The utility industry is undergoing a tremendous transformation: Increased customer expectations, an evolving regulatory environment, and the ways consumers interact with technologies are changing the way you do business.

The E Source Forum addresses these changes and arms you with the research, best practices, and tools you need to succeed.

Last October, utility professionals from all over the US and Canada gathered in Denver for three days for the 2014 E Source Forum, where they learned best practices in the design, execution, and marketing of their energy-efficiency programs; how to vet technologies; and how to provide an incredible customer experience.

What follows is a collection of insights that were shared through these sessions.
Cracking the Multifamily Nut: Effective Strategies for Designing Multifamily DSM Programs

Tips for reaching this difficult sector:

- Bundle—it makes everything more attractive
- Set a solid baseline with measurement and verification
- Ensure that programs are easy and accessible because the multifamily segment doesn’t have staff, time, or expertise
- Get maintenance staff on your side—in smaller units, they have influence over the owner’s decision
- Target new property owners because they often plan for capital improvements when they purchase a property
- Use direct-install programs as a means to get in the door with other programs
- Offer on-bill financing
- Ask customers what they want in a program
# Trade Ally Network Peer Roundtable

## Trade Ally Network Do’s & Don’ts

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<th><strong>DO:</strong></th>
<th><strong>DON’T:</strong></th>
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<tr>
<td>Segment trade allies based on needs and expertise</td>
<td>Focus on customer experience just for customers—do it for trade allies too</td>
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<td>Put energy experts in the contact center to help with inquiries and trade ally troubleshooting</td>
<td>Let your trade allies take control of your brand and reputation</td>
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<td>Stay current on codes, rebates, and other items as programs evolve and change</td>
<td>Forget to communicate with customers systematically and regularly</td>
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<td>Capture customer information</td>
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Best of DSM Tweets & Comments

Dennis Goodman | SRP
“Big data analytics can be used to manage energy use. These powerful tools will help in future program delivery and communications.”

David Felix | SRP
“Cracking the multifamily nut tips: Leverage your account manager relationships with their MF customers and establish a great working relationship with facilities managers of the (multifamily) dwellings (they will be your champion that sells the program to management).”

Preston Langford | Xcel Energy
“Industry trends show utilities are making the changes necessary to meet future challenges of DSM goals ... Interesting.”

Annie Gilleo | @ardowns
Heard: Sue Kelly, Am. Pub. Power Ass’n: efficiency is the most promising way to meet potential Clean Power Plan reqs.

Rick Hodges | Bonneville Power Administration
“Residential, low income, and continuous optimization are some examples of the 20 or so collaboration (electric, gas, water) programs between BC Hydro and Fortis BC. ConEd’s joint program has performed cost allocation by net avoided costs. Program management has a high potential for conflict (management, contact oversight, communication, etc.). There can be cost reductions and it’s easiest to go through one joint implementer.”

Hilen Cruz | SRP
“Net Metering: Keep the conversation positive, keep fairness in mind, maintain a pro-solar campaign.”
From Pipe Dream to Program

Pitfalls to avoid when choosing emerging technologies for DSM programs:

- Falling in love with a technology and not being able to assess it rationally
- Ignoring seasonal nuances that could affect test results
- Evaluating technologies in a silo—successful programs consult a cross-functional product and service steering team

“If you’re busy, emerging technology is not your friend. It takes a long time from initial assessment to full program launch. It’s not for the faint of heart.”

—Dave Bisbee, Project Manager, Sacramento Municipal Utility District
Best of Tech Tweets & Comments

Jim Rogers, Former Chairman and CEO, Duke Energy

“EVs are a chicken-and-egg issue. Do you deploy charging stations before people have bought them? It’s going to take time ... let’s pace deployment with consumer acceptance.”

Laura Adelman | National Grid US

“Programmable thermostats don’t necessarily save energy! Be sure to use technology to conserve, not consume more.” —learning from The Future of Residential Demand Response Is Here

LeAndra MacDonald | @leandramacd

@ESourceForum Sue Kelly on EVs, “As an early adopter, I am charging forward on $1/gallon.”
Large Business Customers Told Account Managers What They Want

We brought in four large business leaders and they gave us their honest feedback on the good, the bad, and the ugly in the energy services they receive.

Getting the investment from the hotel owner is the toughest thing we face, followed closely by getting behavioral engagements from hotel employees ... When I hear from an account rep, I want to know my hotels are on the right rate structure. And, once a year, we do a 10-year look-ahead so the hotel owners can cash-flow out. Right now [in September], every Marriott is doing annual budgets.”

—Doug Rath, Director, Energy and Environment/ The Americas, Marriott International Inc.

My suggestion is to do a tour and get to know the clients. There are a lot of unknowns in the marijuana industry.”

—Michael Elliott, Esq., Executive Director, Marijuana Industry Group

Don’t treat me like everyone else.”

—Carol Dollard, Energy Manager, Colorado State University

[We want] incentives. It also helps to have some marketing so we can be promoted as being a company that’s working hard to be as efficient as possible.”

—Craig Smith, Director, Engineering, Kroenke Sports Enterprises

When I sit with my rep, it isn’t a sales call for energy efficiency. Having them show up at my door with a product doesn’t work. It’s dictated by us according to what we have to spend.”

—Craig Smith, Director, Engineering, Kroenke Sports Enterprises
Portals and Apps: Putting Energy Information and Control at Your Customers’ Fingertips

Here are some valuable points to remember when designing portals and apps.

Portals can help drive customer engagement (primarily through alerts), and they present a huge opportunity for utilities.

Best-practice portal features include integration with Green Button (and other data sources), views or comparisons of energy usage over time, the option to create budget goals, savings tips, and multiple communication channels. Also consider including social competition and information on solar panels and electric vehicles.

Graphs don’t make a compelling portal—alerts, multiplatform compatibility, and information that’s directly relevant to customers do.
If You’re Not on Social, You Should Be

Having a solid understanding of the latest industry trends in social media and a plan for how to use this important tool more effectively will help expand the reach of your marketing. It helps by:

- Improving outage or crisis communications/management
- Increasing brand awareness
- Expanding communications with customers

"Listening is about respect and context. Find something you have in common with your customer and be a human. Listening is also about behavior. All customers feel empowered to take action on social media when their power is out, so you have to adjust to changes in customer behavior that you didn’t anticipate. Most of the time, the fact that you engaged with a customer leaves them feeling better."

—Ike Pigott, Communications Strategist, Alabama Power

"Overwhelmingly, respondents said that outage communications and community communications garner the most customer engagement."

—Haley Kaiser, Associate Analyst, Market Research Services, E Source
Best of Marketing Tweets & Comments

Brad Goar | Florida Power & Light

“Aggressive energy savings goals require high participation rates. ... Move from motivation by information to motivation by entertainment.” —learning from Games Customers Play

Elaine Cole | Newfoundland and Labrador Hydro

“Let’s meet customer expectations by providing options for customer service through better social media. #WhereWeNeedToBe”

Paul Seo | BC Hydro

“Instagram and utility blogging are the next big trends in social media for utilities.”

Ike Pigott | Alabama Power

“When trying to decide whether or not to respond to a comment on social media, ask yourself, ‘Is there a chance I can make this person’s day better?’”

Conservation Services Group

“Overall customer satisfaction with their utility climbs as #energyefficiency program participation increases.”

Tamara Rozmarynowski | Integrys

“When trying to decide whether or not to respond to a comment on social media, ask yourself, ‘Is there a chance I can make this person’s day better?’”
Connecting Customer Experience with Employee Experience

“Always treat your employees exactly as you want them to treat your best customers.” —Stephen R. Covey

Research has repeatedly linked employee satisfaction, employee retention, and employee productivity to customer satisfaction, customer loyalty, and profitability.

Utilities are no longer a monopoly—they’re part of the ‘choice’ business. Customers need to trust you in order for them to give you their business. To get customers to trust you, it’s important to provide consistent service across all channels and areas of the business.”

—Maureen Russolo, Vice President, Consulting Solutions, E Source

Make sure that employees understand that when they’re talking to a customer, they are NorthWestern Energy—they’re part of the company’s reputational effort.”

—Claudia Rapkoch, Director, Corporate Communications, NorthWestern Energy

An important facet of your customer experience plan is engaging your employees to become advocates for that plan. When the employees who do the work own the process, they become more engaged.”

—Bruce Folsom, Director, Products and Services, Avista Utilities

If you’re working in the right ways, with the right people, in the right direction—that’s what makes the difference.”

—Gail Watts, Manager, Customer Communications, PPL Electric Utilities Corp.
Best of Customer Experience Tweets & Comments

**Stephen Bicker | Tacoma Public Utilities**

“All my folks get sales training. Engineers get it twice.”—Hans Schreff. Best advice of the conference.”

**Stacey O’Neale | Duke Energy**

“Give customers the last word. ...They are the stars of their own show.”

**India McKnight | Oncor Electric Delivery**

“Four C’s in customer experience: consistency, continuity, context, and connectedness—these are small and related things to reach the customer. Great summation!”

**Frank Scumacci | ComEd**

“Avista giving their employees the power to improve the customer experience all the way through the collective bargaining groups ... Bravo!”

**Mary Medeiros | Silicon Valley Power**

“Really pay attention to negative feedback and solicit it, particularly from friends. ...Hardly anyone does that, and it’s incredibly helpful.’ —Elon Musk. Great advice!”

**Adrienne C. Anderson | @ace1205**

“In Social Media: Listen, Engage, Be Flexible, DON’T BE AFRAID OF CRITICISM”
“Omnichannel without customer experience is like pancakes without syrup.”

Laurie Parker | Nashville Electric Service

“Watch out because if we underestimate consumer adoption of technology, we may be behind the curve to meeting consumer expectations.”

J.D. Steedley | Santee Cooper

“Understanding what will drive change: it’s not just utility infrastructure, it’s going to be intellectual infrastructure, technology infrastructure, and social infrastructure.”

Mona Chandra | National Grid US

“Good discussion on why customers use Twitter to report outages. We have to be where our customers already are and when the power is out, we only have mobile.”

Michael Walker | SRP

“Love the six E’s of employee engagement! To have a great customer experience, you have to start with a great employee experience. Great session.”

Susan Davis | NiSource

“Love the six E’s of employee engagement! To have a great customer experience, you have to start with a great employee experience. Great session.”

Susan Davis | NiSource


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**1. You won’t find another agenda that speaks to your priorities as much as ours does.**

We address what’s currently on the minds of utility professionals—from designing a successful program with the right technologies to executing a top-notch marketing plan and delivering an excellent customer experience.

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**2. There’s a great mix of sessions.**

We provide an experience that’s intended to deliver fresh topics in unique formats. You’ll hear from single speakers and panels of experts as well as learn from your peers in interactive workshops.

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**3. There’s something for everyone at your utility, no matter what their role is.**

We offer four topical tracks in Demand-Side Management, Technology, Marketing & Communications, and Customer Experience so everyone on your team will find value from attending.

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**4. You’ll gain a network of valuable contacts.**

At least 80 percent of our attendees are from utilities across the US and Canada. The network you’ll build during the Forum will be an invaluable resource throughout the whole year.

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**5. We have a lot of fun!**

We plan activities that help you get to know one another, including networking games, off-site tours, a bowling night, and a culinary tour, to name a few. Enjoy getting to know your fellow attendees while seeing some sights in Denver.