



# Preparing for High Bill Calls

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**Jim Hunter**, Director of Customer Engagement

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**Susan Gilbert**

Chief Executive Officer  
Co-Founder



**Jim Hunter**

Director of Customer  
Engagement

● ——— Apogee Interactive, Inc. ——— ●



# Agenda

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What Helps During Peak Call Season

Our Experience Proactively Reducing Calls

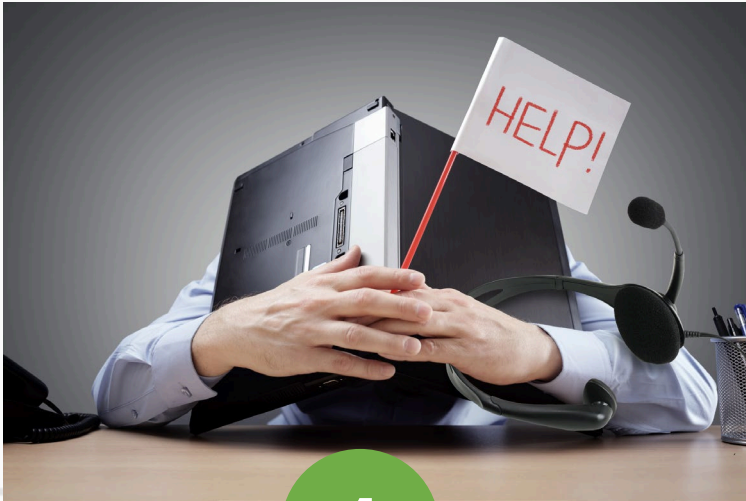
Disaggregation of Billing Histories Key

Show Some Available Tools

Offer to Get Utilities Up and Running Pre-Season



# What Helps a Call/Contact Center Manager?



1

Handling incoming calls – as efficiently and accurately as possible



2

Enabling quick, confident responses



3

Digging deeper to deliver first-call resolution



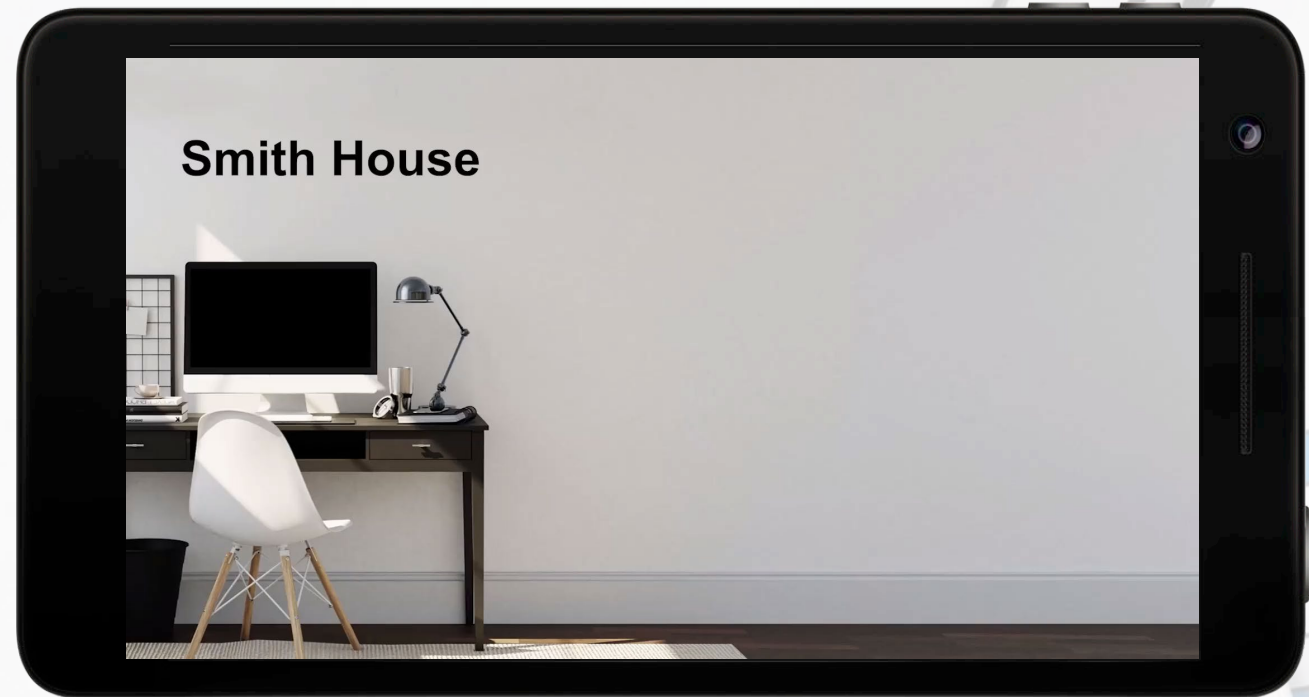
# High Bill Video Bill Explanation

Let's begin with what works...

Proactively sending personalized videos with 4 scenes:

1. Weather
2. Days of Service
3. Rate Change
4. Behavior

Watch for them...



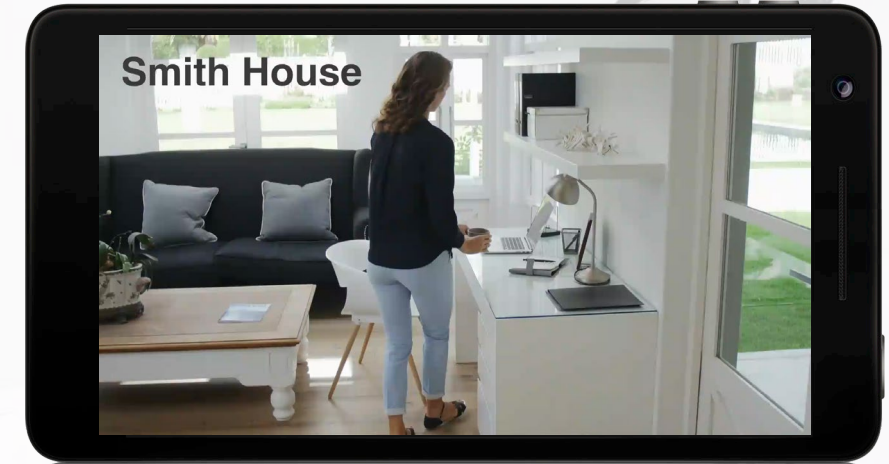
▶ Play High Bill  
Video Explanation

# Why call after viewing that?

- Extraordinary CTR topping 30%
- 15x Industry average of ~2%
- Use high engagement to Promote Programs suited to profile
- Cost per message not \$1
- Pennies or *fractions* of at scale.
- One **20th** other methods
- Unlike print, know who watched
- Survey creates two-way dialogue
- Get customers' reaction in ~real-time
- Success led to promoting programs

# Abbreviated Bill Explanation

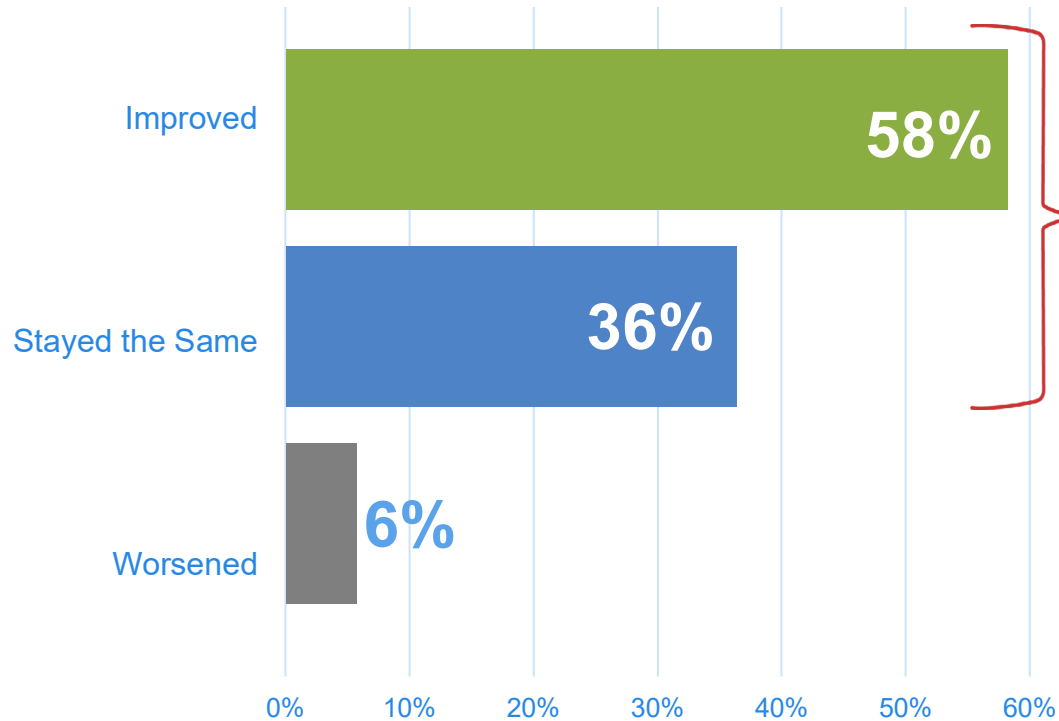
- Notice how abbreviated the bill explanation is
- This one promotes **Paperless Billing** - Click to Enroll at end >>>
- Clients report 10% increase in program participation
- Now offer 30 different video endings promoting:
  - New rates
  - Paperless billing
  - Rebates
- Lower messaging costs, freeing up rep time, improved operational efficiency, and promoting programs...
- Personalized videos also drive-up customer satisfaction and NPS
- Survey at end says customers love them



► Short Version Bill Explanation with Paperless Billing

# Perception Impact

After watching this video, has your perception of your utility...



- **58% IMPROVED!**

- **94%** Improved or Unchanged

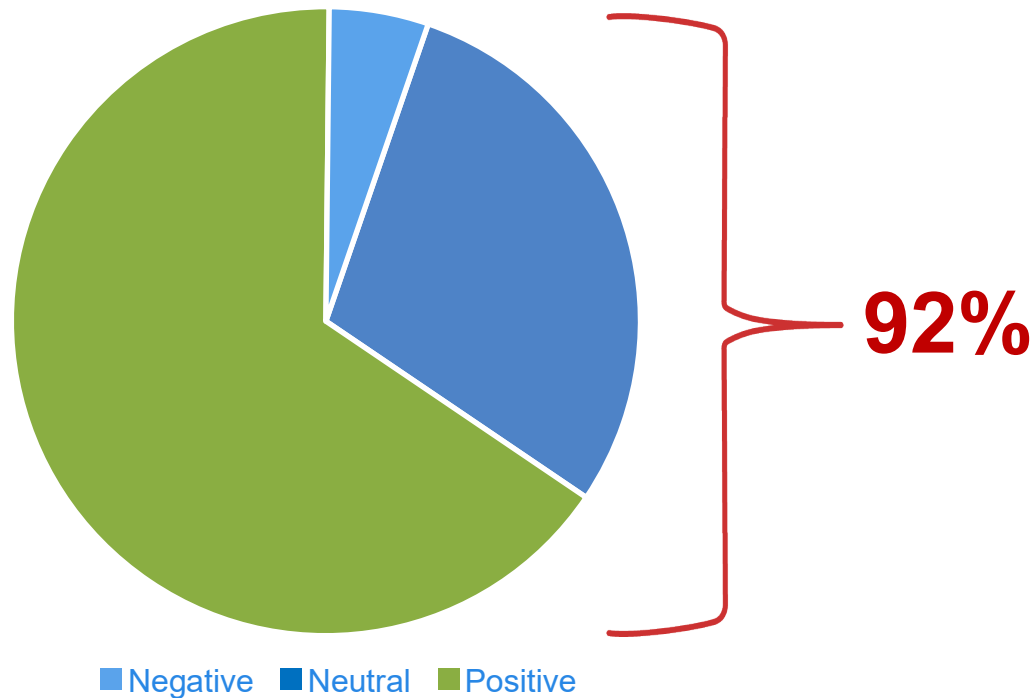
- ~10x more improved (58%) vs. (6%)



# Comment Analysis

## Extremely Positive!

Verbatim Classification



See appendix for complete list of verbatim comments

Wow! How'd you do that?

It created awareness and prompted more attention in thermostat settings.

I like the cost factors breakdown.

Seeing real increase costs was interesting and helpful. I think my other factor increase was from moving the thermostat to 68 instead of 66.

Interesting info, that you did not have to invest in supplying.

Very well done with the explanation of the higher monthly bill.

Very informative. I didn't know this.

The breakdown of costs

Good idea, simple and informative!

I must say it was interesting and informative good idea

I liked how it detailed the various factors that may have increased or decreased the bill. Knowing the cycle was 5 days longer was helpful.

it was very clear.

Impressive how you could break it down that way.

Well done!

I liked the dollar amounts told

It was specific to me and my family.

I like the breakdown of the factors affecting our bill.

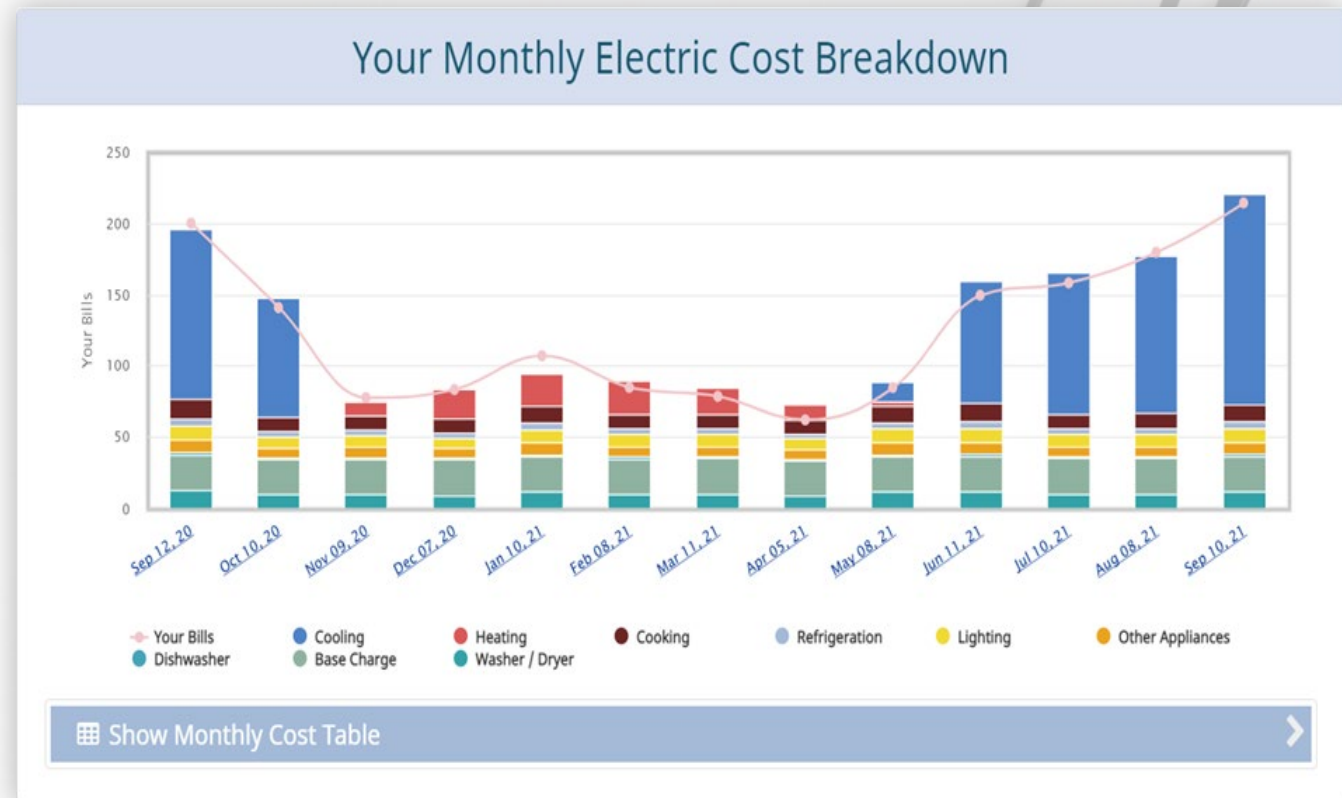
Extraordinary results:  
**98%** want them *regularly*.

Expect High Bill  
**COMPLIMENTS!**



# Accuracy Sets Us Apart

- Apogee Distinctive: Accuracy
- Pink Line - Bill Amount
- Colored Bars - Our Disaggregation
- Generally, Spot On
- Divergence Creates the Dialogue
- What happened in January?
- Consistency Builds Trust
- Field Audit, CSR, Online Audit





# Instant Answers for Reps

**Helps Reps  
Answer Customer  
Questions**



- **Reduces** call time
- **Improves** first call resolution

- **Consistent Answers**
  - Website Self-Service Online Audit
  - From Call Center Service Rep
  - Field Auditors
- **Builds Trust**

# Instant Answers

- Reps find answers for callers
- Builds their confidence
- Explanations drive first call resolution
- 97% achieved by one municipal
- Get email address to send report



# Instant Answers

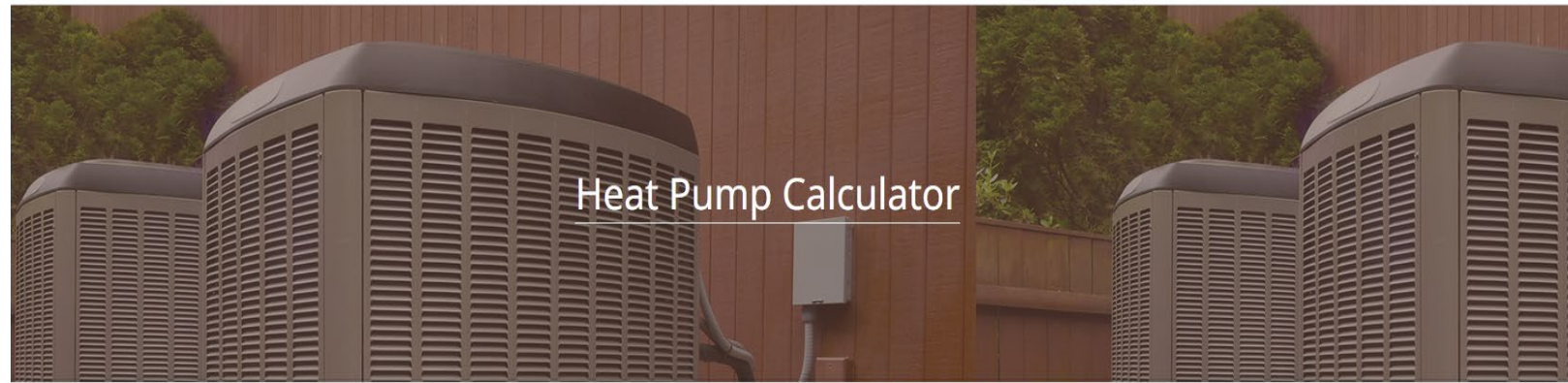
- Common Questions
- Some require *quick* decision
- Water heater or HVAC replacement
- Keep it simple
- Make it fast...

- ▶ Appliance
- ▶ Clothes Dryer
- ▶ Cooking
- ▶ Electric Vehicle
- ▶ Heating Comparison
- ▶ Heat Pump
- ▶ Holiday Lighting
- ▶ Lighting
- ▶ Programmable Thermostat
- ▶ Phantom Loads
- ▶ Space Heaters
- ▶ Televisions
- ▶ Water Heater



# Make It Easy

- Ask only what you must know
- Let them enter their profile
- Let them enter price
- We do the rest



Estimate the Annual Costs of your Home Heating & Cooling Energy Use

Describe your home

Select your home type:

Slide the bars below to match your home

1. Home Size (Sq ft): 1800

2. How air tight is it?

Poor/Drafty OK Good

3. Average Heat/Cool Setting (Degrees):

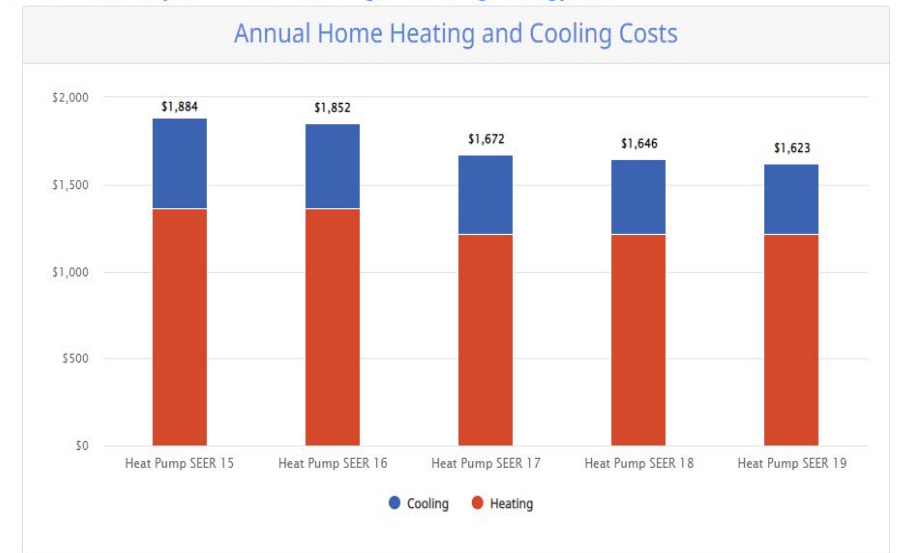
Heat : 70° Cool : 74°

Cooler Warmer

Adjust your fuel rates

Electric \$/kWh

0.120



# Electric Vehicle Calculator

## Tell Us About Your Gas Vehicle

MILES PER DAY: **30**

MILES PER GALLON: **21**

COST PER GALLON: **\$4.01**

## Choose Your Plug-in Electric Vehicle

Choose the Model Year: **2022** ▼



CHEVY BOLT



HYUNDAI KONA



HYUNDAI IONIQ



HYUNDAI SANTA FE



KIA NIRO



KIA SORENTO



NISSAN LEAF



TESLA MODEL 3



TESLA MODEL S



TESLA MODEL X



TESLA MODEL Y



TOYOTA PRIUS



2022-CHEVY BOLT

RANGE (MILES)

247

**3.45**

MILES PER KWH

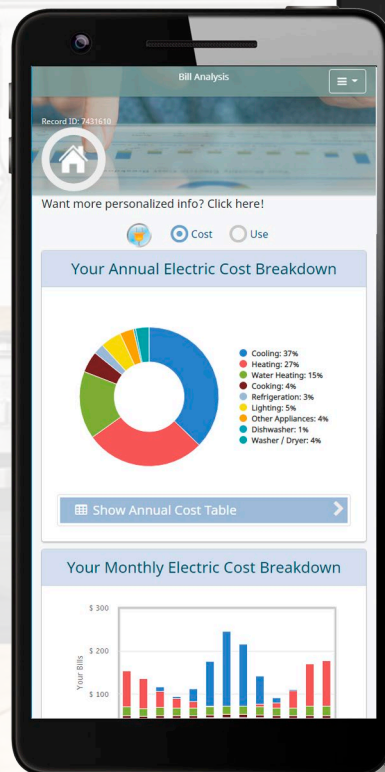
## Your Results

	Monthly Fuel Cost	Pounds of CO <sub>2</sub>
Current Gas Vehicle	\$171.86	842
New Electricity Cost	\$31.32	360
New Gasoline Cost	\$0.00	0
Monthly Savings	\$140.54	482

% OF CHARGING DURING OFF-PEAK HOURS: **50%**

# Online Energy Audit

As viewed on tablet or mobile device



**Tell Us About Your Home**

1) WHAT IS THE LOCATION OF YOUR HOME?

Your Account Number:  Enter City:

2) HOW BIG IS YOUR HOME?

Advanced House Details | Small House (500-1600 Sqft.) | Medium House (1600-3500 Sqft.) | Large House (3500-8000 Sqft.)

Do you own your home? ☒ Yes ☐ No

3) HOW MANY PEOPLE LIVE IN YOUR HOME?

Use the slider below to select the number of people in your home. Num. Occupants:

4) WHAT TYPE OF CAR DO YOU DRIVE?

Reset Profile | Show Analysis

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Full question set



# Mid-Cycle Alerts

- Notification sent mid-cycle
- Shows range of final amount
- While still time to change it
- Promote relevant programs
- Educate customers



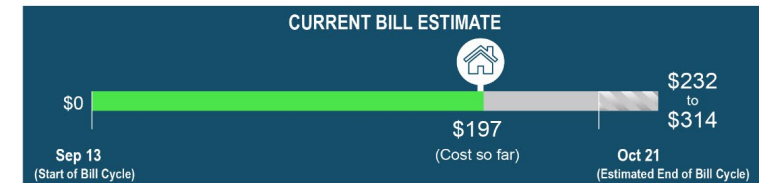
Hi Jessica,

This is your personal mid-cycle energy report. To help you learn more about your energy use, Apogee Electric provides you with resources to help you save energy. The [Energy Advisor](#) tool gives you an analysis showing where you use the most energy as well as some tips to save money.



You have used about \$197 worth of electricity in this billing cycle, and your total bill is projected to be between \$232 and \$314 by the end of your billing cycle. [Learn More.](#)

Your bill for the same month last year was \$138.

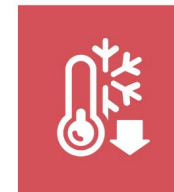


\* This is an estimate based on your past energy use and the weather forecast. If you have made changes in your usage patterns like vacations, guests, or how you use major appliances, it will affect the accuracy of the estimate.

Here is some information on how the weather is affecting your bill....



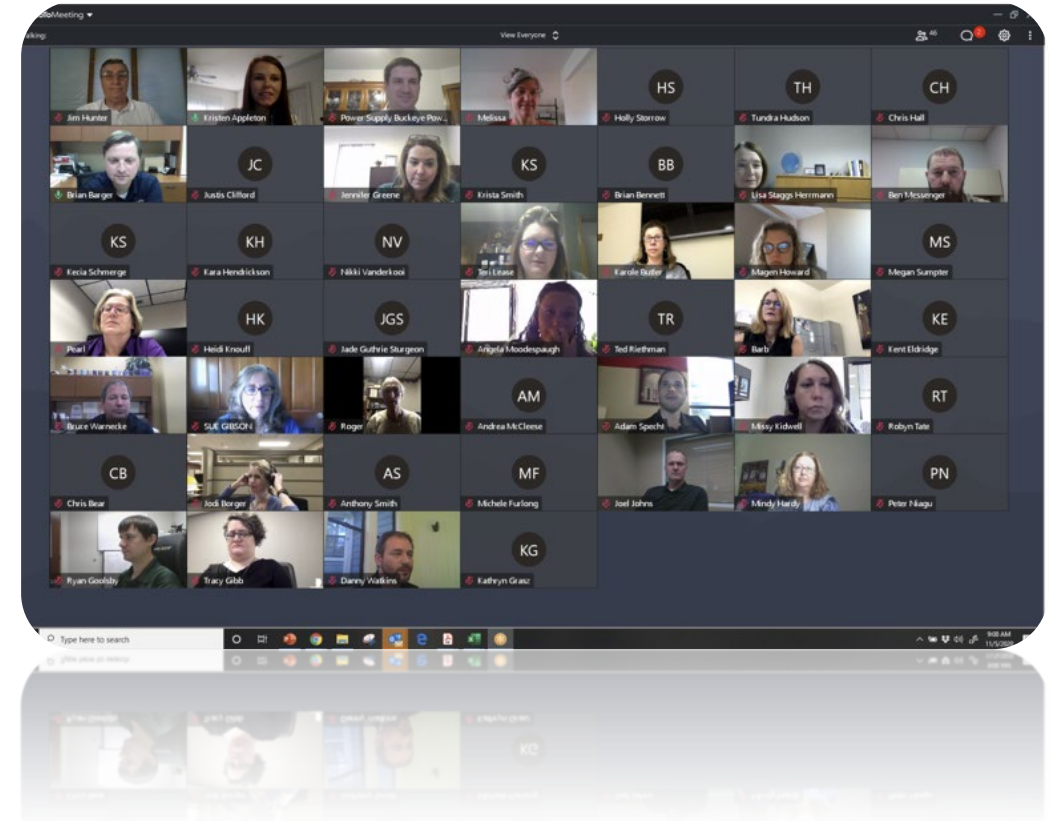
**Energy Use**  
30% of your energy used this bill cycle is estimated to be for heating.  
[Learn More...](#)



**Weather**  
We estimate that your neighborhood has 29 days that require heating this bill cycle.  
[Learn More...](#)

# Customer Service Rep Training

- Use depends on knowing tools exist
- Included: training, handbooks, videos
- Shows appreciation to reps
- Can reduce turn-over, reducing costs
- Applications are exceptionally intuitive
- Could be used without training
- Time initially and at regular intervals helps
- With turnover new reps can watch the videos
- Marketing Recourses also provided at no cost





# Marketing Resources

- Made for One, Shared with All
- Camera-Ready Art for
  - Brochures, Bill Inserts
- Website Banner Ads
- Articles for Publications, Newsletters
- Press Releases
- Icons









YOUR UTILITY  
LOGO

- ...1 Take a quick survey  
...2 Explore your energy use  
...3 Find easy ways to save
- Visit [yourutility.com](http://yourutility.com) and start saving today.





# Tasks & Timeline: 6 to 8 Weeks

Set-up Tasks & Timeline									
		Week 1	Week 2	Week 3	Week 4	Week 5	Week 6	Week 7	Week 8
Task 1.0	Kick-Off Meeting								
Task 2.0	Data Transfer Protocols								
Task 3.0	Files Received or Web Service Activated								
Task 4.0	Video Script changes								
Task 5.0	Testing								
Task 6.0	Bill Samples Reviewed & Testing Complete								

# Video Messaging Pilot Offer

- FIRST 5 UTILITIES
  - Special discounted pricing for 4-month pilot
  - Includes Rep training, handbook
  - Marketing support
  - Links to your programs
  - Monthly report of customer ratings and verbatim comments
  - Final Report on value produced and in-person presentation of findings
  - Request in Chat or contact [info@apogee.net](mailto:info@apogee.net)

# Questions?





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**Jim Hunter**  
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**Get Social with Apogee!**



Thank You!