

E Source membership 2021

Delivering valuable industry insights and tools
to the LPCs



E Source

Dawn Arnold, Director of TVA Customer Relations

Wayne Greenberg, CEO

Jeffrey Daigle, Director

Courtney Welch, Solution Director

Agenda

- Intros
- Our capabilities
- Observations across the industry
- Aligning your priorities with our solutions
- Next steps and questions

Who you're speaking with today



Wayne Greenberg

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We understand utilities and municipalities because we've made them our business for more than 30 years.



E Source

TROVE™

An E Source Company



STRATEGY WISE™

An E Source Company



An E Source Company

Utility research and advisory

Using market research data, expert analysis, and industry experience, we help utilities put their customers first, meet their business objectives, and solve their corporate challenges.

Data science

Applying predictive data science to help electric and gas utilities make data-driven decisions that improve their bottom line and increase customer satisfaction.

Strategic utility consulting

Advancing business and technology solutions that strategically enhance operations for utilities and their cities.

Who We Serve

Electric

Gas

Water

Cities



600+

North American
customers in the
utility ecosystem

United States

100+

Water utilities

73%

of the kWh
produced in North
America are from
E Source members

60%

of the top
100 IOUs

250+

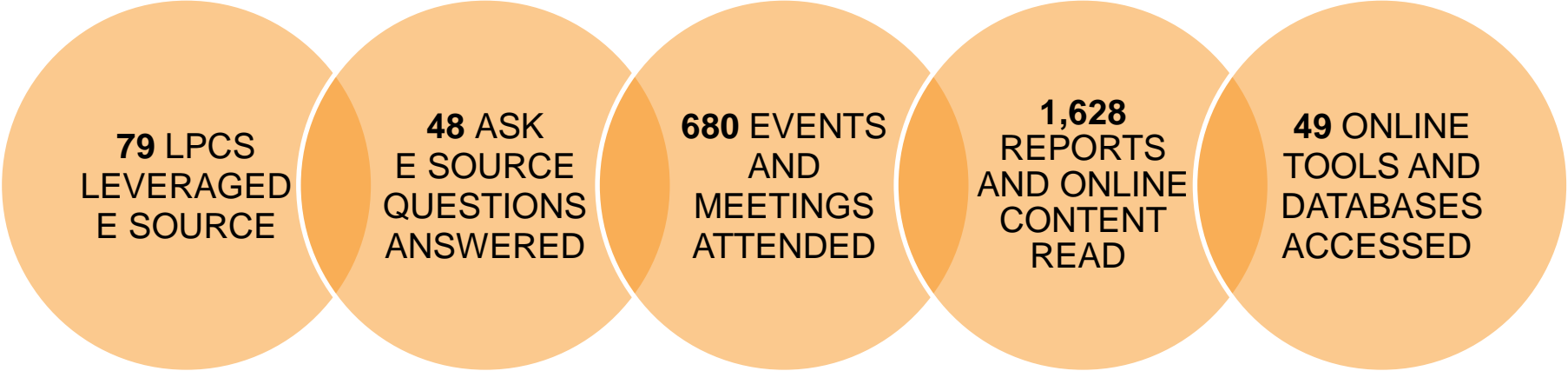
Munis and
co-ops

Canada

70%

of the top gas
& electric
utilities in
Canada

How we've served the Valley (July 1, 2019 – June 30, 2020)



79 LPCS
LEVERAGED
E SOURCE

48 ASK
E SOURCE
QUESTIONS
ANSWERED

680 EVENTS
AND
MEETINGS
ATTENDED

1,628
REPORTS
AND ONLINE
CONTENT
READ

49 ONLINE
TOOLS AND
DATABASES
ACCESSED

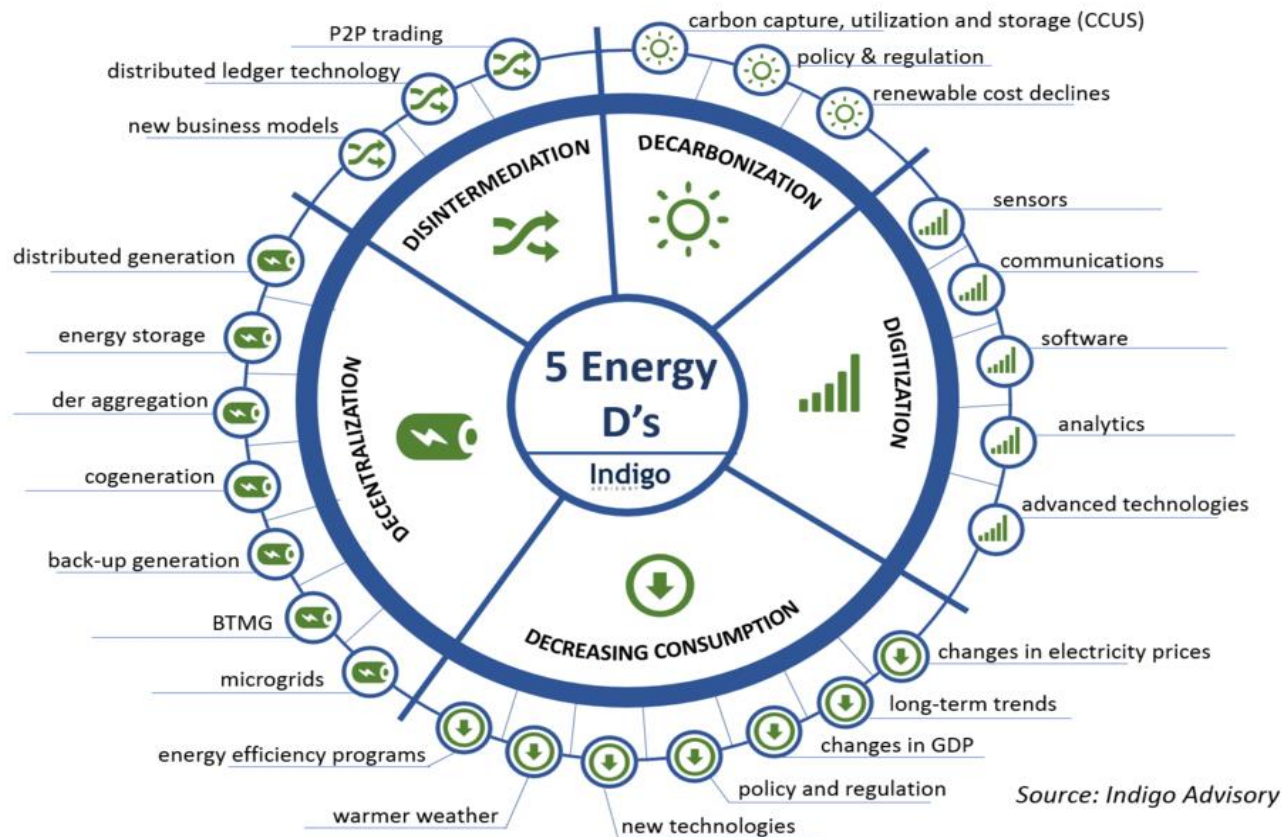
An aerial view of a city skyline, likely San Francisco, with the Golden Gate Bridge visible in the background. The image is overlaid with a network of white, glowing lines that connect various points across the city, suggesting a global or interconnected network. The text "Observations across the industry" is centered within a white rectangular frame.

Observations across the industry

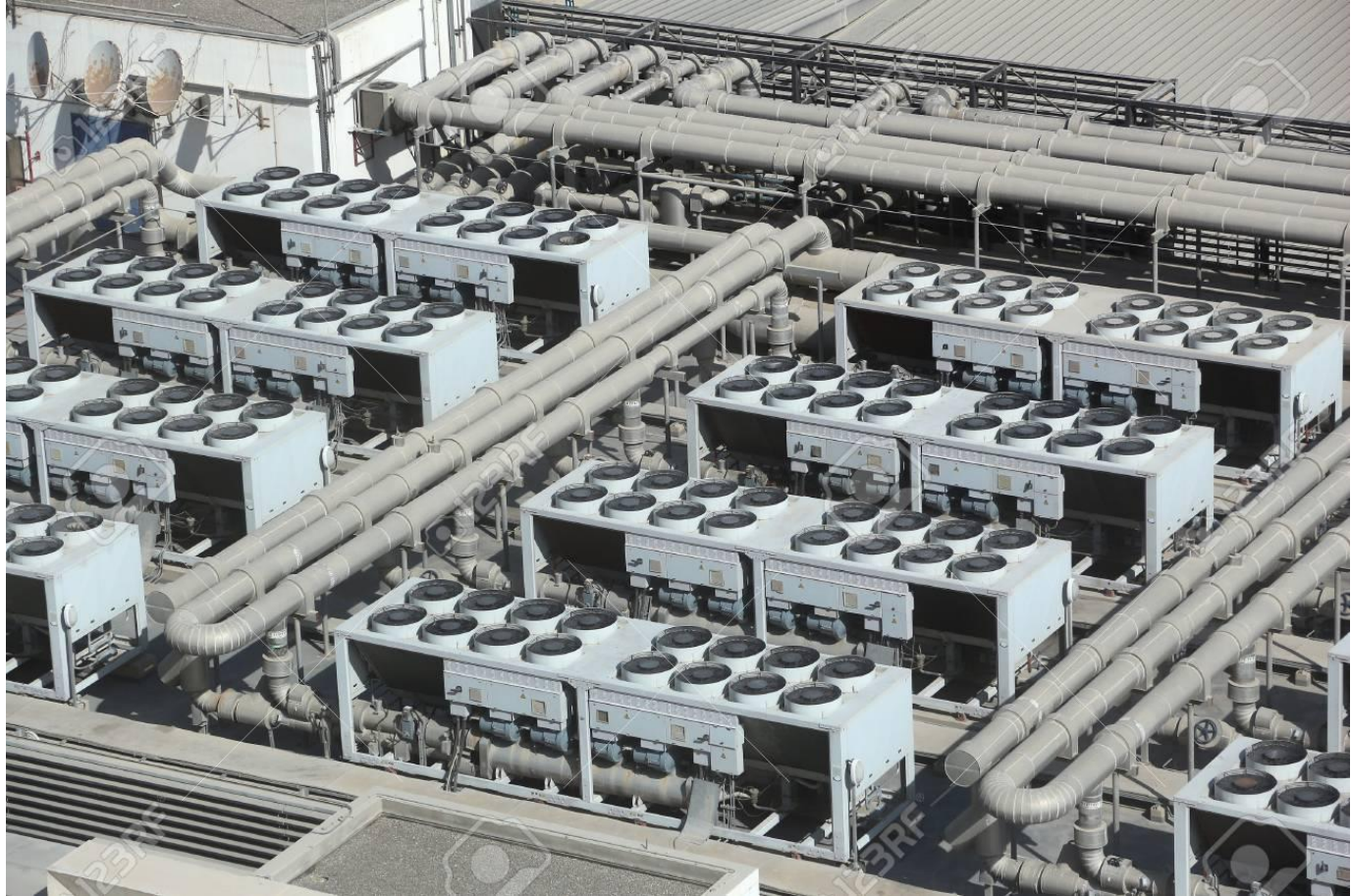
COVID-19 observations

- Industry continues no-shutoff policy across much of the US
 - Many dates extended; more extensions expected
 - Shutoffs have begun across the Valley—although as a last resort
- Electricity usage down between 5% and 9% each of the last several months
 - Residential use up ~8% over the period
 - C&I use down ~13% over the period
- Water use similar to electricity
- Natural gas use stable
- Underserved populations are challenged
- Most IOUs are weathering better than munis/coops

Megatrends

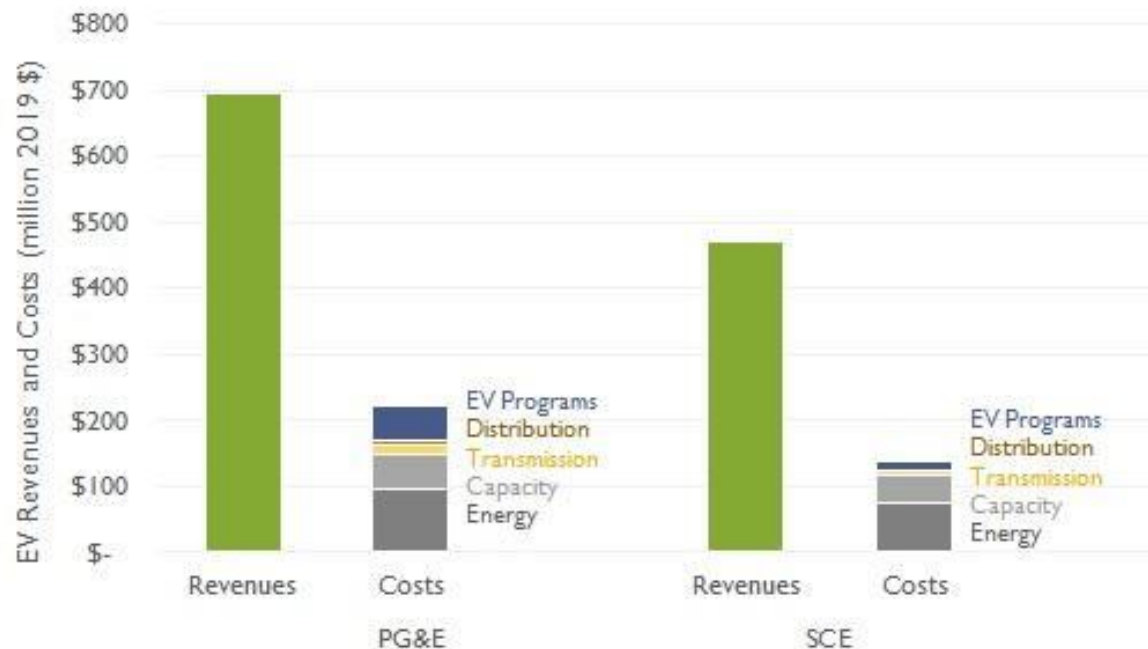


**Biggest
new
load
since ...**





EV financial contributions



Source: Synapse Energy Economics

Project for Colorado Energy Office will help state meet goal of nearly 1 million EVs on the road by 2030

“E Source sees the critical role that utilities can play in the growth of EVs since they are at the epicenter of electrification, carbon reduction, consumer behavior, charging, and electricity pricing. We don’t see other entities with the ability to step up and accelerate this very early marketplace.”

—Bill LeBlanc, Chief Instigation Agent, E Source

Buyers want pickups



BOLLINGER MOTORS



LORDSTOWN

The future is *autonomy*

T-pod



E/NRIDE

Data science

Machine learning and artificial intelligence—*real* solutions to *real* problems

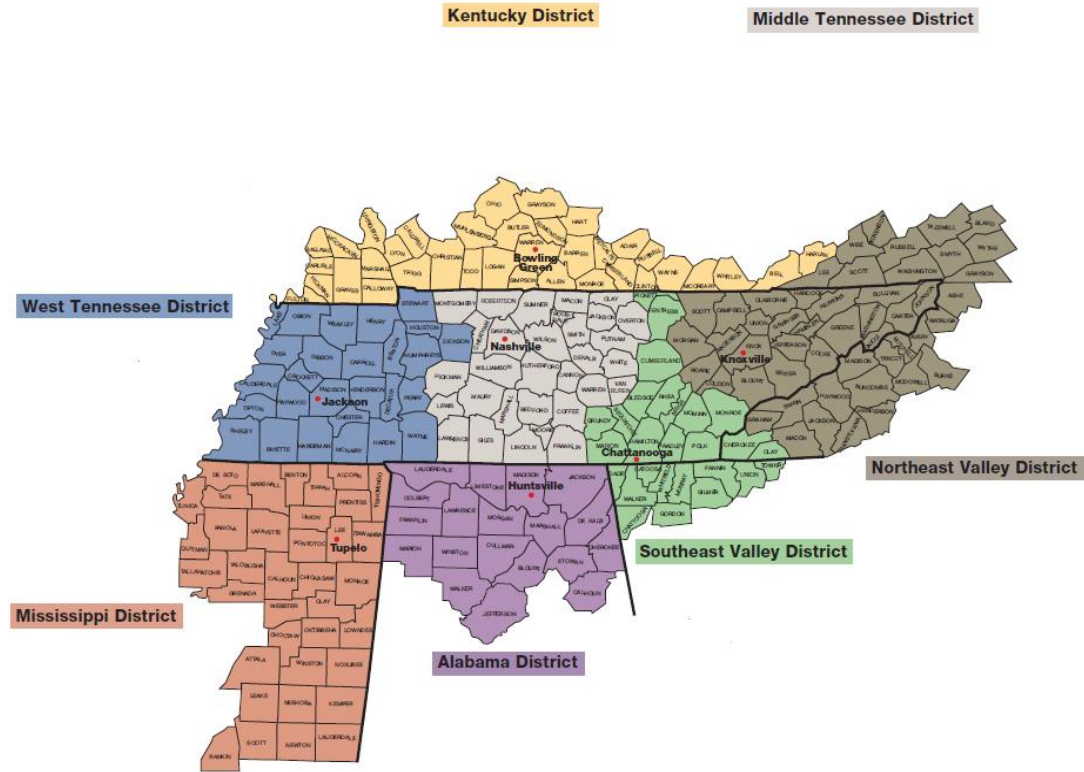


The customer

- Most of the changes happening in the industry are driven by consumer demand
- E Source has the tools for you to better engage with customers and drive long-term (and growing) beneficial uses of energy
- Let E Source be your customer-focused partner, and together we will ...

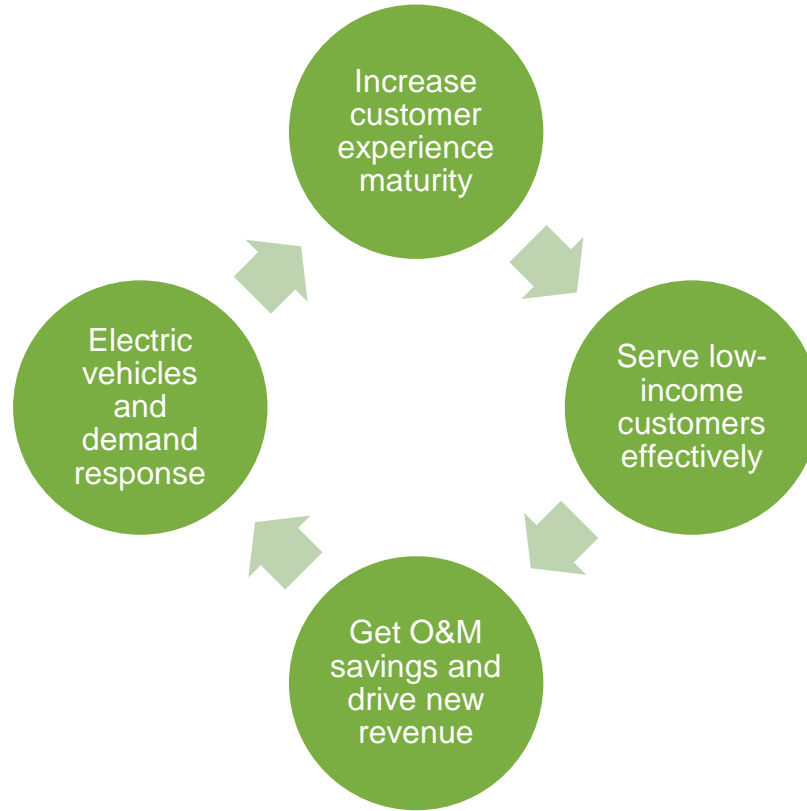
Power What's Next

We're connected with the Valley



We bring national insights and pair them with our local perspective to enable the Valley's success

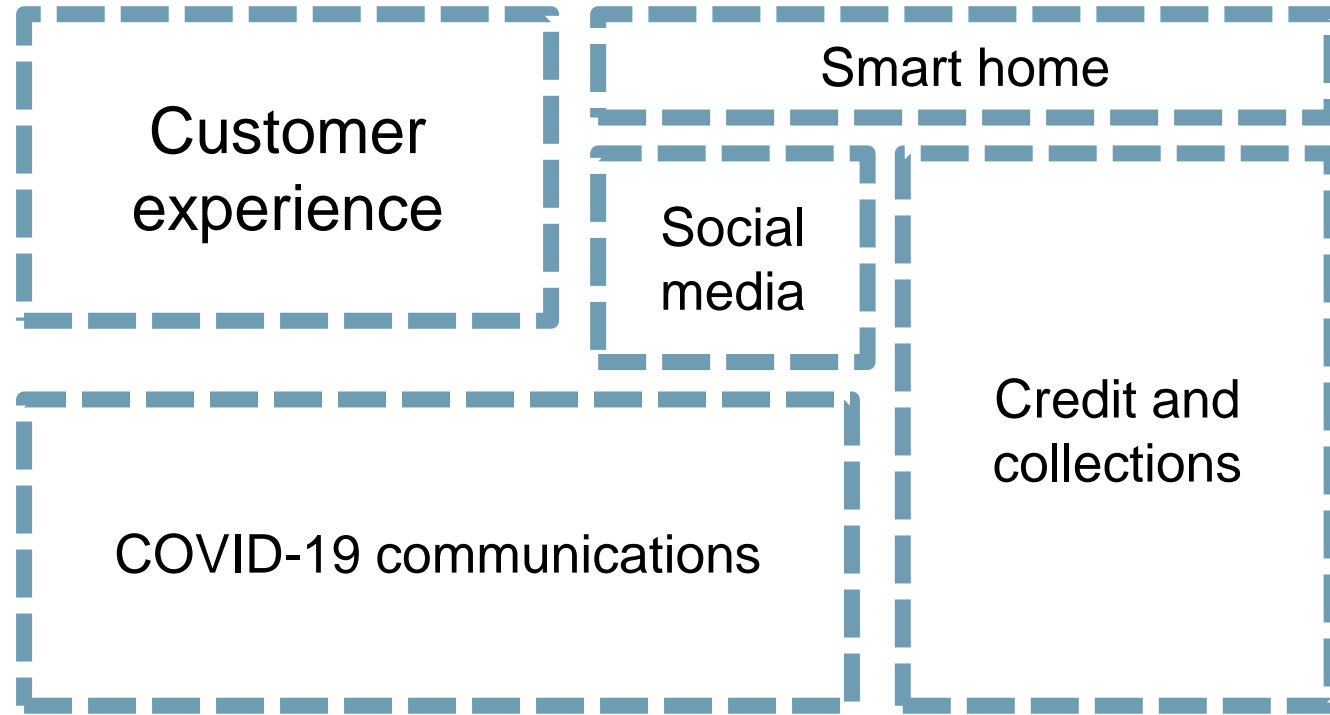
Aligning your priorities with our solutions





Increase customer experience maturity

The landscape of CX in the Valley



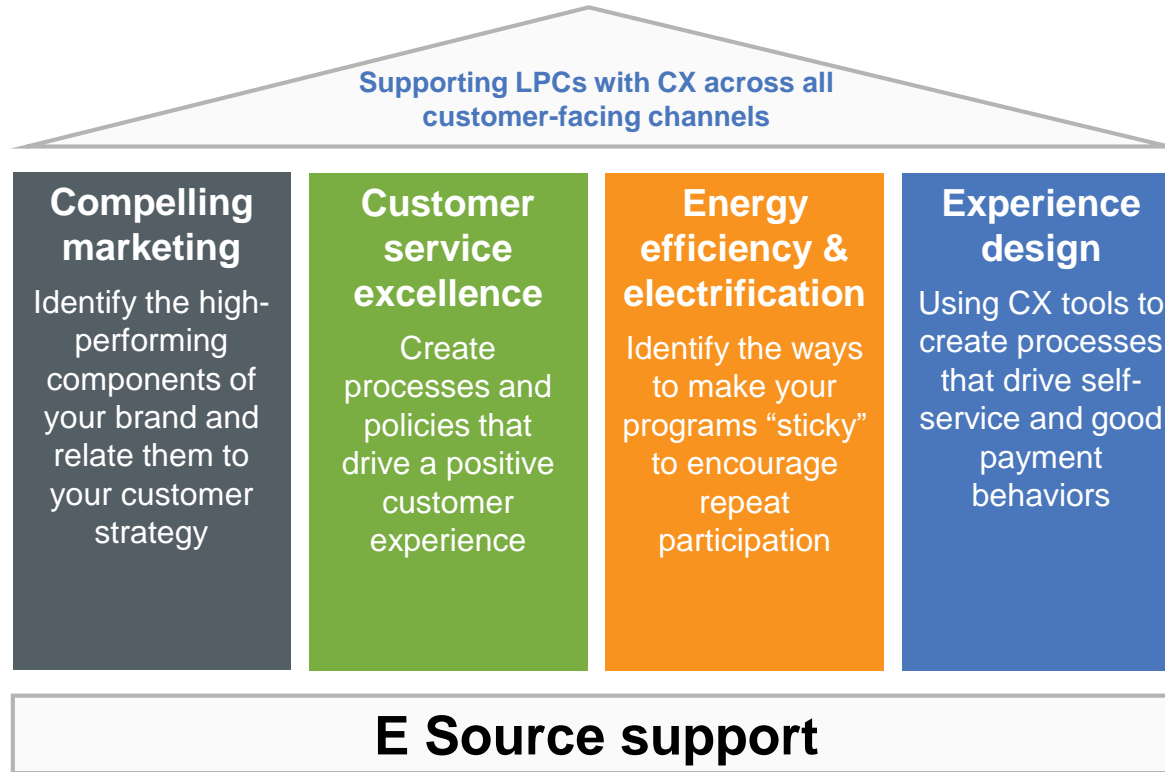
Drive a successful CX strategy

We can help you **improve your CX maturity** by:

- Leveraging E Source's maturity framework to create your CX strategy
- Identifying best practices for improving your self-service options regardless of channel
- Capturing communications best practices that have been translated for your customers in the Valley
- Advising on improvements to your customer care efforts



Supporting your CX initiatives





**Serve low-income
customers
effectively**

The low-income landscape in the Valley and nationally

Rates are low, but there is a high energy burden on low- and moderate-income (LMI) customers

Low-income customers are having a hard time paying bills ... now more than ever

Much of home heating in the Valley is electric

New business is reluctant to move into underserved areas

Make empathy and empowerment core elements of your marketing campaigns

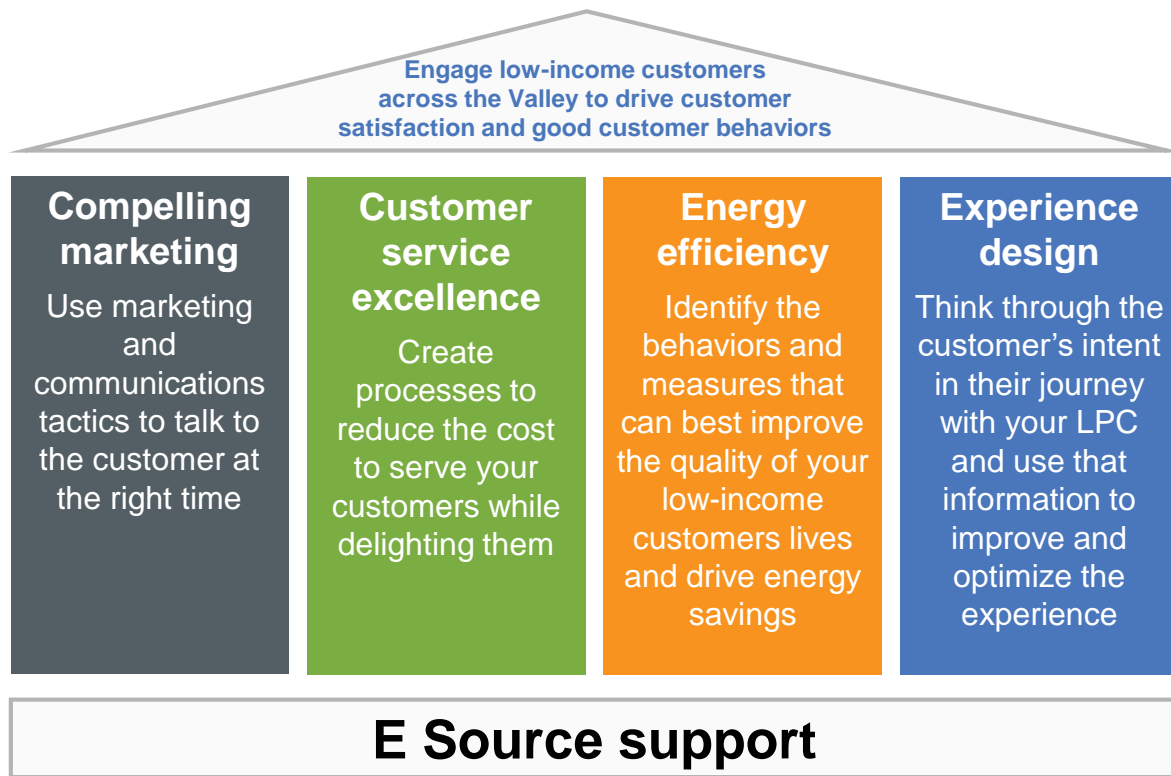
New participants have to navigate a difficult system for assistance

Successfully serve your low-income customers

We can help you **reduce the energy burden on LMI customers** by:

- Identifying and advising on successful programs and partnerships that work for your territory and unique customer base
- Identifying the best, cost-effective technologies to meet your customers' specific energy needs
- Advising on energy-efficiency and distributed energy resource (DER) strategies for revitalization efforts to support the hardest hit small and midsize business customers and to entice new businesses to move into underserved areas
- Recommending solutions to barriers associated with financing offerings for low-income customers

Engage your low-income customers



Expand beyond business as usual in serving your low-income customers

We can help you **build brand and reduce costs** by:

- Leveraging effective marketing and communication approaches to demonstrate that you're committed to doing the right thing from the customer perspective
- Understanding your low-income customers' attitudes, perceptions, and behaviors through our deep market research and ethnographic studies





O&M savings and driving new revenue

The savings and revenue landscape in the Valley and nationally

Measuring utility call center performance service level/speed to answer

Improving efficiencies across CX and corp comm teams

Payment option solutions for closed walk-in centers during COVID-19

New product and service offerings for residential customers

New product and service offerings for small and midsize business customers

New product and service offerings for large business customers

Cutting O&M costs and driving new revenue

We can help you **drive new savings** through:

- Cost-saving measures and efficiencies in the call center
- Streamlining self-service, reducing calls to the call center
- IVR containment

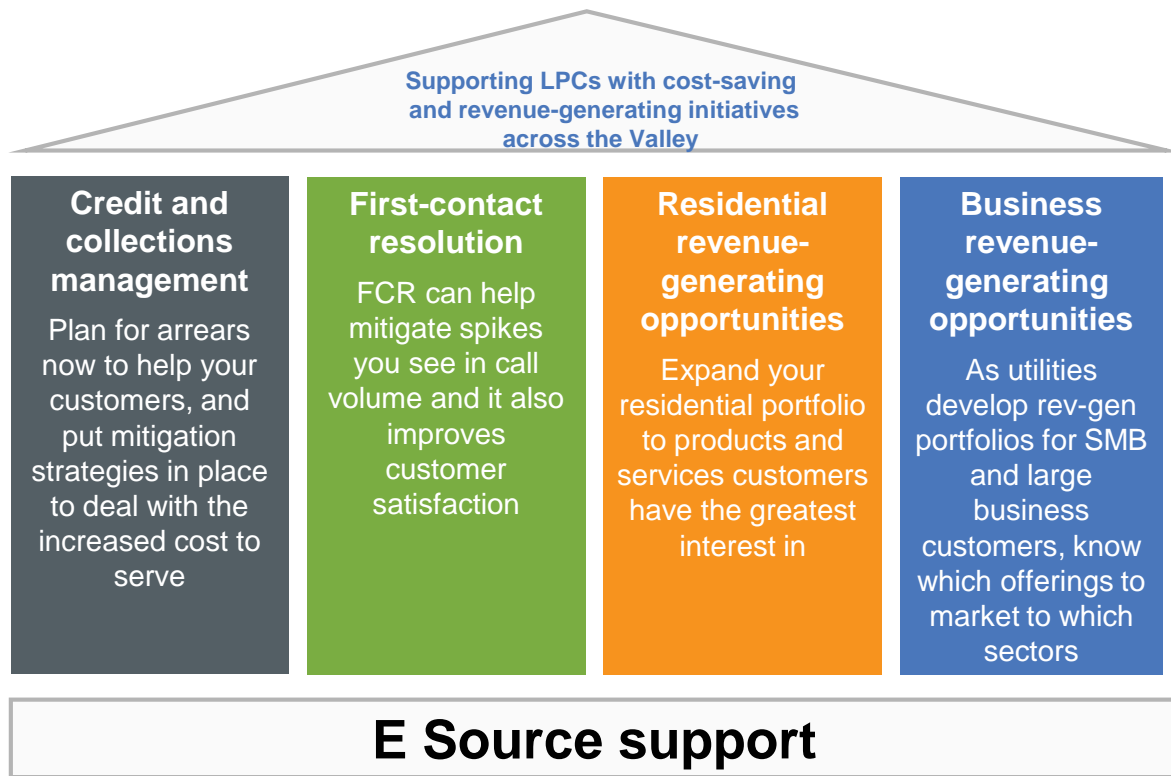


We can help you **generate new revenue** through:

- Identifying new products and services being introduced by other utilities, including municipals and co-ops
- Targeting interested residential segments and business sectors
 - Household appliance protection (residential)
 - Equipment leasing (residential and business)
 - Surge protection and wiring warranty plans (residential)
 - EV charging stations (business)
 - Solar and storage (business)
 - Microgrids (business)



Supporting your cost-saving and revenue-generating initiatives





Electric vehicles and demand response

EV trends in the Valley and nationally

EVs as a new revenue source

How to make smart investments in EV infrastructure

Claritas PRIZM Premier segment data to target early adopters

Fleet electrification as “biggest bang for your buck” strategy

How to work with and motivate dealerships

Where to get started with a long-term roadmap

Electrify the transportation sector

We can help you **design and implement successful EV pilots, programs, and rates** by:

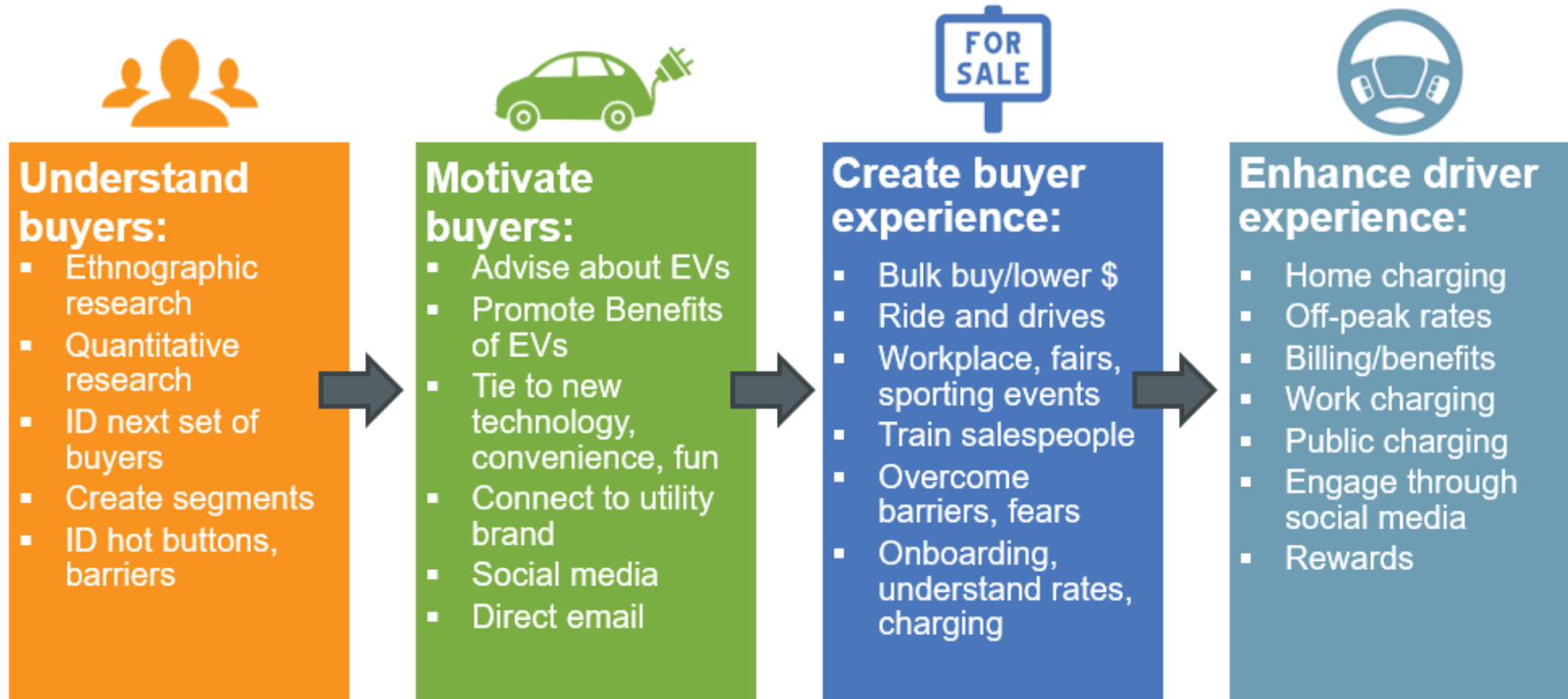
- Helping you design solutions to enhance the driver experience, including:
 - Home charging
 - Off-peak rates and dynamic pricing
 - Workplace charging
 - Public charging
 - Rewards
- Advising on utility and customer benefits of line extension versus make-ready EV charging infrastructure programs
- Summarizing our nationwide literature review of EVs
- Conducting and synthesizing interviews with EV leaders

What's our utility's role in EV adoption?

We can help you **boost EV adoption and improve EV-buyer and EV-owner customer experience** by:

- Identifying the most innovative EV marketing approaches used by other utilities and players outside the industry
- Understanding your next wave of EV buyers
- Supporting your marketing initiatives to educate and motivate buyers
- Helping you develop messaging that addresses barriers to EV adoption
- Helping you create a buyer experience and collaborate with dealerships
- Sharing best practices for engaging EV owners through social media

Accelerate EV adoption in your marketplace



A photograph of a landscape with several wind turbines on a green, hilly terrain. In the background, there is a body of water and distant mountains. The entire image is overlaid with a semi-transparent green filter. A white rectangular border frames the central text.

Next steps

Next steps

- Please take 2 minutes to complete a quick survey.
- Attend our web conference on September 15 at 1:00 p.m. CT to learn more about service package options ([register](#)).
- TVPPA will be coordinating invoicing and the membership service agreement (MSA).
- The MSA will be effective from October 1, 2020, through September 30, 2021.

Thank you!

Please take this quick survey!

www.pollev.com/esource1

Questions?