

APC GEE® Empowering Utilities for the Future

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Customer Engagement and Program Management Platform



Speaker



Jim Malcom, COO, Apogee Interactive, Inc.

Jim Malcom is Chief Operating Officer of Apogee Interactive, Inc., providing 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.

Malcom brings more than 30 years in corporate finance and accounting to Apogee, which began with the firms KPMG and Ernst & Young in Atlanta. His career steadily expanded to include senior posts as chief financial officer, corporate controller, vice president and treasurer for such area companies as Heidelberg USA, LecStar Telecom and Powertel.

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.

Take Aways

- Financial benefits of customer satisfaction
- Impact of customer awareness on customer satisfaction
- Nurturing a customer relationship
- Targeting the correct customer



- Serving Hundreds of North American Utilities
- Reaching Tens of Millions of Customers
- Providing Software as a Service (SaaS)
- Delivering
 - Increased Customer Satisfaction
 - Heightened Customer Engagement
 - Energy Efficiency and Revenue Generating Program Promotion
- Distinctive: Top-Rated Data Analytics and Predictive Modeling
- Industry's Most Comprehensive Customer Engagement Platform
- Consistency Creates Customer Trust

Market Leader in Customer Engagement

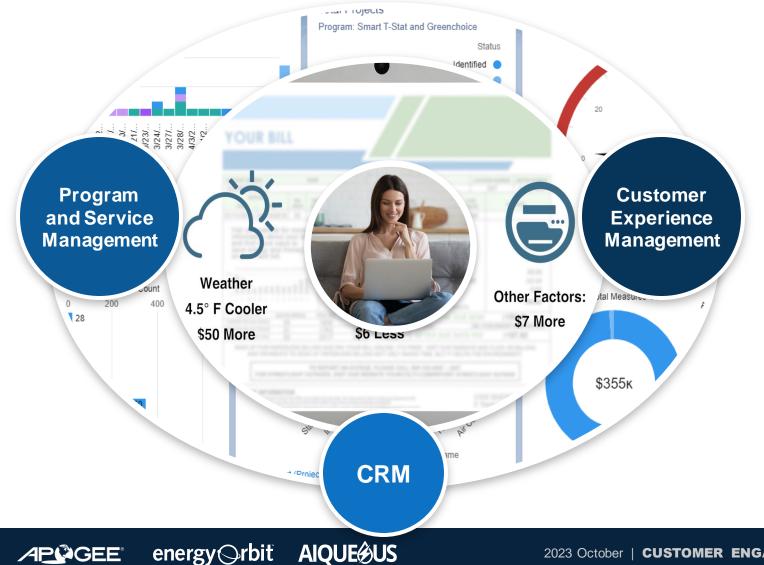
Celebrating 30 Years of Success

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Utility Benefits:

- 360 View of the Customer
- Customer Self-Service
- Staff Productivity
- Automated Proactive Communications
- Streamline Partner Collaboration and Rebate Management

| Involce Number Involce Date Voucher ID PO ID Gross Amount Discount Taken Paid Amount 409817 Aug222023 01178149 35.00 0.00 35.00 MMK- PT REFUND BGG 0 1178149 BGG 0 1178 | A STATE | Check Date: Aug/29/202 | 3 | Supplier Number | er: PATEPICPB | Check No: 4000461334 | | | | | |
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Customer Satisfaction Scores and Awareness



Source: J.D. Power 2013 Electric Utility Residential Customer Satisfaction StudySM

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Operational Costs Savings

- University of Indiana Research Paper
- 38 Utilities
- 478 Data years
- 1/100 or 10/1000 points increase
- Satisfaction-Varying Operating Costs SVOC

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Large Utilities

- (> 3 million residential customers)
 - ✓ Save \$29 million operating costs
 - \$13 million Selling and General Administration
 - ✓ \$8 million in Distribution

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✓ \$ 3 million Customer Service



J.D. Power and Apogee

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| | J.D. POWERS CRITERIA | | | | | | | | | | | |
|--|--|--|--|--|--|--|--|--|--|--|--|--|
| Power Quality & Reliability | Billing & Payment | Price | Corporate Citizenship | Communications | Customer Service | | | | | | | |
| APOGEE SOLUTIONS | | | | | | | | | | | | |
| Reliability Report Storm Notifications Demand Response | Bill Analysis Messaging Promote Billing and Payment Options Mid-Cycle and Threshold Alerts Annual Summary | Rate Analysis Rate Communications Peak Price | Covid Messaging Charity Promotion Round-Up Program Payment Assistance | Personalized Messaging Specific Usage Tools Program Promotion Pre-cooling Pre-heating | CSR Toolkits Self-service Tools EA and SPCs Field Auditor Tool Welcome Series Marketplace | | | | | | | |

ACSI and Apogee

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| | | | ACSI Criteria | | | | | | | | | | |
|--|---|-------------------------------------|--------------------------------------|--------------------------------|--|-------------------------------------|--|--|--|--|--|--|--|
| Power Quality, Reliability & Restoration | Digital Presence (Mobile App & Website) | Billing and Payments | Customer Service | Local Community Involvement | Energy Savings Ideas | Environmental /Green Programs | | | | | | | |
| | Apogee Solutions | | | | | | | | | | | | |
| Reliability Report | Digital First Strategy | Bill Analysis Messaging | CSR Toolkit | Covid messaging | Energy Analytics | Carbon Reporting | | | | | | | |
| Storm Notifications | On-line tool kit | Promote billing and payment options | Self-services tools (EA and SPCs) | Charity promotion | Personalized Energy Recommendations | "Green" Rates Promotion | | | | | | | |
| Demand Response | Proactive Communications | Mid-cycle and threshold alerts | Field auditor tool | "Round Up" Program | Program Promotion | EV Promotion | | | | | | | |
| | | Annual Summary | Welcome series | Payment assistance | | Solar in Home Profile | | | | | | | |
| | | | Marketplace | | | | | | | | | | |



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Customer Program Strategy

Get customers:

- ✓ Aware
- ✓ On-board
- Engaged

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Combination of outbound communication supported by on-line resources

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Customer Program Strategy

Get customers:



✓ Engaged

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Combination of outbound communication supported by on-line resources

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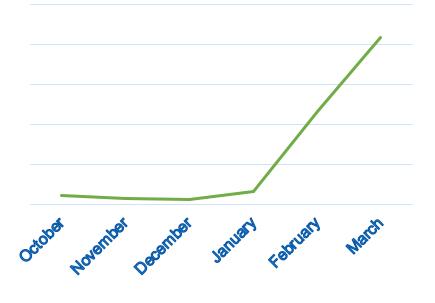


Lobby Cards



Learn how you can save with Coast EPA's **Residential Energy Advisor.** Just scan the QR code below to visit our **Energy Resource Center** and start saving! It's FREE and takes less than 5 minutes! Coast Electric

Energy Advisor Usage



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Customer Program Strategy

Get customers:



Combination of outbound communication supported by on-line resources



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Jones Onslow EMC

After the initial 6-month pilot, JOEMC saw better program participation and freed up staff for other projects. The outcome:

- **10.1% increase** in program participation and increased open rates and click-thru rates
- **87.2%** of 6,460 survey respondents advised that the bill was "**very easy**" to understand
- 95.6% of recipients responded they do not need to call customer care with bill questions

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Stephen Goodson, Vice President of Energy Services and Corporate Communication at JOEMC shared his experience,

"The folks at Apogee are great to work with...they are responsive and attentive. They're also extremely flexible."

Customer Program Strategy

Get customers:

- ✓ Aware
- ✓ On-board

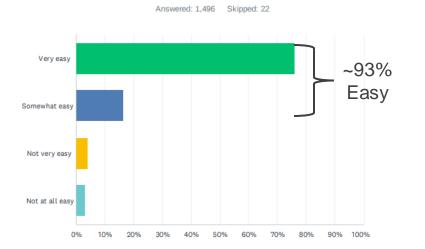
Engaged

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Combination of outbound communication supported by on-line resources

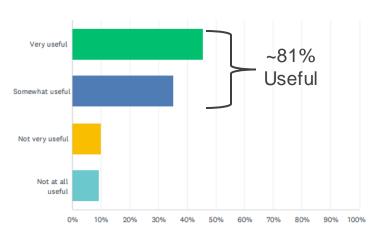


Survey Results: February Video Bill Explanation



Q1 How easy was the bill explanation to understand?

Q2 How useful was the information presented in this video?



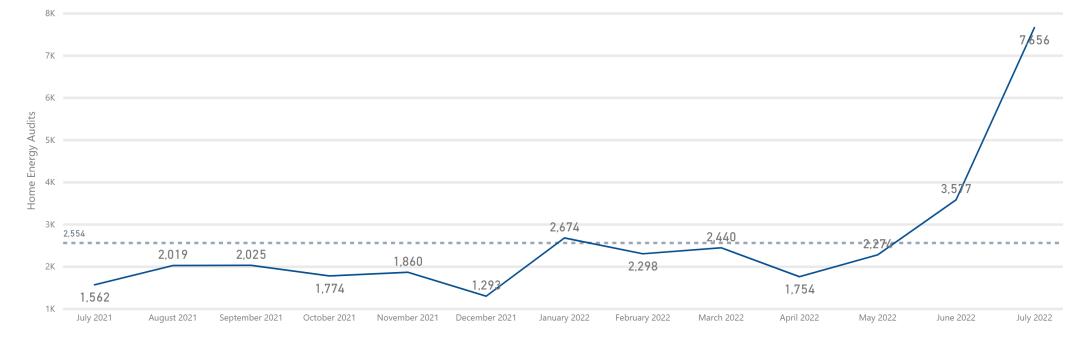
Answered: 1,503 Skipped: 15

| ANSWER CHOICES | RESPONSES | ANSWER CHOICES | RESPONSES | |
|-----------------|-----------|-------------------|-----------|-------|
| Very easy | 76.20% | Very useful | 45.31% | 681 |
| Somewhat easy | 16.51% | Somewhat useful | 35.26% | 530 |
| Not very easy | 4.08% | Not very useful | 10.05% | 151 |
| Not at all easy | 3.21% | Not at all useful | 9.38% | 141 |
| TOTAL | | TOTAL | | 1,503 |

Energy Audits

July 2021- July 2022TypeHome Energy AuditsCustomer Audit with Billing Data17,692Customer Audit without Billing Data4,849Customer Service151Field Audit10,514Total26,239

| July 2022 | |
|-------------------------------------|--------------------|
| Туре | Home Energy Audits |
| Customer Audit with Billing Data | 5,565 |
| Customer Audit without Billing Data | 1,137 |
| Customer Service | - |
| Field Audit | 954 |
| Total | 3,577 |

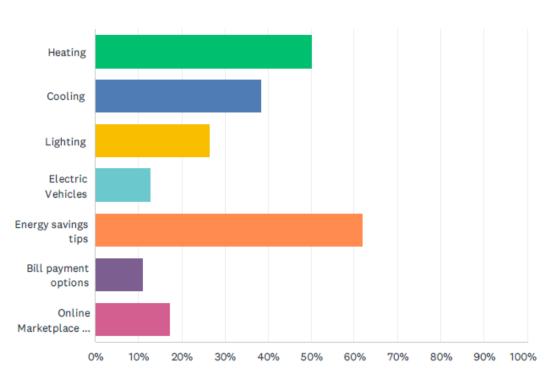


Gauging Customer Interest

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Q3 What topics are you interested in learning more about? (pick all that apply)



Answered: 6,089 Skipped: 4,258

Net Promoter Scores

| | Baseline Score | Apogee Messaging Score |
|--------|----------------|------------------------|
| IOU #1 | 9 | 29 |
| IOU #2 | 18 | 33 |





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Right Customer Right Program Right Time

Envoy: Outbound Communications

Personalized Annual Messaging Campaign

- Bill Explanation Video, can include water analysis
- Targeted Video- Programs and Rebates
- Annual Summary
- Seasonal Messages
- Mid-Cycle Notifications
- Automated Welcome "New Customer" Series

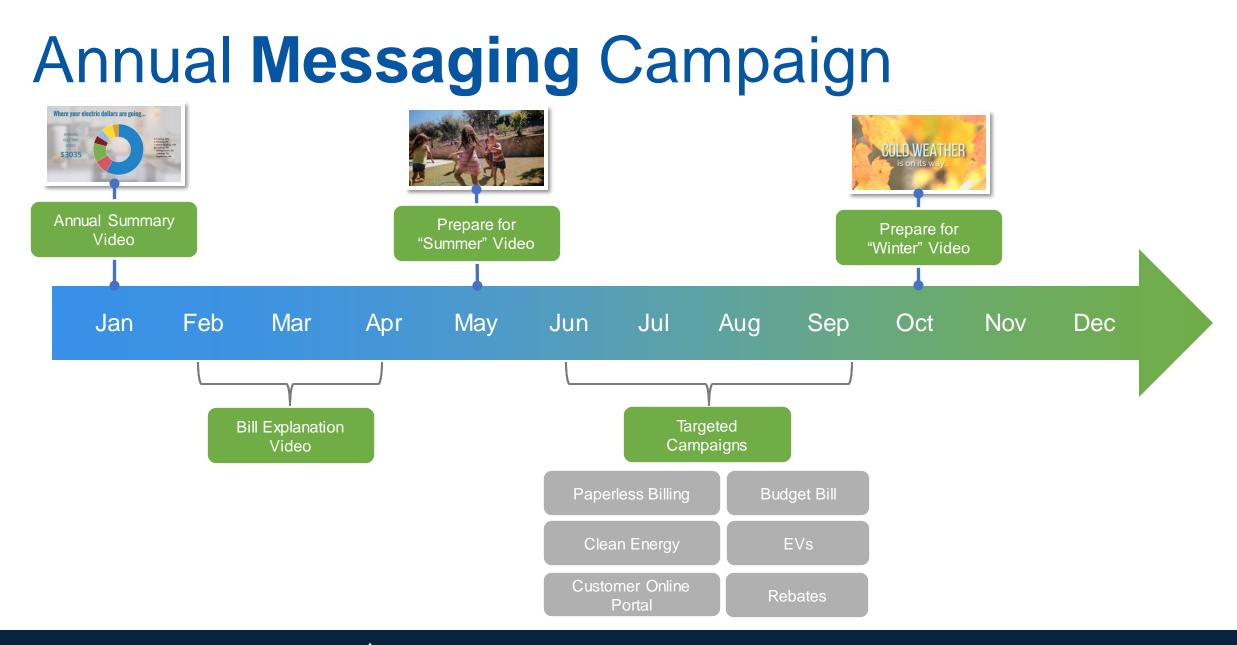
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Omni-Channel

• Email and SMS

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| | | 1.5 | |
|--|---|-----|---|
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Segmentation and Targeting

- Owner vs. renter
- Income

Past program participation

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Propensity to participate

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Residence Characteristics

- Size
- Age

Energy consumption patterns

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Energy profile



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Seasonal Messages





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Welcome Series:

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Automated messaging options from start of service.

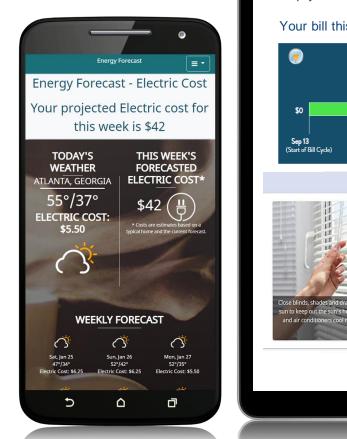
| 7-10 Days After Service Started: "Welcome to Consumers Energy" | 3-4 Days After Receiving First Bill: "Understanding Your Bill" | 3-4 Days After Receiving Second Bill: Program Promotions | 3-4 Days After Receiving Third Bill: General Video Bill Explanation |
|---|--|--|--|
| Velcome! | <text><text><text><text><text></text></text></text></text></text> | <text></text> | WELCOME to your VIDEO BILL EXPLANATION |

Mid-Cycle Alerts

- Notification sent on each customer's 16th day of bill cycle
- How much their bill is now and how much it is forecasted to be at end of bill cycle
- Behavioral tips to save on energy bills
- Promote Lansing initiatives and programs

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Your Mid-Cycle Energy Report

Hi Kellee,

So far, your electric bill is \$197 and is estimated to be between \$232-\$314 by the end of your bill cycle. We've included tips to help you save.

Your bill this time last month was \$378.



Energy Monitor

Proactively identify high bill customers

- Identify accounts with large increase
- Evaluate each account weekly
- Proactively alert customer manually or automatically
- Great for customer sat.

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Currently in beta

| Utilities coserv | | | Period | Stat V H | te ide Ignored | | Date Ran | nge | Load Account Detail | ✓ Search filter | | | | iearch | | |
|---------------------|--------------------|---------------|------------|-----------------------------|-------------------|------------|-------------|------------|---------------------------|--|------------------------------|----------------------|-----------------------|--------------|--------------------|----------|
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| | | | | | | | Actio | ns• 🗐 🖛 Jî | Account Detail - 9000 | | | Actions * | | | | × |
| Period | Account | † Timestamp | % Increase | Avg kWh | Actual kWh | • Avg Temp | Actual Temp | Actions | Current State: History | None | | | | | | |
| Days7 | 9000653053 | 11-16-2022 | 206 | 273 | 833 | 65 | 64 | Ľ | Show all Detail | No | | | | | | |
| Days30 | 9000989678 | 11-16-2022 | 164 | 1279 | 3381 | 66 | 66 | Ľ | Timestamp | Analysis Timestamp | Period | % Increase | Avg kWh | kWh | Avg. Temp | Temp |
| Days14 | 9000653053 | 11-16-2022 | 126 | 488 | 1102 | 65 | 65 | Ľ | 11-16-2022 | 11-13-2022 | Days30 | 54 | 1112 | 1709 | 66 | 66 |
| Days14 | 9001572756 | 11-16-2022 | 122 | 259 | 575 | 66 | 65 | C | 11-16-2022 | 11-13-2022 | Days14 | 126 | 488 | 1102 | 65 | 65 |
| Days7 | 9000928495 | 11-16-2022 | 122 | 110 | 244 | 65 | 64 | Ľ | 11-16-2022 | 11-13-2022 | Days7 | 206 | 273 | 833 | 65 | 64 |
| Days14 | 9001555260 | 11-16-2022 | 93 | 482 | 932 | 65 | 65 | Ľ | Notes | | | Add Not | ie + | | | |
| Days7 | 9000420057 | 11-16-2022 | 92 | 211 | 407 | 65 | 64 | Ľ | Timestamp | Owner | Action | | Note | | | |
| Days14 | 9001032265 | 11-16-2022 | 92 | 200 | 384 | 65 | 65 | Ľ | 11-17-2022 | Jim Albert | StateCha | nge | State change t | o None | | |
| Days14 | 9000343248 | 11-16-2022 | 90 | 680 | 1294 | 65 | 65 | Ľ | 11-17-2022 | Jim Albert | StateCha | nge | State change t | o Watch | | |
| Days14 | 9000420057 | 11-16-2022 | 87 | 361 | 674 | 65 | 65 | Ľ | 11-14-2022 | | | | | | | |
| Days7 | 9001109280 | 11-16-2022 | 86 | 190 | 353 | 65 | 64 | Ľ | 11-14-2022 | | | | | | | |
| Days14 | 9001109280 | 11-16-2022 | 84 | 314 | 578 | 65 | 65 | C | | | | Detail chart | | | | |
| Days7 | 9001432203 | 11-16-2022 | 84 | 220 | 405 | 65 | 64 | Ľ | 160 | <u>A</u> | | | | | | |
| Days30 | 9001032265 | 11-16-2022 | 83 | 454 | 831 | 66 | 66 | Ľ | 120 | | - | | | ~ | | L |
| Days7 | 9000343248 | 11-16-2022 | 82 | 385 | 700 | 65 | 64 | Ľ | afor | | | | no | | r | |
| Days14 | 9000389772 | 11-16-2022 | 82 | 209 | 379 | 65 | 65 | Ľ | www.co | | | ~~~ | | - 1 | | |
| Days14 | 9000928495 | 11-16-2022 | 81 | 198 | 358 | 65 | 65 | C | - | I I I I I I I I I I I I I I I I I I I | u H H te | at at at at | ռեհե | | | |
| Days14 | 9001432203 | 11-16-2022 | 78 | 386 | 689 | 65 | 65 | Ľ | | | | | | | | |
| Days7 | 9001032265 | 11-16-2022 | 78 | 115 | 205 | 65 | 64 | Ľ | 102 Mar 102 | start start strate start and start and | al al tall a stall an and as | tor wron neon a core | 101 1.101 n.101 1.201 | STOR STOR AN | or and a cor a cor | 013 2022 |
| Days7 | 9001548577 | 11-16-2022 | 78 | 174 | 310 | 65 | 64 | C | 10, 10, 10, | 10, 10, 10, 10, 10, 10, | | | | 5 5 | 5 5 5 5 | 12 |
| Days7 | 9001082336 | 11-16-2022 | 76 | 239 | 419 | 65 | 64 | C | | | Actual Usag | e 🗣 Average Usage 🤜 | Temperature | | | |
| Days7 | 9000389772 | 11-16-2022 | 76 | 125 | 219 | 65 | 64 | Ľ | | | | | | | | |
| Days14 | 9001082336 | 11-16-2022 | 75 | 413 | 724 | 65 | 65 | Ľ | | | | | | | | |
| Days14 | 9000459210 | 11-16-2022 | 75 | 418 | 732 | 65 | 65 | Ľ | | | | | | | | |
| Days30 | 9001555260 | 11-16-2022 | 75 | 1134 | 1982 | 66 | 66 | Ľ | | | | | | | | |
| | 25 of 1517 rows 25 | rows per page | | | | | × 1 2 3 4 | | | | | | | | | |

Measure Results

- Sustained engagement rates with unique **CTR of 15-20%**
- Avg monthly audits= ~300-400 depending on message campaign and marketing efforts
- Engagement with Programs & Rebates = **3-5%** of customers who perform an audit engage with a program

Customer Relationship Management

Account & Contact Management

Track all customer and trade ally interactions and engagement





Built on the Salesforce.com Platform, and includes...

Marketing System Integration

Target marketing based on attributes and participation and analyze effectiveness

Event & Participation Management

Schedule and host events while registering and tracking participation and follow through

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Assets & Sites

Go beyond customers and track equipment installations at specific locations

Program Management

Reporting

Manage your budget and evaluate cost-effectiveness in real time





Simple Programs Complex Programs Third – Party Programs

Mobile

Access all your dashboards, reports, field inspection notes, and take photos from any mobile device

Centralization

Access documentation, project information and customer account data all in one place





Projects

Store documentation (invoices, photos, spreadsheets) and document all customer interaction and communications

Service Order Management

Online Application & Review Process

Online application form or portal (for those requesting the service); Application review and approval process by utility staff





Includes installation of equipment at customer locations and more...

Data Integration

Data Integration with utility work / service order management

Utility Contractor Portal

Utility contractor portal to receive, manage and complete assigned service orders

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Automations

Automated communication and payments between customers and contractors



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Upcoming Events

November 12 – 15

APPA Customer Connections – San Antonio, Texas

December Webinar:

Making Distributed Technology Work for You





Please complete our Survey





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Any Questions



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