



Moving from Segmentation to Personalization

March 31, 2020

Presenters



Luke Gebhard Senior Project Manager, Milepost Consulting

As a Senior Project Manager for Milepost Consulting, Luke Gebhard provides clients with servant leadership in project management, engagement strategy, and marketing and communications support. Prior to joining Milepost in 2015, Luke served as Senior Program Manager in the Tennessee Department of Environment and Conservation's Office of Energy Programs and served as Energy Efficiency Program Director in Nashville Mayor Karl Dean's Office of Environment and Sustainability. Luke holds a BA from the University of the South and a Master's from Vanderbilt University.



Elizabeth Burroughs Engagement Manager, Apogee Interactive Inc.

Elizabeth has graduated from Georgia State University in 2013 with a BBA in Marketing. Her professional background includes experience with strategic marketing campaigns. As Engagement Manager at Apogee Interactive, her role includes creating and executing outbound communication plans for Apogee's Envoy customers. Elizabeth specializes in digital communications strategies for utilities and is currently working with more than 20 utilities nationwide. She continues to help energy professionals meet and exceed their customer engagement goals with relevant, personalized, and proactive messaging regarding topics such as rate transformation, high bills, or utility program initiatives. Her proven campaign tactics include sophisticated digital applications that incorporate the utility customer's bill analysis with or without AMI data. Once the customer's data is analyzed the information is then selectively distributed to in the form of video, text, email, and where appropriate, utility social media.



Kate Panaousis Marketing Analyst, Apogee Interactive Inc.

Kate's responsibilities include coordinating with the Marketing Department in developing company's marketing plan and positioning strategy, while she also provides market research and sales team support. Kate holds a Bachelor's Degree in Economics from Aristotle University of Thessaloniki, Greece and a Master's Degree in Applied Economics and Management from Panteion University of Athens, Greece. Kate loves geography, traveling and outdoor recreational activities.



- Software as a Service (SaaS) provider focused on three major utility initiatives:



Customer
Engagement



Customer
Satisfaction



Program
Participation

- Best in class Data Analytics
- Providing Consistency, Building Customer Trust



Who We Are
Leading the market in
customer engagement

In our **27th** year

Serving
HUNDREDS
of utilities, reaching
MILLIONS
of customers

Who We Are: Milepost



We provide **strategic** and **engagement** consulting services to help organizations **adapt** and **thrive** in a world challenged by environmental and social change.

three **core strategies**



STRATEGIC SOLUTIONS TO
BUSINESS CHALLENGES

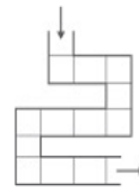


ENGAGEMENT PLANS THAT
EMPOWER



BEAUTIFUL, COMPELLING
VISUAL COMMUNICATIONS

our **expertise**



PROJECT
MANAGEMENT



TEAM
DEVELOPMENT



STRATEGIC
PLANNING



ENGAGEMENT
STRATEGY



STRATEGIC
COMMUNICATIONS

Segmentation and Personalization Defined



Segmentation:

Discovering groups of individuals with a common, yet broad, set of characteristics. Customers can be segmented based on attributes like geography, demographic, culture, and behavior.

Personalization:

Tailoring relevant content at the most personal individual level. Real personalization enables marketers to focus on the things that matter most to their individual customers.

The Difference Visualized

Segmentation vs. Personalization



Opportunities: Customer Data



Utilities hold the most valuable commodity in the personalization game: **customer data**.

Many utilities have already segmented their customers:

- Demographics (e.g. age, gender, race)
- Socio-Economic (e.g. income, household size)
- Use and demand

Opportunities: Delivery Channels



Technology is allowing utilities to **leverage customer data** to scale personalized communications across multiple delivery channels:

- Email
- SMS
- Digital
- Smart home integration

Opportunities: Customer Expectations



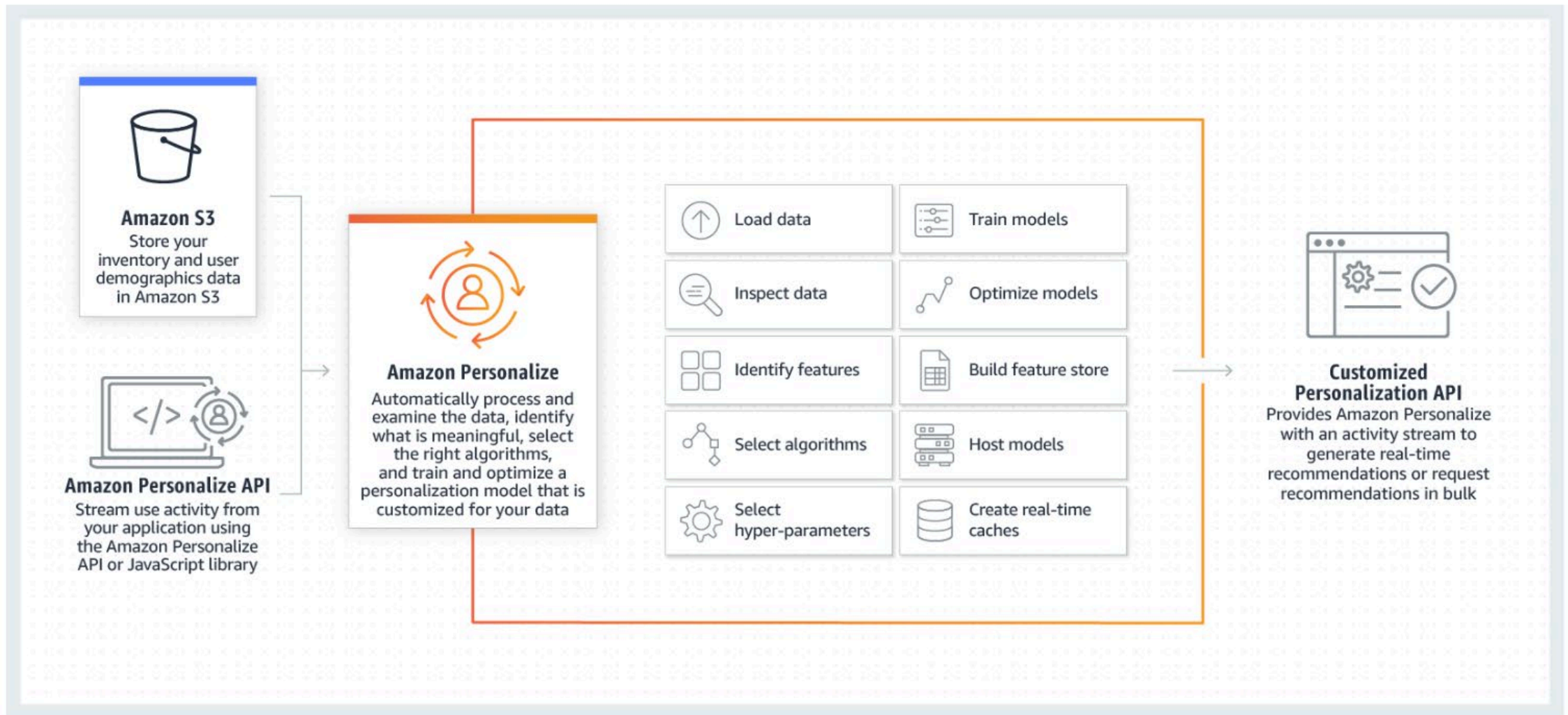
Customers expect to receive more than just a bill. They want **actionable information**:

- Energy use patterns and behaviors that impact billing
- Steps customers can take to save energy and money

Customers increasingly want **self service options**:

- Online
- Mobile

Personalization Case Study: Online Retail



Personalization Case Study: Grocery



Your Personalized Coupons Expire on
04/05/2020

[Unsubscribe](#)



Kroger Best Customer
To You

11:25 AM



Your exclusive offers are waiting for you!

[View in your browser](#)

Kroger

FRESH
FOR
EVERYONE.

Best-Customer Bonus

Just a Little Bitty
Reminder

We wouldn't want you to miss out on any Best-Customer coupons you may not have had a chance to download or redeem yet. We hope this friendly reminder helps you bring home more of your favorite things for less—before your savings expire on 04/05/2020!

[Sign In to Load](#)

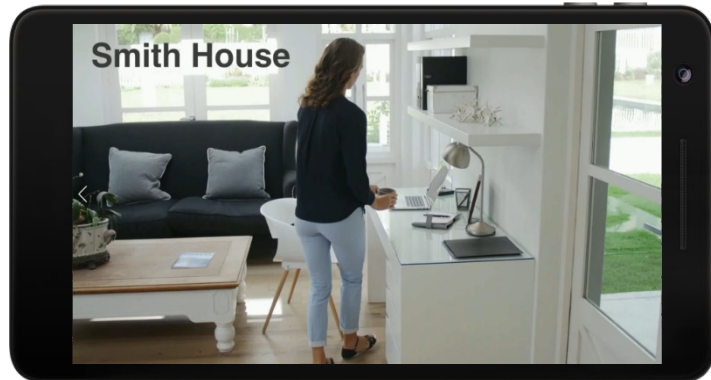
Personalization Case Study: Telecomm



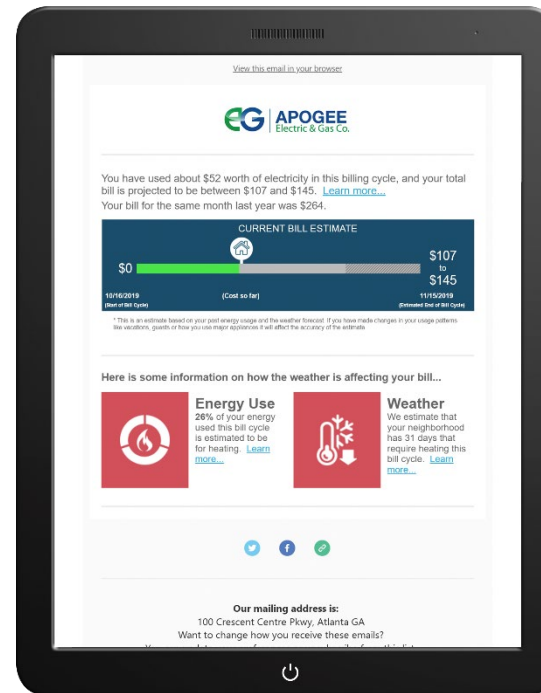
Personalized Messages



Video Bill Explanation



Mid-Cycle Alerts



Personalized Seasonal Messages

PRE-HEATING



PRE-COOLING



Smith House



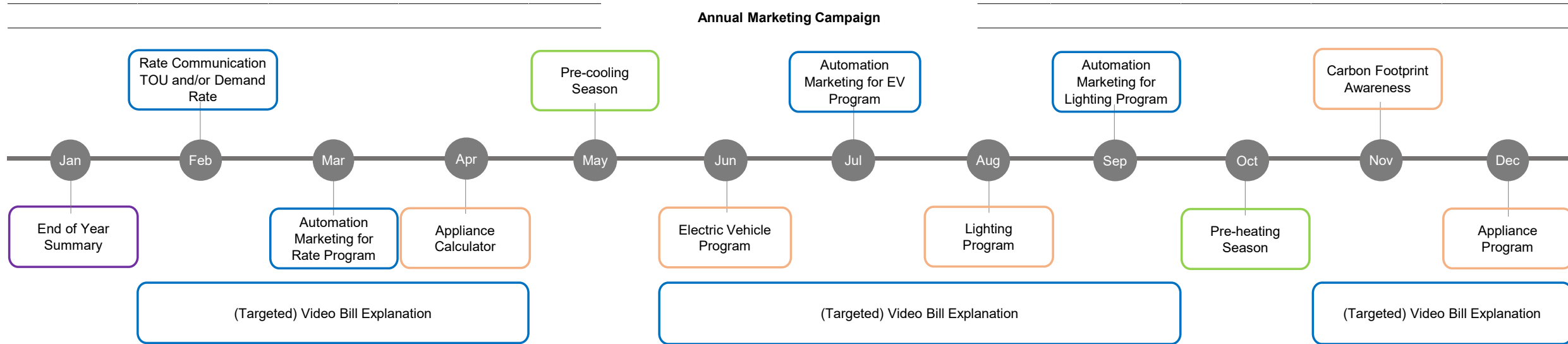
Marketing Automation



Follow-up email

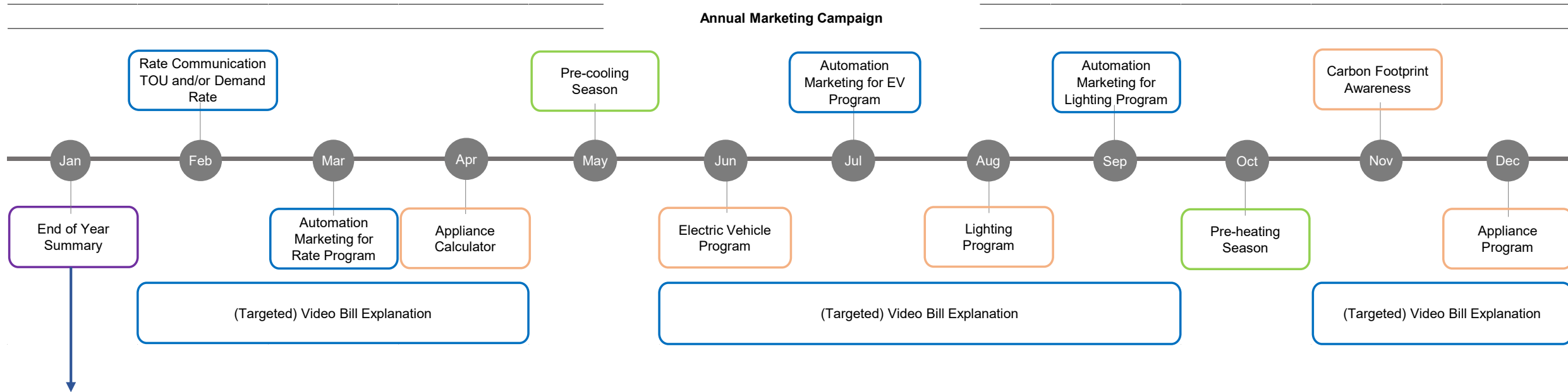


Create a communication plan and engage throughout the year:



- ▶ Multi touchpoint campaign
- ▶ Tailored to utility's needs and strategic goals
- ▶ Increased customer awareness on critical issues
- ▶ Increased program participation - communication based on customers' preferences and needs
- ▶ Increased customer satisfaction and customer engagement
- ▶ Establishes loyalty and trust

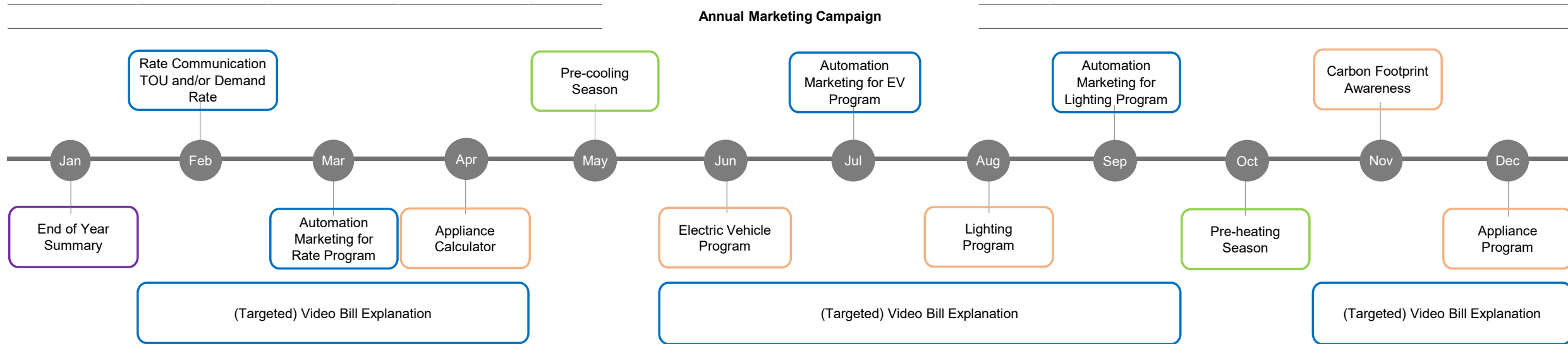
Case Study #1: Liberty Utilities



“Thank you for being a value customer of “Energy Provider”. As your trusted energy advisor, we have prepared this year-end summary of your energy use in the 20XX...”

- ▶ Email was linked to Online Energy Audit Tool
- ▶ **Online Energy Audits 4X higher** this month **than average** number of past twelve months

Case Study #1: Liberty Utilities



Apogee's flagship solution – Personalized Video Bill Explanation

- ▶ Avg unique click-through rate: **14X** higher than industry standard
- ▶ **87% responded** “**very or somewhat useful information**” – usefulness of billing information increases satisfaction *J.D. Power
- ▶ **1 out of 2 respondents** reported “**their perception of their energy provider improved, after watching the video bill explanation**”

Case Study #2: Xcel Energy



Pilot – lasted a couple of months

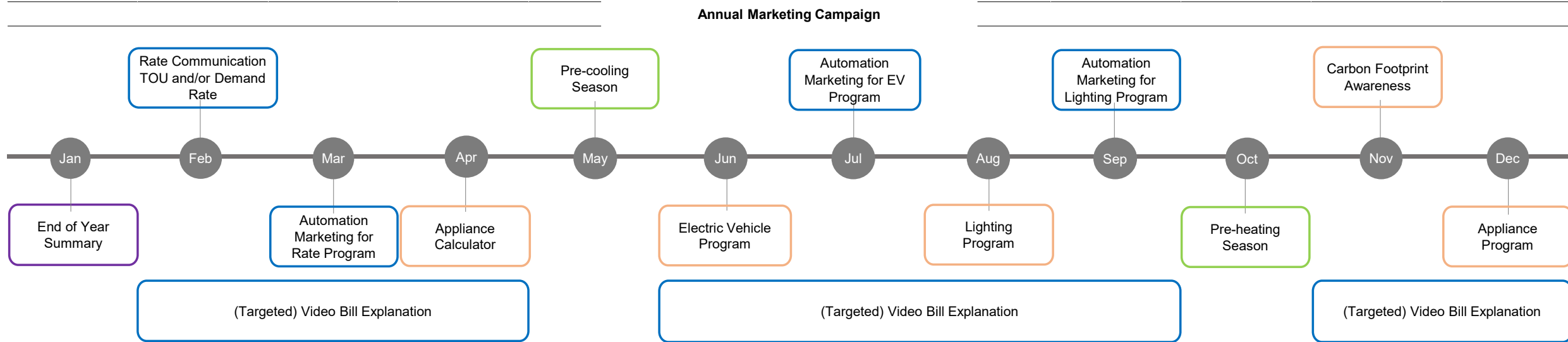
- ▶ **AESP Award** for outstanding achievement in customer engagement
- ▶ **89.3%** found the **videos very or somewhat useful**
- ▶ **1 out of 2 reported an improved perception** of Xcel Energy
- ▶ Impact on high bill calls: **15% reduction**

On-scale program – nearly two years now

- ▶ **89.5%** found the **videos very or somewhat useful**
- ▶ **1 out of 2 reported an improved perception** of Xcel Energy
- ▶ **NPS up to 35** VS Utility Sector – Avg NPS = 27 ([*Delighted, 2020](#))
- ▶ **Hundreds of thousands of responses collected**

Sustainable results – campaign performance and customer satisfaction

Create a communication plan and engage throughout the year:



Personalized and timely messaging:

- ▶ Nurturing the customer relationship – Customers are **experiencing your brand many times and in a positive way!**
- ▶ Establishing engagement and loyalty – **Engaged customers are ready for the next step!**
- ▶ **Achieving your strategic goals** while maintaining a high level of customer satisfaction and **keeping costs low!**
- ▶ Need for an **established communications platform** in good times and in times of crisis!

Any Questions



Contact Us



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Upcoming Webinars



April 16th, 2020

“Field audits are just not popular”

by:

Joel Gilbert, President and Chief Software Architect
Apogee Interactive, Inc.

April 28th, 2020

“Realistic and Cost Effective Artificial Intelligence”

by:

Sydney Roberts, PhD
Joel Gilbert, President and Chief Software Architect
Apogee Interactive, Inc.

Thank You!



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Empowering Utilities for the Future



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