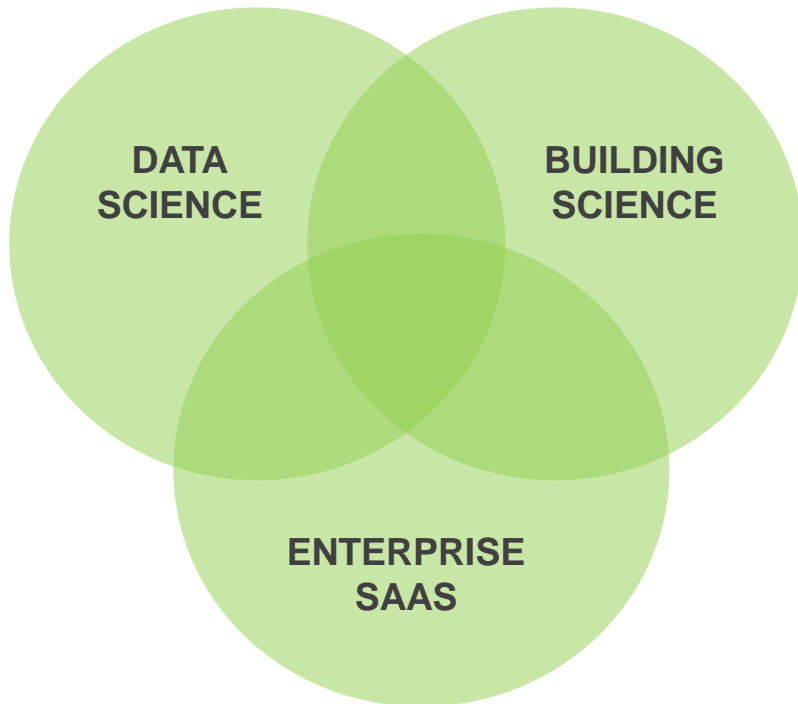


# THE IMPORTANCE OF DATA & ANALYTICS:

HOW DATA CAN HELP ACHIEVE ENERGY SAVINGS &  
ENVIRONMENTAL GOALS

# OVER 30 UTILITY & GOVERNMENT CLIENTS

Some Examples



**3M**  
Business Customer  
Meters

**55M**  
Secure  
reads/day

**AMI +  
Monthly**

**N. AMERICA  
+ EUROPE**

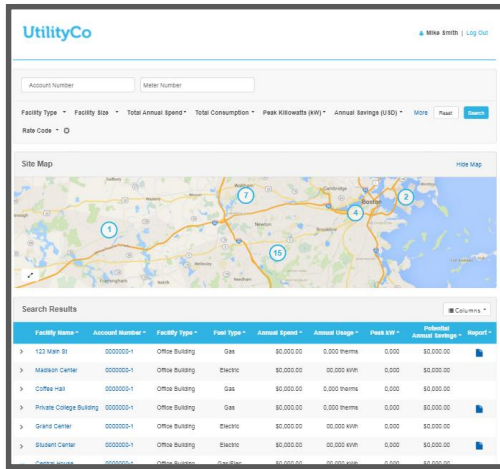
## Bill's Current Approach Is:

- Reactive
- Time intensive and costly
- Requires multiple visits to customer
- Long resolution time
- Difficult to track what customer is interested in after leaving

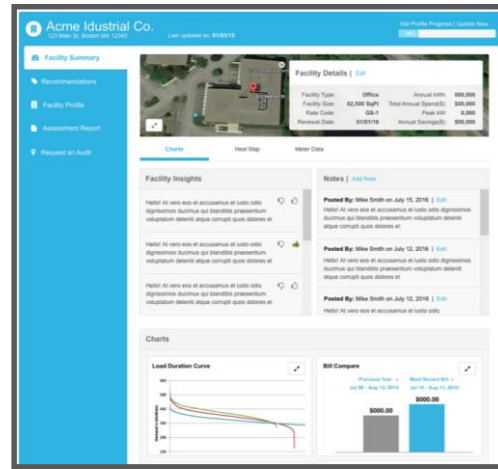


# INTRODUCING FIRSTADVISOR: EE ACCOUNT PLANNING TOOL

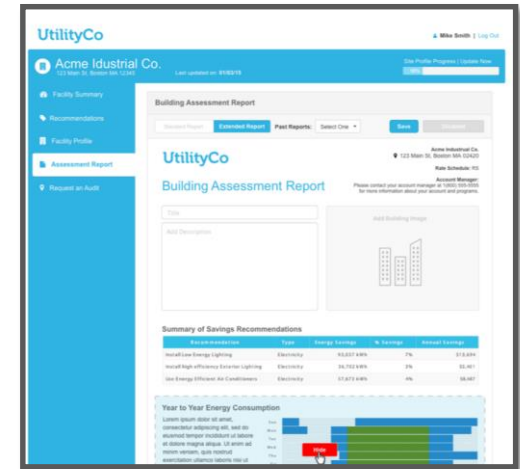
## PORTFOLIO PLANNING DASHBOARD



## DETAILED CUSTOMER INTELLIGENCE



## CONFIGURABLE PDF COLLATERAL



For **account managers** to target customers and optimize time



For **account managers** to quickly understand customers before engaging and respond live to new information



For **account managers** to instantly generate personalized collateral



For **marketing** to segment customers to maximize spend



For **CSRs and phone-based reps** to rapidly understand customers calling in



For **CSRs and phone-based reps** to follow up and generate action

# INFORMED CUSTOMERS PARTICIPATE IN DSM PROGRAMS

Personalized

Customer-specific insights @ the building-level with relevant ECMs

Digital

Interactive and engaging on mobile, tablet or computer

Useful

Allows for tracking of ECMs customer is interested in





## Bill's New Approach with FirstAdvisor Is:

- Proactive
- Saves time and money
- More efficient visits to customer
- Track what customer is interested in
- Delighted customers

Large North American Utility		Large North American Utility
<ul style="list-style-type: none"> <li>Targeting mid-size customer segment (200kW-1MW)</li> <li>Increase sales team productivity</li> <li>Lift customer win rates</li> </ul>	<b>Objectives</b>	<ul style="list-style-type: none"> <li>Target underserved segments: Schools &amp; Municipalities</li> <li>Drive retrocommissioning projects</li> <li>Lift customer win rates</li> </ul>
<ul style="list-style-type: none"> <li>Engage <b>200+</b> customers</li> </ul>	<b>Project Scope</b>	<ul style="list-style-type: none"> <li>Engage <b>100+</b> customers</li> </ul>
<b>18%</b>	<b>Previous Conversion Rates</b>	<b>20%</b>
<p><b>50%+ improvement, at faster speeds</b></p> <ul style="list-style-type: none"> <li><b>25%</b> conversion rate</li> <li><b>3x</b> improvement in sales velocity</li> <li><b>70%</b> project commitment post-interaction</li> </ul>	<b>FirstFuel Impact</b>	<p><b>50%+ improvement, at faster speeds</b></p> <ul style="list-style-type: none"> <li><b>30%</b> conversion rate</li> <li><b>7GWh</b> identified savings</li> <li><b>50+</b> program incentive applications filed</li> </ul>

THANK YOU



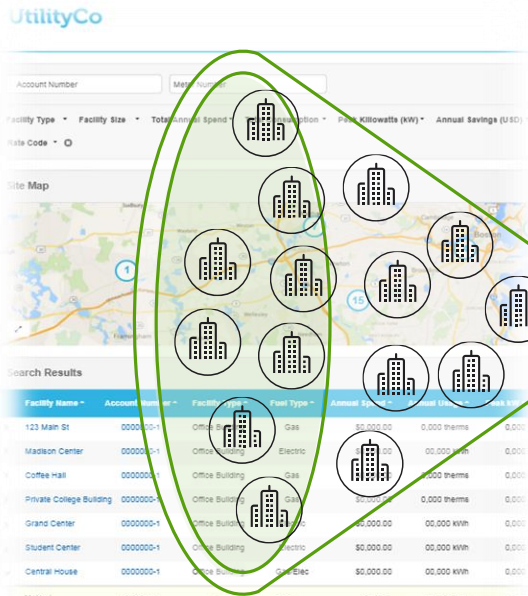
Scott McClintock  
Vice President  
[smcclintock@firstfuel.com](mailto:smcclintock@firstfuel.com)  
617-699-7034



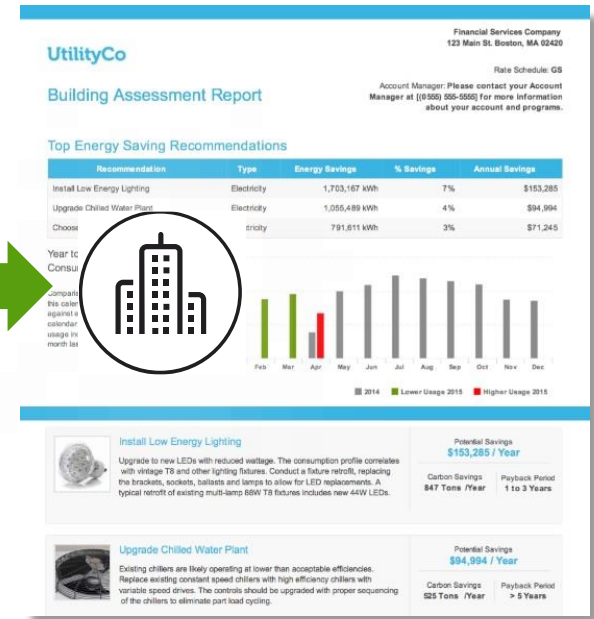
# ADVANCED ANALYTICS FOR IMPROVED EE TARGETING

Customer Portfolio of Business Customers

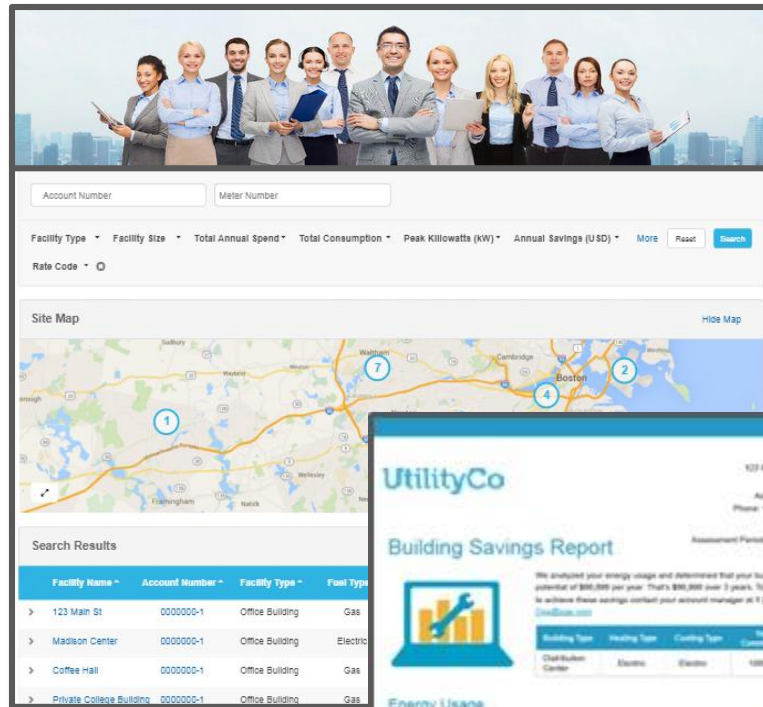
Targeted Prospects @ Building Level



**Filter By:**  
 Facility Type  
 Peak Usage  
 Savings Potential  
 Building Size  
 Geography  
 Specific Savings Measure  
 Propensity to Act



# DRIVING ACCOUNT TEAM PRODUCTIVITY ACROSS C&I SEGMENTS



360,000  
TOTAL CUSTOMERS



Improve Internal Sales Effectiveness

Utilize customer-specific insights and collateral

Enhance Marketing and Program Design

Estimate program potential across customer base

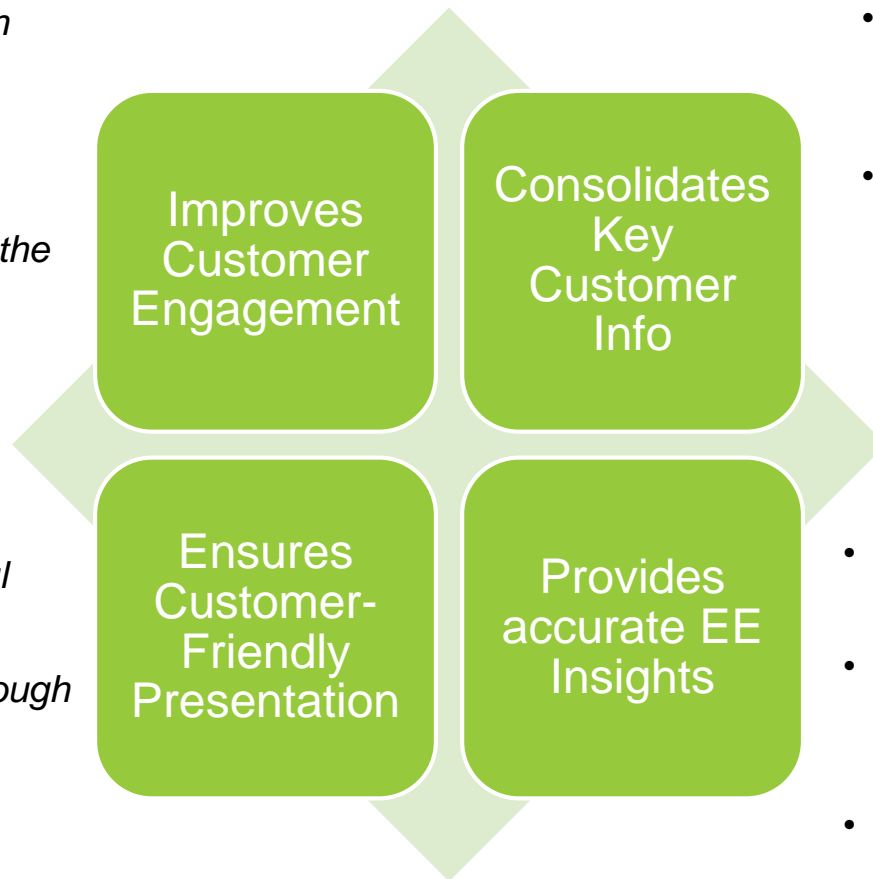
Boost Program Participation

Target the right customers with the right offerings

*“We aim to delight our customers by serving as their most trusted advisor for understanding and managing their energy use and related costs.”*

# ENERGY EFFICIENCY ACCOUNT TEAM BENEFITS

- *Improves credibility with customers*
- *Respond faster and to more customers*
- *Good door-opener into the discussion*



- *Consolidates key information (usage, cost etc.); a one-stop shop*
- *Stores customer information in one place as personnel changes*

- *Chart visuals are useful*
- *Customer friendly, not intimidating, simple enough to promote a program/audit/etc.*

- *Can see and speak to customer's savings potential*
- *Includes recommendations & potential savings in the absence of a proposal*
- *Populates good-fit and low-cost ECMs*