



Empowering Utilities for the Future

JD Power Customer Satisfaction Survey

November 12, 2020

John Hazen- JD Power | Jim Malcom- Apogee Interactive

Our Agenda



Presenters
Bios



JD Power
Methodology



Current trends
in Customer
Satisfaction



Customer
engagement
during a crisis



Q&A



- 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



Jim Malcom, COO, Apogee Interactive, Inc.

Jim provides oversight business and financial operations of the company. His senior management experience in the telecommunications and management consulting industries is providing strategic direction for Apogee's continued growth and success. He is a graduate of the University of Georgia with a bachelor's and master's degree in business administration, a certified public accountant, and a chartered global management accountant.



John Hazen, Managing Director, JD Power

John is responsible for working with utilities across the United States to help them understand the importance of customer satisfaction and how to improve their customers' experience.

Mr. Hazen joined J.D. Power in 2008 as director, Voice of the Customer. Prior to that, he was the Director of Guest Services at the Disney Internet Group. Previously, he led award-winning call center sites for Saturn, DirecTV, and OnStar. He also has international experience in managing offshore teams.

Mr. Hazen earned a bachelor's degree in marketing from Western Michigan University.



J.D. POWER

"Embrace" 2020

**John Hazen,
Managing Director
November 2020**



This year we will....

2020

Keys to Improving Customer Satisfaction

Don't Fight the Results

Hold Teams/People Accountable

Dig Deep into the Details

Learn/Borrow from Others

Have Public Satisfaction Goals

Create a Culture Focused on Customers

Communication is Critical Both with Customers but also Employees

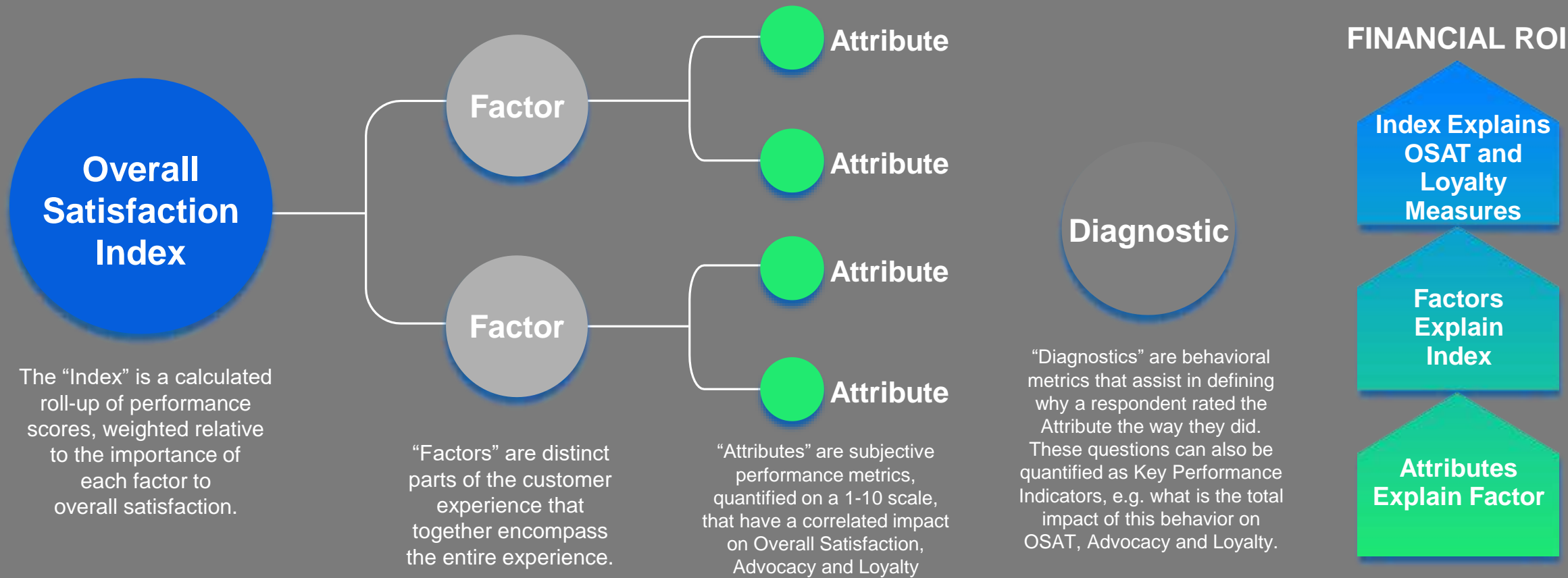


J.D. Power Overview



The J. D. Power Index Model

This proprietary model is designed entirely by J.D. Power research scientists to maintain our core values of integrity, independence and impact. The index identifies the many drivers of customer experience, accurately measures and links their impact to business results, and uncovers insights to drive positive financial results for our clients



JD Power Utility Practice...

Industry Leader for Utility Satisfaction Benchmark for 20+ Years

Survey 225,000+ Utility Customers Each Year

Industry Experts

Electric, Gas, and Water Satisfaction

Utility Digital Experience Study

Contact Center Certification and Improvement

Climate Change Sustainability



Utilities and Covid-19



How has the response from [BRAND] to the novel coronavirus (Covid-19) outbreak changed your impression of them?

"More Positive"



Overall Industry
Results 17%

"More Positive"

Brands with the Highest Percent of "More Positive" Customers

| | |
|---------------------------|-----|
| OUC | 32% |
| Cleco Power | 31% |
| NES | 30% |
| Florida Power & Light | 29% |
| Georgia Power | 29% |
| El Paso Electric | 28% |
| EPB | 25% |
| Clay Electric Cooperative | 24% |
| Duke Energy Progress | 24% |
| GreyStone Power | 24% |
| JEA | 24% |
| City of Tallahassee | 23% |
| Duke Energy Florida | 23% |
| Mississippi Power | 23% |

Industry Results

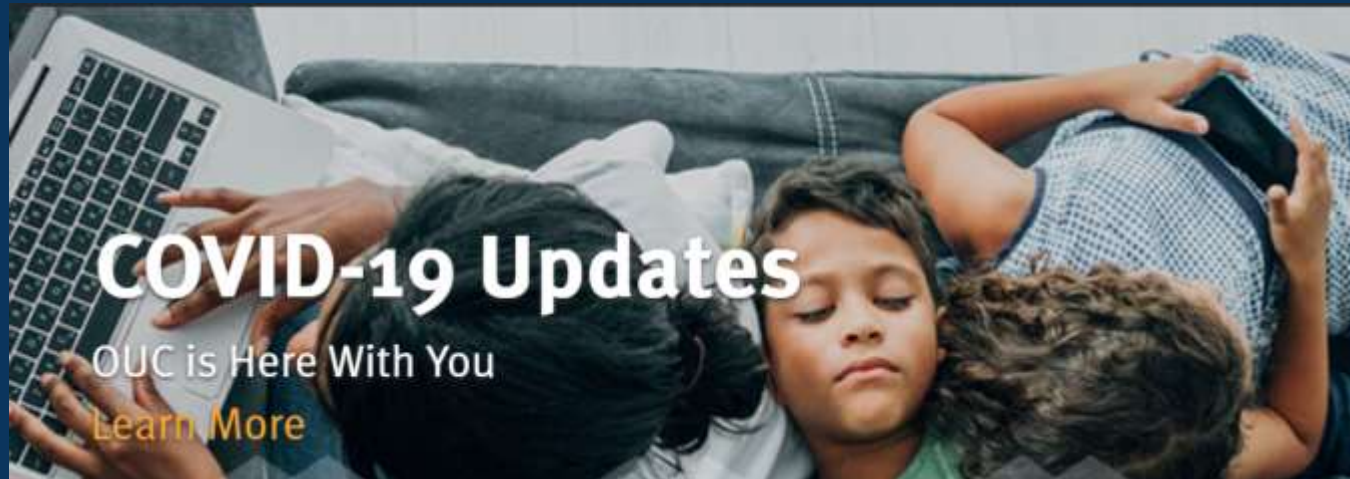
| | |
|-----------------------------------|-----|
| Austin Energy | 22% |
| Con Edison | 22% |
| Duke Energy Carolinas | 22% |
| Sawnee EMC | 22% |
| United Illuminating | 22% |
| Kentucky Utilities | 21% |
| Knoxville Utilities Board | 21% |
| NV Energy | 21% |
| OG&E | 21% |
| Public Service Co. of Oklahoma | 21% |
| Rocky Mountain Power | 21% |
| Tampa Electric | 21% |
| Imperial Irrigation District | 21% |
| Magic Valley Electric Cooperative | 21% |

2020 JD Power Residential Electric Study: April/May Results

Q2 Customer Verbatims...

"They have been really great about helping their customers who have been effected by COVID which was greatly appreciated by me because I lost my job."

"They earned my respect more when they were the first to help customers during the Covid-19 pandemic. They were the first to state they would not shut off someone's power due to no payment because of loss of job or having to shelter in place. My household are essential workers so we did not need to use that option but it was nice to hear our power company was the first to assist."



2020...Is It Over Yet?

COVID-19: As customers fall behind and cutoffs loom, agencies flooded with calls for utility aid

Utilities resume power disconnections as pandemic continues

Baltimore gas explosion

Utility Customers Across Area Experiencing Sticker Shock As Bills Skyrocket

Delinquency Rates of Duke, FPL Customers Power Upward During Pandemic

Eversource was on a victory lap. Then came Isaias

Investigation into Con Edison's Failure in Preparing and Responding to Tropical Storm Isaias

The Office You Left Is Not Going to Be the Office You Return To

Work-At-Home Customer Care

**EMBRACE
THE
SUCK**



Electric Residential Customer...

“I never have to worry about my electricity. All communications are easy to understand. There are so many options for how to pay including I can go to Walmart across the street and use their kiosk. They are upfront about everything and if a bill is late they give a grace period. Their emails are fun to read and informative. Switching my electric over from one apartment to a new one was easy and hassle free. Overall I have had no complaints or worries with the company.”



Engage-Data



Source of Outage Information

Overall Industry
Source of Outage
Information.

No Outage Info and
Phone Calls to
Utility have both
dropped
significantly while
Mobile App, Text
Messaging, Social
Media and Utility
Website have been
increasing since
2018.

| Sources used to get outage information | 2018 | 2019 | 2019 V2 | 2020 Q1 | 2020 Q2 |
|---|------|------|------------|------------|------------|
| Called utility (%) | 33% | 30% | 32% | 31% | 29% |
| Emailed utility (%) | 2% | 2% | 2% | 3% | 5% |
| Mobile app (%) | 5% | 6% | 7% | 10% | 10% |
| Nearby neighbor (%) | 8% | 7% | 7% | 16% | 15% |
| None - didn't try to find outage info (%) | 34% | 33% | 28% | 21% | 23% |
| Radio/TV (%) | 4% | 3% | 4% | 8% | 9% |
| Utility called (%) | 5% | 5% | 5% | 12% | 13% |
| Utility emailed (%) | 4% | 4% | 5% | 13% | 15% |
| Utility sent text message (%) | 7% | 10% | 11% | 21% | 21% |
| Utility social media site (%) | 2% | 2% | 3% | 13% | 14% |
| Utility work crew (%) | 2% | 2% | 2% | 9% | 10% |
| Went to utility website (%) | 17% | 18% | 21% | 22% | 21% |

Customers Aware of Energy Efficiency Programs have Higher Overall Satisfaction!

Energy Efficiency Program Awareness

795

Overall Satisfaction

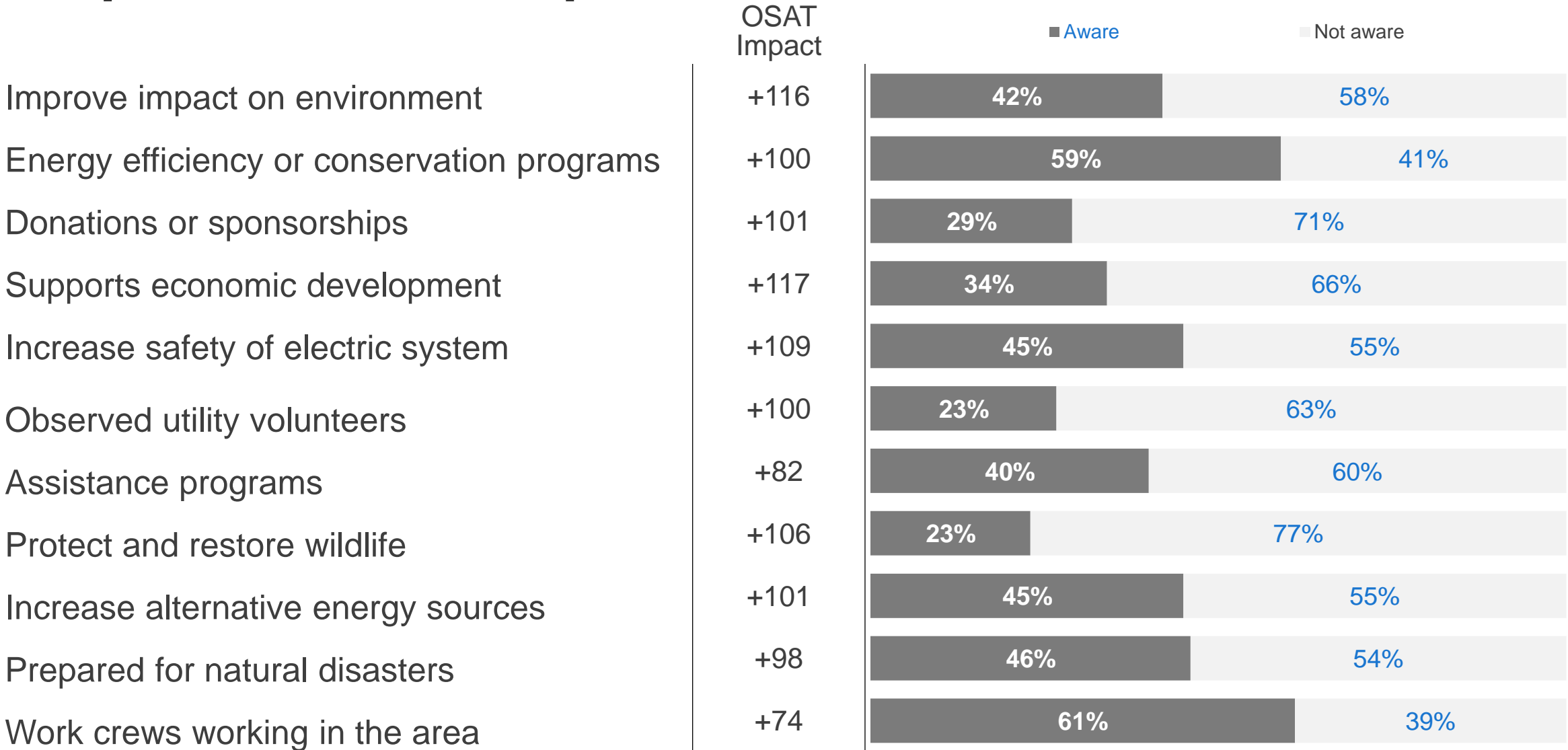
Aware

694

Not Aware



Corporate Citizenship Awareness



Great Visual....but the data is cumulative so it doesn't tell me what's going on now!

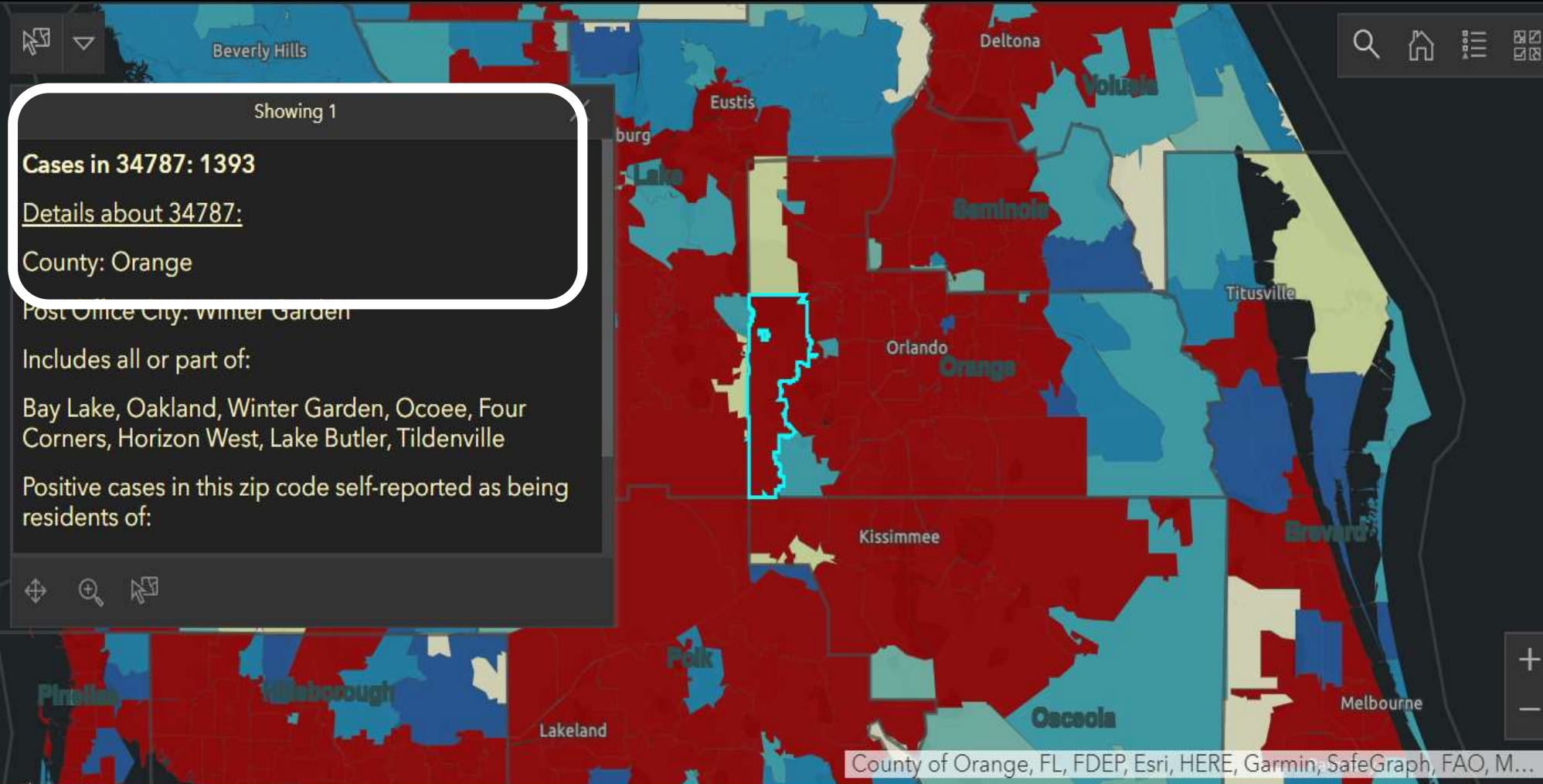


Florida's COVID-19 Data and Surveillance Dashboard

Florida Department of Health, Division of Disease Control and Health Protection

Select a County

ORANGE



Zip Codes

| | |
|-------|--------|
| 32829 | Orange |
| 32830 | Orange |
| 32831 | Orange |
| 32832 | Orange |
| 32833 | Orange |
| 32835 | Orange |
| 32836 | Orange |
| 32837 | Orange |
| 32839 | Orange |
| 34734 | Orange |
| 34760 | Orange |
| 34761 | Orange |
| 34786 | Orange |
| 34787 | Orange |

Florida Cases

Florida Testing

Cases by County

Rates Map

Case Maps

Cases by Zip Code

Health Metrics

USA and World



Dig Deeper into the data to understand strengths, weaknesses and where to drive improvements!

Electric Utility Residential Customer Satisfaction Study

Map Based View

J.D. POWER

Overall Customer Satisfaction



PG&E Overall and Communications Satisfaction by County

Electric Utility Residential Customer Satisfaction Study

Map Based View

J.D. POWER

Communications



Study Year

2020

Peer Group

J.D. Power Standard

Region Size Segment

West Large

Brand Name

Pacific Gas and Electric

Highlight Brand Name

Northern light speed

Factor

☐ Billing & Payment

☒ Communications

☐ Corporate Citizenship

☐ Customer Care

☐ Customer Care - Digital

☐ Customer Care - In-Person

☐ Customer Care - Phone

☐ Overall Customer Satisfaction

☐ Power Quality & Reliability

☐ Price

Score

690 700 710 720 730 740 750 760 770 780 790 800

Legend:

Score

COUNTY

No. of Respondents

No. of Respondents

When viewing Factor Scores by County, please refer to the following:

n=30 Insufficient Sample Size

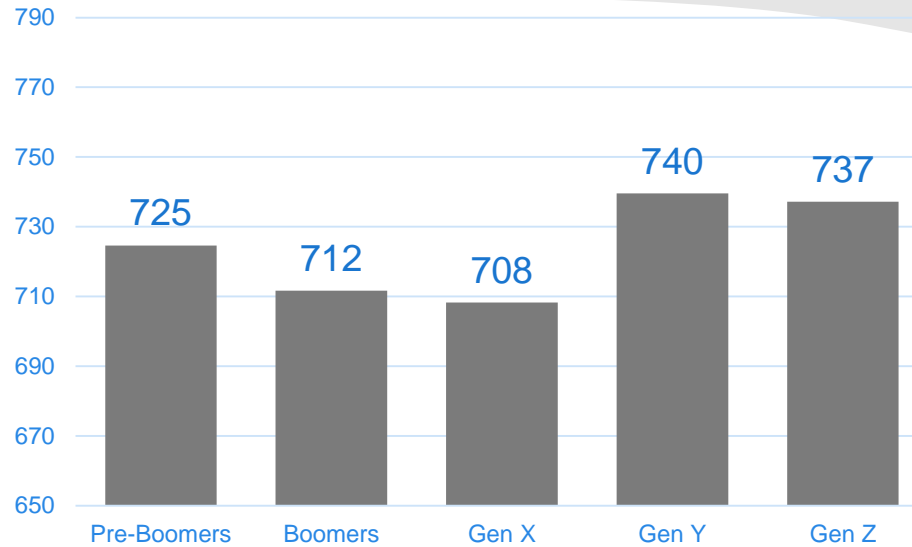
n=30 - 10 Small Sample Size

n=30 - 10 Small Sample Size

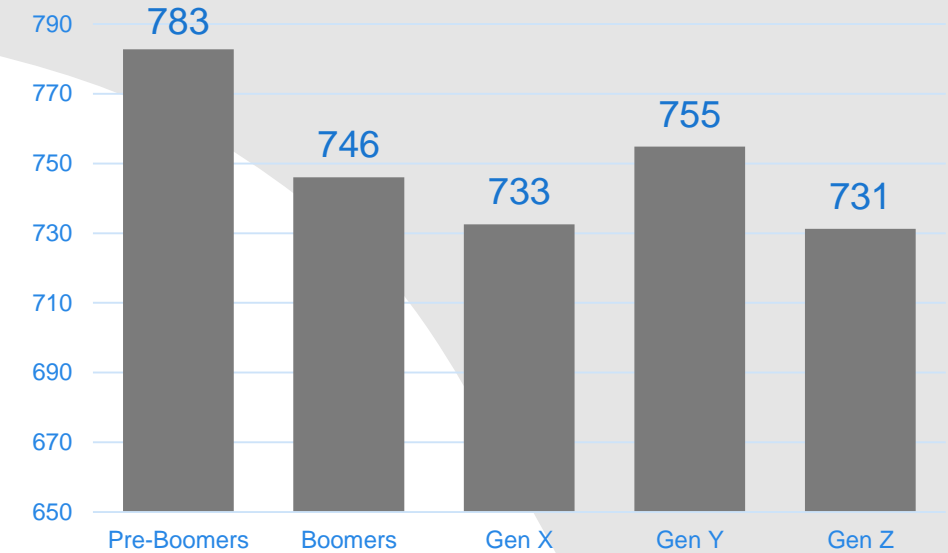
n=30 - 10 Small Sample Size

Where Are YOUR Satisfaction Gaps by Age

Large Brands Overall Satisfaction



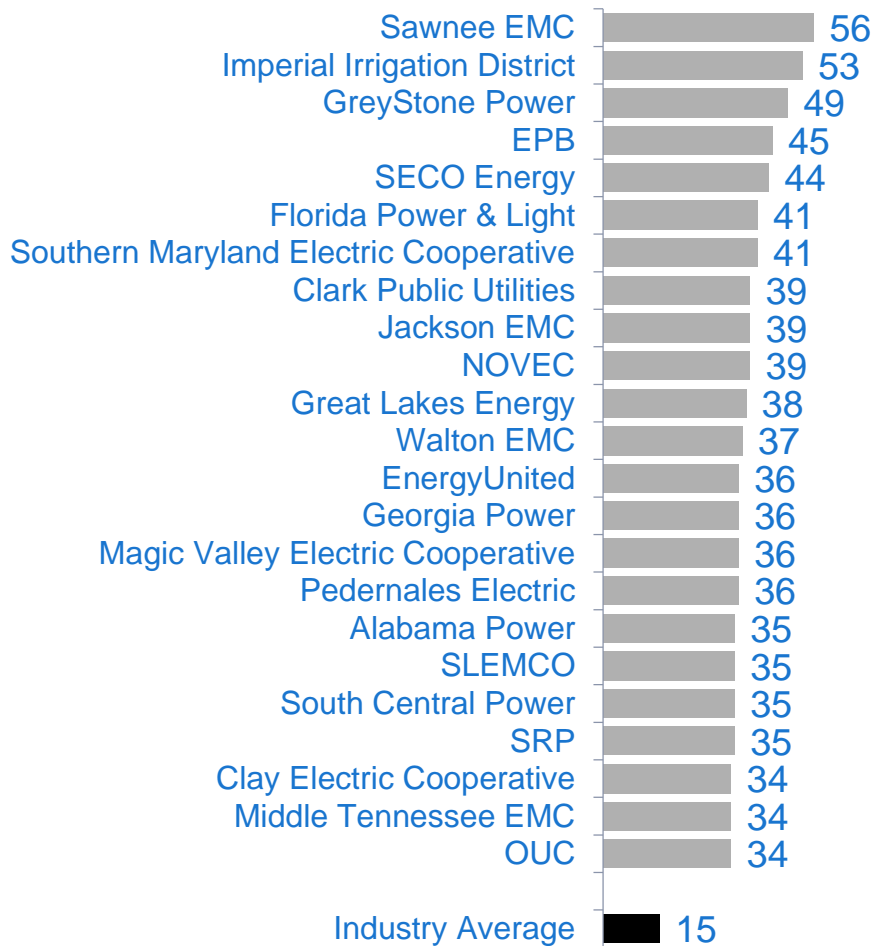
Brand A Overall Satisfaction



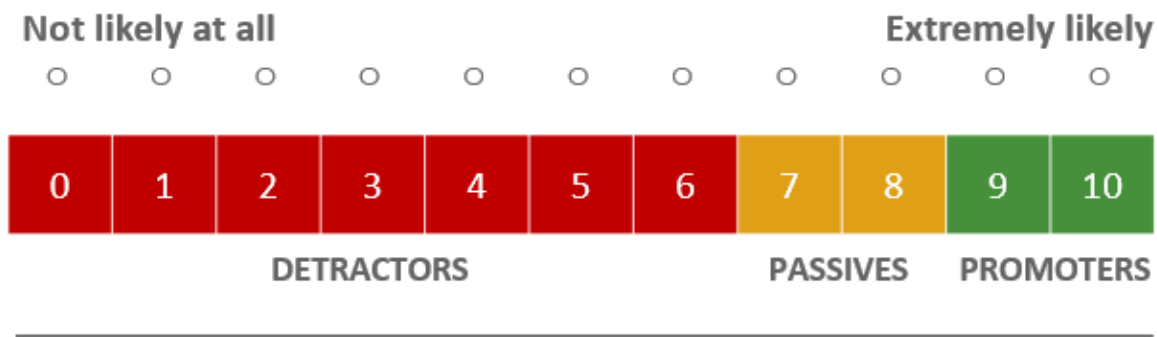
Generation: Brand A Gap to the Industry Large Brands in Overall Satisfaction

NPS® shows why Promoters are important

Top Brands - Industry



How likely is it that you would recommend (brand) to a friend or colleague?



Percentage of Promoters

Percentage of Detractors

Net Promoter ScoreSM (NPS[®])

Q1: NPS +13

Q2: NPS +17

2019: NPS +8

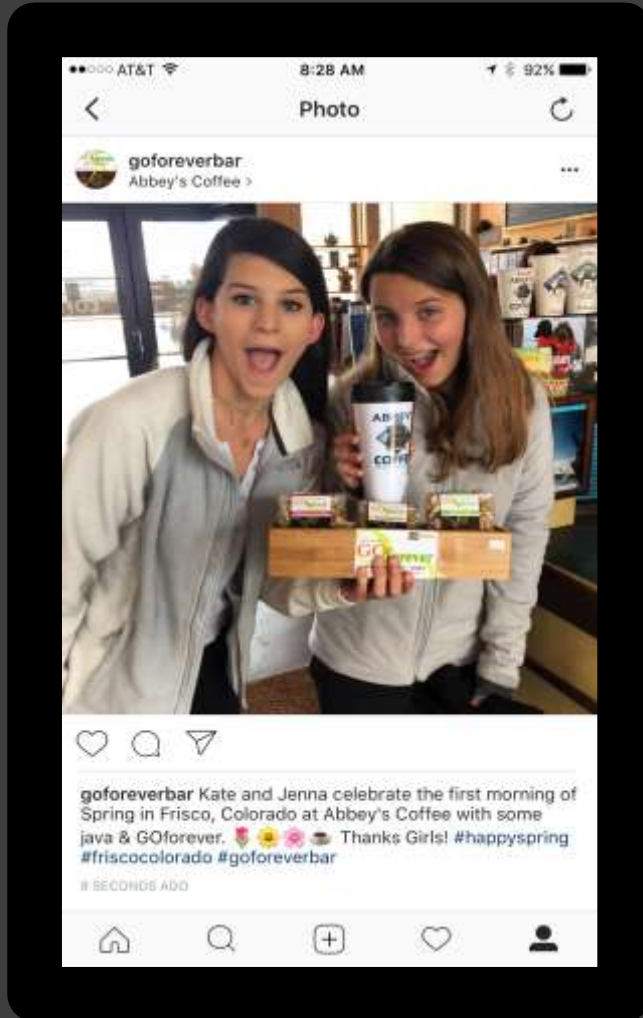
Note: Net Promoter System®, Net Promoter Score®, NPS® and the NPS-related emoticons are registered trademarks of Bain & Company, Inc., Fred Reichheld and Satmetrix Systems, Inc.

Engage-Human Touch



What will Generation Z expect from their utility as a customer/guest?

T...
Lit...
Pressed...
Triggered...



Facebook is for OLD People!

Beer and Immunity

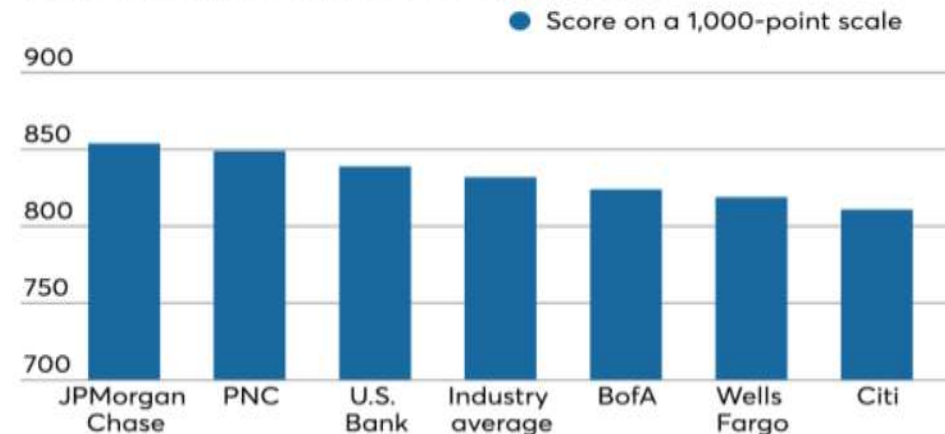
JPMorgan Chase ranks No. 1 in customer satisfaction: J.D. Power

At JPMorgan Chase we organize a bus trip every year. The management teams take part, and so do the tellers. We go to call centers and operating centers and see customers and CEOs and have great fun. When people get on the bus, we give them beer and immunity: Say whatever you want –you won't insult anyone here. They speak out, for example, about what other banks are doing well. And we follow up. That's what respect looks like. It doesn't just mean that I treat you nicely. It's that I understand I need to do a better job, not only for myself but for you, too.



Chasing Chase

JPMorgan Chase had the highest customer-satisfaction score among the nation's six largest banks



Customer Service for Anything...



Customer Service for Anything

Helping people find answers.



ASK FOR HELP ON ANYTHING AT:

1-800-927-7671

(press 3)

How it works

The world is changing a lot. It is for us too. But the one thing we DO know is we love helping people. You may know us for our great service. But our hope with Customer Service for Anything is that we can offer up our fantastic customer service team to help you in anyway that we can – no purchase required.

If you just want someone to talk to, a kind voice, about anything – the weather, the latest Netflix show, your dream vacation plans for when this is over – anything. We'd love to connect with you.

1-800-927-7671

(press 3)

Ms. Monica Whiting

V.P. Customer Experience

How many handwritten notes
did your team send last week?
Last Month?
This Year?

Dear Ms. Whiting,

Our son, who lived in Tampa, passed away in February. After his passing I contacted TECO to get his account transferred over to me so that I could continue to pay the electric bill at his townhome until such time as it was sold.

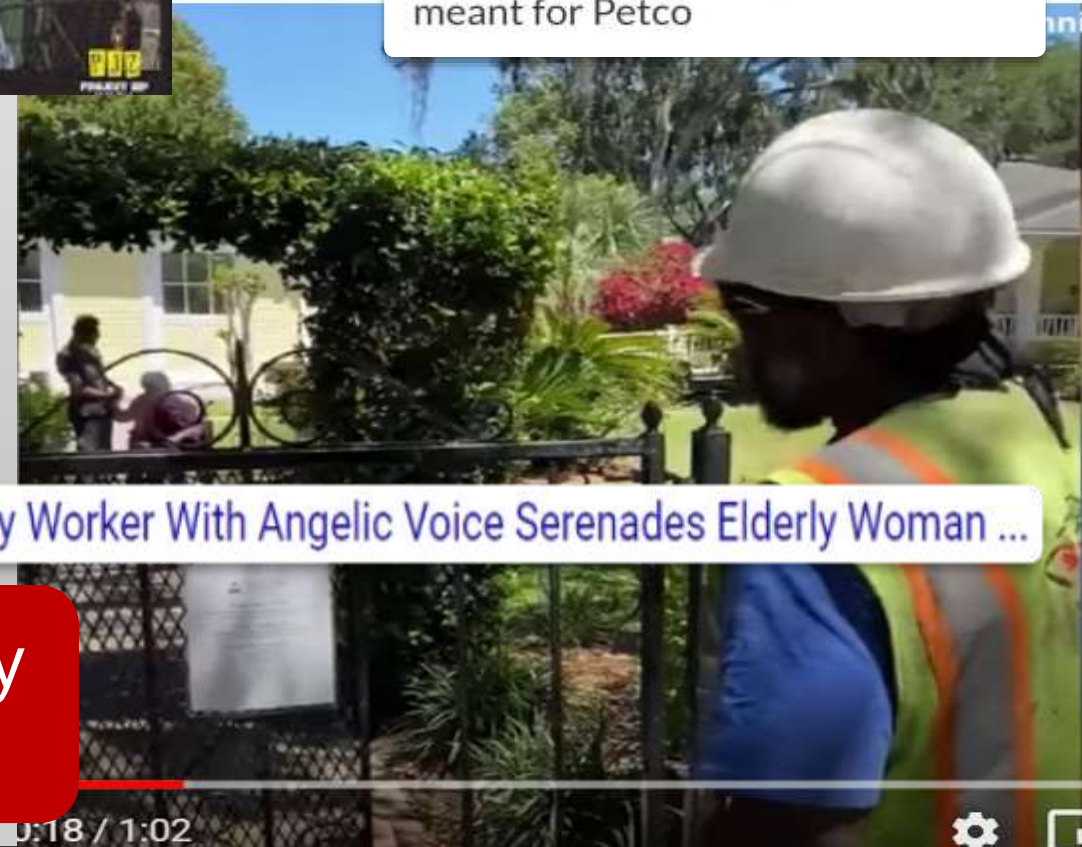
The customer service agent I spoke with was very sympathetic, professional and extremely helpful. She made the process simple and easy for me and I really appreciated that.

What really blew me away was that a month or so later I received a sympathy card with a hand-written note in the mail from that same agent. Her name, (and I apologize because I only have her first name), is Charlsene. To say that this goes above and beyond doesn't do it justice. She must be an absolutely awesome employee and you are lucky to have her.

I just thought you should know.



Pepco buys 8-year-old girl hamster
after she accidentally sends letter
meant for Petco



Utility Worker With Angelic Voice Serenades Elderly Woman ...

Customers want Digital but they
still LOVE the Human Touch...

Wrap Up



10 Lessons in Customer Behavior

- **Work backwards from the customer.** Don't just talk to them. Listen to what they have to say, and then put it into use, into practice.
- **Customers will give you a grace period (sometimes).** If you've been consistent on projects and results, customers will be forgiving with a bad situation. But, you have to have started this in a positive space.
- **Your customer judges you on the basics.** Reliability and value drive customer needs. They always have. They always will. No matter how you're applying it.
- **Customers love convenience.** So you have to be on all channels, not just the ones easiest for you (and not just the ones most of them use). Be available however a customer wants to talk.
- **Work on your consistent customer message.** They want every message across every medium to connect and be consistent. (And the tolerance for differences in channels is declining.)

All Customers respond to one phrase...two simple words that your Mom taught you to say.
"Thank You."

Work backwards from the customer

Customers will give you a grace period (sometimes)

Your customer judges you on the basics

Customers love convenience

Work on your consistent customer message

10 Lessons in Customer Behavior

- **Your customer is going to measure you by others.** They're going to come to you with expectations they learned in retail, in banking, in insurance, in healthcare.
- **Every customer is mobile.** Even the customer who doesn't identify as mobile, doesn't think of himself as mobile (i.e., doesn't shop on his phone) is mobile.
- **Your customers who don't talk to you may wander.** If you don't keep your customers in the conversation, they may be talking to someone else.
- **Customers today expect that you know them.** This applies to every transaction. Recognize them by name, know their pain points, know their account history.
- **If you make a customer a promise, keep it.** Customers don't like when a problem occurs, but it's much, much worse if you've told them a timeline or a result that doesn't happen.

All Customers respond to one phrase...two simple words that your Mom taught you to say.
"Thank You."

Your customer is going to measure you by others

Every customer is mobile

Your customers who don't talk to you may wander

Customers today expect that you know them

If you make a customer a promise, keep it

*“They always treat us as their
most important customer.”*

Utility Customer

Thank You!





Empowering Utilities for the Future

Communications During a Crisis



PANDEMIC



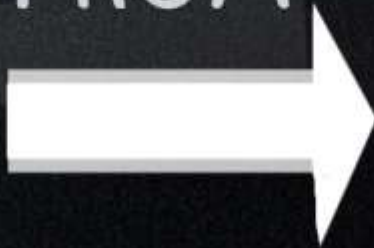
STORM



**POWER
QUALITY**

LESSONS
LEARNED

FROM



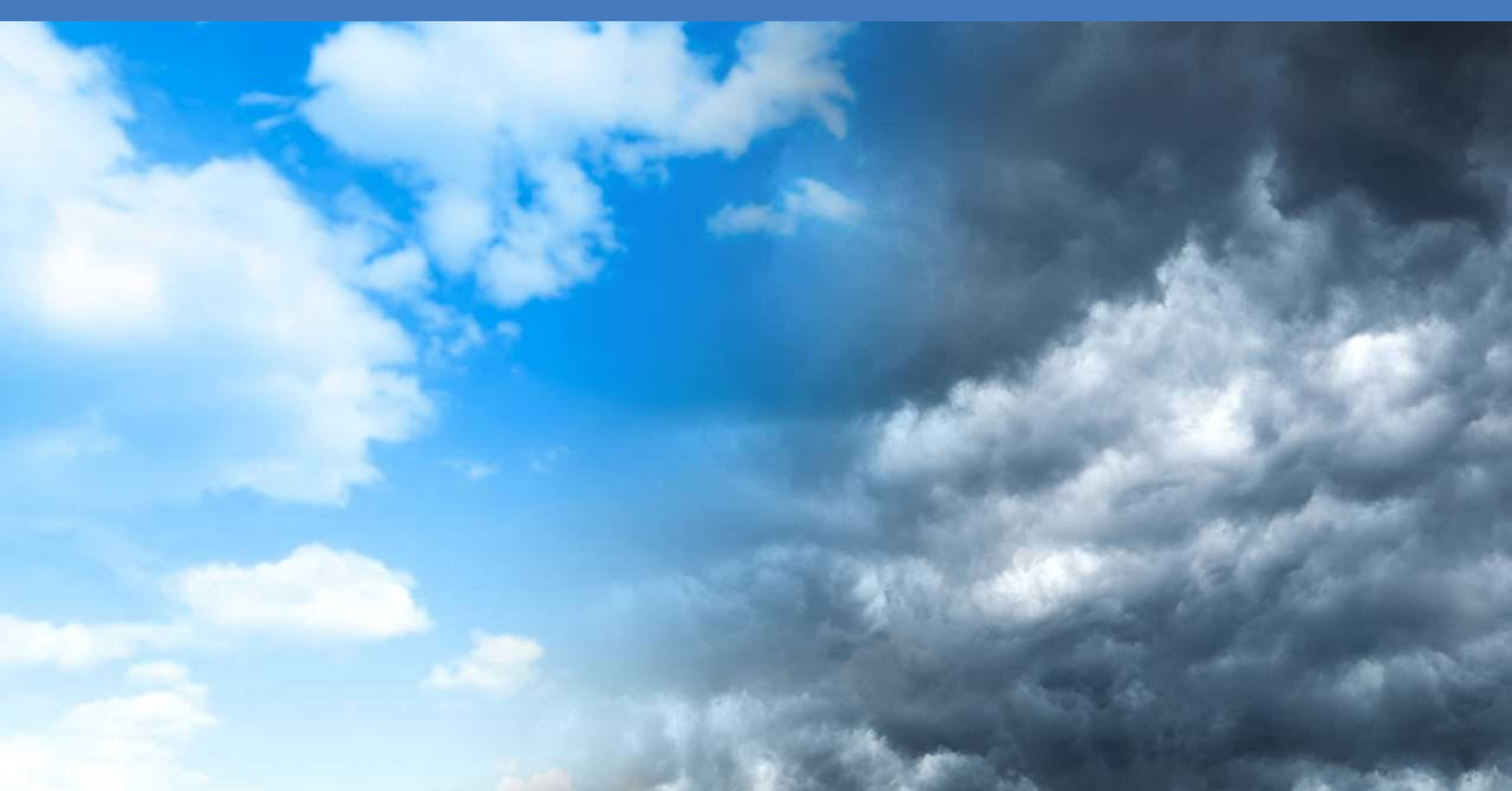
Communications During a Crisis



Communications During a Crisis

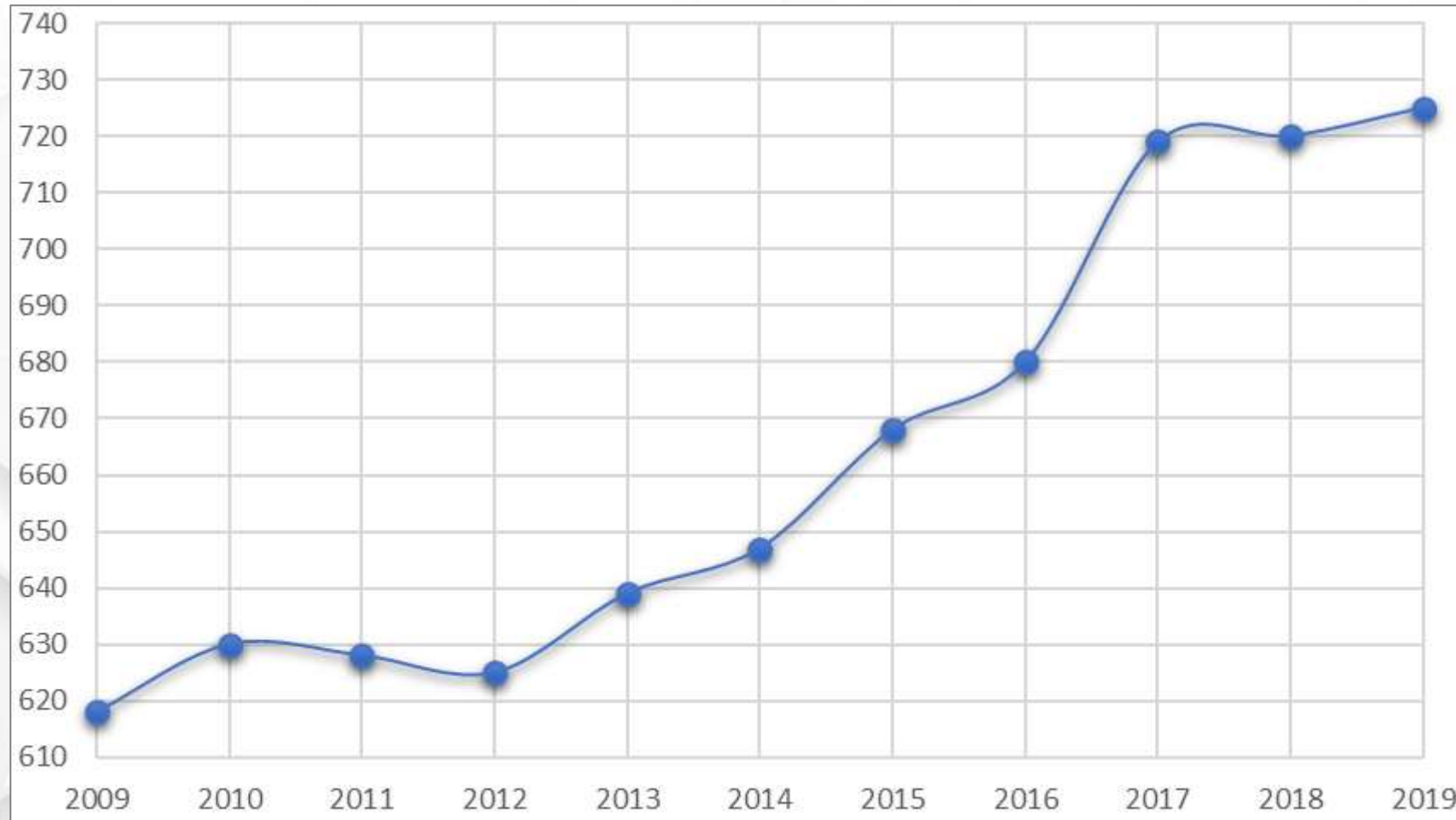
- Payment of
- Assistance
- Authorized vs Unauthorized payment centers
- Programs
- Energy tools





Utility Industry Trend

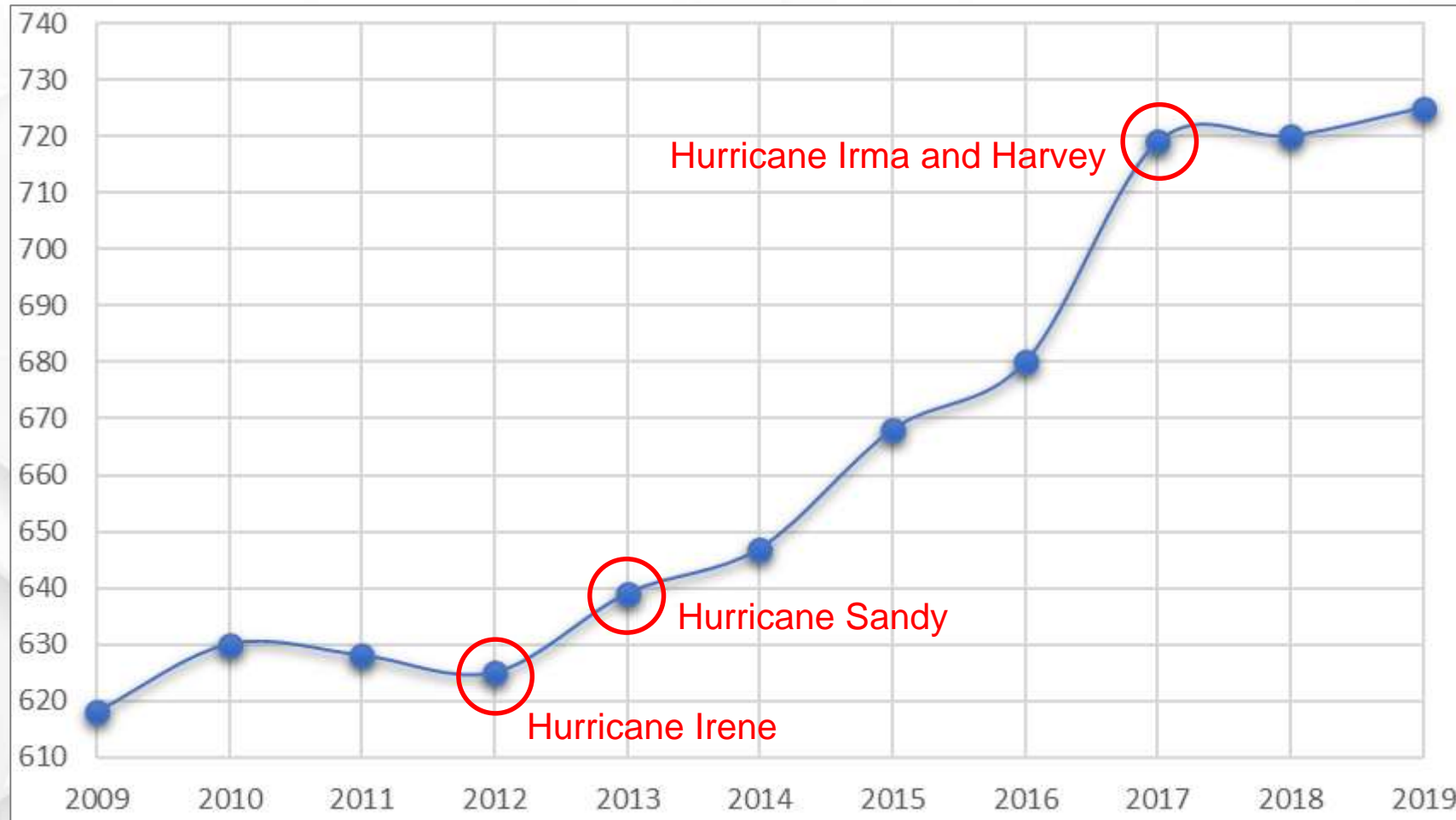
CSat Score over Time



Source: J.D. Power 2009 – 2019 Electric Utility Residential Customer Satisfaction StudiesSM

Utility Industry Trend

CSat Score over Time



Source: J.D. Power 2009 – 2019 Electric Utility Residential Customer Satisfaction StudiesSM

Establishing a Relationship

- 1 Commitment
- 2 Trust
- 3 Loyalty

S E R V I C E
Q U A L I T Y
S A T I S F A C T I O N
L O Y A L T Y
S U P P O R T
C O M M U N I C A T I O N
F E E D B A C K
T R U S T



Managing a Crisis

1

COMMUNICATIONS

2

PERFORMANCE

Crisis Communications

1. **Adjust** your tone
2. **Use** your voice
3. **Practice**
transparency
4. **Be fair** but firm
5. **Start** the
conversation

Source: Forbes July 30, 2020

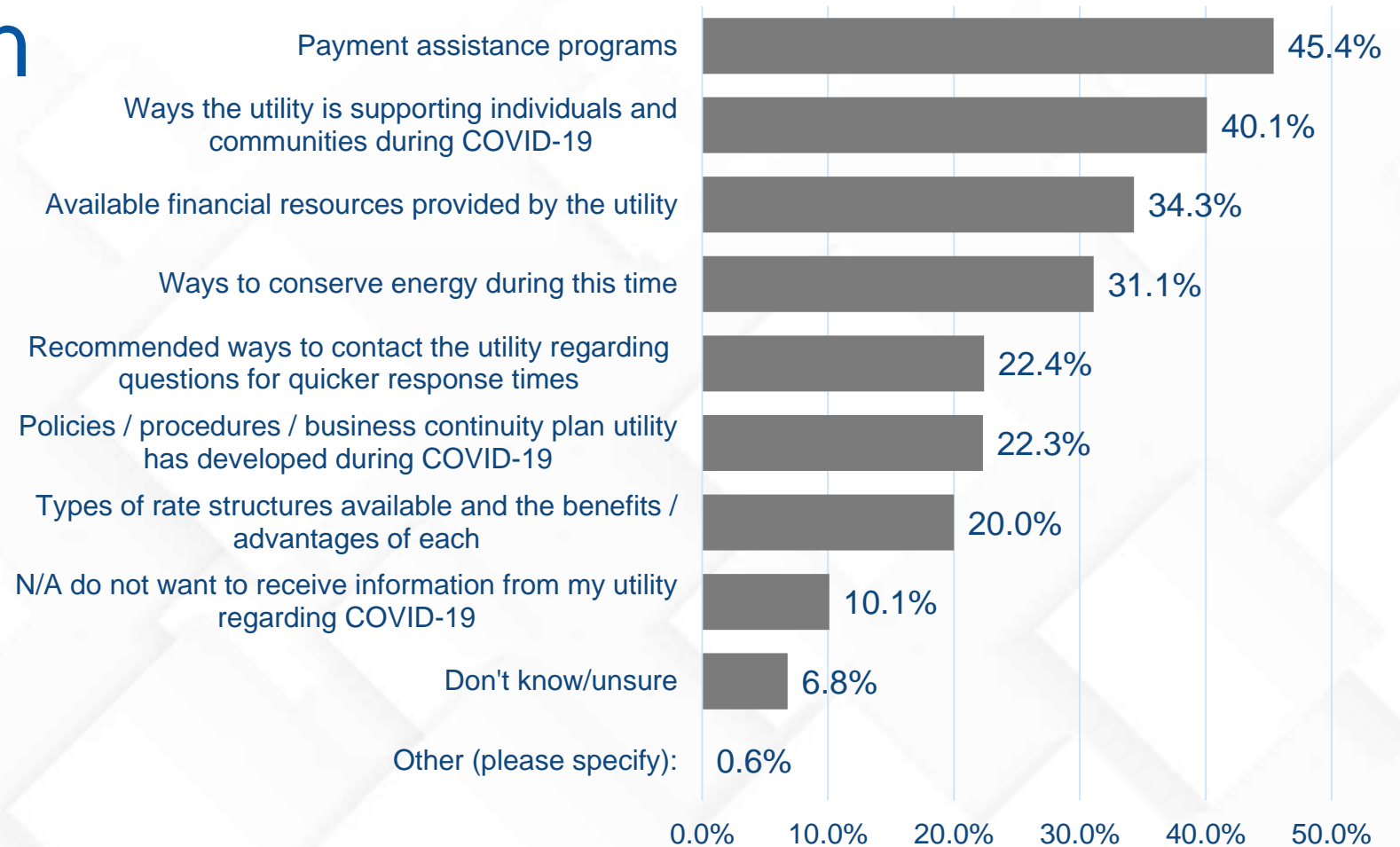




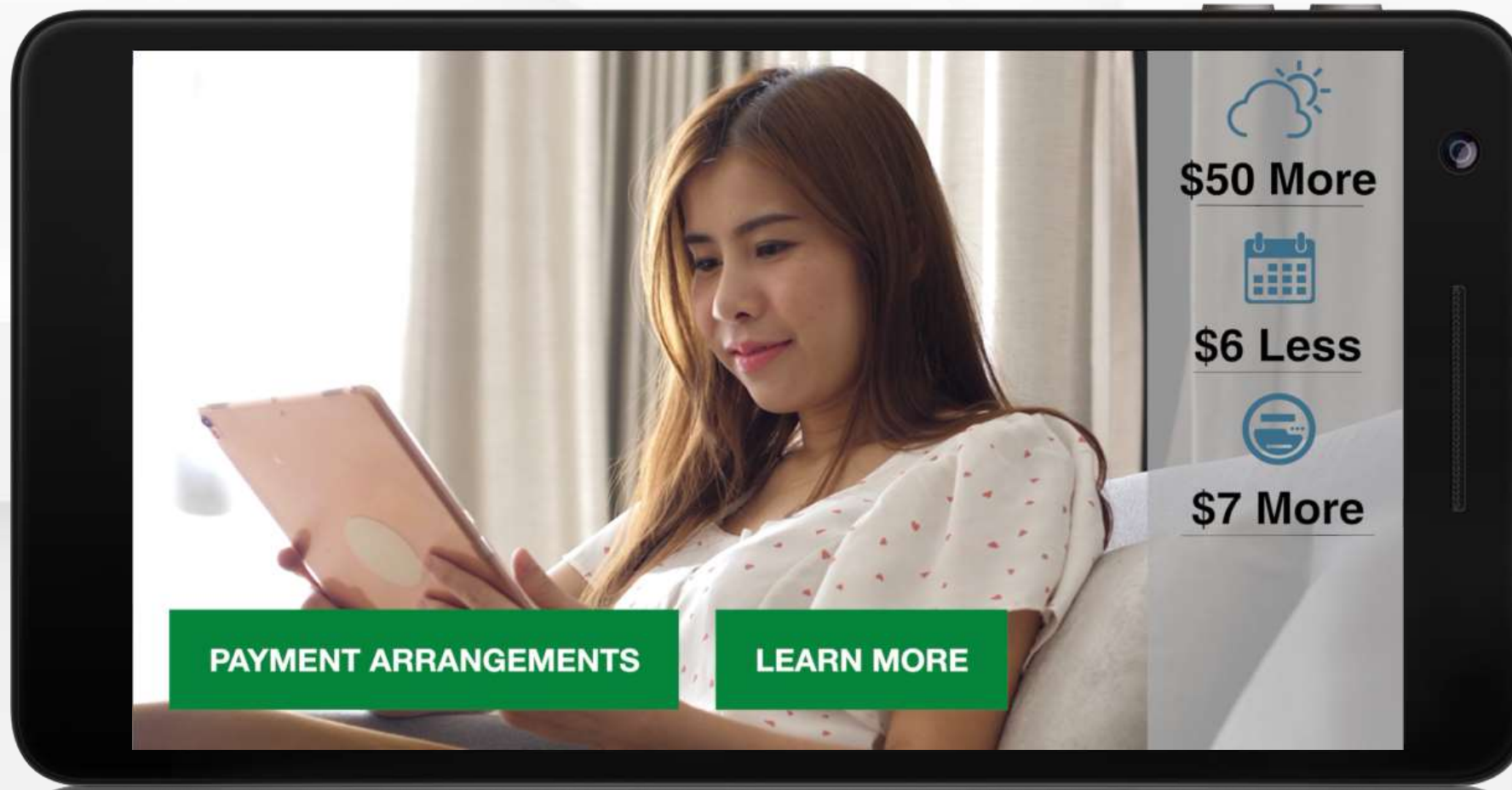
Pandemic

Preferred Communication During COVID-19

What COVID-19 related topics would you like to see more communication from your electric utility about?



Proactive Outbound Video



Calls to Action

- ▶ Payment options
 - Assistance
 - Authorized vs Unauthorized payment centers
- ▶ Programs
- ▶ Energy tools
- ▶ NPS and Voice of the Customer Survey's



Messaging Results

- ✓ NPS 39 compared to industry average 15
- ✓ 98% user **improved** brand perception
- ✓ 96 reported **favorable** perceptions
- ✓ 90% reported would not contact utility
- ✓ 97% bill explanation **useful**





Storm

Preparation



Storm Video





Dear Sawnee EMC Member,

Tropical Storm Zeta barreled into north Georgia before daylight on October 29th, bringing up to 60 mph winds and heavy rain. The storm moved through our area quickly, yet it left destruction in its path unlike anything we have ever faced.

To our members who experienced a power outage, whether it was only a few hours, or much longer, we apologize for your inconvenience. We never like to see even one outage, but the 75,000 that were out at the height of this storm is truly one for the record books.

Zeta's powerful winds uprooted thousands of trees which entangled power poles and lines making the restoration process even more challenging. When compared to any other hurricane, tornado, or ice storm, Tropical Storm Zeta was undoubtedly the most powerful storm to ever impact our electrical distribution system in our 82-year history.

Our staff began watching Hurricane Zeta and preparing for it over a week before it came our way. These contingency plans included acquiring additional line crews and equipment. However, these actions are just part of the complex strategy of restoring service to all members after a major storm.

The over 350 men and women who call Sawnee EMC home, worked tirelessly around the clock to make sure every Sawnee EMC member had their power restored as quickly and safely as possible. It is my belief that our staff, as well as, the hundreds of contractors who aided us, are the true heroes of this storm and I sincerely thank them for their dedication, fortitude, and overall cooperative spirit.

For the many of you who have reached out to us over social media, by phone, or email to express your gratitude and appreciation for our staff, please know each comment is much appreciated.

We will learn from this massive event and we are already having conversations about ways to improve and streamline our efforts, so we can weather the next storm even better for our members.

In closing, thank you for your patience and support during this historic event and for being a member of Sawnee EMC.

May God bless you and yours.

Sincerely,

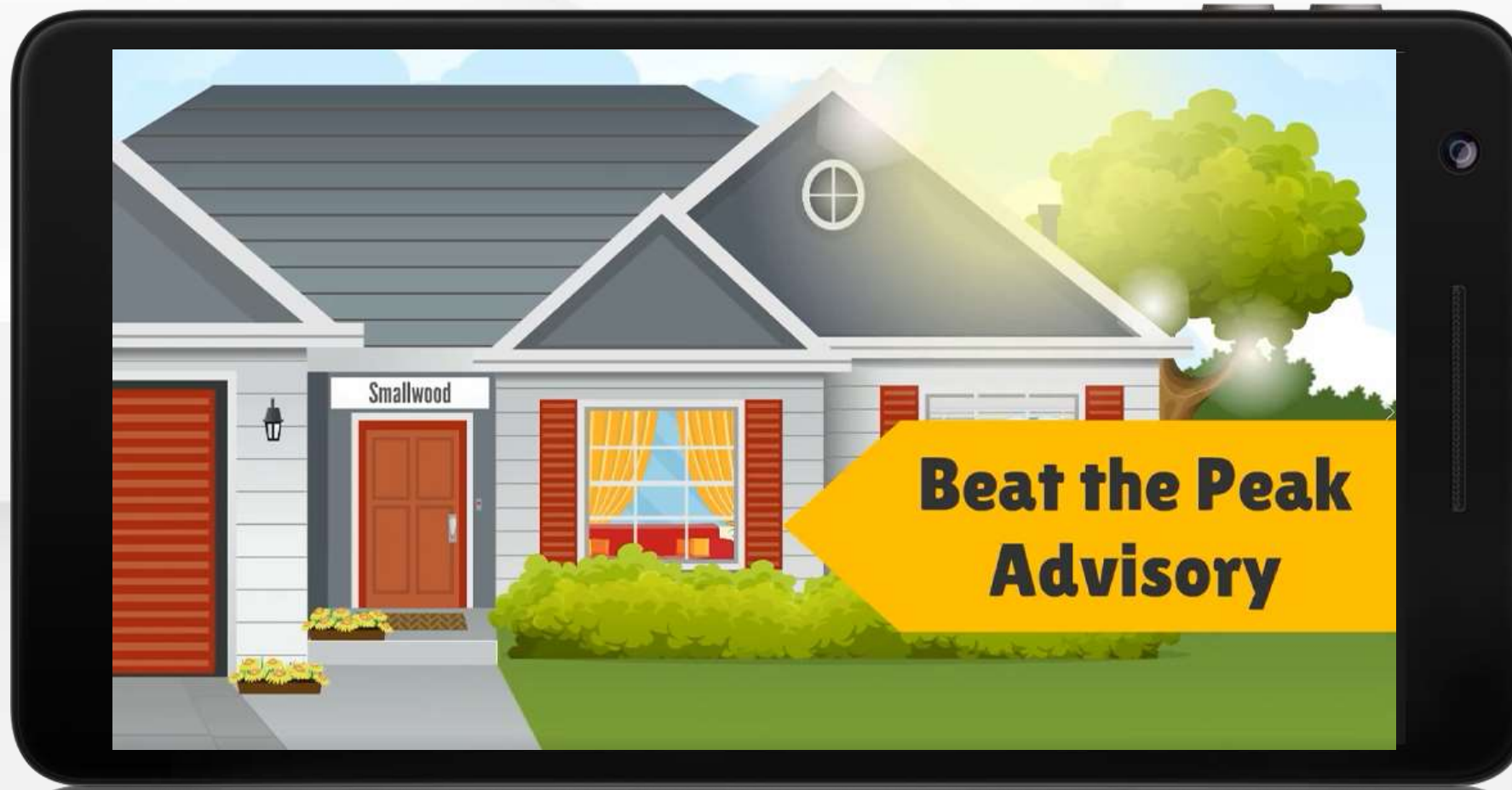
A handwritten signature in black ink, appearing to read "M. Goodroe", is placed above the printed name.

Michael A. Goodroe
President and CEO



Power Quality

Beat the Peak Video



Upcoming Webinars

December 8, 2020 – 2:00PM EST

Post Covid-19 Consumer Billing and Payment Behavior featuring Jacqueline Martine, Fiserv

January 28, 2021 – 2:00PM EST

Making the Smart Grid Relevant to Mainstream featuring Chris King, Siemens eMobility

► **Register online at apogee.net/webinars**



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Thank You!

Any Questions



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