

CASE STUDY: Lakeland Electric

Lakeland Electric's Journey to Build Strong Communities and Relationships with Customers

Problem:

Lakeland Electric is the third largest municipal in Florida serving 127,000 customers located just east of Tampa. In August 2015, with advanced metering in place leadership at the utility decided to use its data collection and management capabilities to help customers engage. Lakeland Electric posted an RFP for a robust, personalized platform.

Lakeland's Assistant General Manager of Customer Service, Dave Kus, wanted to build relationships with customers beyond just the monthly bill transaction. Positioning Lakeland Electric as a trusted energy partner there to help customers understand, manage, and even predict their energy costs would allow the utility to get ahead of disruptive technologies, improve operating efficiencies, and customer satisfaction.

"We believe that the wealth of data provided by our smart grid system can be presented to our customers in an engaging format, as well as in a way that empowers and motivates proactive energy cost management." Dave Kus continued, "By providing our customers with tools such as proactive bill analysis and alerts, one-click rate comparisons, home energy analysis, recommendations, seasonal services, and data that explains connections between the weather and their bill, we'll put our customers in control of their energy use while helping the Lakeland Electric forego future generation needs."

Lakeland Electric had specific goals in mind for the project. The energy toolset should include:

- *Use of smart grid data that will provide customers with historical and predictive energy use information.*
- *Position Lakeland as a trusted “energy advisor” with accurate and consistent messaging.*
- *Avoid the high bill surprise by communicating bill amounts mid-cycle in time to avoid a high bill.*
- *Encourage customers to create an Energy Profile on www.lakelandelectric.com to help them manage their energy costs.*
- *Help customers choose their best rate plan.*

Solution:

After reviewing several vendors responses to a competitive bid Lakeland Electric selected Apogee Interactive. Vendors were evaluated on eight points, price, digital tools and applications, deliverables, website offering, ongoing support, timeline, references, and examples of work. Apogee scored the highest out of five vendor submissions. As a result, Lakeland and Apogee began to build the energy toolset in December of 2015.

Apogee provided a solution that included a comprehensive digital engagement platform that uses a utility’s billing data, AMI data, local weather, rates, and home profile data.

The result was an energy toolkit that includes:



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Energy Forecast uses predictive analysis combined with the weather to show customers the weather can affect the daily or weekly cost of energy. It also provides a virtual thermostat that helps customers understand the impact of their thermostat settings in easy to understand dollar amounts.

Mid-Cycle and Threshold Alerts allow customers to opt-in to their notification preference whether they want to be notified when their bill reaches a certain threshold amount or by monitoring their bill with mid-cycle alerts during the monthly billing period.



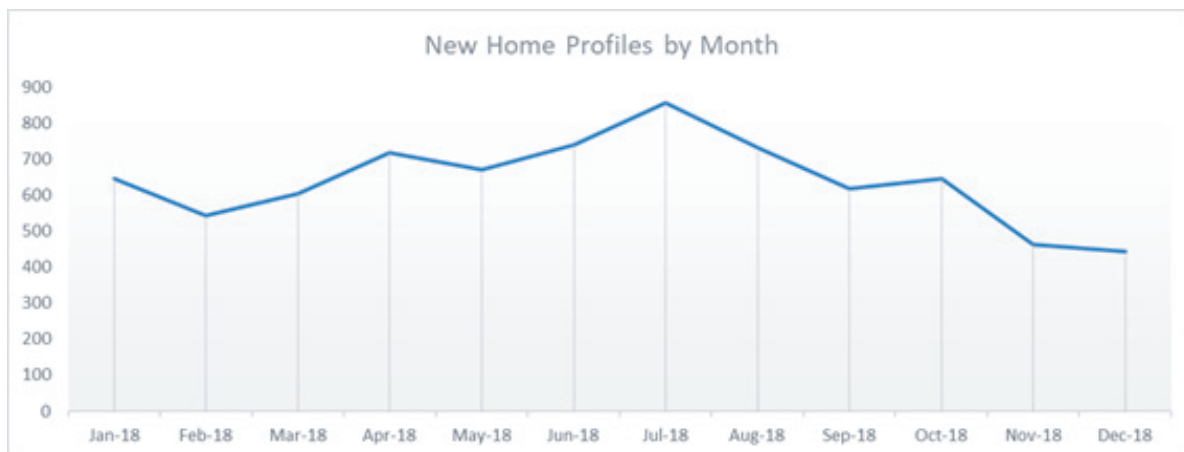
Personal Video Messaging creates customized video messages for each customer explaining their bill why their bill is more than the previous month or more than the same month last year. Lakeland Electric sets the criteria that triggers the video send, for instance if the bill is ten dollars more than last month's bill.

Energy Summary Reports are delivered by email or mail or through video messages. These reports are exclusive to the customers billing data and show customers their disaggregated bill analysis month by month. The charts and graphs in these reports clearly show the correlation with energy consumption and the seasonal weather changes.

The Results:

Lakeland Electric launched the project in January 2017. Lakeland, along with a third-party firm that preformed monthly transaction surveys began to gather feedback from customers about the platform. The surveys revealed 86% customer satisfaction among users.

By February 2018 Lakeland had collected 11% of their customers profiles which amounts to 14,278 home profiles. As of February 2019, they have almost doubled their goal of 10% gaining 19.6% or 21,613 total customer profiles. In addition, the Energy Forecast tool has totaled 26,337 visits. Mid-cycle alerts delivered by email earned an incredible 72% open rate. Alerts and Video Bill communications to customers garnered as much as 13% unique click through rates compared to a median industry standard of 2% supplying relevant useful clearly produces results and increases engagement. It is important to understand data was presented upon opening the email the click throughs were voluntary.



Even more remarkable to note is that new home profiles continue to be collected each month. Between January 2018 and December 2018 home profiles are averaging about 640 per month. In November of 2018 Lakeland reported Key Success Indicators (KSIs) to the Utility Committee, overall customer satisfaction was reported at just under 91% despite hurricane Irma resulting in more than 78,000 outages. First contact resolution was also noted as being on target and meeting their goal. Having the communications platform in place and customers already engaged was an added advantage. Apogee's platform is helping Lakeland build strong communities and good relationships with its customers by building customers' trust with an automated digital communications system that educates and engages them with relevant, useful, and personalized energy information. Opening a positive exchange with customers and putting them in control of their energy use is the first step on that journey.

Lakeland Electric chose the EMPOWER Platform because this trusted tool recommends the most appropriate electric pricing plans, shows customers how their personal behaviors as well as the weather impacts electric bills, alerting them when their energy usage hits a certain level, and giving them detailed electric use data by integrating with Lakeland Electric's smart meter system. Getting customers to be more efficient and thoughtful about their energy usage now, helps Lakeland Electric offset future generation costs and keep customer rates among the lowest in Florida.



For more information contact info@apogee.net or 678-684-6801.



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