



APOGEE® 2017
Sizzlin' Summer Sessions!

Summer Sessions: Mastering Customer Engagement
June – August, 2017





APOGEE® 2017
Sizzlin' Summer Sessions!

Summer Sessions: Mastering Customer Engagement
June – August, 2017



Mastering Customer Engagement

2:00 – 2:30 PM

June 6th

Empower Engagement Platform

June 8th

Energy Advisor

June 13th

Call Center Solutions

June 15th

Energy Envoy

June 20th

Personal Video Messaging

June 22nd

Energy Alerts

July 18th

Energy Summary Reports

July 25

Energy Forecast

Aug. 1st

Field Audits

Register: www.apogee.net/webinars

Presenter:



Susan Gilbert, CEO

- Co-founded APOGEE Interactive, Inc.
- Devoted to utility success delivering energy education
- Committed to promoting stewardship and responsible energy use
- Leveraging technology for cost effective impacts

A close-up photograph of a woman with dark hair, wearing a light grey blazer, looking down at a white smartphone she is holding with both hands. The background is a bright, out-of-focus indoor setting.

UNLOCKING THE **VALUE** OF CUSTOMER ENGAGEMENT

APOGEE[®]
INTERACTIVE
Your Trusted Partner in Customer Engagement

Our Focus

LONG TERM BENEFITS of ENGAGEMENT

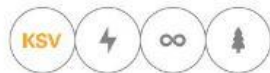
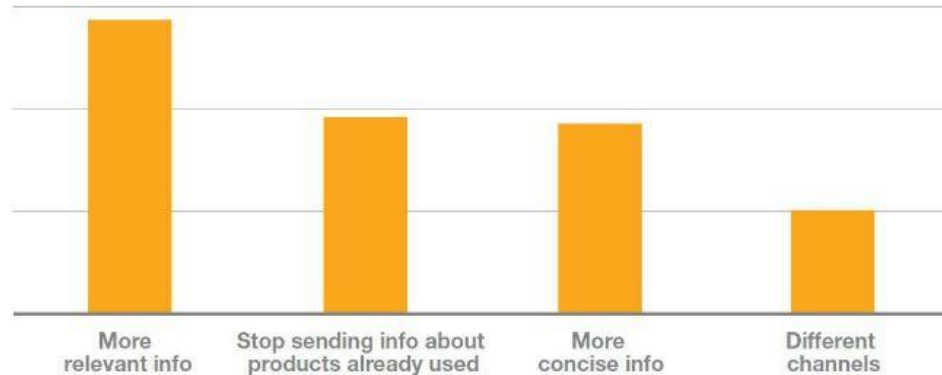


Customer Engagement

Benefits include:

- 👍 Increased customer SAT and trust
- 👍 Customers more likely to buy
- 👍 Cost less to serve

What one thing could utilities do to improve communication



PROPRIETARY & CONFIDENTIAL. COPYRIGHT 2016 KSV

What do customers want?

More *relevant* information!

Source: KSV Marketing



We Enable
POP!

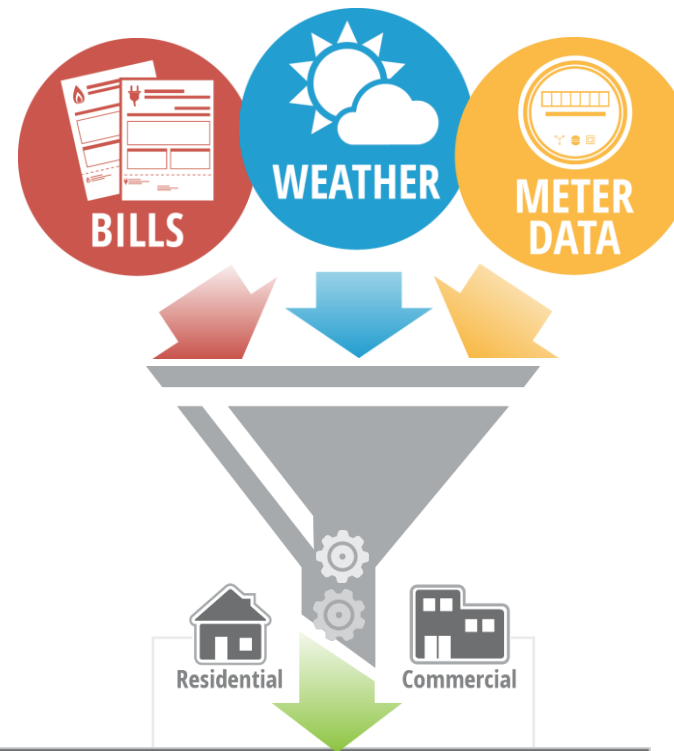
Personalized







Outbound

Proactive

EMPOWER PLATFORM

*Apogee's Comprehensive
Digital Engagement Platform*



DIGITAL ENGAGEMENT PLATFORM					
UTILITY CUSTOMER		UTILITY DEPARTMENT			
					
SELF SERVE	OUTBOUND	MARKETING	POWER DELIVERY	COMMUNICATION	CUSTOMER SERVICE
On-line	Field Audit	EE Target	Operation Efficiency	Social Media	High Bill Resolution
Video	Video	Conversion Target	Surgical DR	CSS	Call Resolution
CSR	Alert	Deemed Benefits	Volunteer Peak Load Reduction	Customer SAT	
IVR / Text	Social Media	Program Promotion		Customer Engagement	
Mobile	Email/Direct Mail				
	School Programs				



How Do We
Engage
Customers?







Borrowed an Old Idea *Proactive & Personal*

American Express 1992

Added Chart in 1996

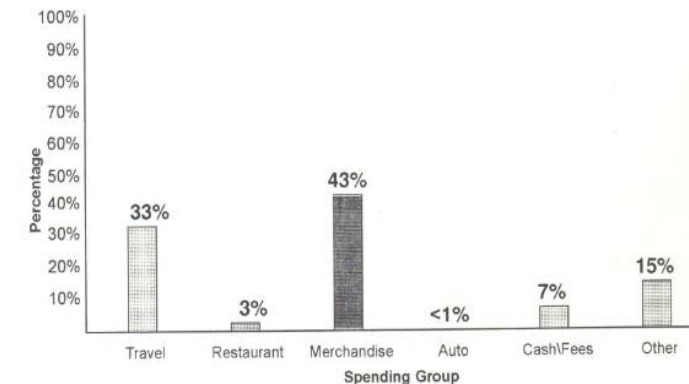
Account Summary

Combined spending of all Cards on the account
SUSAN M GILBERT
ACCOUNT # 3727-861539-23002

							
Groupings	Travel	Restaurant	Merchandise	Auto	Cash/Fees	Other	Total
Key Categories	Airline Car Rental Lodging	Restaurant	Retail Supermarkets Drug Stores	Auto Services Gas	Card Fees Adjustments Cash Advances	Entertainment Health Care Charities	
JANUARY	652.00	-	-6.98	-	-	183.90	828.92
FEBRUARY	727.70	-	187.25	-	25.00	353.90	1,293.85
MARCH	-92.00	66.66	1,997.69	-	-	285.34	2,258.19
APRIL	164.00	249.18	2,169.06	-	-	165.69	2,747.93
MAY	894.00	46.02	526.00	-	-	168.24	1,334.26
JUNE	1,914.00	-	-117.94	-	-	251.86	2,047.92
JULY	559.52	-	394.65	-	-	256.45	1,210.62
AUGUST	-	-	409.93	-	1,210.62	180.03	1,800.58
SEPTEMBER	752.73	90.51	363.95	16.40	-	295.99	1,519.58
OCTOBER	442.00	-	717.48	20.57	-	214.51	1,394.56
NOVEMBER	341.55	-	558.30	-	-	210.49	1,110.34
DECEMBER	154.58	25.73	824.06	-	75.00	189.23	1,268.60
TOTAL	6,210.08	478.10	8,023.45	36.97	1,310.62	2,756.13	18,815.35

Note: Charges posted to your account through December 31, 1998.

YEAR-END SUMMARY Percentage of Spending by Category



SPECIAL PURCHASE ACCOUNTSM

You may be able to extend payment on large purchases using the Card.

The Special Purchase Account gives you an increased measure of flexibility combined with financial control.

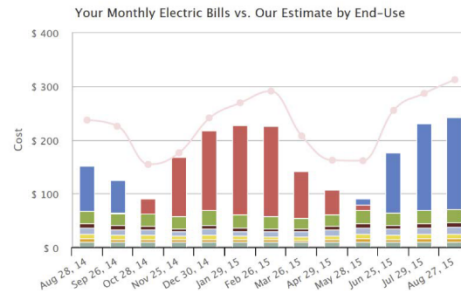
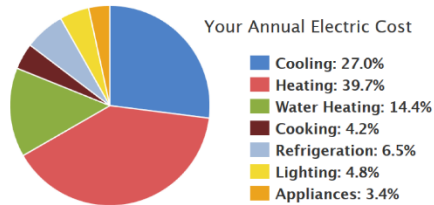
To see if you are eligible, call 1-800-327-2177.

Your Energy Summary Report

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.
- 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.
- 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

Personal

Categorize Spending

Educate

Next?

Every Section Unique to THAT Customer

Summary Reports

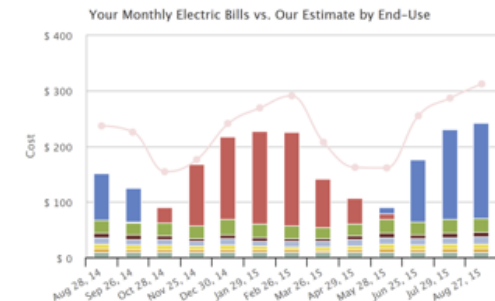
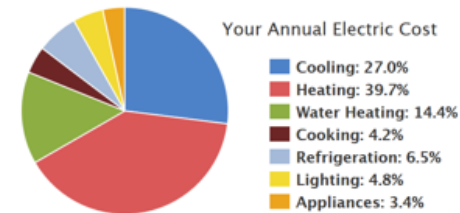
- ✓ Powerful
- ✓ Proactive
- ✓ Personal
- ✓ Mail or eMail
- ✓ Quarterly/Annually
- ✓ Bumped Satisfaction 16%
- ✓ = 100 pts. JD Power

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.

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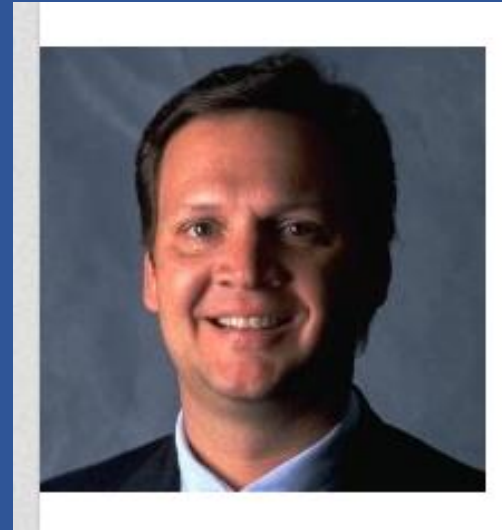
[LOGIN NOW](#)

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”

Learn from the Leaders

My Card

Stores I Visit

My Point Balance

Special Offers



Susan Gilbert
Account ending in - 27003

Log In



Amex Offers for Susan

Discover the latest offers and make membership even more rewarding. Enroll your Card in the offers below to get started.

2X MEMBERSHIP REWARDS® POINTS



GET ONE ADDITIONAL MEMBERSHIP REWARDS® POINT FOR EACH DOLLAR YOU SPEND

Instant Refresh

Update your wardrobe, refill your makeup bag, perk up your home, all at one store. Get 1 additional Membership Rewards point per dollar spent on online purchases made using your eligible, enrolled Card at Macys.com by 12/31/17. See below for terms, eligibility and exclusions.

Offer available online only. See complete offer terms below.

Get Offer

436,921 MEMBERS GOT IT

167 DAYS LEFT

2X MEMBERSHIP REWARDS® POINTS



GET ONE ADDITIONAL MEMBERSHIP REWARDS® POINT FOR EACH DOLLAR YOU SPEND

Who are YOU
digitally
engaged with?

HI SUSAN

POINTS : 5,870

TIER : BLUE


Hilton
HONORS

account login

just for you

check out our partner offers


31,000 Hilton Honors Points
+ 12 wines for \$79.99



VINESSE

learn more


new! earn up to 5,000 Hilton
Honors Points on car rentals



Alamo Enterprise National

learn more

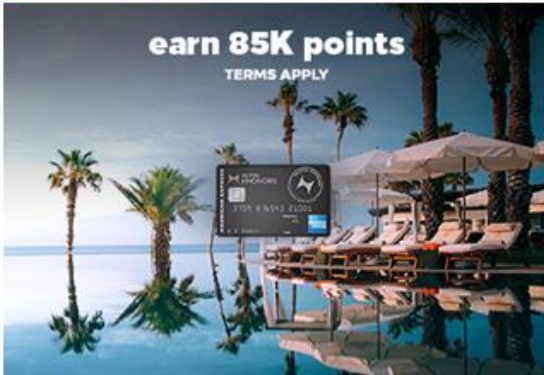
join, dine & earn
1,000 Hilton Honors Points



Hilton
HONORS DINING

earn 85K points

TERMS APPLY



BEHAVIOR CHANGES



YOUR HOME ENERGY RATING

HOME EFFICIENCY RATING

POOR

AVERAGE



USAGE

+50 kWh



WEATHER
IMPACT

+3° F



DAYS OF
SERVICE

+2 Day



Using appliances more.



Cooking at home more.



Change in thermostat settings.



More people in the home.

TIPS TO HELP YOU SAVE

Programmable or Smart Thermostats:

Your best money saving tip is programming your thermostat. If you raise your cooling setting from 75° to 78°F you could save as much as \$258 per year.

ENERGY STAR® Appliances

If you change out your older major appliances in your house to ENERGY STAR® appliances, you could save up to \$78 a year.

LED Bulbs

Simple changes like replacing incandescent light bulbs with more energy efficient LEDs can help you save up to \$57 a year.

For More Ways to Save

Fill out your profile or make adjustments to your current profile and see how much more you could save.

[LEARN MORE](#)

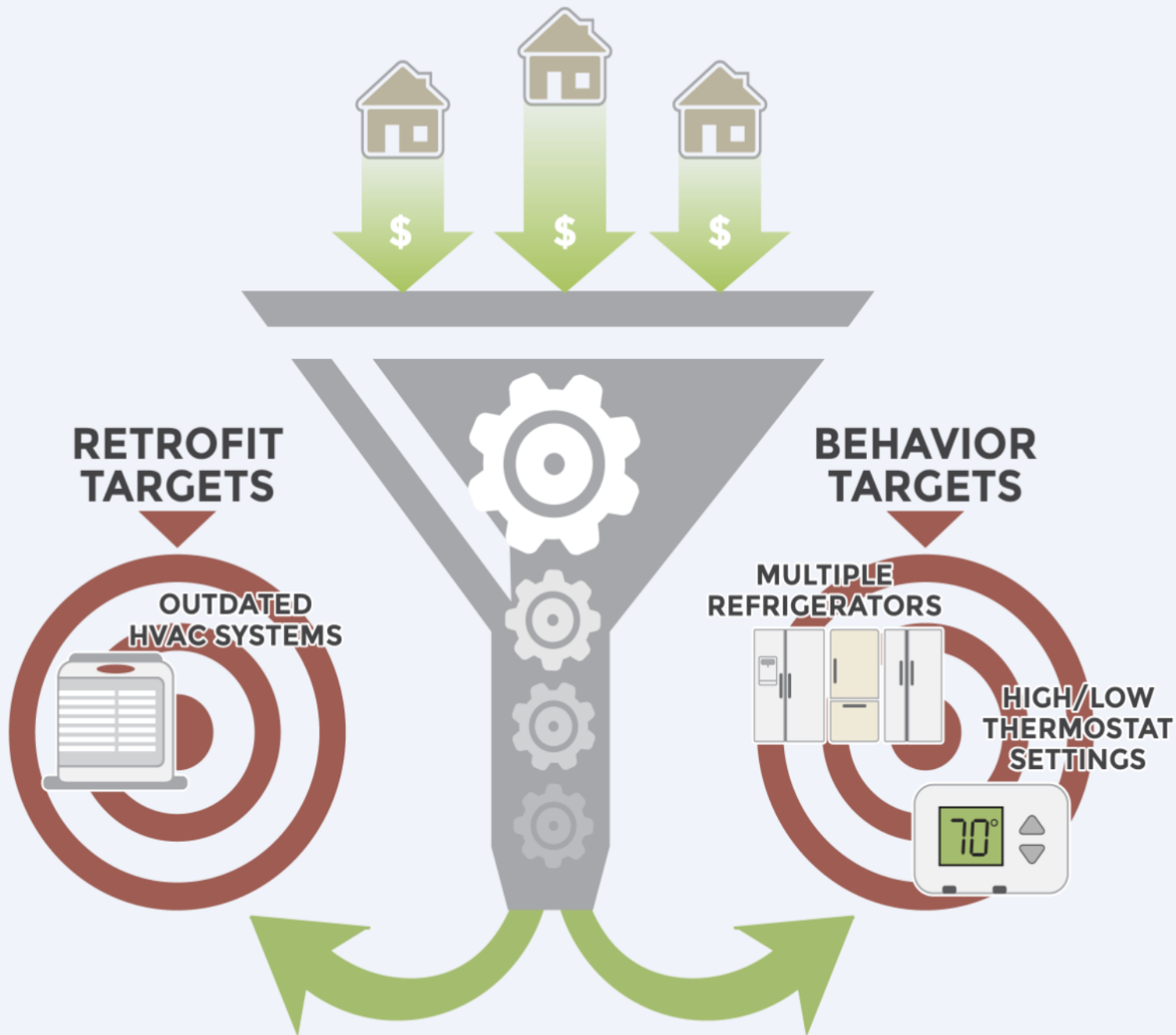
Ways to Pay Your Energy Bill

We have more convenient ways you can manage and pay your bill. Find one that fits your busy lifestyle.

[LEARN MORE](#)

*This analysis uses your account and usage information to make assumptions about your home that are typical of most homes in Georgia. It may not reflect the actual equipment or living preferences about your home cooking, lighting, etc. If you would like to refine this analysis to reflect the specifics of your home, please refer to the online Home Energy Monitor tool in the email and complete your home profile.

AMI DATA and ENERGY BILLS



Program Targeting Improves Yield

Using bills and weather

Pin-point *retrofit* targets

Find *behavior* opportunities



An EDISON INTERNATIONAL® Company

Rizzuto/Rizzutom
928 E. Imperial Hwy.
Brea, CA 92821-5612

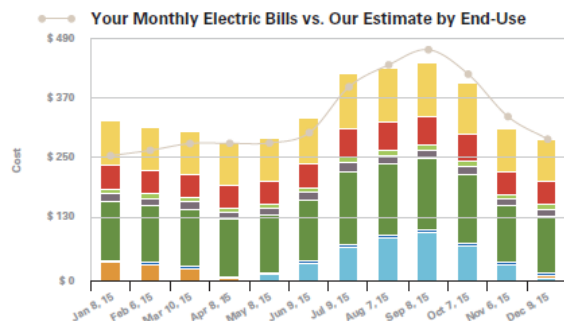
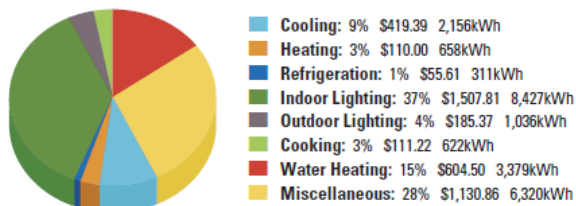
P111



Dear Valued Business Customer,

We are pleased to provide you with this 12-month summary of your recent business energy use. By understanding how your business uses energy, we can help you identify areas where your business can be more energy efficient — helping you reduce costs, while saving time and resources.

Here's a breakout of how energy is being used, based on your annual electricity costs and usage:



24/7 Access to Energy-Saving Recommendations Customized for Your Business

Our online Business Energy Advisor tool will provide you with:

- Recommendations to help reduce your energy usage, customized for your business profile
- Available incentives for lighting and equipment upgrades to help lower your operating costs
- Your energy-use history, which identifies when and where your energy is being consumed
- Your energy plan to track your short- and long-term energy goals

The estimates shown in the table reflect your last 12 months of energy use billing data. Additionally the energy use by HVAC, lighting, and other equipment is shown based upon your building's NAICS classification and with industry-accepted norms for the way energy is used in those building types, climate zones and daily temperatures. Last year's usage was used to estimate annual costs. Values reflect past usage and assume no operational changes. Your future usage and costs may be different. C-9363

Your 12-month Business Energy Use Summary

Saving energy starts with understanding how it's being used.

Here are some quick and easy tips and recommendations to manage your energy costs:

- Optimize your HVAC. Benefit from lower unplanned repair costs, cost-covering incentives, lower energy bills, and improved air quality and system reliability.
- Charge batteries and battery-operated equipment prior to TOU On-Peak hours, then use only pre-charged equipment during TOU On-Peak hours.
- Upgrade to energy-efficient equipment. ENERGY STAR® models can have a significant impact on costs.
- Reduce lighting levels and take advantage of daylighting from store windows.

Manage Your Business Energy Online with My Account at sce.com/myaccount

- Analyze hourly, daily, and monthly usage
- View projected bills and plan your usage
- Set monthly spending goals
- Compare rates to find the best option
- Make online payments quickly

Start saving energy today. For a more detailed and customized energy report, enroll in My Account at sce.com/myaccount and access the Business Energy Advisor tool.

Small Business Edition

Only as good as the segmentation data



Proactive Alerts

80% Want Alerts

67% Check for alerts even when phone isn't vibrating

Source: Pew Research Center 2015

Learn More from the Leaders

Personal



Hello, SUSAN M GILBERT

Traditional Gold Card
Ending: 27003



Requested

Large purchase on your Card

As you requested, we're letting you know that this purchase was above your [notification amount of \\$500.00](#).

Relevant

**SURVEY SYSTEMS
ASSOCIATES INC**

\$550.00*

Sat, Jul 15, 2017

Useful

You can [track this pending charge online](#) and be notified when the final amount is posted to your account.

If you still have questions about this transaction,
we suggest contacting the merchant directly.

**The amount above may not reflect the final amount as some merchants issue a pre-authorization charge.*



Was this email helpful?

Yes

No

Feedback

To stop this alert, simply [click here](#).

[Privacy Statement](#)

[Update Your Email](#)

Your Card Member information is included above to help you recognize this as a customer service e-mail from American Express. To learn more about e-mail security or report a suspicious e-mail, please visit us at [americanexpress.com/phishing](#). We kindly ask you not to reply to this e-mail but instead contact us via [Customer Care](#).

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AGNEUALE0024002



ENERGY ADVISOR



Intuitive, game-like UX



Advanced inputs available



< 1 Minute completion



Mobile friendly



Provides “what ifs”



Weather and Bill alerts



Cleaner look and feel



TELL US ABOUT YOUR HOME ?

1) WHAT IS THE LOCATION OF YOUR HOME? ?



Your Home's Location

Atlanta, Georgia

2) HOW BIG IS YOUR HOME? ?



Advanced House
Details



Small House (500-1600
Sqft.)



Medium House (1600-
3500 Sqft.)



Large House (3500-
8000 Sqft.)

3) HOW MANY PEOPLE LIVE IN YOUR HOME? ?



Num.
Occupants:
4

4) HOW MUCH INSULATION DO YOU HAVE? ?



Advanced Insulation
Details



Don't Know



Thick Insulation



Some Insulation



No Insulation

5) WHAT TYPE OF HEATING AND COOLING SYSTEM IS IN YOUR HOME? ?



Advanced HVAC
Details



Heat Pump



High Eff. Heat Pump

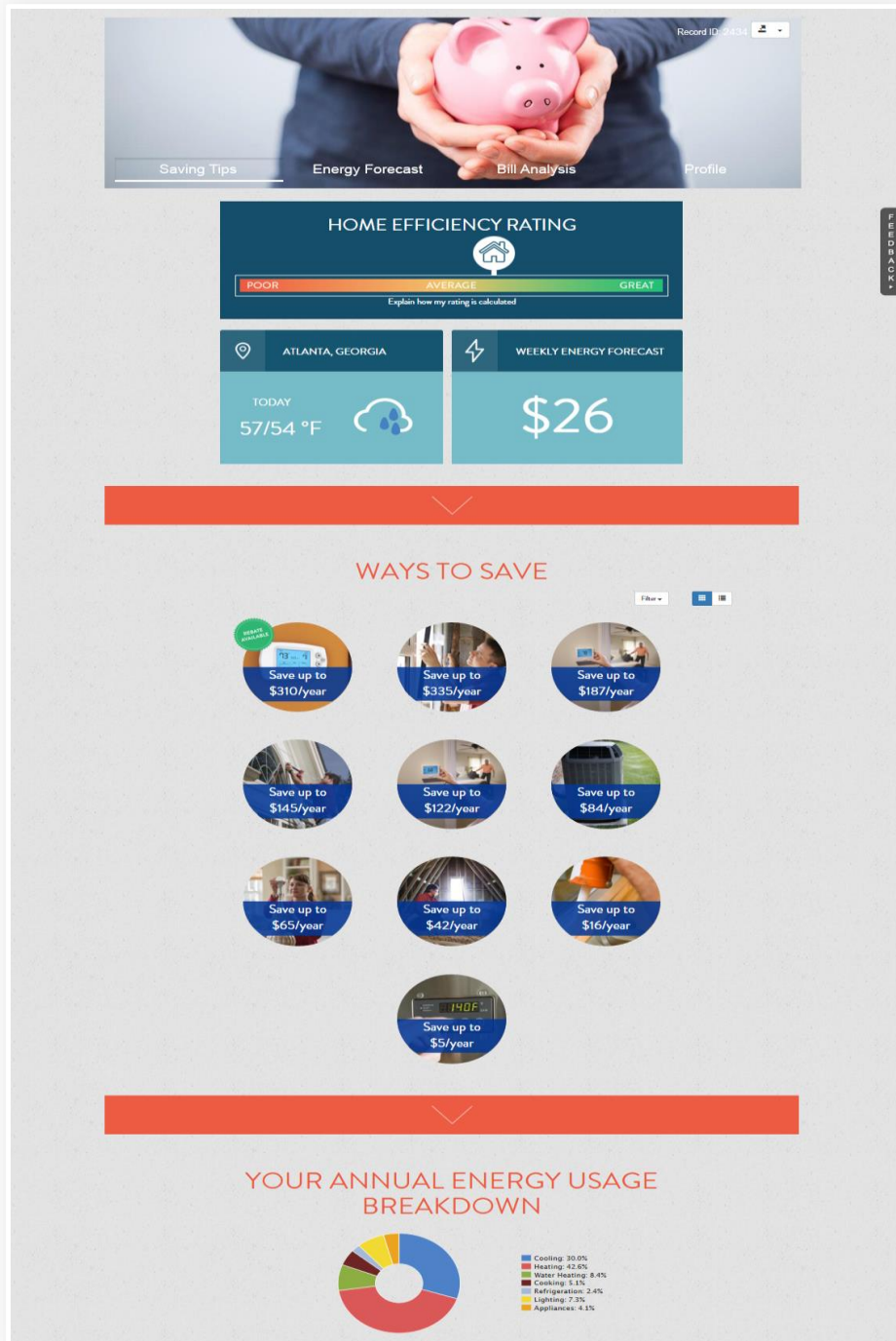


Electric Heat w/Central
Air



RESET PROFILE

SHOW ANALYSIS



EMPOWER PLATFORM

Drives Customer Engagement

Provides Home Rating Comparison

Creates Better Customer Journey

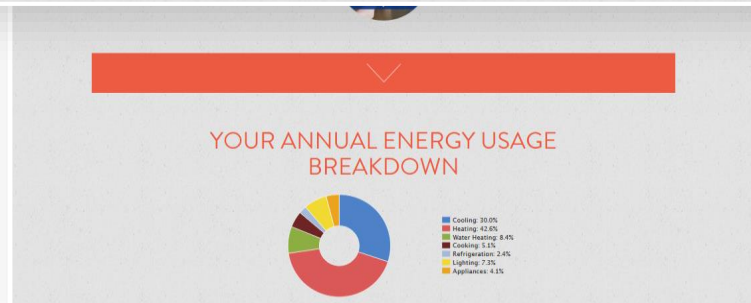
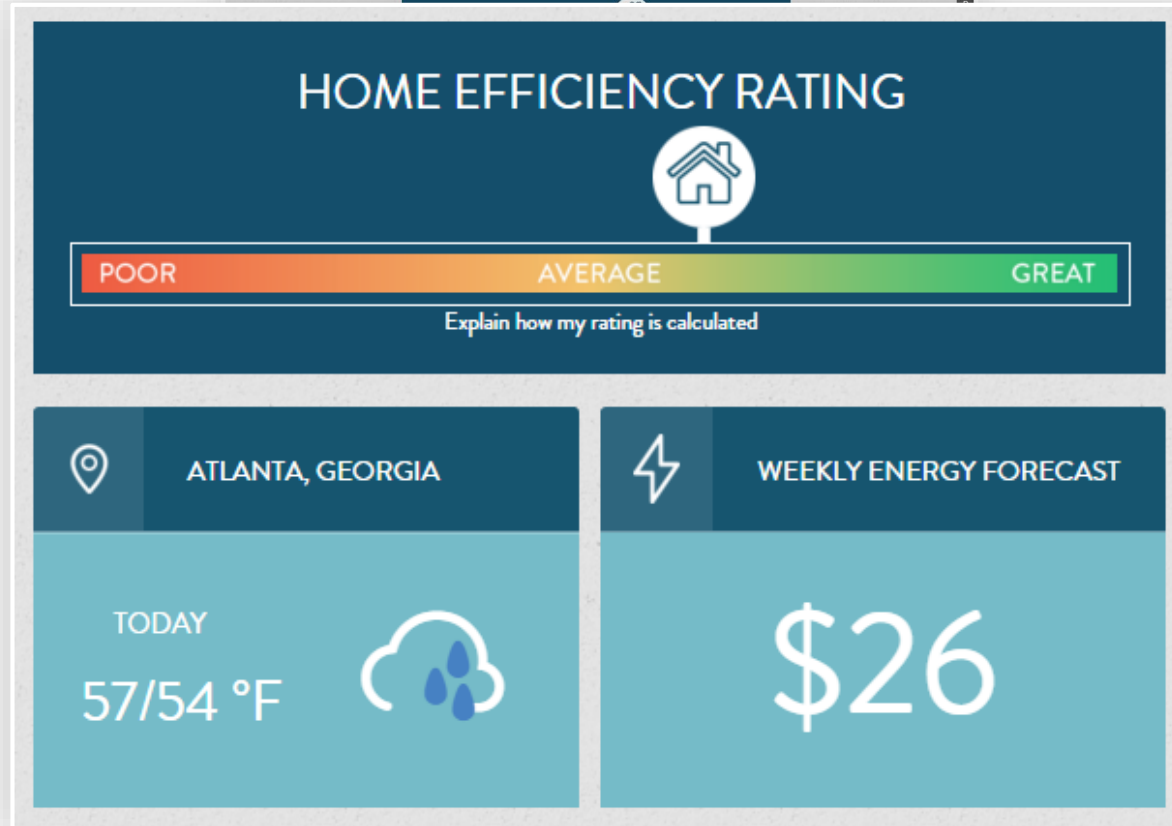
Actionable Business Analytics



EMPOWER PLATFORM



Personalized
How YOUR Home Rates
Weather Feature
Energy Cost Forecast
Easy to Understand
Provides Progressive Engagement



EMPOWER PLATFORM



Engineering Computations of
Personalized Savings Numbers

Drives Engagement

Promotes Program Participation

Highlights Rebates

WAYS TO SAVE

Filter



EMPOWER PLATFORM



Personalized Disaggregation
Educate About End Use
Teaches Where Energy
is Used

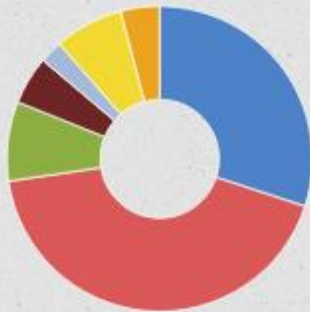
WAYS TO SAVE

REBATE
AVAILABLE

Filter



YOUR ANNUAL ENERGY USAGE BREAKDOWN



Cooling: 30.0%
Heating: 42.6%
Water Heating: 8.4%
Cooking: 5.1%
Refrigeration: 2.4%
Lighting: 7.3%
Appliances: 4.1%

\$63/year

\$42/year

\$16/year

Save up to
\$5/year

Mastering Customer Engagement

2:00 – 2:30 PM

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Empower Engagement Platform

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Energy Advisor

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