

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

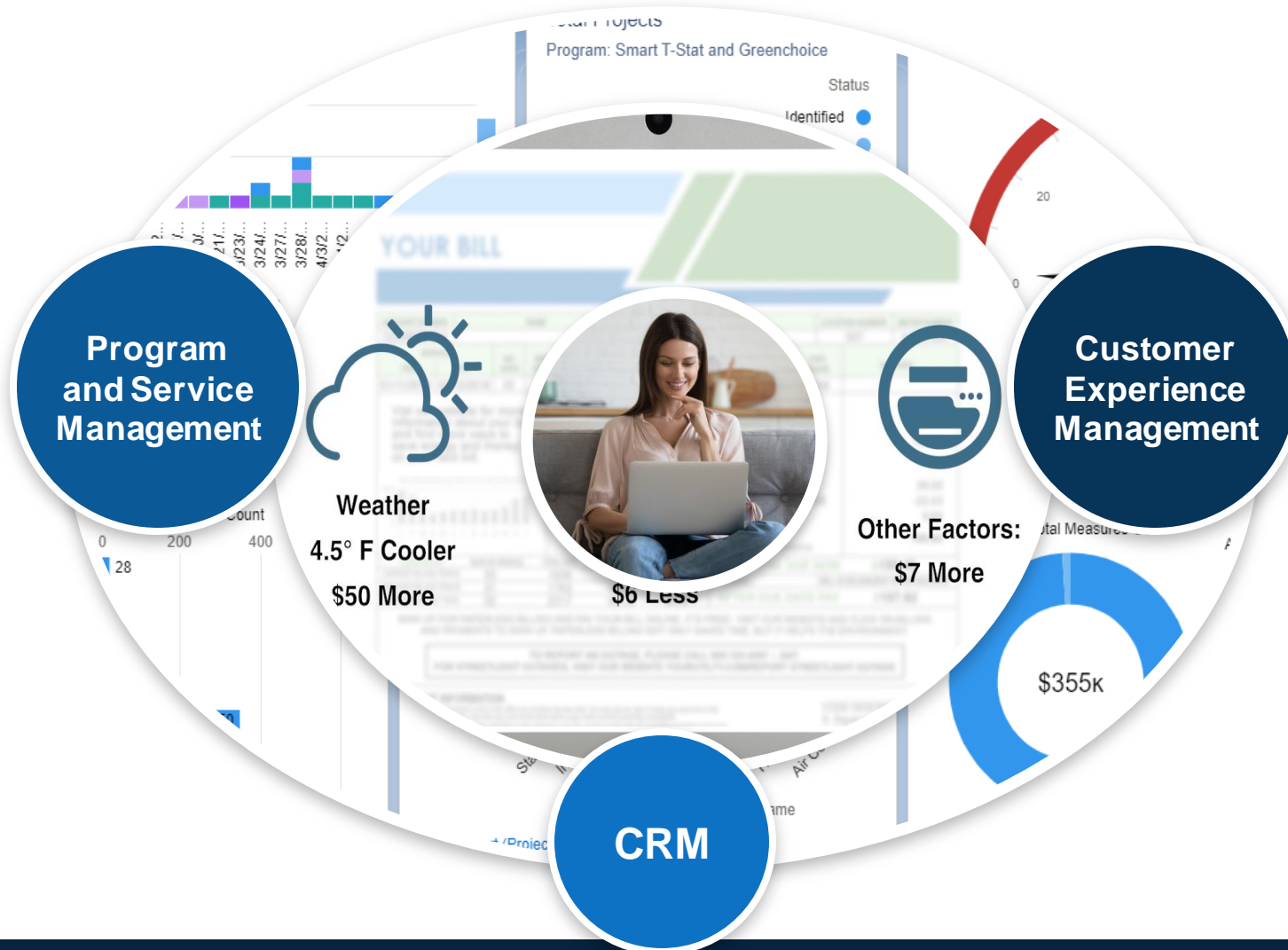
- **Financial** benefits of customer satisfaction
- **Impact** of customer awareness on customer satisfaction
- **Nurturing** a customer relationship
- **Targeting** the correct customer



- **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



Utility Benefits:

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

Check Date: Aug/29/2023		Supplier Number: PATEPICPB			Check No: 4000461334	
Invoice Number	Invoice Date	Voucher ID	PO ID	Gross Amount	Discount Taken	Paid Amount
4190817	Aug/22/2023	01178149		35.00	0.00	35.00
MMK ~ PT REFUND						

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Check Number	Date	Total Gross Amount	Total Discounts	Total Paid Amount
4000461334	Aug/29/2023	\$35.00	\$0.00	\$35.00



Customer Satisfaction Scores and Awareness



582

Unaware of
programs



642

Aware of
programs



679

Participate in one
or more programs

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

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



J.D. Power and Apogee

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

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

Storm
Notifications

Demand
Response

Digital First
Strategy

On-line tool kit

Proactive
Communications

Bill Analysis
Messaging

Promote billing and
payment options

Mid-cycle and
threshold alerts

Annual Summary

CSR Toolkit

Self-services tools
(EA and SPCs)

Field auditor tool

Welcome series

Marketplace

Covid messaging

Charity promotion

"Round Up" Program

Payment assistance

Energy Analytics

Personalized Energy
Recommendations

Program Promotion

Carbon Reporting

"Green" Rates
Promotion

EV Promotion

Solar in Home Profile



comedSM
AN EXELON COMPANY



 **Chartwell**

Gold Winner

2022 BEST PRACTICES AWARDS
Communications Video Messaging

Customer Program Strategy

Get customers:

- ✓ Aware
- ✓ On-board
- ✓ Engaged

Combination of outbound communication supported by on-line resources



Customer Program Strategy

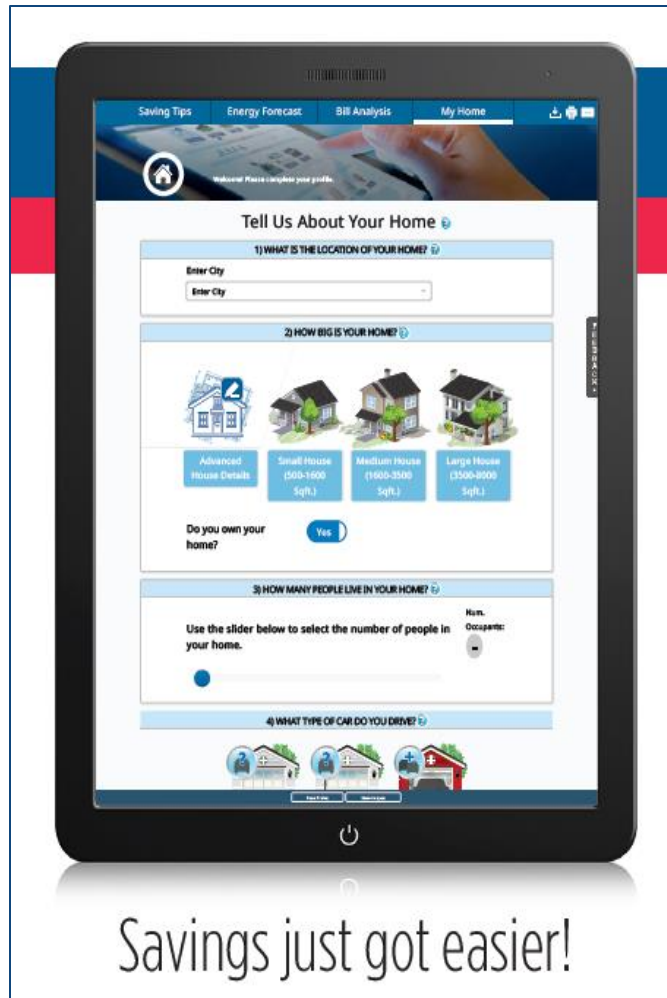
Get customers:

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Combination of outbound communication supported by on-line resources



Lobby Cards



Learn how you can save
with Coast EPA's
Residential Energy Advisor.

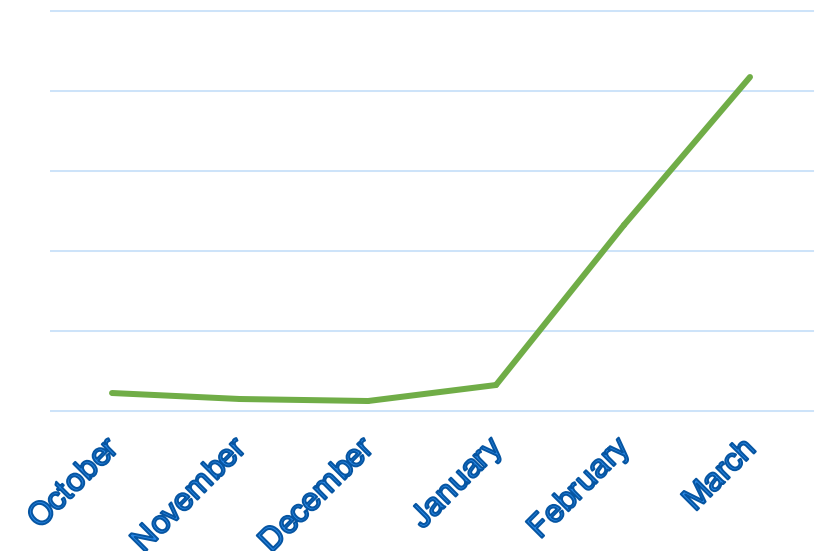
Just scan the QR code below
to visit our
Energy Resource Center
and start saving!



It's FREE and takes
less than 5 minutes!

Coast Electric
POWER ASSOCIATION
A Touchstone Energy® Cooperative

Energy Advisor Usage



Customer Program Strategy

Get customers:

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Combination of outbound communication supported by on-line resources



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



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

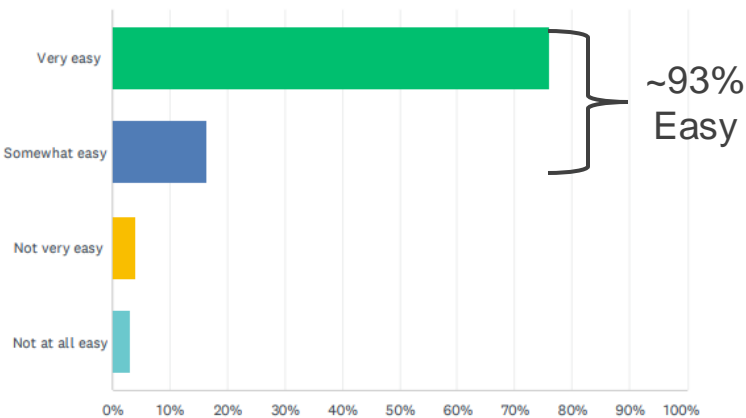
Combination of outbound communication supported by on-line resources



Survey Results: February Video Bill Explanation

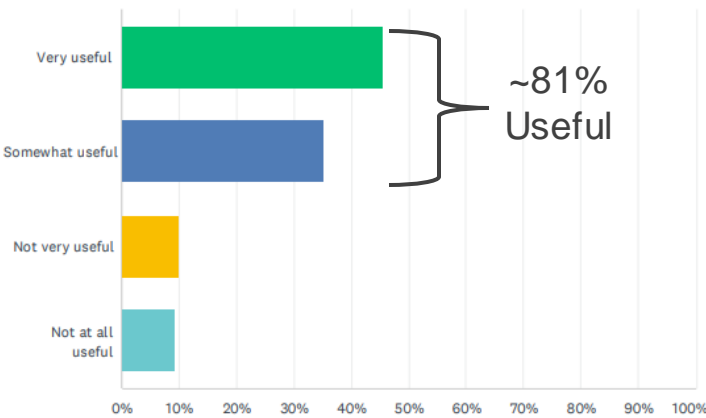
Q1 How easy was the bill explanation to understand?

Answered: 1,496 Skipped: 22



Q2 How useful was the information presented in this video?

Answered: 1,503 Skipped: 15



ANSWER CHOICES	RESPONSES
Very easy	76.20%
Somewhat easy	16.51%
Not very easy	4.08%
Not at all easy	3.21%
TOTAL	

ANSWER CHOICES	RESPONSES
Very useful	45.31%681
Somewhat useful	35.26%530
Not very useful	10.05%151
Not at all useful	9.38%141
TOTAL	1,503

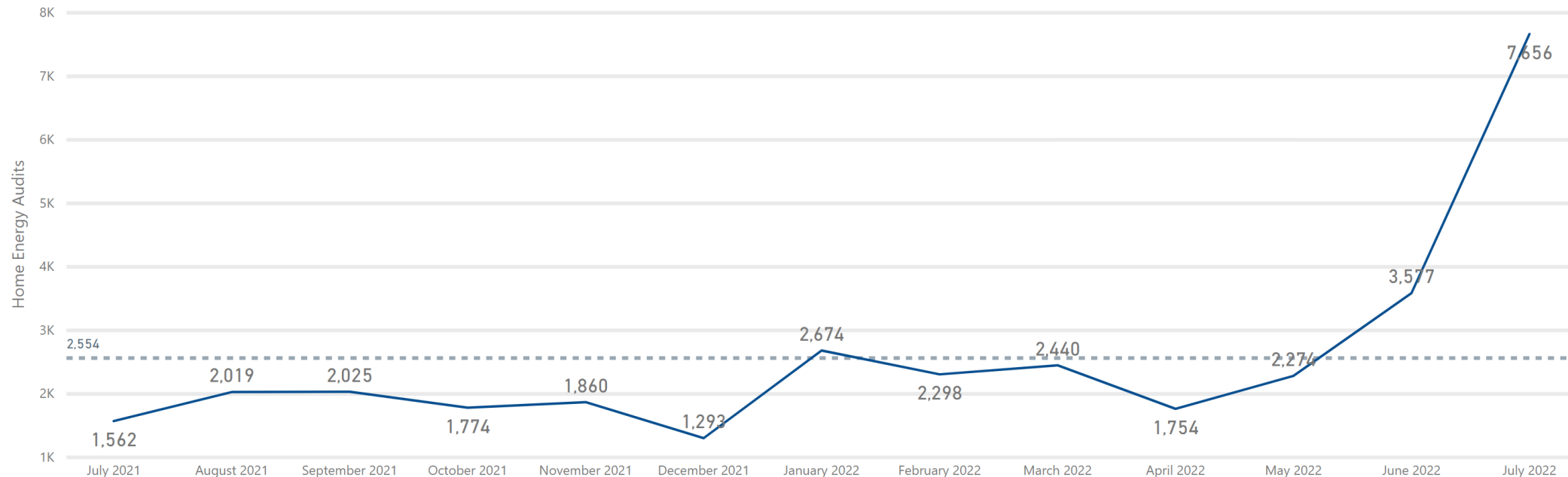
Energy Audits

July 2021- July 2022

Type	Home Energy Audits
Customer Audit with Billing Data	17,692
Customer Audit without Billing Data	4,849
Customer Service	151
Field Audit	10,514
Total	26,239

July 2022

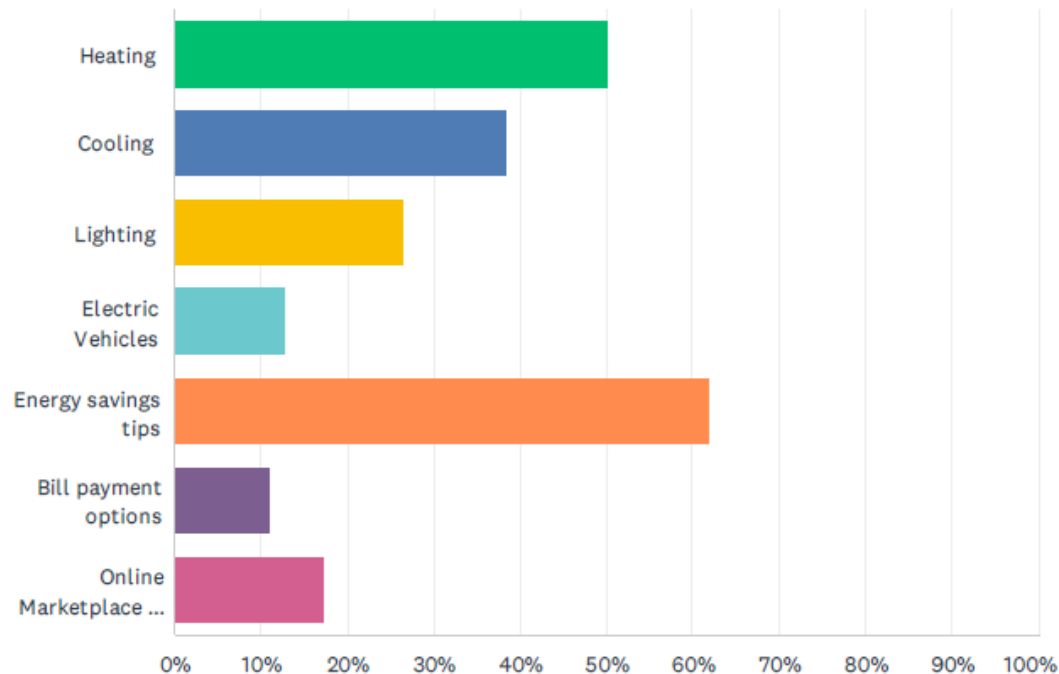
Type	Home Energy Audits
Customer Audit with Billing Data	5,565
Customer Audit without Billing Data	1,137
Customer Service	-
Field Audit	954
Total	3,577



Gauging Customer Interest

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



Right Customer
Right Program
Right Time

Envoy: Outbound Communications

Personalized Annual Messaging Campaign

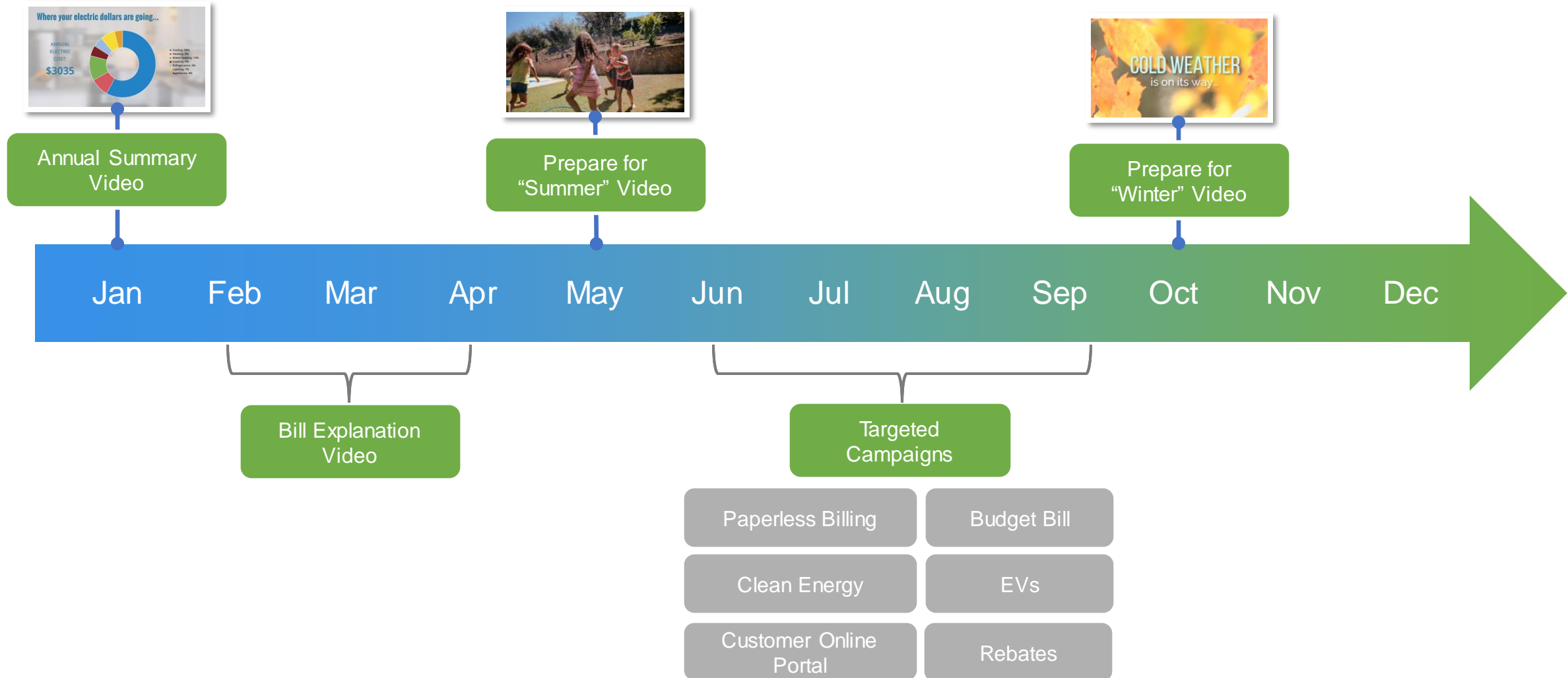
- Bill Explanation Video, can include water analysis
- Targeted Video- Programs and Rebates
- Annual Summary
- Seasonal Messages
- Mid-Cycle Notifications
- Automated Welcome “New Customer” Series

Omni-Channel

- Email and SMS



Annual Messaging Campaign





Right Customer

Segmentation and Targeting

- Owner vs. renter
- Income
- Past program participation
- Propensity to participate



Right Program

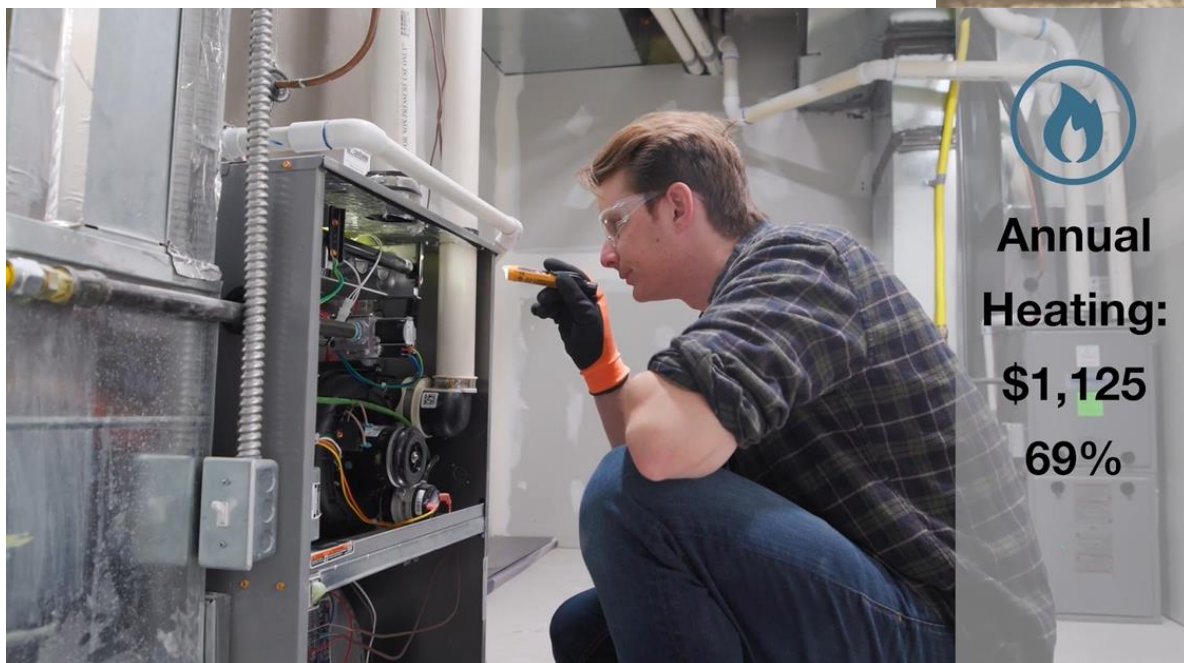
Residence Characteristics

- Size
- Age
- Energy consumption patterns
- Energy profile



Right **Time**

Seasonal Messages



Welcome Series:

Automated messaging options from start of service.

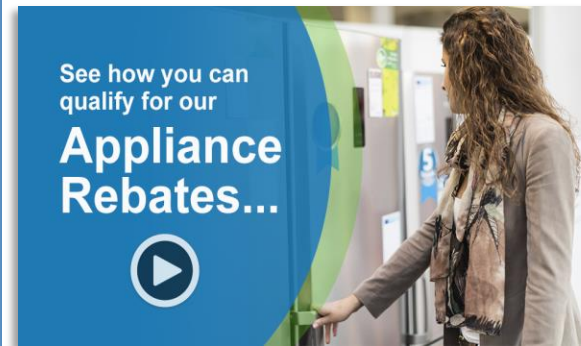
7-10 Days After Service
Started:
“Welcome to
Consumers Energy”



3-4 Days After Receiving
First Bill:
“Understanding Your Bill”



3-4 Days After Receiving
Second Bill:
Program Promotions

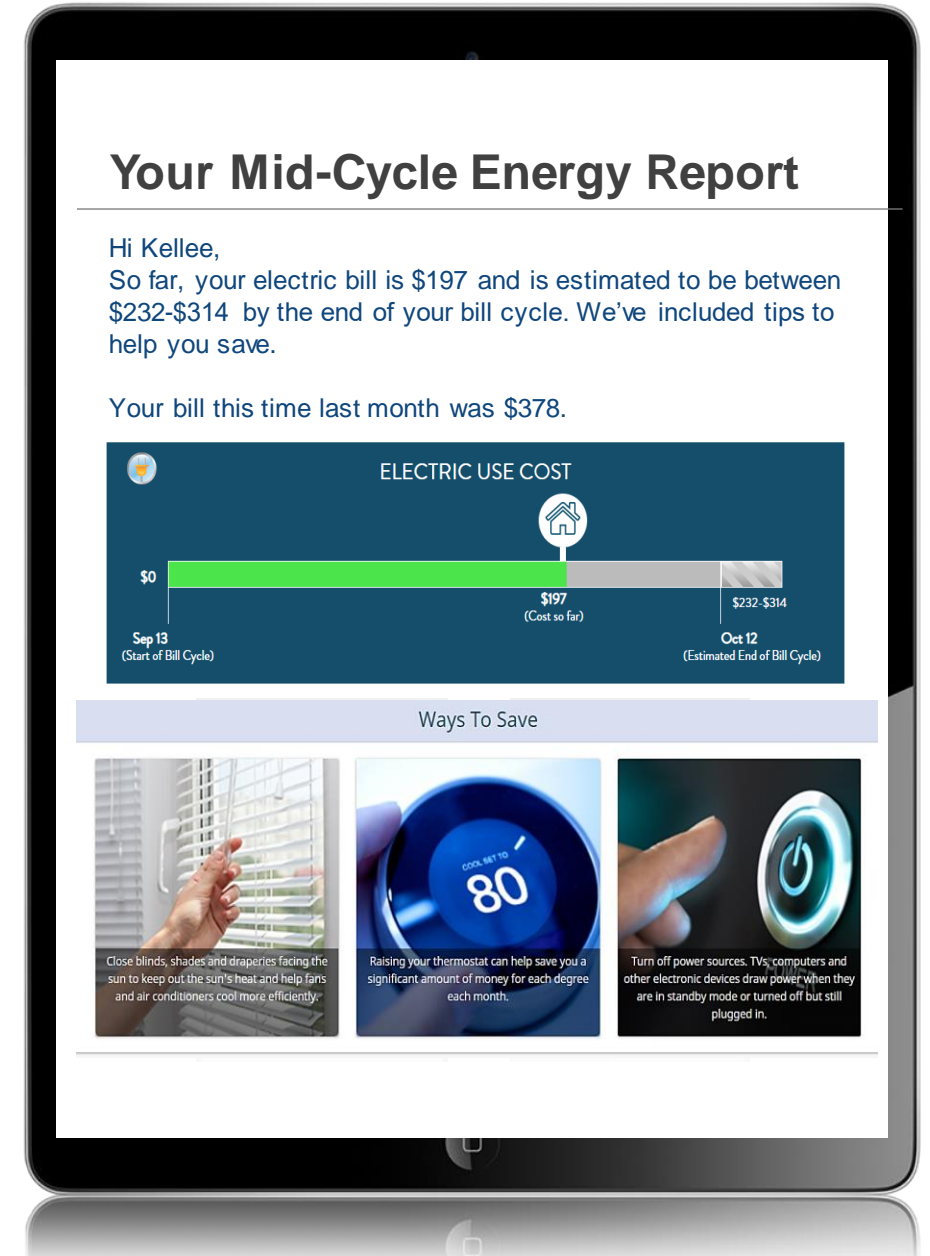
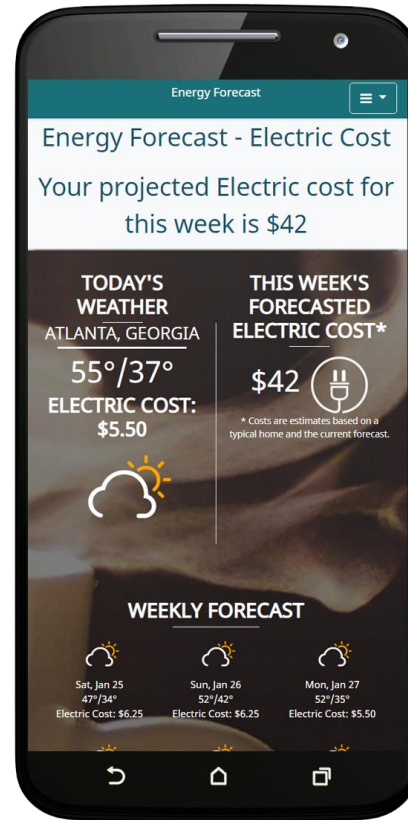


3-4 Days After Receiving
Third Bill:
General Video
Bill Explanation



Mid-Cycle Alerts

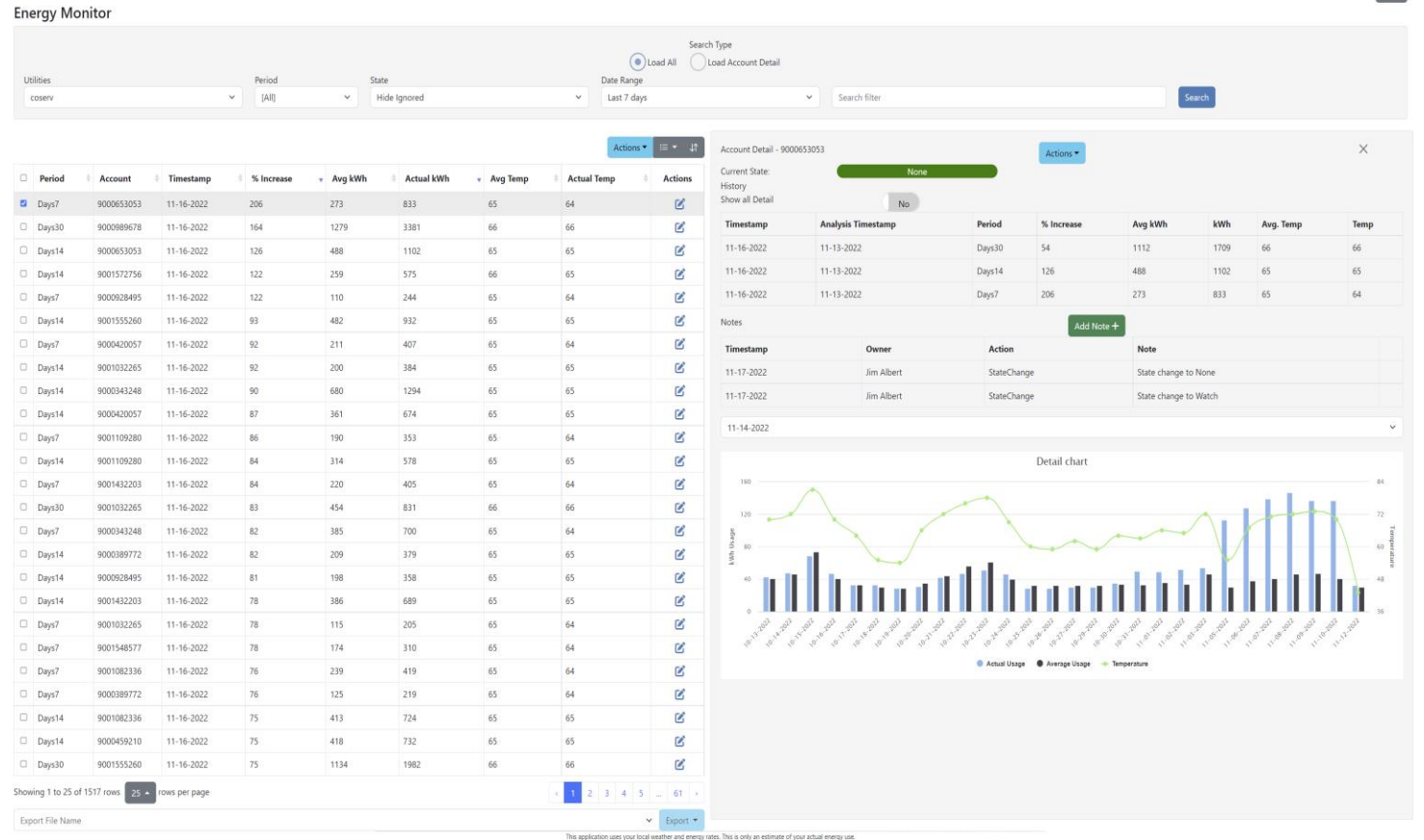
- **Notification** sent on each customer's 16th day of bill cycle
- How much their bill is now and how much it is forecasted to be at end of bill cycle
- Behavioral tips to save on energy bills
- Promote Lansing initiatives and programs



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.
- Currently in beta



Measure Results

- » Sustained engagement rates with unique **CTR of 15-20%**
- » 10% uplift in new customer program participation
- » 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



Marketing System Integration

Target marketing based on attributes and participation and analyze effectiveness



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

Event & Participation Management

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



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



Mobile

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



Simple Programs
Complex Programs
Third – Party Programs

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



Data Integration

Data Integration with utility work / service order management

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

Utility Contractor Portal

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



Automations

Automated communication and payments between customers and contractors



Upcoming Events

November 12 – 15

**APPA Customer Connections
– San Antonio, Texas**

December Webinar:

**Making Distributed Technology
Work for You**





Please complete our Survey



Jim Malcom
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678-684-6820

Thank You!

Any Questions



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