



# New Trends in Technology for Utilities

February 20<sup>th</sup> 2020

Karen Morris & Brenda Guthrie



# Our Presenters



## **Brenda Guthrie, Account Manager, Apogee Interactive**

As Account Manager here at Apogee, Brenda Guthrie partners with utilities and offers solutions that align with utility goals . She works with IOUs, munis, and co-ops, right now she is busy with rate transformation projects and customer engagement strategies for her clients. Brenda represents utilities in the Southeast and parts of the Midwest. Brenda is a true Midwesterner at heart, has been in Atlanta for 7 years and has a degree in International Business from the University of Dayton.



## **Karen Morris, Marketing Manager, Apogee Interactive**

Karen manages Apogee's marketing resources service as well as Apogee's own corporate marketing efforts. For the past 20 years, she's worked closely with 100s of utilities across the country to help them better market their programs, improve brand perception and develop digital strategies. She brings timely and informative webinars to energy professionals through Apogee Institute as well.



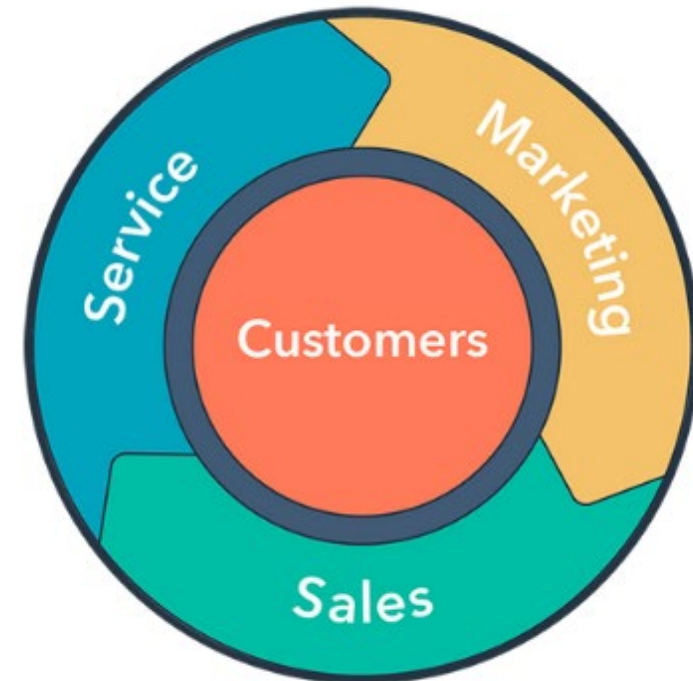
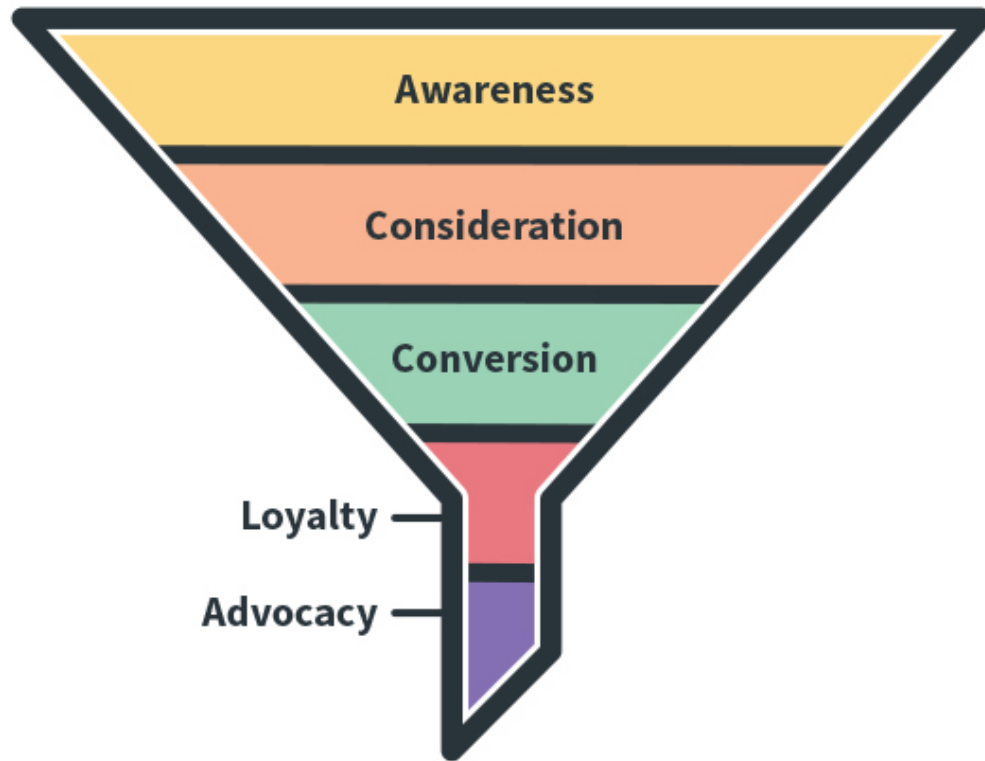
# Our Agenda

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- Emerging Trends in Technology
- Effective Communications Strategies
- Driving Program Success



# The Age of the Customer



Technology and Personalization are Driving a More Customer Centric Strategy

# The Age of the Customer

*Why is the customer relationship important to utilities?*

- *Reduce the costs to serve*
- *Increase revenue*
- *Secure the customer relationship from disrupters*

*Communicating...*

- *Behavioral Demand Response*
- *Privatization*
- *Rates*
- *Programs*







# Personalization

# Forbes

**90%** found personalization appealing

**80%** prefer businesses that used personalization

**71%** reported they were frustrated by an impersonal customer experience

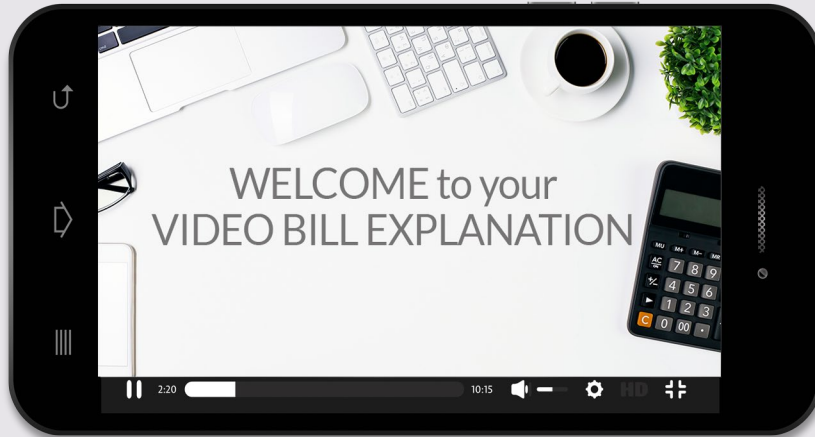
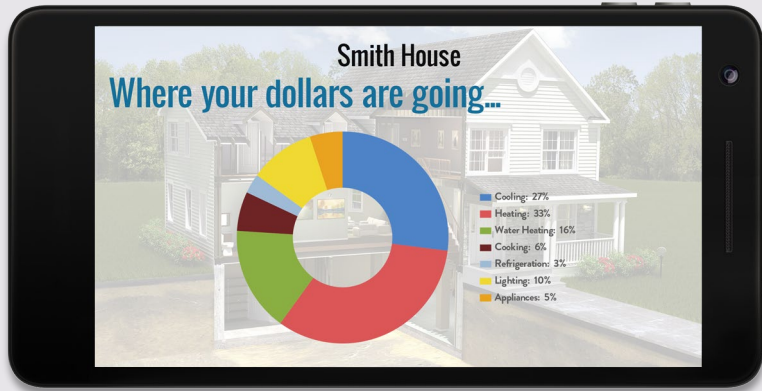


# Hyper-Personalization

*Goes beyond personalization...*

## Examples:

- **Amazon** recommendations uses machine learning and artificial intelligence to recommend purchases.
- **Email platforms** that anticipate what time you are likely to open an email and includes custom content based on behavior
- **Airbnb** knows your location, language and currency (after you agree to accept cookies) –They even offer hosts examples of experience worth offering or what's not.



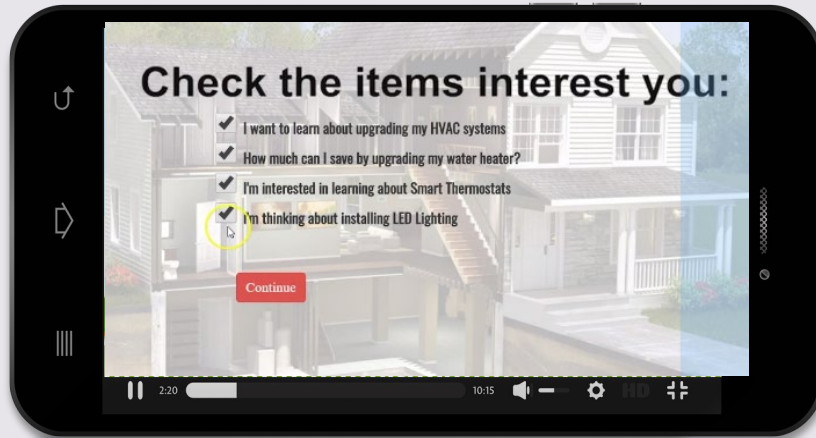
## Personalized Video Content

- 41% of marketers say video has helped reduce calls
- 94% say video has increased understanding of products and services
- 68% prefer to learn about products and services by watching a short video

*\*Source 2019 Wyzowl video survey*



# Interactive Video Content



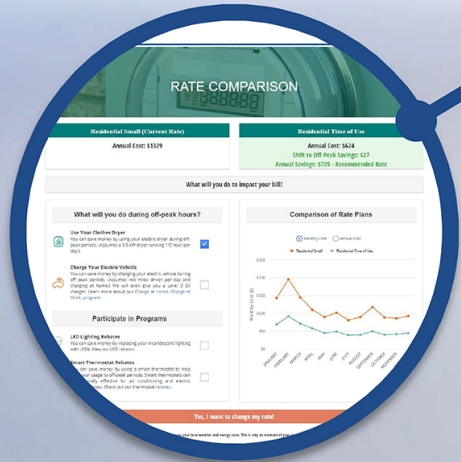
Includes:

- Video Hotspots
- Branches
- Surveys
- Polls
- Links to Calculators
- Links to Personal reports



WELCOME to your  
VIDEO BILL EXPLANATION

Learn more  
about YOUR  
RATE PLAN OPTIONS



EG APOGEE  
Electric & Gas Co.

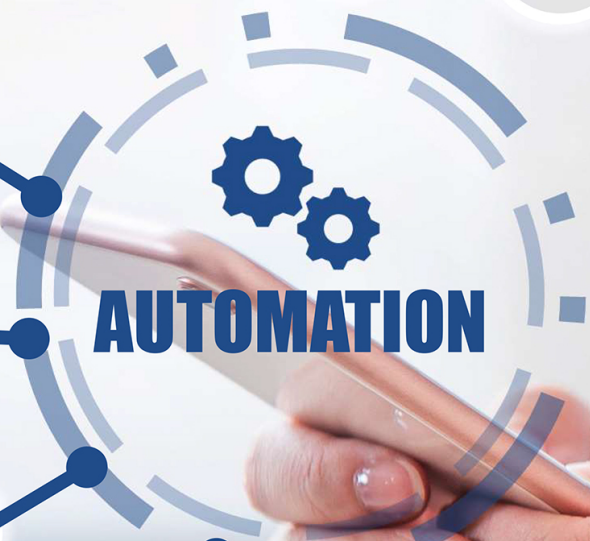
Hi John Smith,

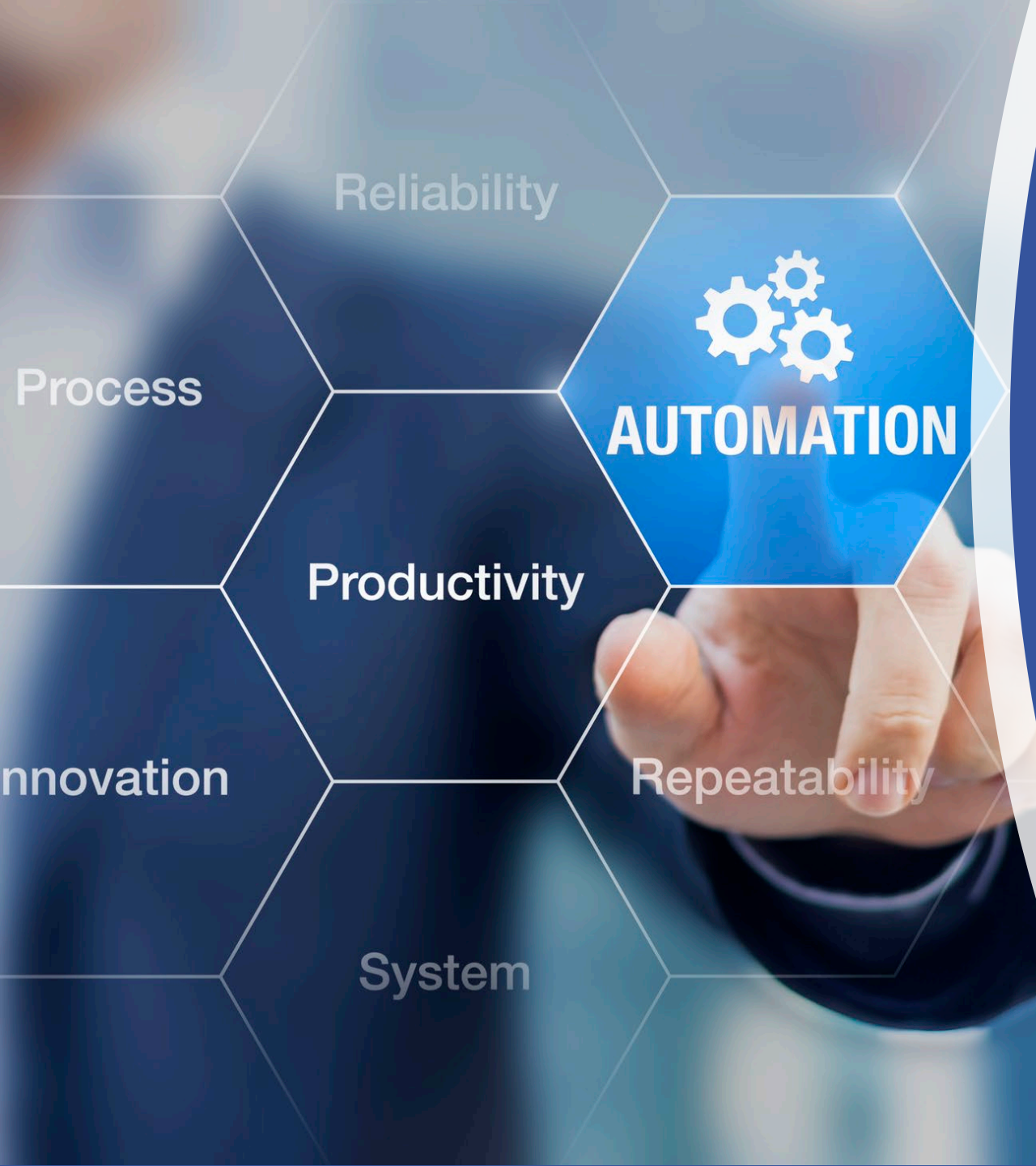
Thank you for taking the time to try out our [Rate Comparison Calculator](#). We offer several rate solutions to help fit different customer needs, and we hope this tool helped you understand some of your options.

If you would like to see all rate plans available to you, visit our website at [www.utilityname.com/rates](http://www.utilityname.com/rates). You can also use the calculator at any time!

**NEW RATES!**

Our mailing address is:  
123 Main Street, Atlanta, Georgia





- Maximize the use of data
- Personalize the customer experience
- Bring marketing efforts to scale
- Increase your reach
- Save time .... Set it and forget it!





Consider Multilingual Communications



# How are you communicating?

## Use a Multi-Channel Approach...

- Text
- Email
- Video
- Social Media
- Feedback
- Web

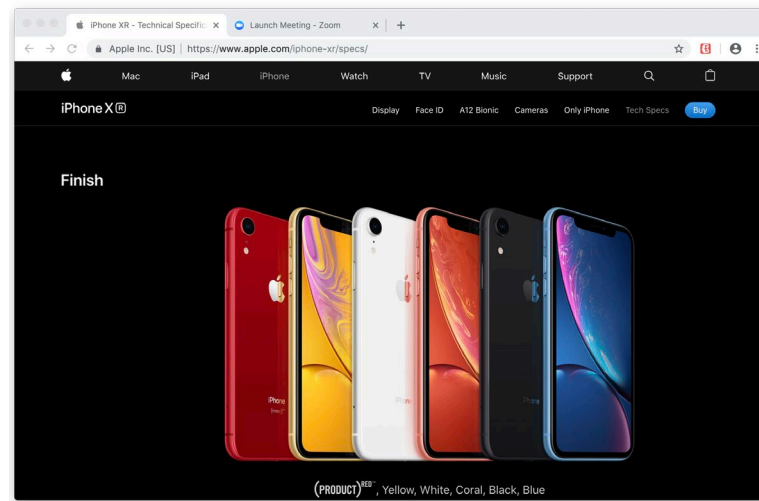


# Digital Communications Strategies

- Know Your Audience
- Align Measurable Goals
- Analyze Results
- Use Automation to Extend your Reach
- Increase your Channels
- Keep Messages Relevant and Simple







# Engagement in a Digital Communications World

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# What does the utility customer want?

- Choice
- Control
- Personalization
- Relevant and proactive



# ENVOY

Digital Communications Platform





**ENVOY**

## Personalized Marketing Campaign Support

1

**Communicating** with customers about what they care about - we do this through our video bill

2

Add in your **marketing initiatives** (EE, program, etc.) – through our Targeted Video Bill

3

Push to a **Call to Action** with scenario-based online applications – Rates Calculator, SPCs, Energy Advisor, Utility rates links, etc.

4

**Marketing Automation** for follow-up communications



ENVOY

Rates Series – Step 1

STEP

1

2

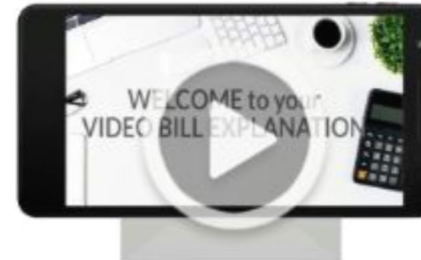
3

4

## Video Bill Explanation

Your bill amount has  
changed from last month.

[Click Here to See Why](#)



[View this email in your browser](#)



Your bill amount has  
changed from last month.

[Click Here to See Why](#)



greatest reason for changes in your electric bill. But other  
factors also cause your energy use to vary.

Learn why your bill is different compared to last month.



Atlanta, GA 30084

Want to change how you receive these emails?

You can [update your preferences](#) or [unsubscribe from this list](#).

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## Targeted Video Bill Explanation

1

STEP

2

3

4







# ENVOY

## Rates Series – Step 3

1

### New Rate Comparison Calculator

- Provides an easy way to understand the rate impact based on energy use
- Allows customers to knowingly select the rate plan they prefer
- Links the customer back to the program adoption page.

2

3

SIGN UP

4

STEP

### RATE COMPARISON

**Residential Small (Current Rate)**

Annual Cost: \$1329

**Residential Time of Use**

Annual Cost: \$651

Annual Savings: \$678 - Recommended Rate

What will you do to impact your bill?

**Use Your Clothes Dryer**  
You can save money by using your electric dryer during off-peak periods. (Assumes a 3.5 kW dryer running 1/2 hour per day.) ☒

**Charge Your Electric Vehicle**  
You can save money by charging your electric vehicle during off-peak periods. (Assumes ~60 miles driven per day and charging at home.) We will even give you a Level 2 EV charger. Learn more about our Charge at Home, Charge at Work, program. ☒

**Participate in Programs**

**LED Lighting Rebates**  
You can save money by replacing your incandescent lighting with LEDs. View our LED rebates. ☐

**Smart Thermostat Rebates**  
You can save money by using a smart thermostat to help shift your usage to off-peak periods. Smart thermostats can be especially effective for air conditioning and electric heating sources. Check out our thermostat rebates. ☐

Monthly Cost (\$)

Monthly Cost Annual Cost

Residential Small Residential Time of Use

Month	Residential Small	Residential Time of Use
JANUARY	\$145	\$45
FEBRUARY	\$195	\$65
MARCH	\$145	\$45
APRIL	\$115	\$35
MAY	\$95	\$25
JUNE	\$105	\$35
JULY	\$85	\$25
AUGUST	\$95	\$35
SEPTEMBER	\$125	\$45
OCTOBER	\$95	\$35
NOVEMBER	\$95	\$35
DECEMBER	\$95	\$35

**Yes, I want to change my rate!**

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

**ENVOY**

## Rates Series – Step 4

1

## Marketing Automation (follow-up email)

2

3

4

**STEP**

[View this email in your browser](#)



Hi John Smith,

Thank you for taking the time to try out our [Rate Comparison Calculator](#)! We offer several rate solutions to help fit different customer needs, and we hope this tool helped you understand some of your options.

If you would like to see all rate plans available to you, visit our website at [www.utilityname.com/rates](http://www.utilityname.com/rates). You can also use the calculator at any time!



**Our mailing address is:**

123 Main Street, Atlanta, Georgia

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# ENERGY ADVISOR Follow-up Communications

[View this email in your browser](#)

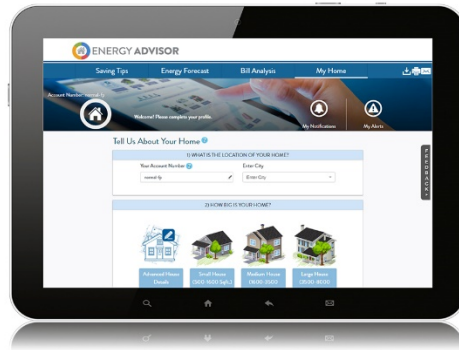


Hi John Smith,

Thank you for using our Energy Advisor! There were several programs suggested to help you save based on your personal home profile.

One of these is our **EnergyWise Attic Insulation Program**. You can receive up to \$300 towards upgrading your attic insulation by participating in this program. [Learn more...](#)

You can update your profile at any time. [Click here](#) to make changes or see more personalized savings tips!



**Our mailing address is:**  
123 Main Street, Atlanta, Georgia

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Hi John Smith,

We noticed it's been a while since you've updated your Home Energy Profile. This tool is easy to use and can help you find ways to save energy in your home.

Just visit our website at [www.yourutility.com/energyadvisor](http://www.yourutility.com/energyadvisor), fill out your home profile, and you'll get a comprehensive report on your energy usage, energy-use comparisons, recommendations on how you can save, and more!



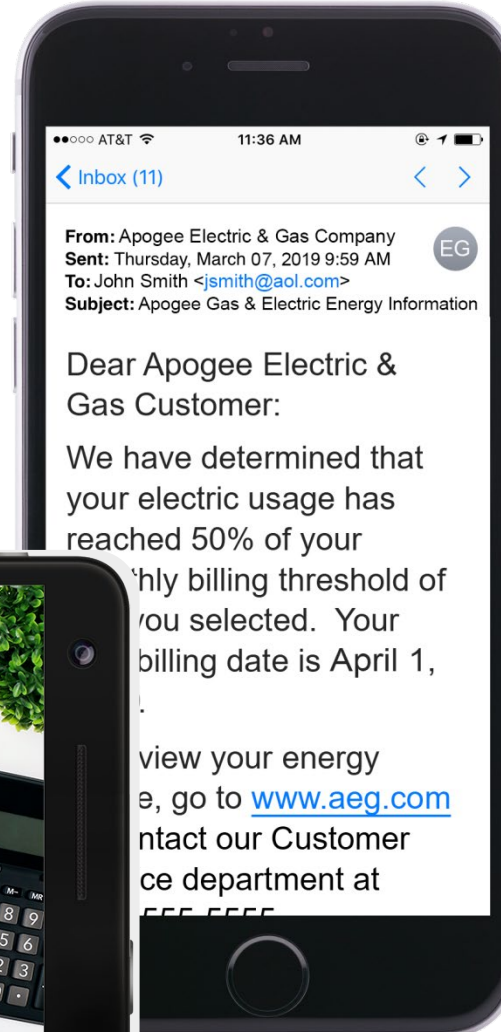
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# ENVOY

- Personalized video messaging
- Automated email and text messages
- Calls to action



**APOGEE**  
Electric & Gas Co.

[Home](#) | [View in browser](#)



## High HVAC Detected in Analysis

Based on your last year of energy bills, it appears that this (54%) percent of your bill is for heating and cooling. Please click the link below to our Energy Advisor to profile your home so we can refine our analysis and find specific ways to save your money.

Upon completion of the home profile, you will see a detailed report of your energy costs by type of appliance and a list of dollarized savings recommendations, some of which may have rebates associated with them.

Let's Get Started!

[ENERGY ADVISOR](#)



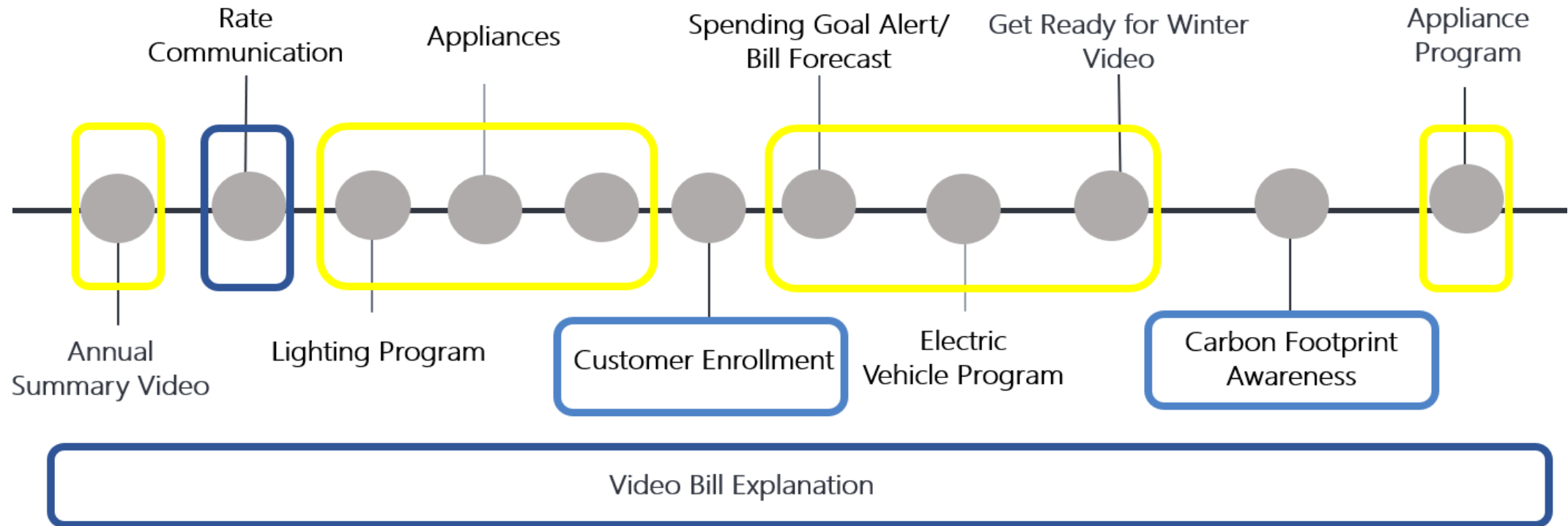
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**ENVOY**

Create a Strategy and Engage Throughout the Year:





A close-up, blurred image of a computer keyboard. The focus is on a key labeled 'Results' in a serif font. Above the text on the key are three small, dark rectangular icons. The background shows other keys in a similar blurred state, creating a sense of depth. The overall color palette is cool, with various shades of blue and grey.

Results

- Value
- Relationships
- Utility Goals



# Questions



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