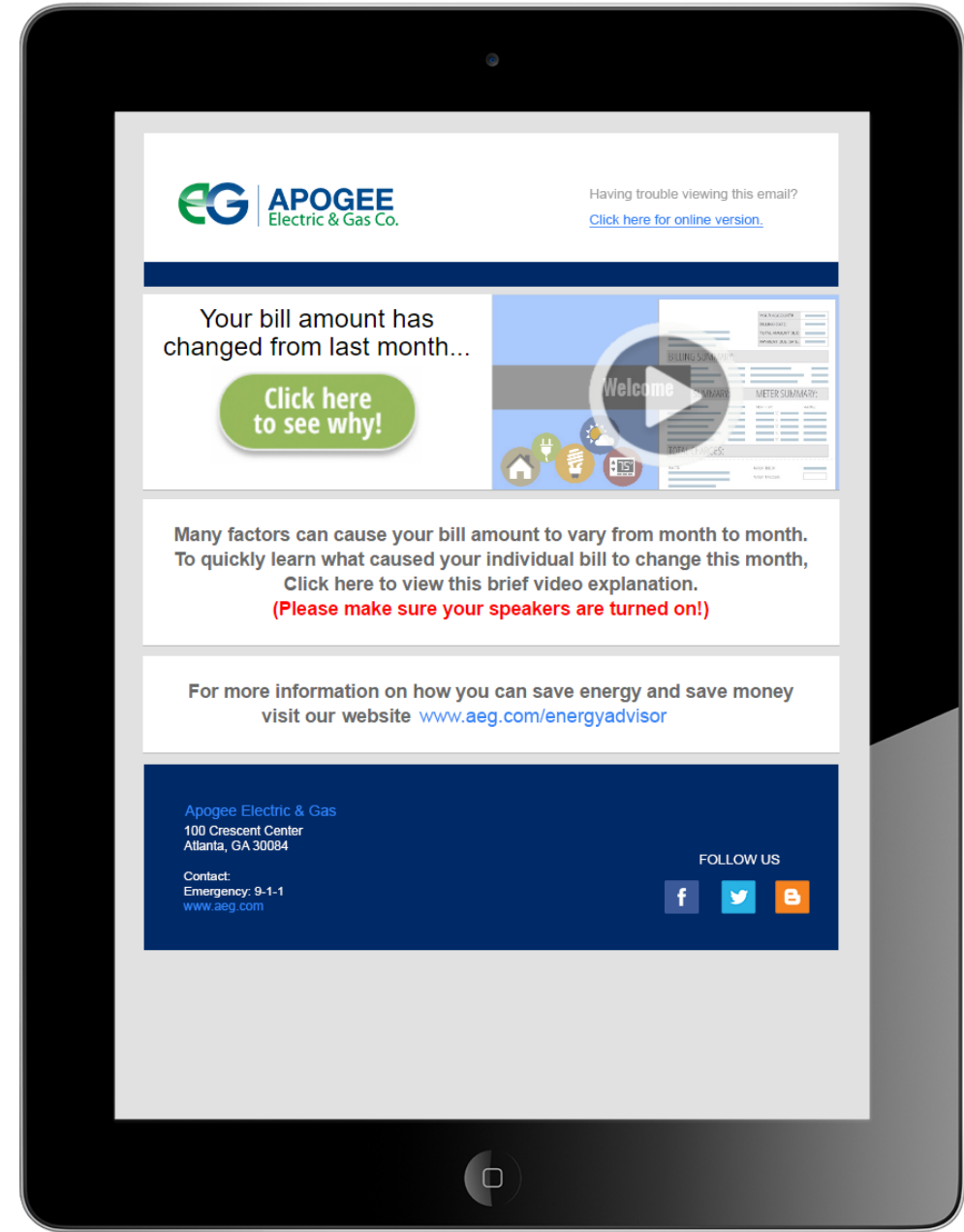
EMPOWER PLATFORM

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

NAVIGANT®

Monthly E-mails

- We customize an ongoing communications campaign
- Specific to your utility and your goals
- Embedded videos add Wow factor



Public Service Announcement Videos

- Severe Storm
- Hurricane
- Beat the Peak
- 42 Movies and Growing!



Special Purpose Calculators

- Attract Attention
- Fun to Use
- Informative
- Drive Programs

- Electric Vehicle
- Solar
- Water Heating
- Paperless Billing
- Space Heating
- Heating Compare
- Heat Pump
- Lighting
- Appliance
- Cooking
- And many more

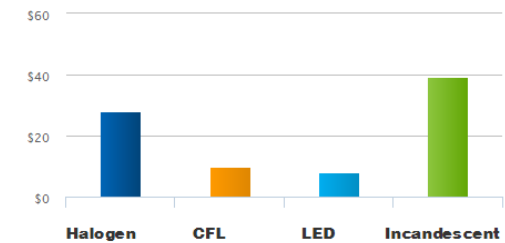


Lighting Savings Calculator

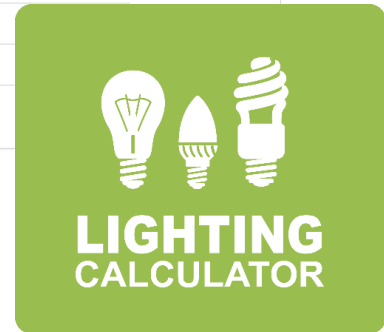
Below are the Inputs to be for this calculation

Select the incandescent wattage 75 Price \$/kWh \$0.120 Number of bulbs 3 Hours per day 4

Lighting Savings and Costs



	Halogen	CFL	LED	Incandescent
Equivalent Watts per bulb	53 W	19 W	15 W	75 W
kWh Savings	96 kWh	245 kWh	262 kWh	
Lbs CO2 Savings	144 lbs	367 lbs	394 lbs	
Annual Savings	\$11	\$29	\$31	



Field Audit Application

- Reduces time on-site
- Involves customer
- Powerful productivity tool for energy auditors
- Creates informative report

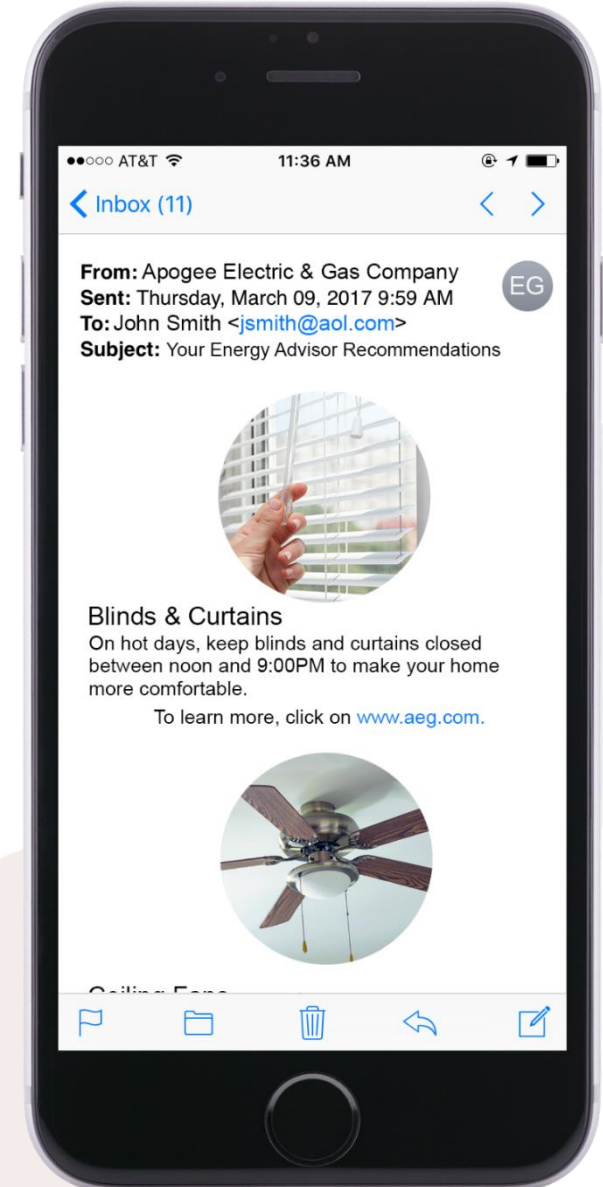
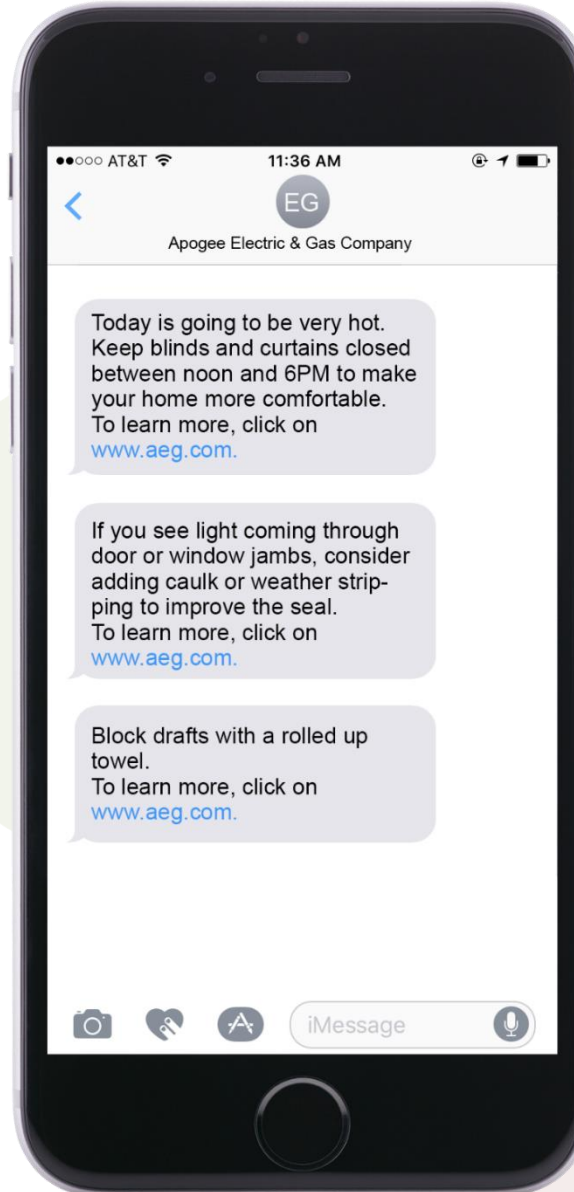


Behavioral Alerts

Text or e-mail

Custom design

Your messages



The Future of Customer Engagement



APOGEE[®]
INTERACTIVE
Your Trusted Partner in Customer Engagement

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