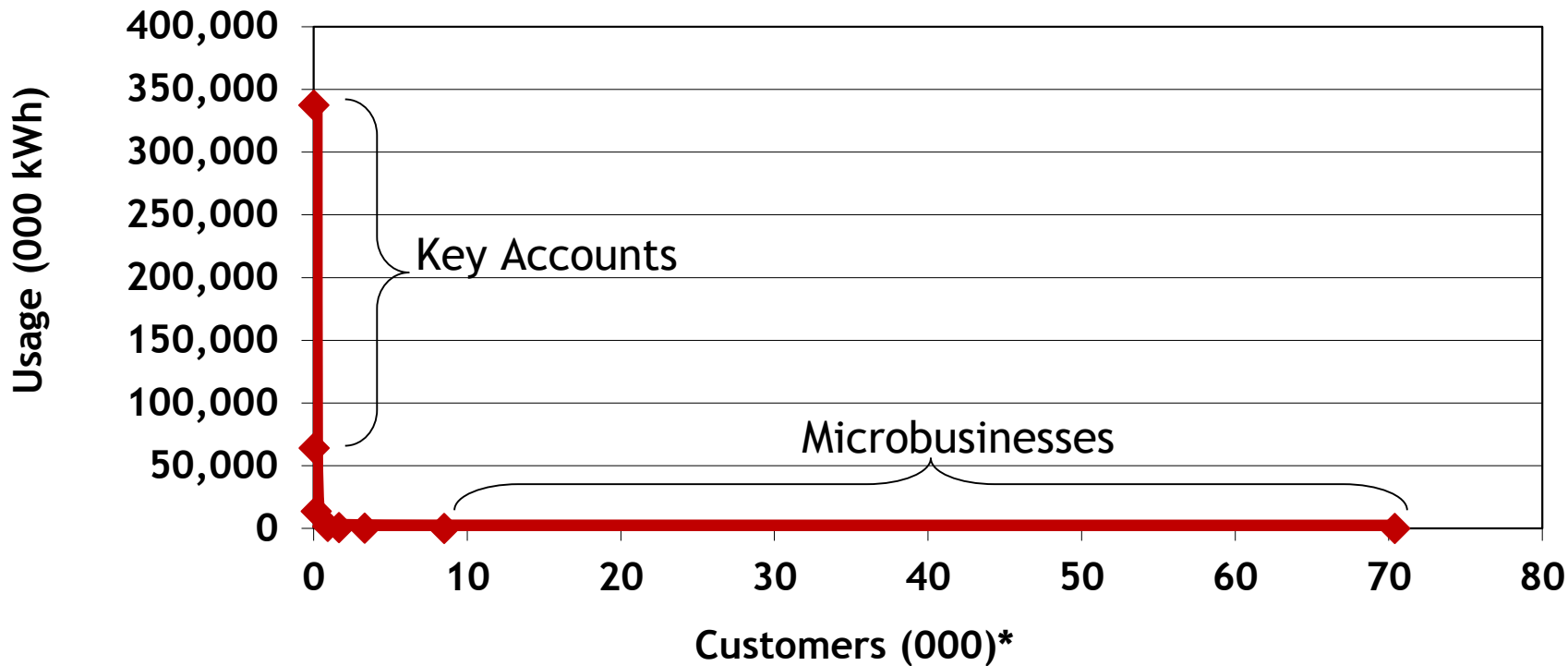# Eversource Customer Engagement Platform

ACEEE Intelligent Efficiency Conference

Geoff Phillips

8 December 2015

- Energy Efficiency goals for Eversource Energy keep increasing (2.93% of annual electric usage for MA in new three-year plan)

- The low-hanging fruit is gone, to hit these goals we need to look at our customers in a new way

- Today I will review:
  - Some of the analyses that drove our go-to-market strategy
  - How we plan to use customer engagement to capture more savings
  - Lessons learned from this effort

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Eversource's C&I Customer Distribution Is Extremely Concentrated

Key Accounts

Microbusinesses

Usage (000 kWh) — vertical axis: 0; 50,000; 100,000; 150,000; 200,000; 250,000; 300,000; 350,000; 400,000

Customers (000)* — horizontal axis: 0, 10, 20, 30, 40, 50, 60, 70, 80
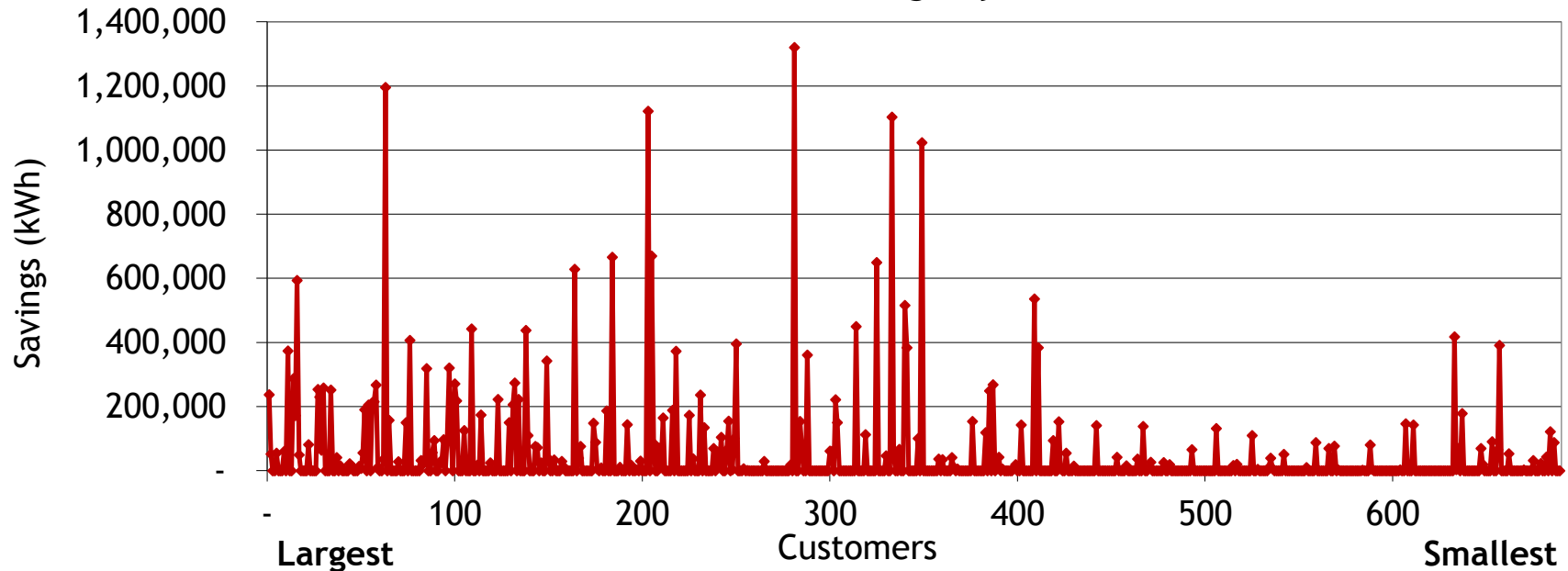
*73,975 Customers from ~140,000 accounts/meters in Eastern MA 2011 Data

2

Some Customer Groups Participate More Than Others
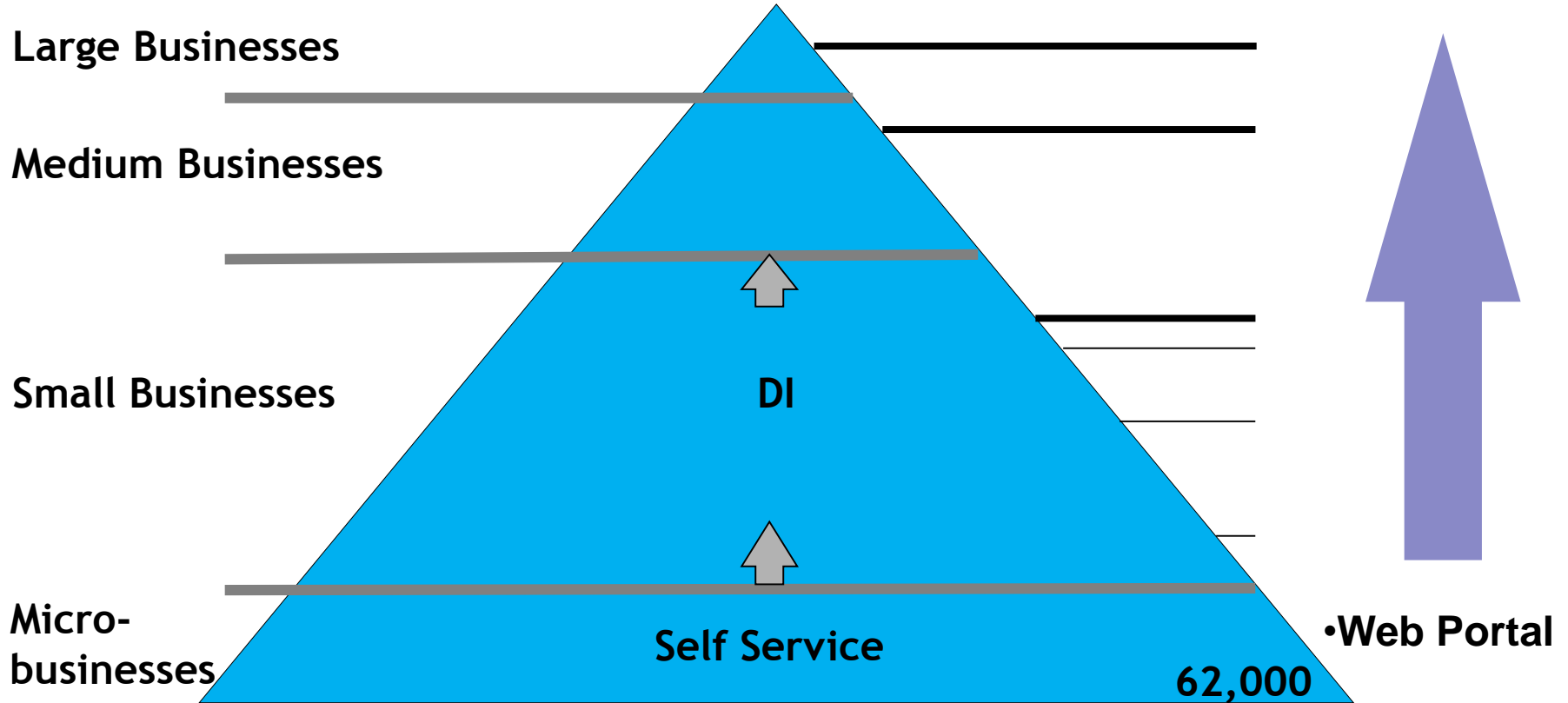
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Each bar represents a customer that saved energy, a point on the axis is a customer that did not save

Medium Business 2011 Savings by Customer

We see more bars on the left than on the right

3

Identified Microbusiness Customers As A New Segment And Modified Go-To-Market Approach

Large Businesses

Medium Businesses

Small Businesses

DI

Micro-businesses

Self Service

62,000

•**Web Portal**

Customer Engagement Platform Functionality

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Generate Actionable Customer Insights

- Robust Data Warehouse
- Third Party Information
- Data Mining and Analytics
- Deep Understanding of Customers

Personalize Inbound Customer Interactions

- Web & Mobile Interface
- Online Assessments
- Measure Fulfillment
- Electronic Rebate Forms
- Personalized Experiences
- Relevant Recommendations
- 24/7 Access to Information
- Effectively Bundled Solutions

Personalize Outbound Communications

- Cost Effective Outreach
- Campaign Management
- Sales Force Automation

Improved Overall Customer Experience

Increased EE Program Participation   **Continuous Customer Engagement**
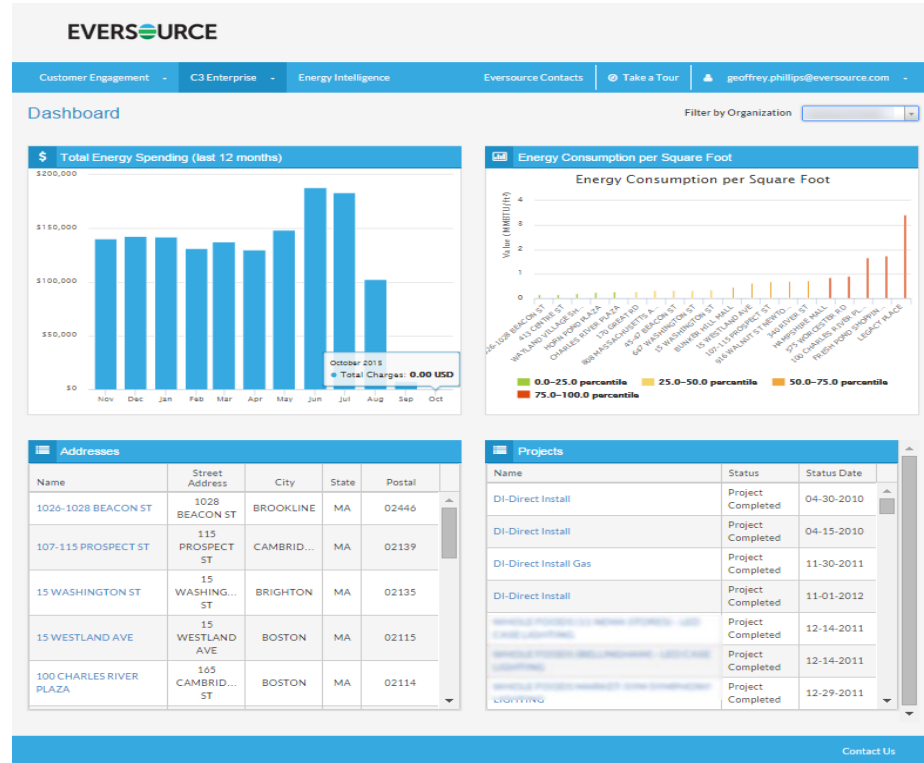
Eversource's Energy Analysis Tool Is An Online Portal Available to Our Largest Customers

Energy Analysis Tool

Provides property level energy data

Displays information on past projects at each address

Enables customizable views of your energy use

- Historical Load
  - Two years worth of billing
  - Two years worth of usage data
  - Five years worth of past participation information
- On-going Updates
  - Daily loads of monthly bill data
  - Daily loads of usage data
  - Daily customer changes (rate codes, new meters)
- Organizational and Building-level Hierarchies

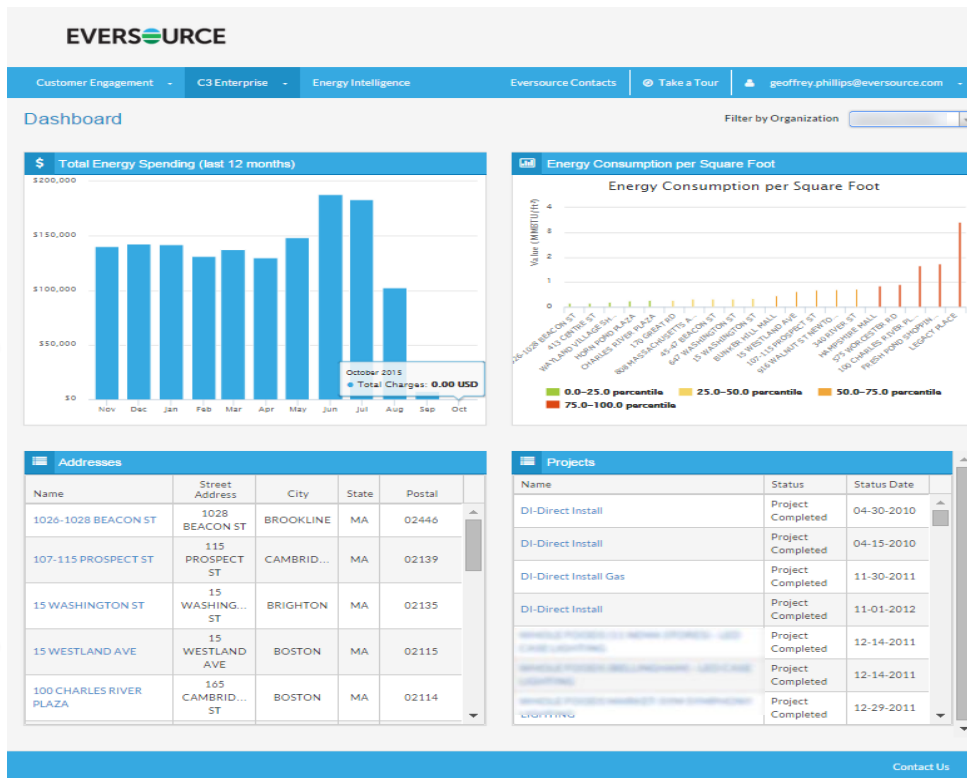# Customers Will Have an Aggregated, Customized Roll-up View of Accounts

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1

Navigate to different features through drop-down menu

2

View total energy consumption within portfolio
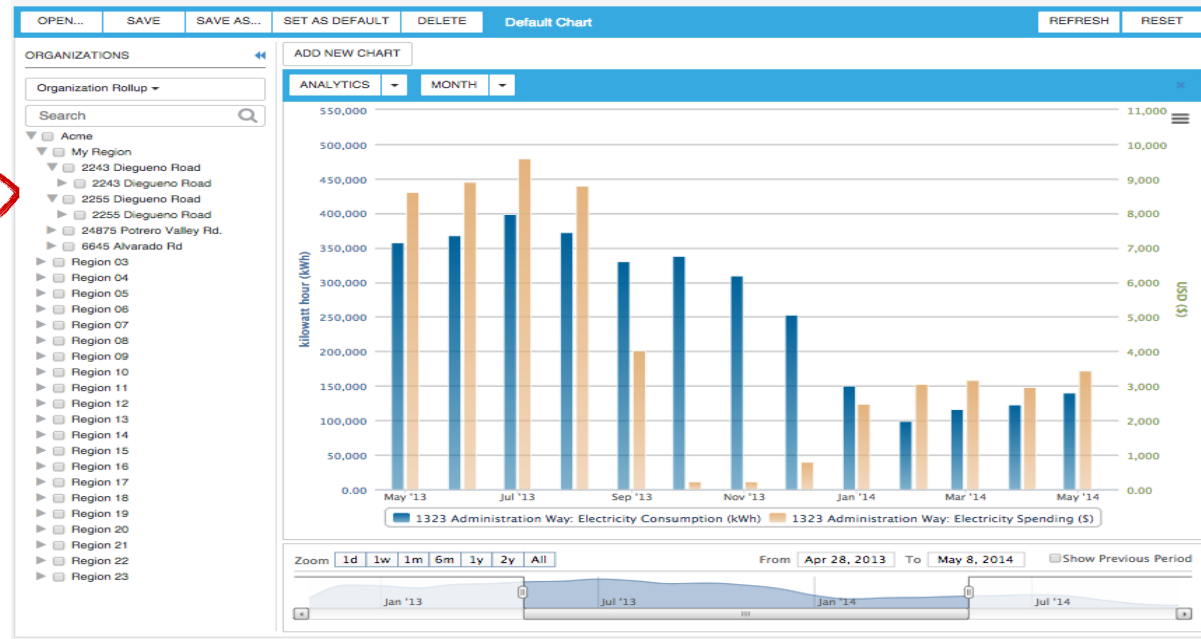
3

Easily access facilities in portfolio

4

View benchmarking results by quartile

5

View project lists

8

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- Leverage customer-defined hierarchy; conduct department-level <u>and</u> premise level analysis
- Review key metrics:
  - Electricity usage & spend
  - Gas usage & spend
  - Energy use intensity

9

Benchmarking Allows Customers to Identify Opportunities

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- Identify facilities that would most benefit from energy efficiency improvements

- Rapidly conduct benchmarking across the portfolio
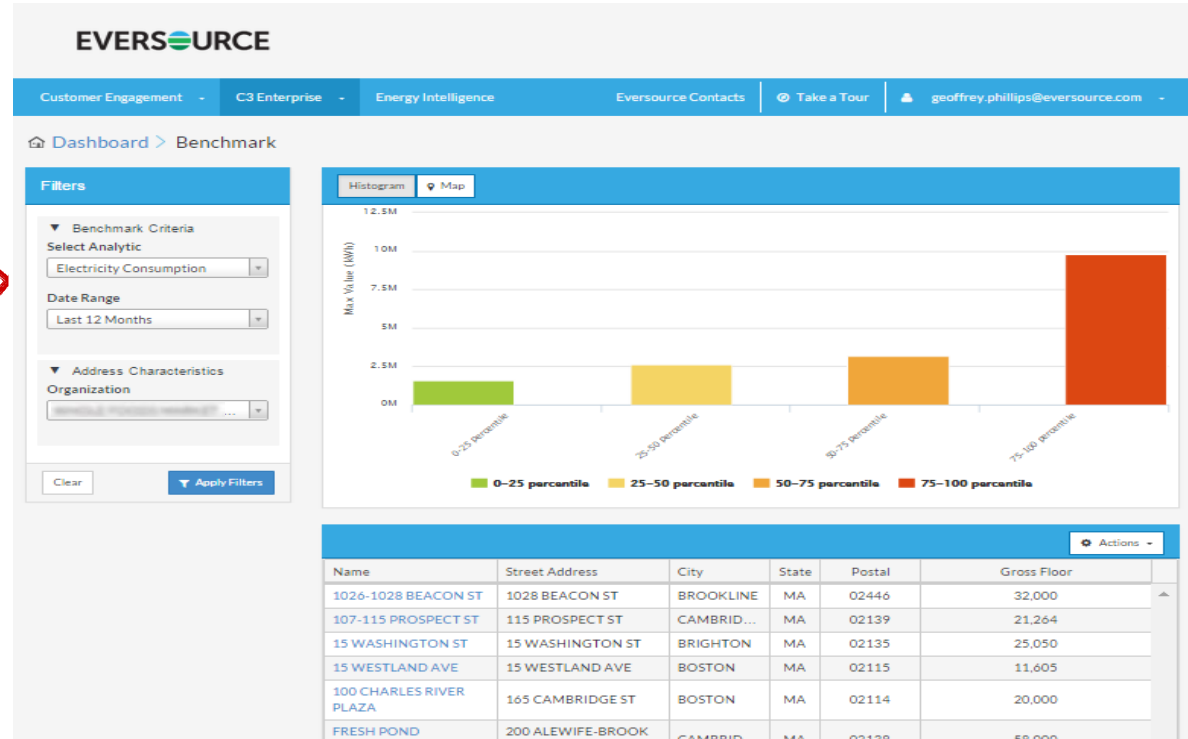
The Customer Gets Personalized Recommendations, Eversource Gets Data

- Once customers begin to complete their profiles, Eversource can begin to use that data to improve the customer experience and deepen engagement through:
  - Analysis to identify roadblocks or levers to increased participation
  - Identifying latent needs to fill product pipeline
  - Identifying barriers to adoption
  - Targeted messaging to move customers to action
  - Analysis of marketing messages to drive continuous improvement

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Total Cumulative Small Commercial Users 2015
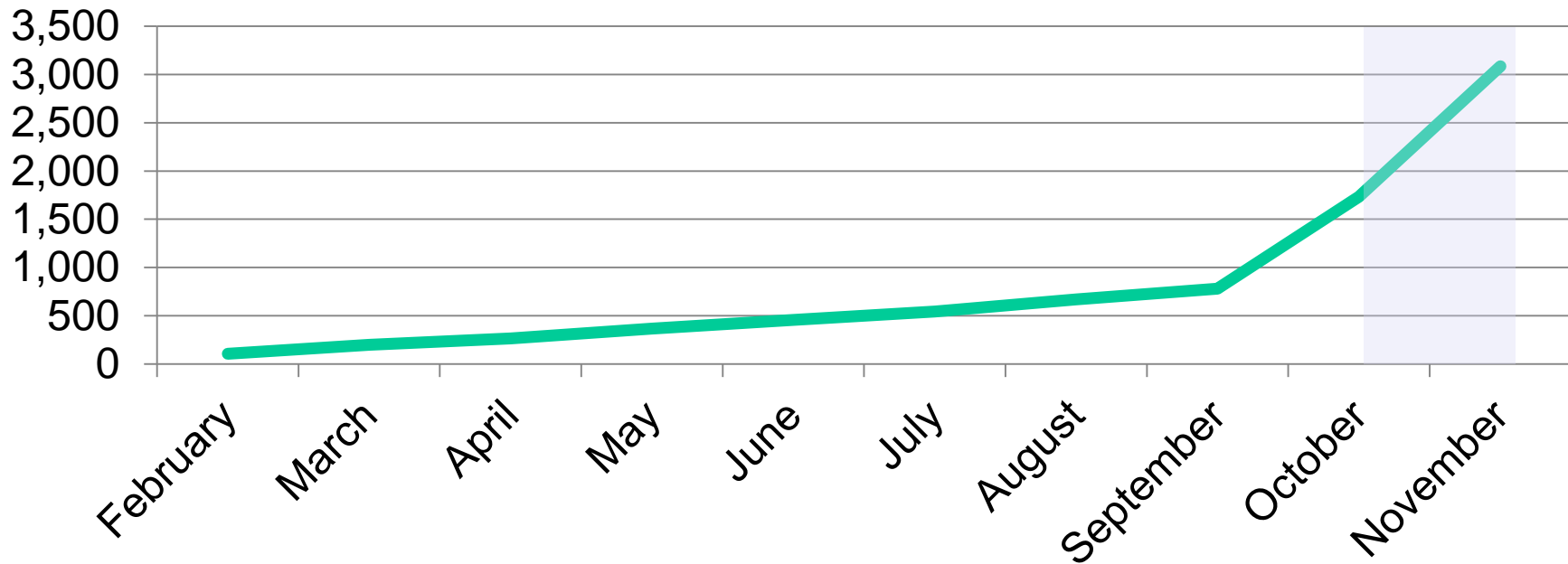
Customer Engagement Involves the Entire Company

- Billing
- Call Centers
- Energy Efficiency
- Meter Data Management
- Corporate Communication
- Community Relations
- Account Management

This cannot simply be an Energy Efficiency initiative, support from senior leadership is key

Customer Engagement Involves Many Systems

- EE Tracking
- CIS
- Billing
- Large Account Billing
- Distributed Generation

These systems probably never had to communicate in the past, now they do

- Identify attributes of those who participate in our programs and those who do not to find additional opportunities
  - Have already tested this and saw a 3X jump in participation from a target group versus the control group in a residential setting
- Refine our segmentation models
  - Better data from customers that is easier to collect
  - Integrated analysis tools to enable faster turn around
- Use new data from digital interactions to inform our strategies

Thank You