

An aerial night view of a city skyline, likely New York City, with numerous skyscrapers and illuminated streets. A prominent green banner is overlaid across the center of the image, containing the title text. The sky is a mix of dark blue and orange, suggesting dusk or dawn.

# MULTI-CHANNEL C&I ENGAGEMENT: USING PERSONALIZED ANALYTICS

# CHALLENGES FACING SOUTHWEST UTILITIES



**ENERGY  
LOCALIZATION**



**RISING CUSTOMER  
EXPECTATIONS**



**CHANGING  
REGULATORY REQ'S**



**BUSINESS  
CASE FOR AMI**

## TWO MAJOR OBJECTIVES



1. CUSTOMER SAT / JD POWER

2. DSM SAVINGS/TARGETS

# CUSTOMER INTELLIGENCE ACROSS MULTIPLE CHANNELS



DELIVERING ANALYTICAL INSIGHTS ACROSS ENGAGEMENT CHANNELS TO  
DRIVE CUSTOMER CARE OBJECTIVES

# BETTER INTELLIGENCE TO MEET THE CHALLENGE



**TECHNICALLY VALIDATED FOR ACCURACY**





# WHY USE DATA ANALYTICS?



## Optimizing efficiency program delivery

DSM program  
planning

Scale analysis  
and audits

Program  
participation

Market activity

Baselining and  
M&V



## Improving customer experience

Customer  
satisfaction

Customer choice

Rate & tariff  
education



## Increasing efficiency of infrastructure

Value from AMI

Bytes, not wires

# WHO USES DATA ANALYTICS?

*“Show me all my customers who could use a lighting retrofit.”*



## Account Managers

- Estimate savings potential
- Segment customers

*“How can I help this customer manage their bill?”*



## Customer Support

- Address customer questions
- Understand rate impacts

*“How can I keep the lights on with a limited budget?”*



## Grid Ops & Planning

- Inform savings scenarios
- Manage capacity constraints

# INFORMED CUSTOMERS PARTICIPATE IN DSM PROGRAMS

Digital

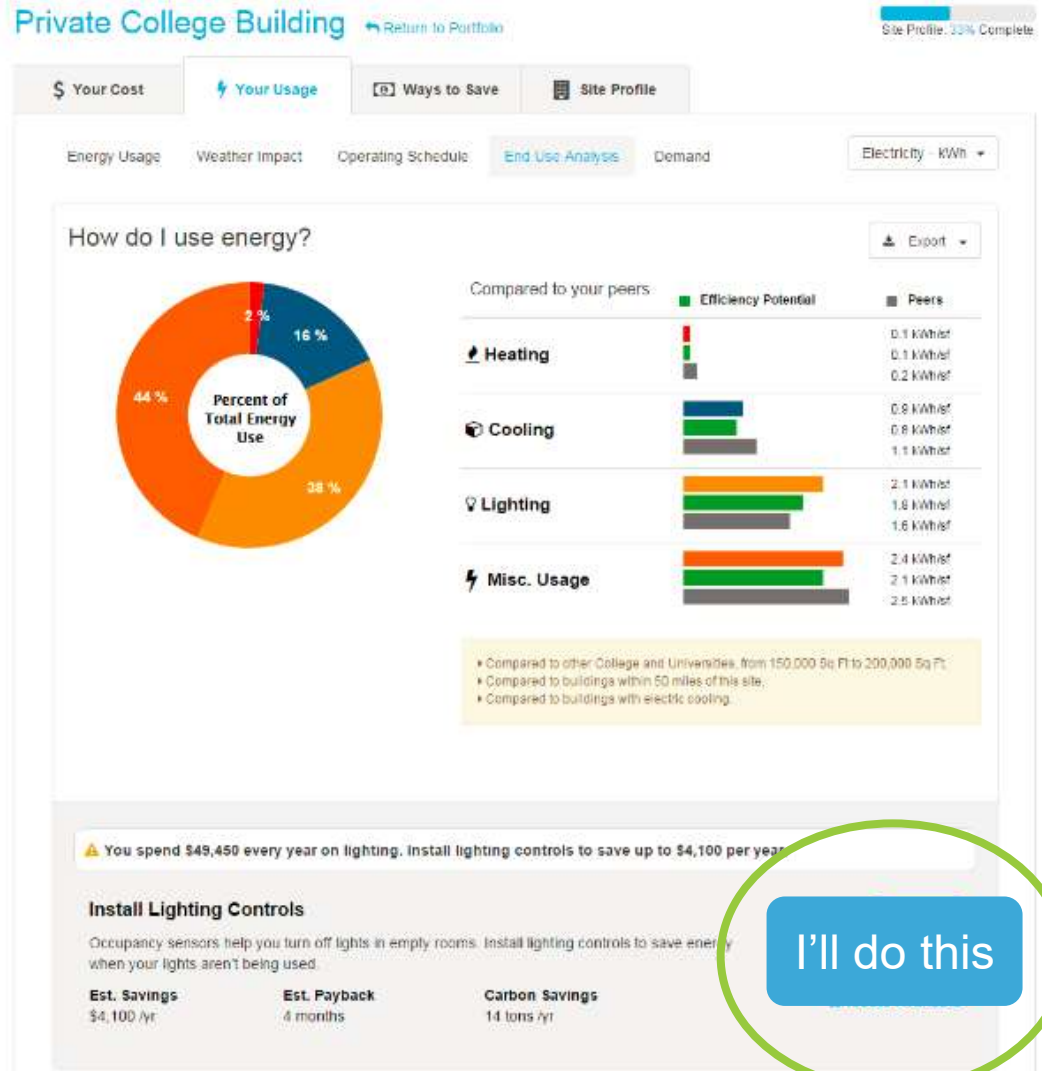
Interactive and engaging online dashboard

Personalized

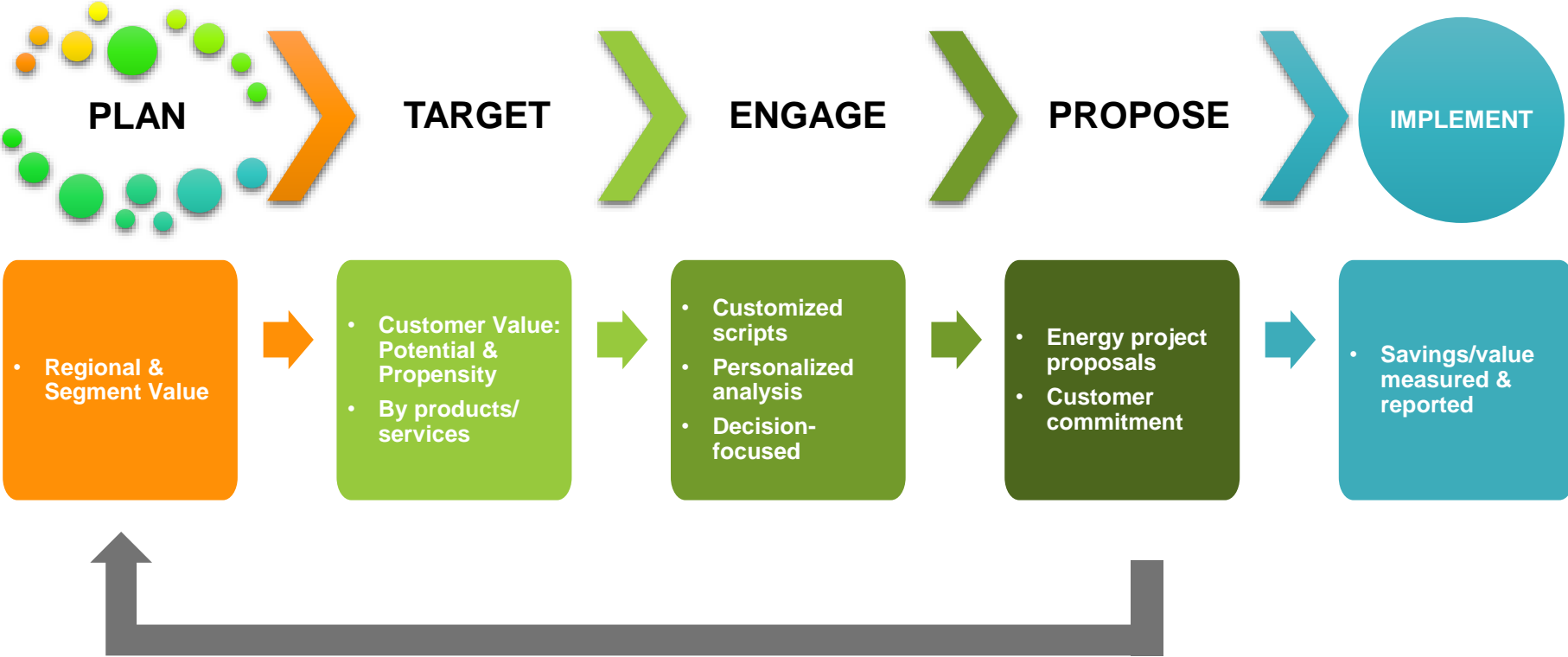
Customer-specific insights with relevant comparisons

Useful

Direct calls to action on ways to save

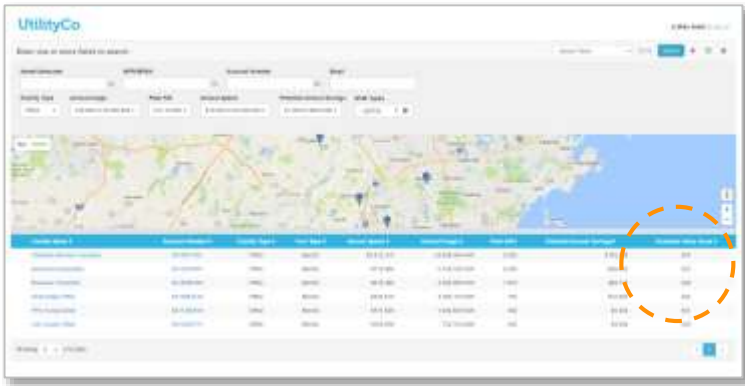


# AN INTELLIGENCE-DRIVEN APPROACH

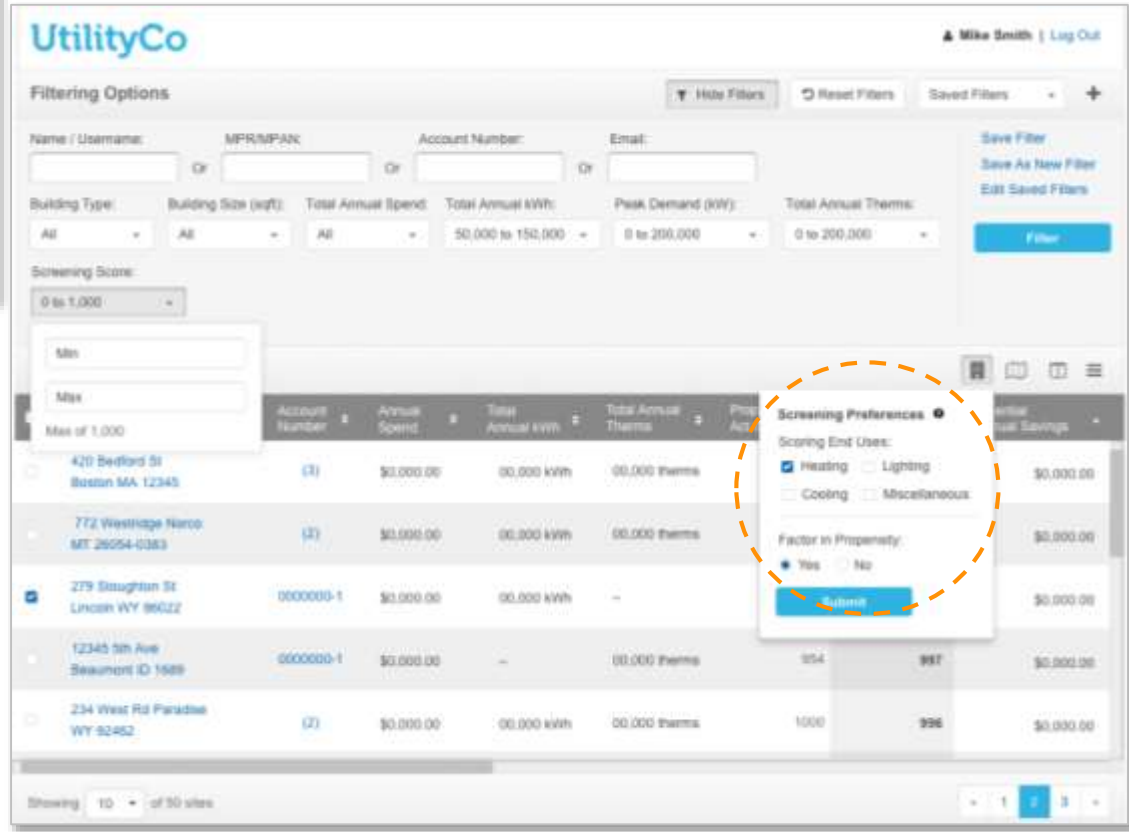




# PORTFOLIO PLANNING AND PRIORITIZATION



*Portfolio wide propensity screening and dynamic filtering leads to more cost-effective DSM programs*



# PERSONALIZED RECOMMENDATIONS & REPORTS

*First, make it personalized...*

**UtilityCo** | Mike Smith | Log out

**Financial Services Company**  
123 Main St, Boston MA 123456

Facility Profile Progress | Update Now  
10%

Facility Summary

Recommendations

Facility Profile

Assessment Report

Request an Audit

**Savings Recommendations** | Sort By: Savings Potential

My PDR | All Recommendations

**Install Low Energy Lighting**  
Upgrade to new LEDs with reduced wattage. The consumption profile correlates with average 7% and other lighting fixtures. Conduct a fixture retrofit, replacing the brackets, sockets, ballasts and lamps to allow for LED replacements. Read more

Potential Savings: **\$153,265 / Year**

Carbon Savings: **847 Tons/Year** | Payback Period: **1 to 2 Years**

Recommended for you | Add to PDR

**Upgrade Chilled Water Plant**  
Existing chillers are likely operating at lower than acceptable efficiencies. Replace existing constant speed chillers with high efficiency chillers with variable speed drives. The controls should be upgraded with proper sequencing of the chillers to eliminate part-load cycling. Read more

Potential Savings: **\$94,834 / Year**

Carbon Savings: **325 Tons/Year** | Payback Period: **> 5 Years**

Recommended for you | Add to PDR

**Choose the Right Schedule**  
The run-time of HVAC systems should mirror the occupancy pattern of the building. We recommend that scheduled operating times be changed to more closely match the actual building use, with a start-up time shifted for early operation. Ideally, start-up in all seasons should be limited to

Potential Savings: **\$71,245 / Year**

Carbon Savings: **295 Tons/Year** | Payback Period: **< 1 Year**

**UtilityCo** | Mike Smith | Log out

**Financial Services Company**  
123 Main St, Boston MA 123456

Facility Profile Progress | Update Now  
10%

Facility Summary

Recommendations

Facility Profile

Assessment Report

Request an Audit

**Building Assessment Report**

Standard Report | Post Reports | Select Date

PDF | Download Report

Financial Services Company  
123 Main St, Boston, MA 02455

Mike Smith | ES  
Account Manager | Please contact your Account Manager at (781) 555-0000 for more information about your account and programs.

**UtilityCo**

**Building Assessment Report**

**Top Energy Saving Recommendations**

Recommendation	Type	Energy Savings	% Savings	Annual Savings
Install Low Energy Lighting	Electricity	1,700,000 kWh	1%	\$153,265
Upgrade Chilled Water Plant	Electricity	1,000,000 kWh	4%	\$94,834
Choose the Right Schedule	Electricity	700,000 kWh	3%	\$71,245

**Year to Year Energy Consumption - Electricity**

Consumption of your energy usage for the calendar year, month by month. Update energy usage monthly via calendar page. Months when the usage increased, over the same month of year, are highlighted.

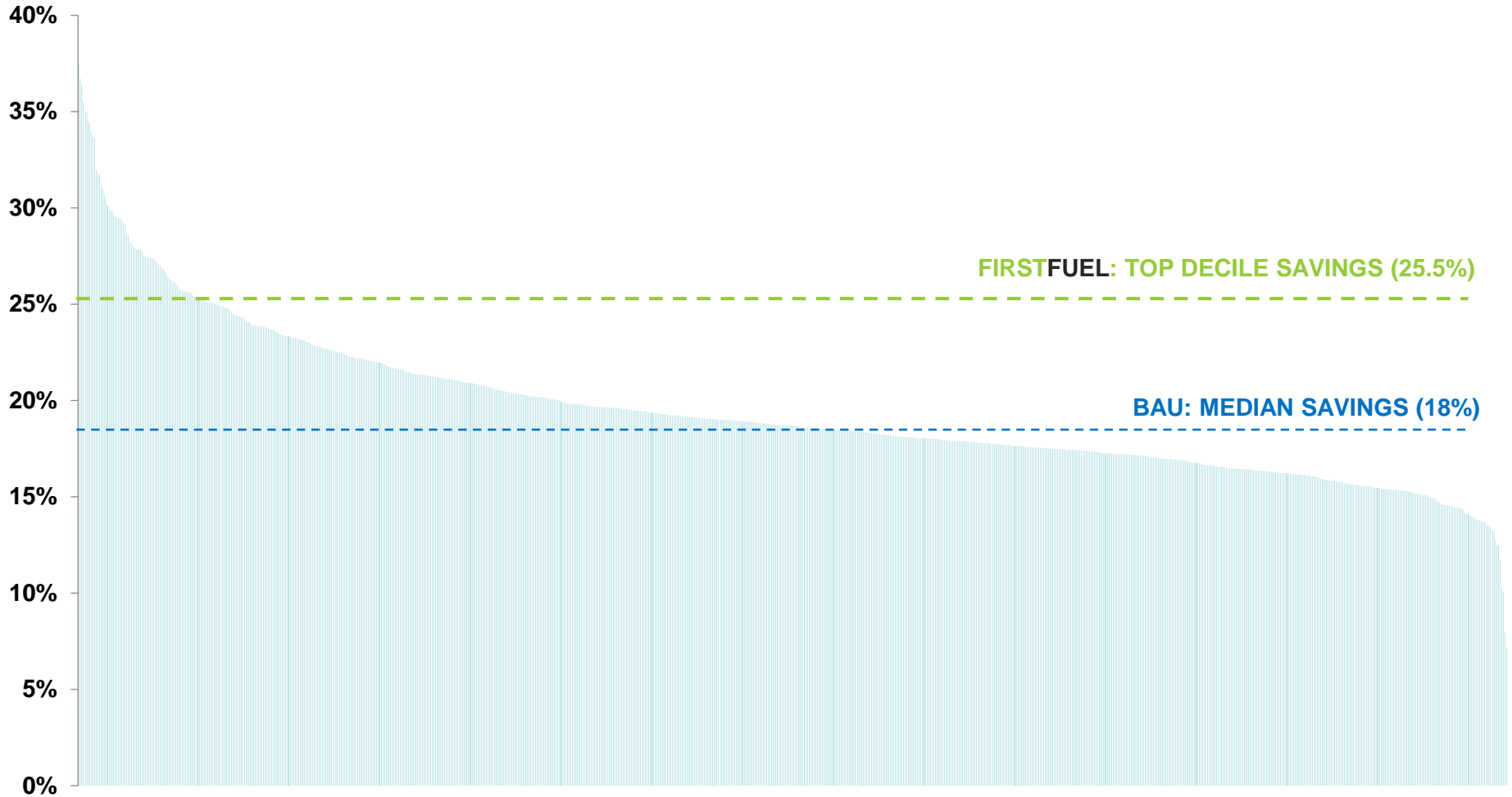
**Year Monthly Usage - Electricity**

The annual energy usage through the year is being reported by calculating the use and is the energy usage.

*Then, make it configurable and portable.*

# EXAMPLE IMPACT: INCREASE IN PROJECT SIZE

## SAVINGS POTENTIAL: 1,000 MID-SIZE BUILDINGS



# LESSONS LEARNED FROM 3 SOUTHWEST UTILITY DEPLOYMENTS



## DATA

- Working with large sets of data can be difficult
- Interval data is better but monthly data is also valuable



## MULTI-CHANNEL COMMUNICATION

- Analytics alone is not the silver bullet – need for multi-channel engagement strategies



## STAKEHOLDERS

- Utility customer service teams including Key Accounts and Call Center are key stakeholders



## COORDINATION

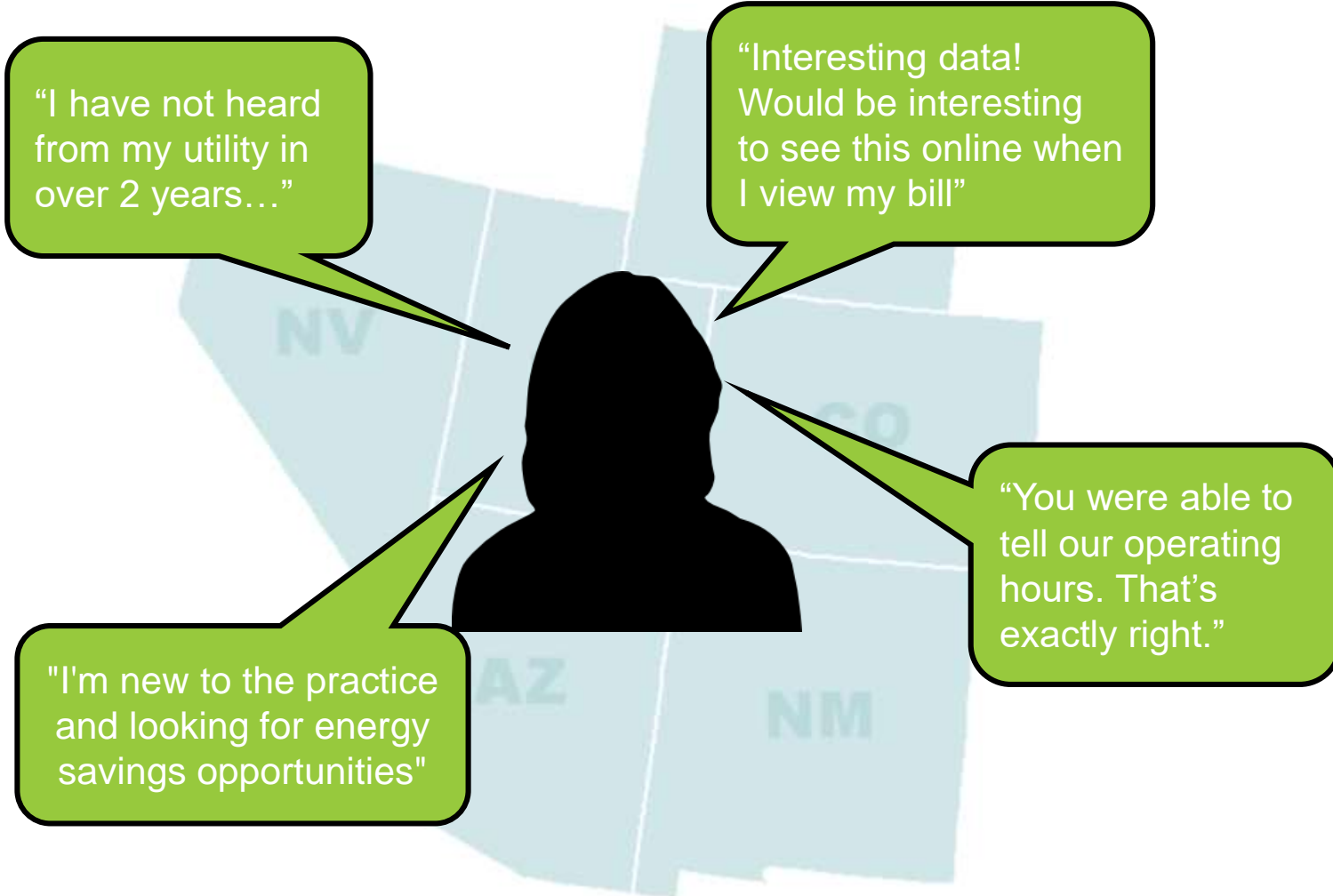
- Need for close coordination between utility program/marketing, implementers and trade allies



## CUSTOMERS

- C&I customers crave personalized analysis and EE recommendations
- Benefits of data analytics extend beyond DSM program participation

# C&I CUSTOMER TESTIMONIALS



"I have not heard from my utility in over 2 years..."

"Interesting data! Would be interesting to see this online when I view my bill"

"You were able to tell our operating hours. That's exactly right."

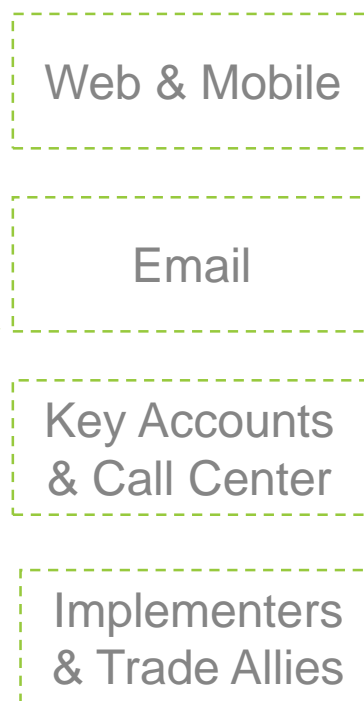
"I'm new to the practice and looking for energy savings opportunities"

# CLOSING THOUGHTS

## Customer Analytics



## Channels



## Outcomes





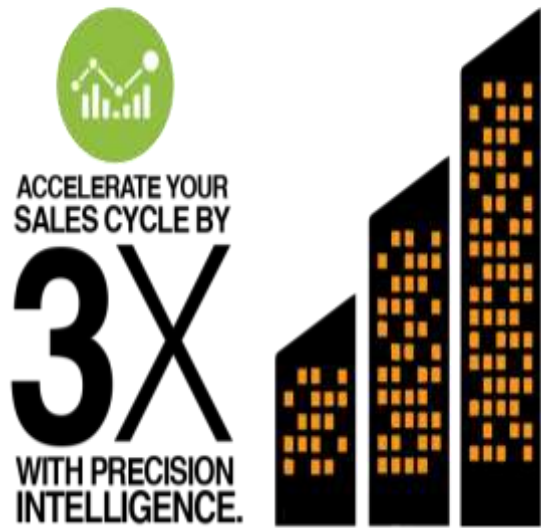
THANK YOU



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[pcarp@firstfuel.com](mailto:pcarp@firstfuel.com)  
c: 415-722-8577

# APPENDIX

# EXAMPLE ANALYTICS RESULTS



# CHALLENGES OF EXISTING CUSTOMER INITIATIVES

