



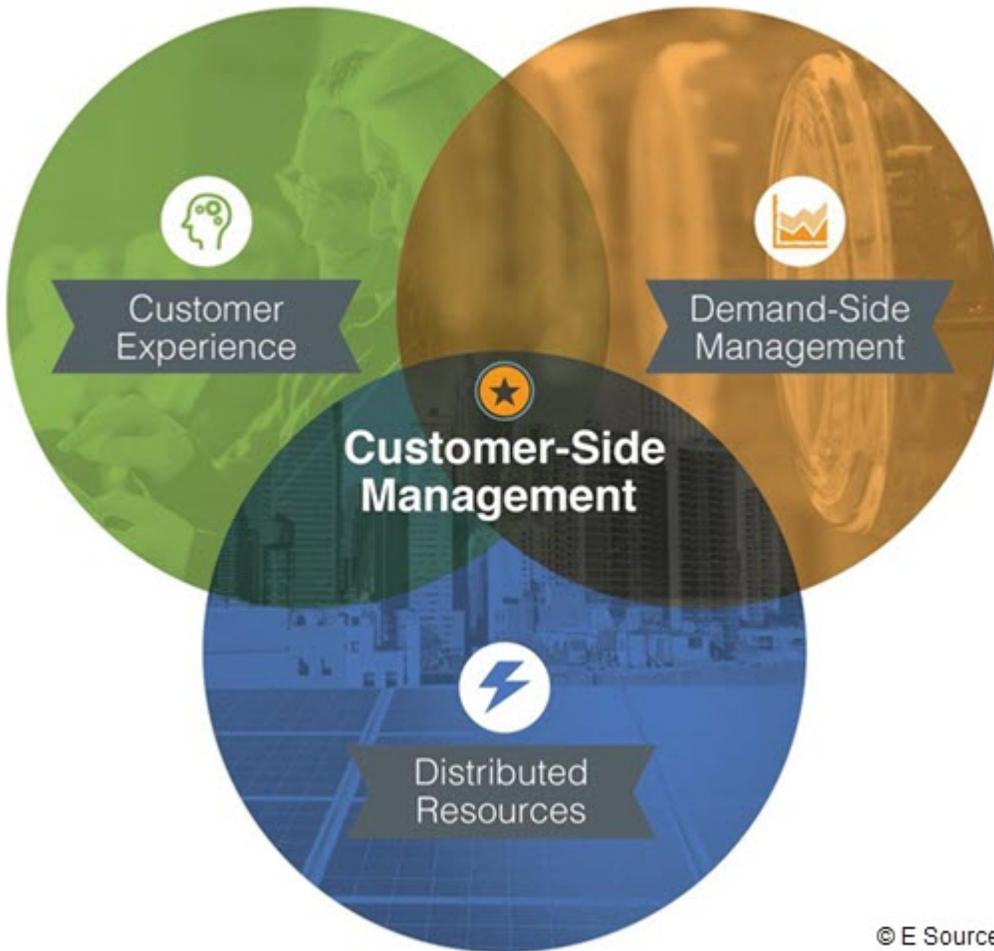
Reach DSM goals through CSM design: E Source Customer-Side Management

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Our demand-side management (DSM) research team hears almost daily about the real struggles utility DSM folks are facing: savings goals keep creeping upward and so do the baselines, products are getting more efficient, markets are getting more saturated, and customer expectations are growing. What's a program manager to do?

E Source suggests that utilities start thinking of customers as proactive business partners who are capable of supporting a range of utility goals. We call this new perspective Customer-Side Management™ (CSM™). CSM represents the intersection between DSM, demand response, distributed energy resources, and customer experience.



We dove into the preapproval filings of three leading states to research how they plan to reach their goals. We found eight key themes in the plans—each reflective of the CSM shift to focusing on learning from customers and improving the customer experience. Here are three of our favorites.

Use consistent messaging and cross promotion. Customers don't usually differentiate between utility departments. So it's worth working internally to break down departmental silos and make a seamless communication system for customers. Once a customer initiates an interaction, leading utilities have, at the ready, information and enrollment promotions for other programs that may be of interest specifically to that customer.

Find and minimize customer barriers. Rather than increase financial incentives or offer more programs, leading utilities study why customers aren't participating and specifically address those factors. They seek ways to make enrollment easier, clarify program rules, and follow up with customers more often.

Improve trade ally training and collaboration. Sometimes a customer's only interaction with a utility DSM program is through the trade ally that visits their home. Leading utilities work closely with their trade allies through regular trainings and network oversight.