

ORACLE

Oracle Energy and Water  
Customer Edge  
Conference

# Personalizing Customer Experience Operations

Customer insights directly integrated within your CRM  
and Marketing Automation Systems

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# Speakers

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**Kojo Quaye**

Product Strategy and Marketing, Group Product Manager,  
Opower Platform



**Darshini Thiagarajan**

Product Strategy and Marketing, Group Product Manager,  
Opower Data Hub



**Laura Baez**

Product Strategy and Marketing, Senior Marketing Analyst,  
National Grid

# What's on tap for the next 50 minutes

**1**

## **Introduction**

What's the problem anyway?

**2**

## **Personalized Marketing**

Hear from Laura Baez on marketing and what it takes to get it right.

**3**

## **Accessing insights**

How can you get access to these insights and what's available?

**4**

## **Personalized CRM**

Let's walk through an example call that features critical customer insights

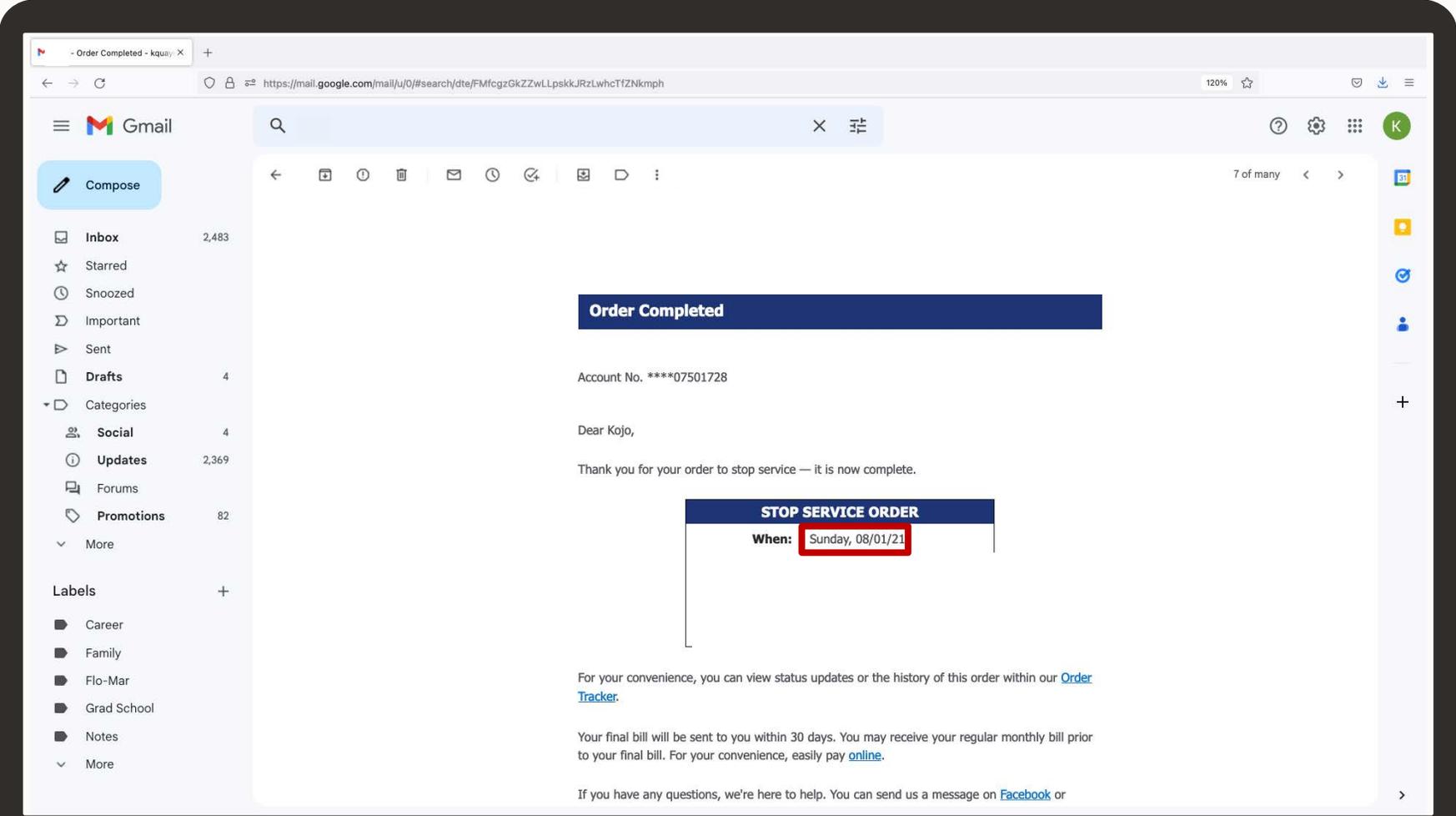
**5**

## **Conclusion**

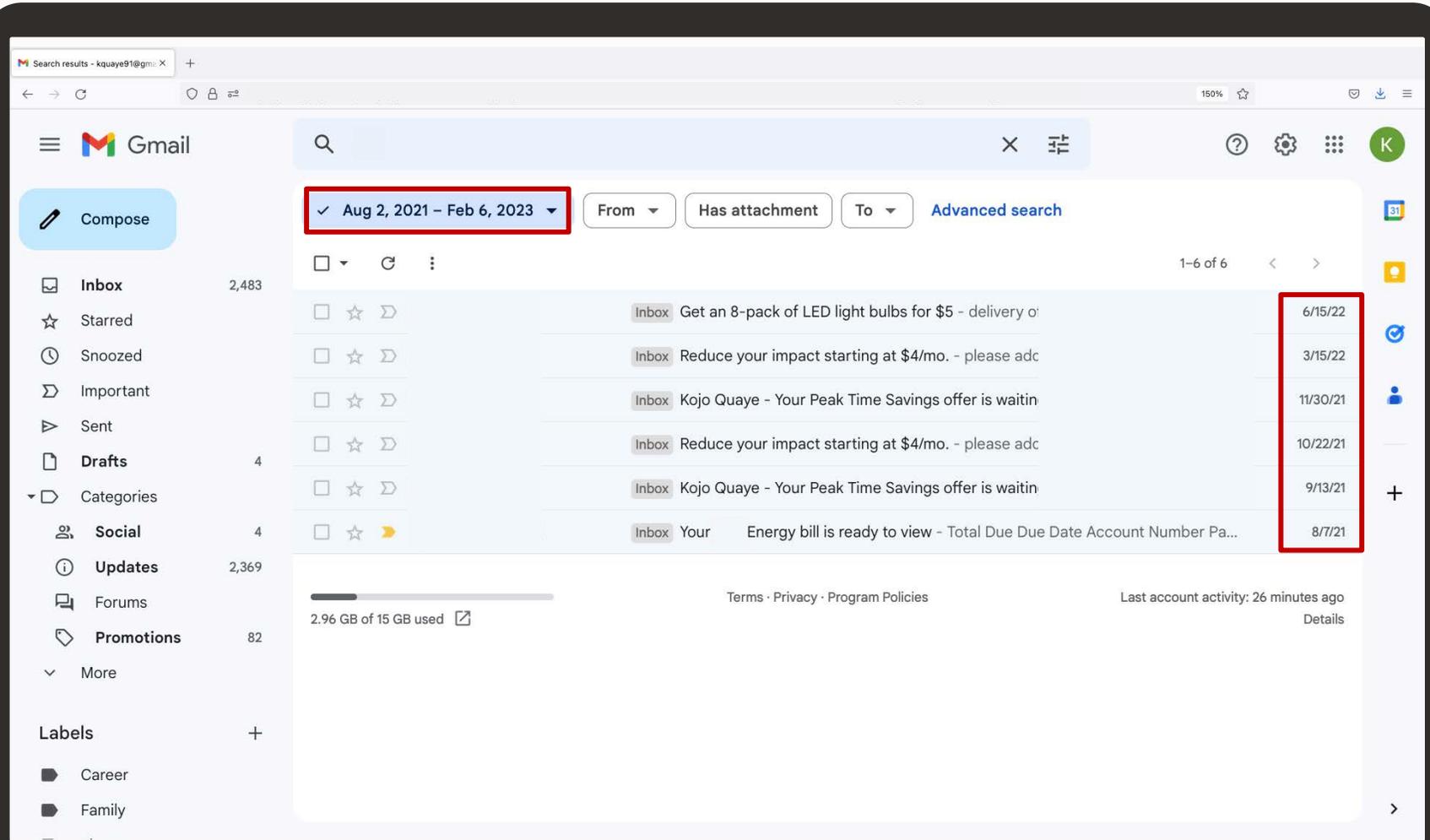
Summary, next steps, and Q&A



# It's not always easy getting the most out of marketing communications



# It's not always easy getting the most out of marketing communications



*5 promotional emails sent after stop service date*

*No change in subject or message content*

*Reminder cadence didn't lead to customer action*



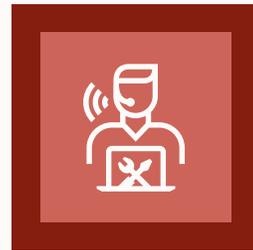
# "Have I answered your questions and provided good customer service?"



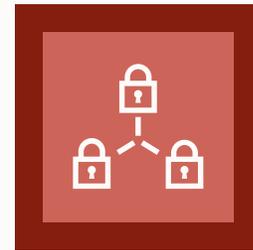
**Larry**



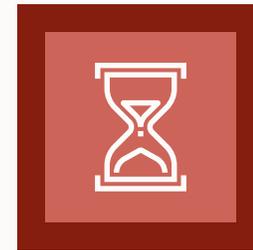
Self service failed



CSR contacted



Bounced Around



Long resolution





Long resolution times

Call escalation

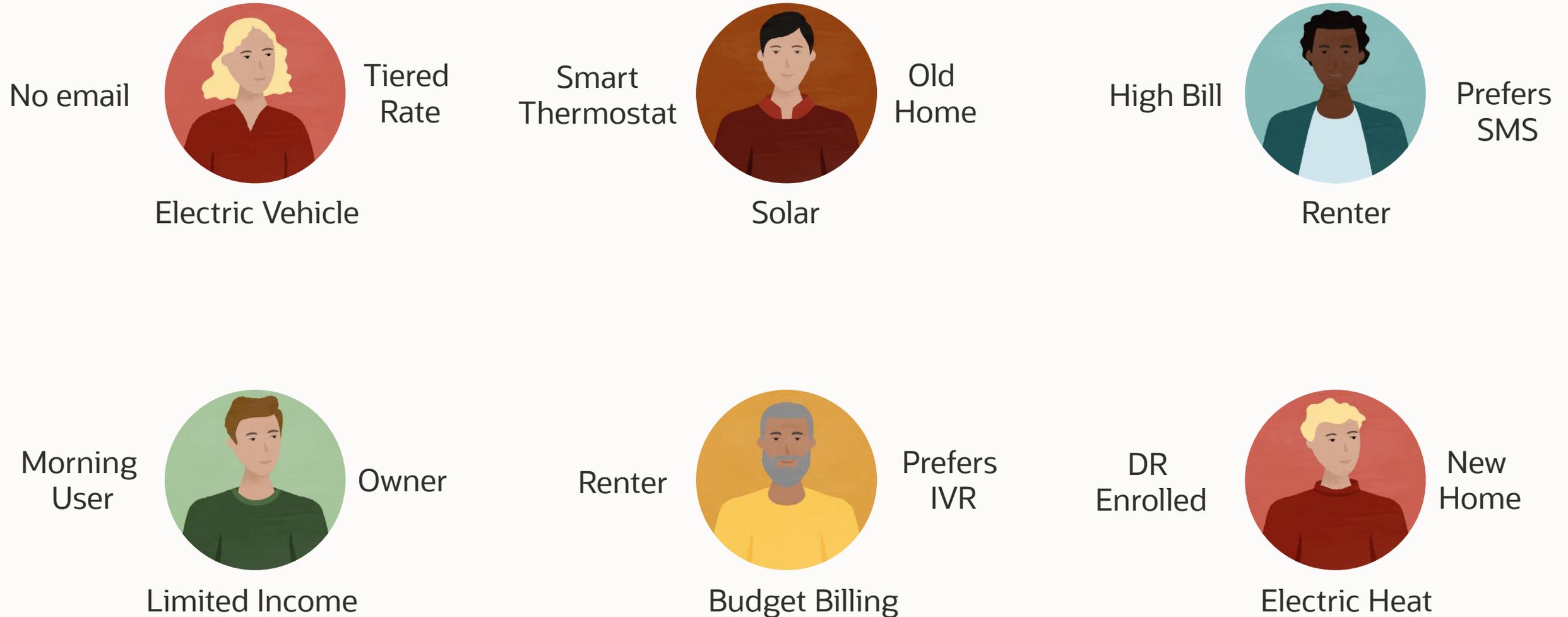
Dissatisfied customers

## **Challenges are rooted in a lack of personalization**

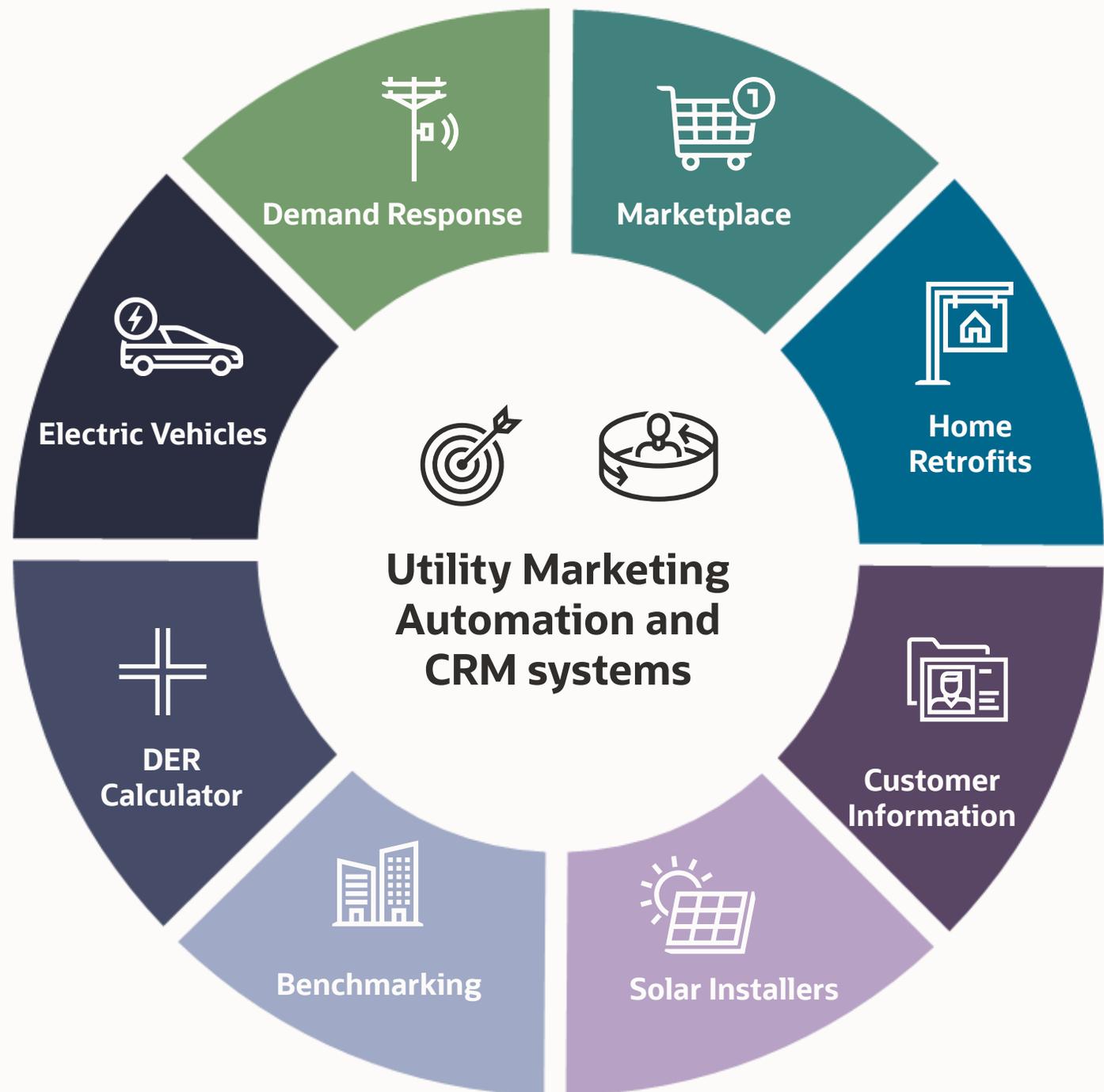
Low conversion

Low engagement

# Personalization is about offering the right program, service, or insight at the right time.



# Personalization requires data from across the ecosystem



# Let's hear from you!

What are your top customer experience/engagement priorities?



# What's on tap next

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Let's walk through an example call that features critical customer insights

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# The marketing communication process



**IDEATION**

**DESIGN**

**PERSONALIZE**

**LAUNCH**

**MEASURE**

*Identify a key on demand marketing need*

*Design look and feel of communication*

*Include valuable customer insights to increase engagement*

*Launch campaign through customer's preferred channel*

*Measure success with key engagement metrics*



## Personalized Heat Pump Education Videos

National Grid collaborated with Opower to deliver personalized videos to targeted customers

- **Personalized disaggregation insights**  
Video included information on customers heating and how much of their utility bill was due to heating and cooling usage.
- **Easy to understand heat pump explanation**  
Educated customers on how a heat pump operates
- **Call to action to learn more**  
Directs customers to program promotion and rebates information



**41% open rate** Videos sent in June of 2021

**45% open rate** Videos sent in September 2021

**80% of customers** Who opened email viewed all the dynamic video content



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# Collaborate with a world class design team from beginning to end

17 people, decades of industry experience at leading firms

Experts in user-centered design and behavioral science

Ongoing consumer research all over the world

**Scene 1**

**Narration:**  
Hello, Christopher.

**Animation:**  
Scene elements appear  
Greeting appears on wall  
Scene slides left to start the next scene.

**Scene 2**

**Narration:**  
Last year, [46%] of your electricity use went towards heating and cooling.  
Spending more time at home may have increased your energy use, as it has for many people these days.

**Animation:**  
Scene elements appear  
center green bar slides down from the top showing the narrated "electricity use %"  
snow is falling in the left window; sun is shining in the right window  
heat and cool air-flow waves with subtle motion, starting from the device out

**Scene 9**

**Narration:**  
How much could you save by switching to a cold-climate heat pump?

**Animation:**  
Scene elements appear  
Center green bar slides down from the top showing the % electricity use  
Number from the second scene (46%) is in place and slowly decreases one percentage at a time to 41% (when scene changes)  
Snow falling seen through the window  
Resolve and zoom in to the closed laptop scene

**Scene 10**

**Narration:**  
Christopher, learn more about cold-climate heat pump systems and whether upgrading is a good choice for you. And connect with an expert to find the right type of heat pump for your home.

**Animation:**  
Laptop opens  
Text slide in  
Arrow bounce down twice  
(same CTA will be added on landing page)

**Scene 10 (Generic Version)**

**Narration:**  
Last year, heating and cooling homes in the U.S. accounted for 32% of all electricity use.  
Spending more time at home may have increased that energy use for many of us.

**Animation:**  
Scene elements appear  
center green bar slides down from the top showing the narrated "electricity use %"  
snow is falling in the left window; sun is shining in the right window  
heat and cool air-flow waves with subtle motion, starting from the device out

**Scene 10 (Generic Version)**

**Narration:**  
Learn more about cold-climate heat pump systems and whether upgrading is a good choice for you. And connect with an expert to find the right type of heat pump for your home.

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# The marketing communication process



*Identify a key on demand marketing need*

*Design look and feel of communication*

*Include valuable customer insights to increase engagement*

*Launch campaign through customer's preferred channel*

*Measure success with key engagement metrics*

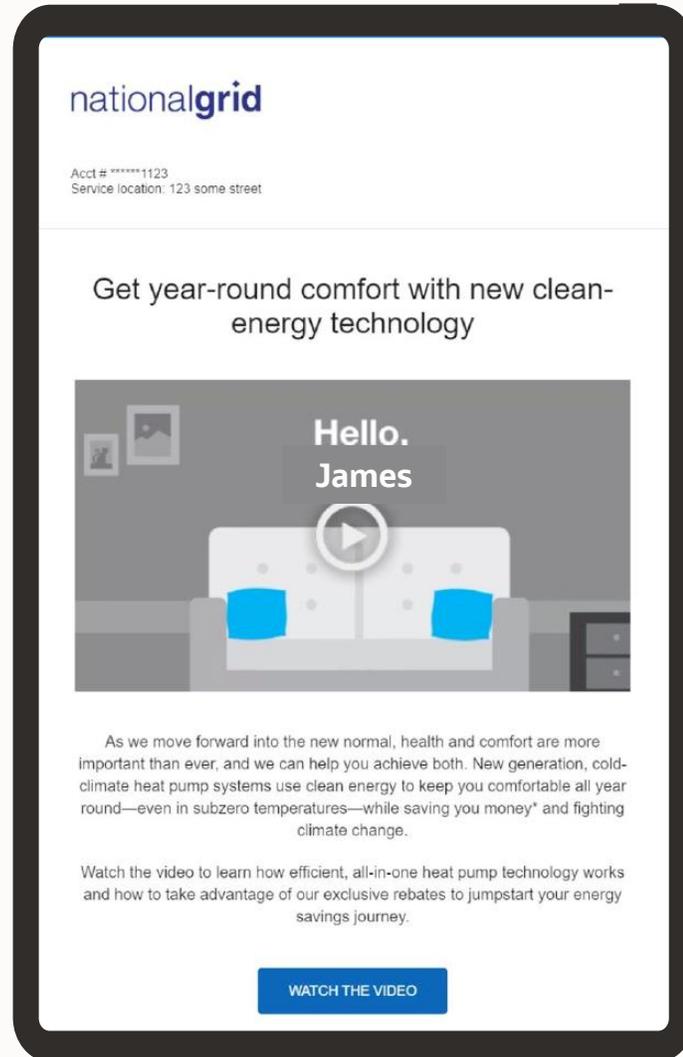


# Provide better personalization with the latest customer attributes

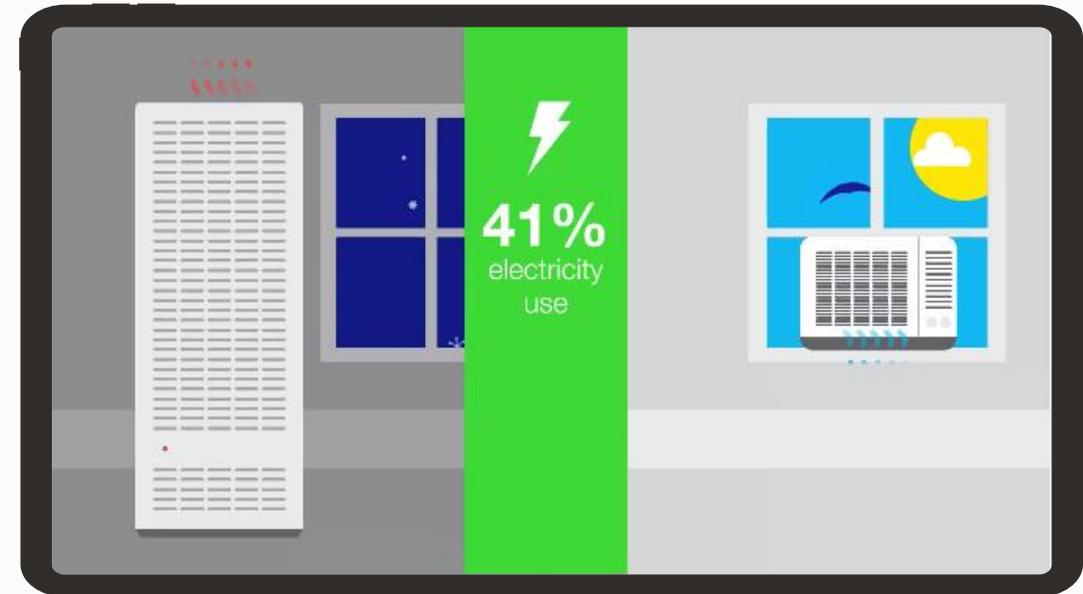
*Account and address are included as well*



**James**



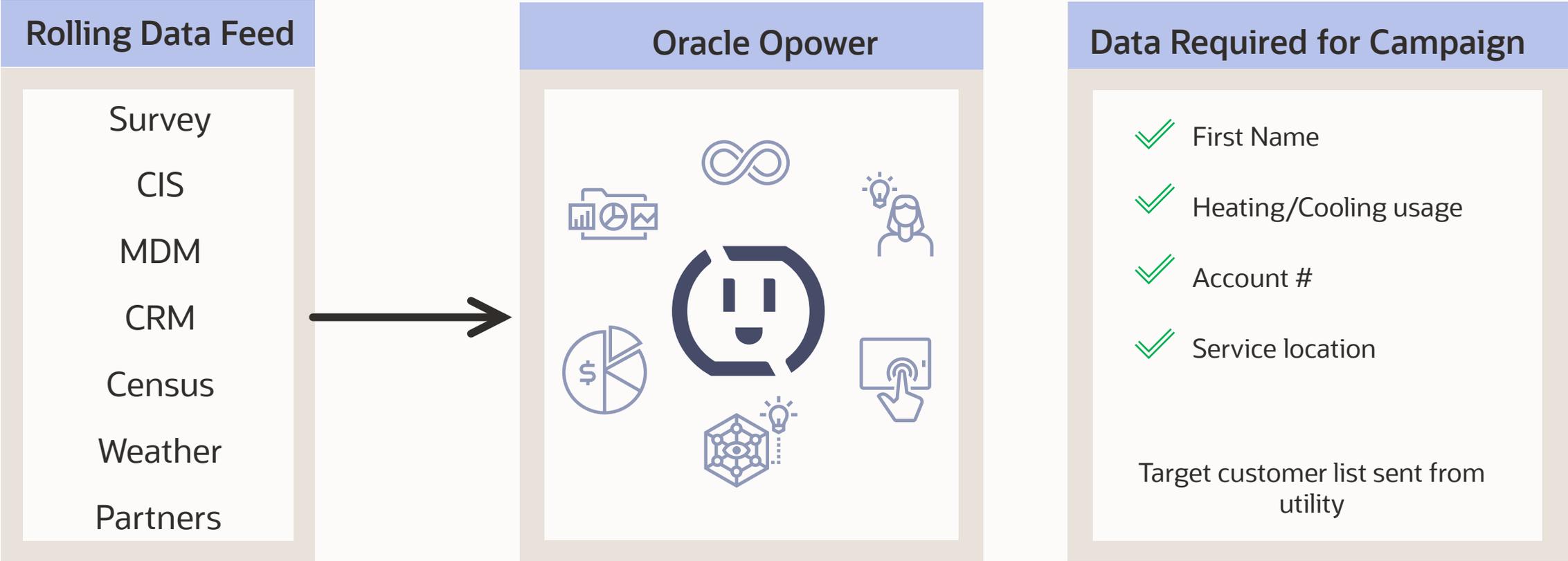
The email template features the National Grid logo at the top left. Below it, account details are listed: 'Acct # \*\*\*\*\*1123' and 'Service location: 123 some street'. The main heading reads 'Get year-round comfort with new clean-energy technology'. A central image shows a living room with a play button overlay and the text 'Hello. James'. Below the image, a paragraph explains the benefits of new generation, cold-climate heat pump systems. At the bottom, there is a blue button labeled 'WATCH THE VIDEO'.



*James's average usage is included as a personalized insight*



# Leverage existing data connections to reduce cost and time to value



# The marketing communication process



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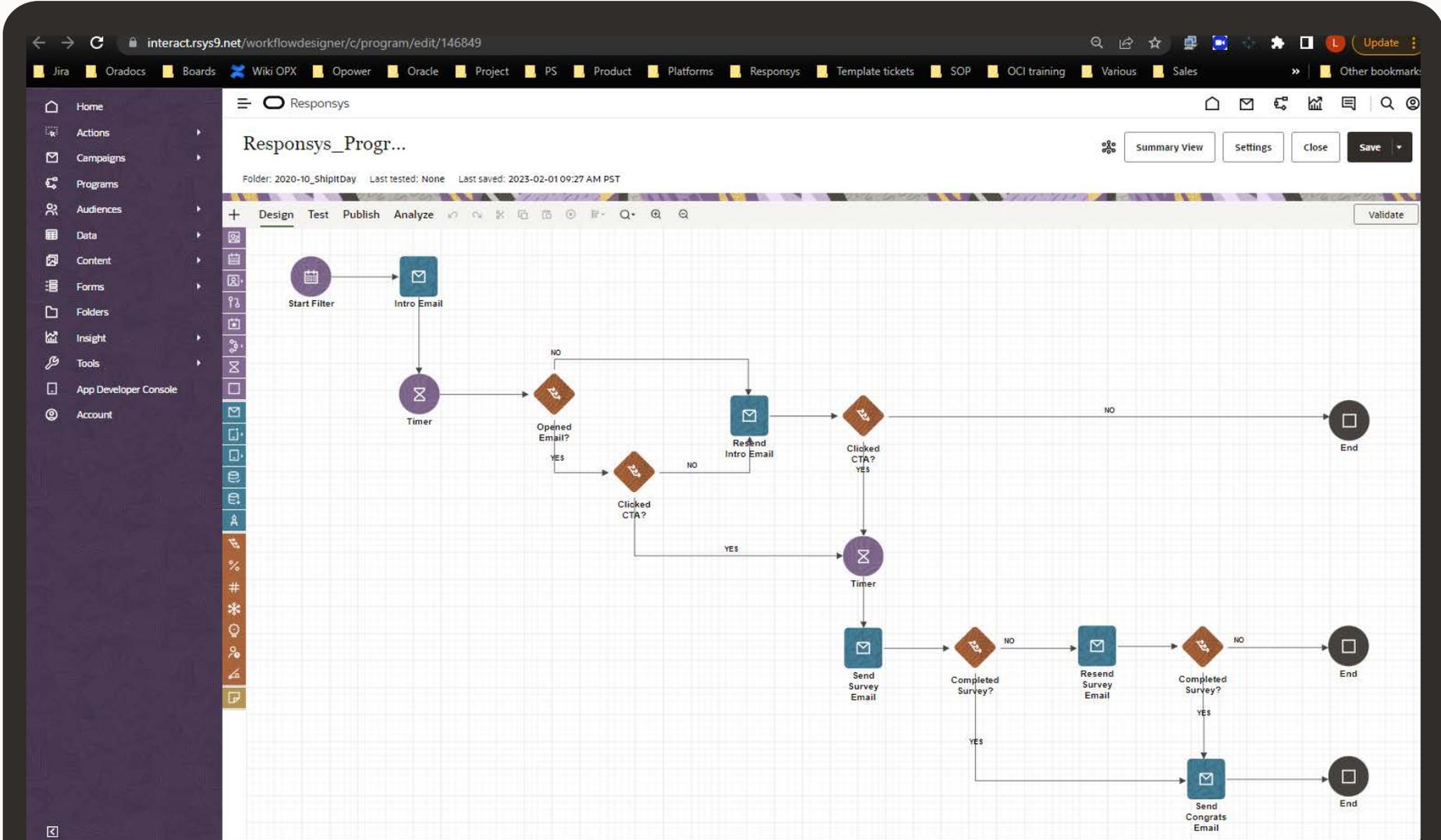
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# Ensure the best outcomes with a thoughtful launch



# The marketing communication process



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# Access key campaign metrics in with custom reporting options

## Campaign Metrics

	Sent	Delivered Rate	Open Rate	Unique Open Rate	Click-Through Rate	Unique Click-Through Rate	Click-to-Open Rate	Unique Click-to-Open Rate	Bounce Rate
Initial Send	149,938	95.36%	52.79%	35.27%	7.71%	7.02%	21.86%	19.92%	4.64%
Resend	136,861	94.26%	46.93%	32.48%	3.51%	3.17%	10.82%	9.75%	5.74%
Aggregate	286,799	94.83%	51.00%	34.21%	5.80%	5.25%	16.95%	15.35%	5.17%

## Email CTA Metrics

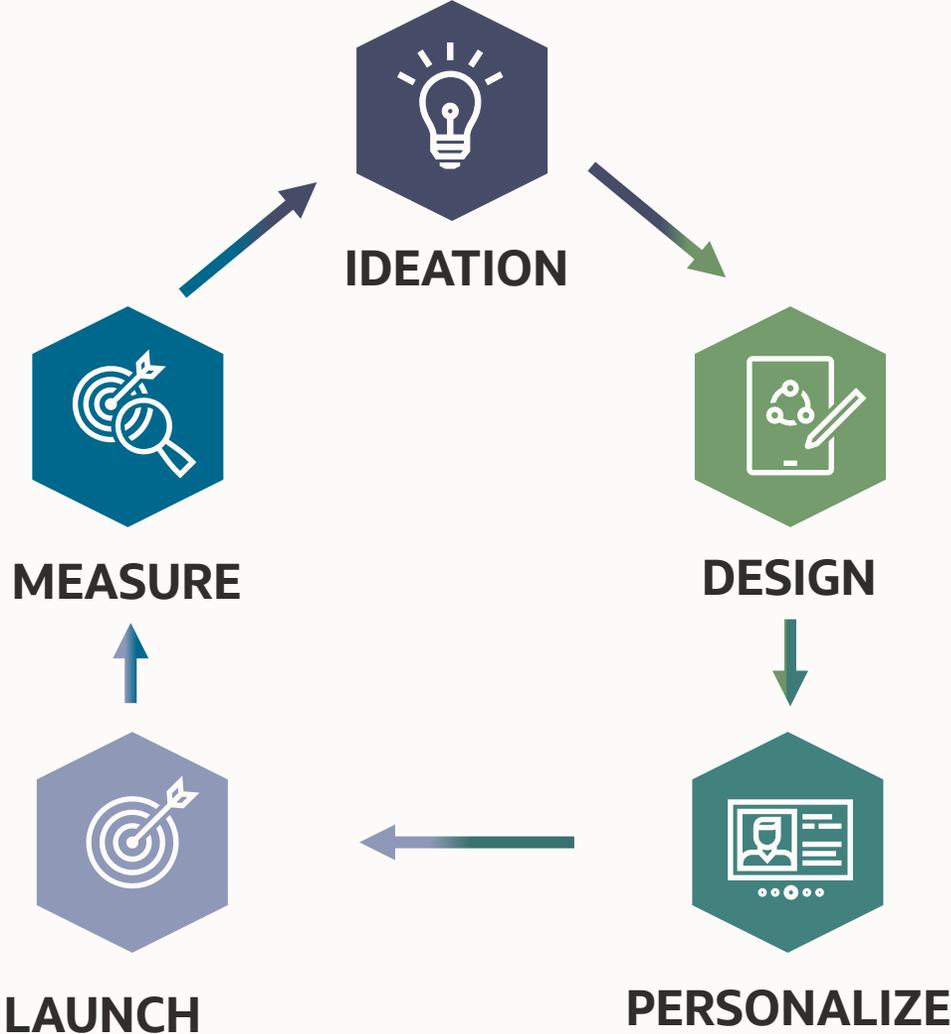
	Initial Send			Resend			Aggregate		
	Clicks	Click-Through Rate	Unique Click-Through Rate	Clicks	Click-Through Rate	Unique Click-Through Rate	Clicks	Click-Through Rate	Unique Click-Through Rate
Video CTA	10,582	7.40%	6.75%	4,151	3.22%	2.91%	14,918	5.49%	4.98%
Logo	107	0.07%	0.06%	101	0.08%	0.07%	216	0.08%	0.07%
YouTube	15	0.01%	0.01%	12	0.01%	0.01%	29	0.01%	0.01%
Unsubscribe	226	0.16%	0.14%	216	0.17%	0.15%	447	0.16%	0.15%
Twitter	14	0.01%	0.01%	7	0.01%	0.00%	23	0.01%	0.01%
Privacy Policy	14	0.01%	0.01%	8	0.01%	0.01%	24	0.01%	0.01%
Instagram	26	0.02%	0.02%	13	0.01%	0.01%	41	0.02%	0.01%
Facebook	16	0.01%	0.01%	12	0.01%	0.01%	30	0.01%	0.01%
Contact Us	24	0.02%	0.01%	13	0.01%	0.01%	40	0.01%	0.01%

## Email Campaign Launch Details

Email Campaign	Initial Send	Resend
Launch	8/16 - 8/17	8/23-8/24
# Emails sent	150,000	137,300
Throttle:	10am-4pm ET	10am-4pm ET
Subject Line:	[First Name], your special edition summer video is here	[First Name], Don't forget your special edition summer video
Video Link	<a href="#">Link to Summer Video sample</a>	



# The marketing communication process



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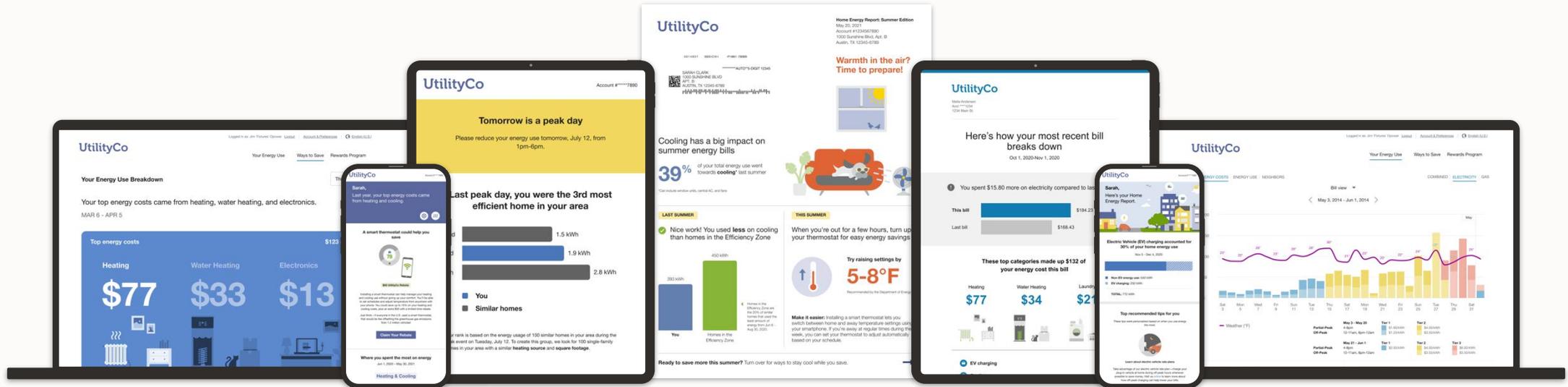
**5**

## **Conclusion**

Summary, next steps, and Q&A



# Opower delivers decarbonization results and customer lifetime value



**33**TWh

Energy Efficiency

**415**MW

Lower Peak Demand

up to **2X**

Faster Product & Program Adoption

**165M**  
yearly views

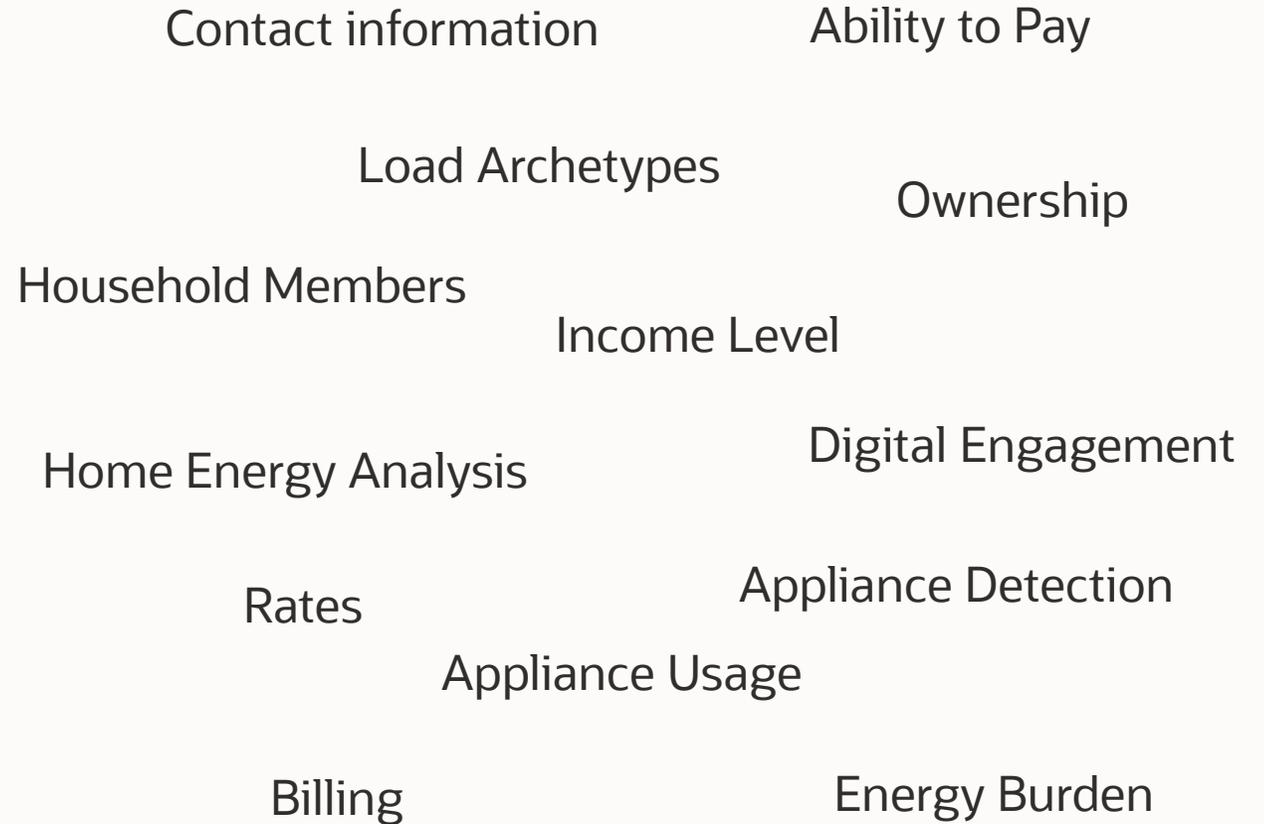
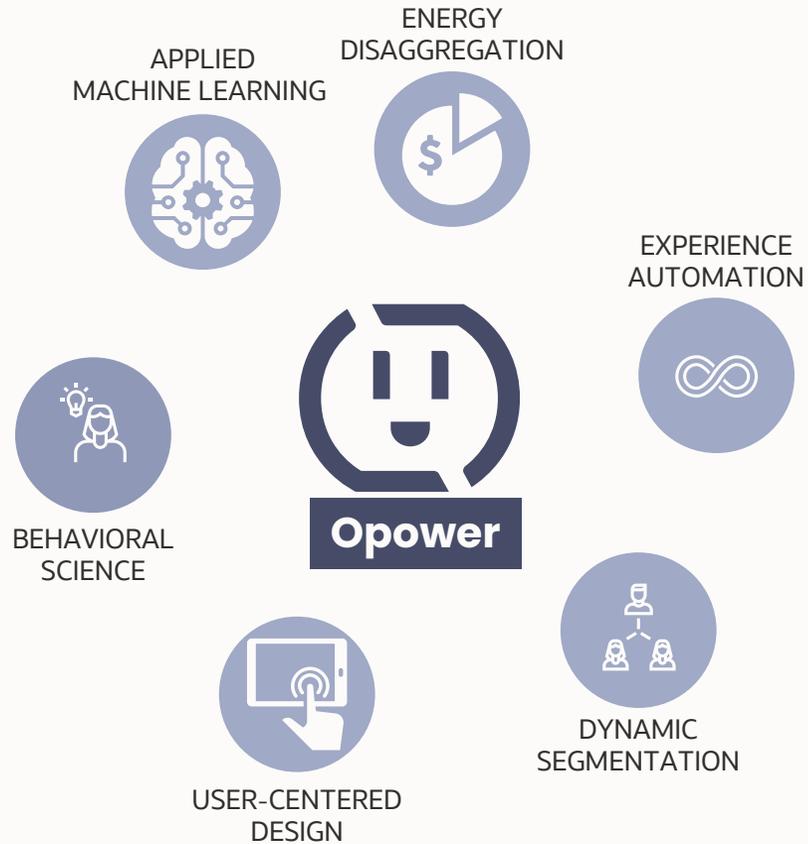
Digital Self-Service

up to **95%**

Satisfied Customers



# Making sense of all customer data requires a powerful platform



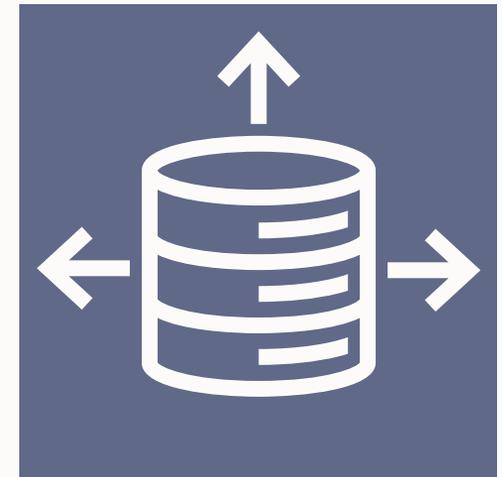
# Flexible solutions to access customer insights



**Professional Services**



**Self Service BI**



**Connected Data**



# Flexible solutions to access customer insights



**Professional Services**



**Self Service BI**



**Connected Data**



# Create your own customer segments with hundreds of attributes

ORACLE Analytics

Untitled

Prepare Visualize Narrate Save

Click here or drag data to add a filter

Auto Visualization (Table)

Rows

Color

Size

Shape

Tooltip

Filters

- Account information & customer load shapes
- Customer classifier: any data from any system
- Demographic data
- Outbound digital engagement metrics
- Online home assessment responses
- Location data
- Billed usage analytics & web engagement metrics
- Program participation data

# Easily export a list for outreach and engagement

The screenshot displays the Oracle Cloud Visual Analyzer interface. The browser address bar shows the URL: <https://ocacs.ocs.oraclecloud.com/ttdvbf269i9ed1dh64ms/dv/?pageid=visualAnalyzer&reportmode=full#>. The interface includes a top navigation bar with 'Prepare', 'Visualize', and 'Narrate' tabs. A left sidebar contains a search bar and a tree view of data categories such as 'Household - Count of Cust...', 'Account Information', 'Contact', 'Customer Archetype', 'Customer Classification', 'Demographics', 'Digital engagement', 'Energy Affordability', 'Household Location', 'Opower EE program', 'Opower HER Deploye...', 'PII Data', 'Program Participation', 'Usage', 'Utility', 'Web Metrics - Actions', and 'Web Metrics - Logins'. Below the sidebar is a 'Classifier' section with a table:

Name	Classifier
Treat As	Attribute
Data Type	Text
Aggregation	None

The main workspace features a 'Table' visualization type selected in the top-left corner. A central canvas area contains a grid icon and the text 'Drag Data Here'. The bottom of the interface shows a 'Canvas 1' tab and various tool icons.



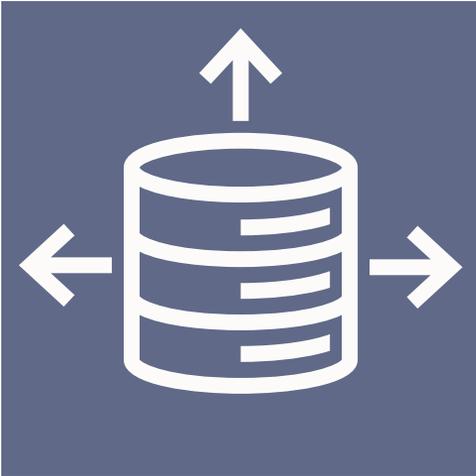
# Flexible solutions to access customer insights



**Professional Services**



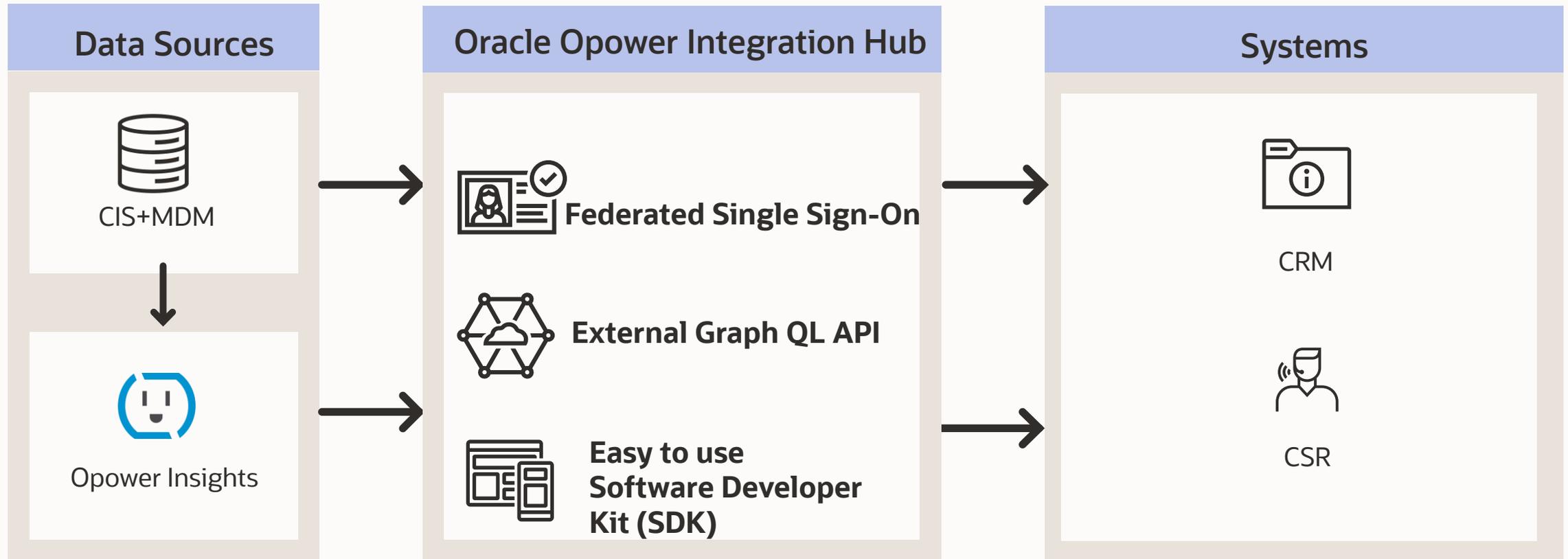
**Self Service BI**



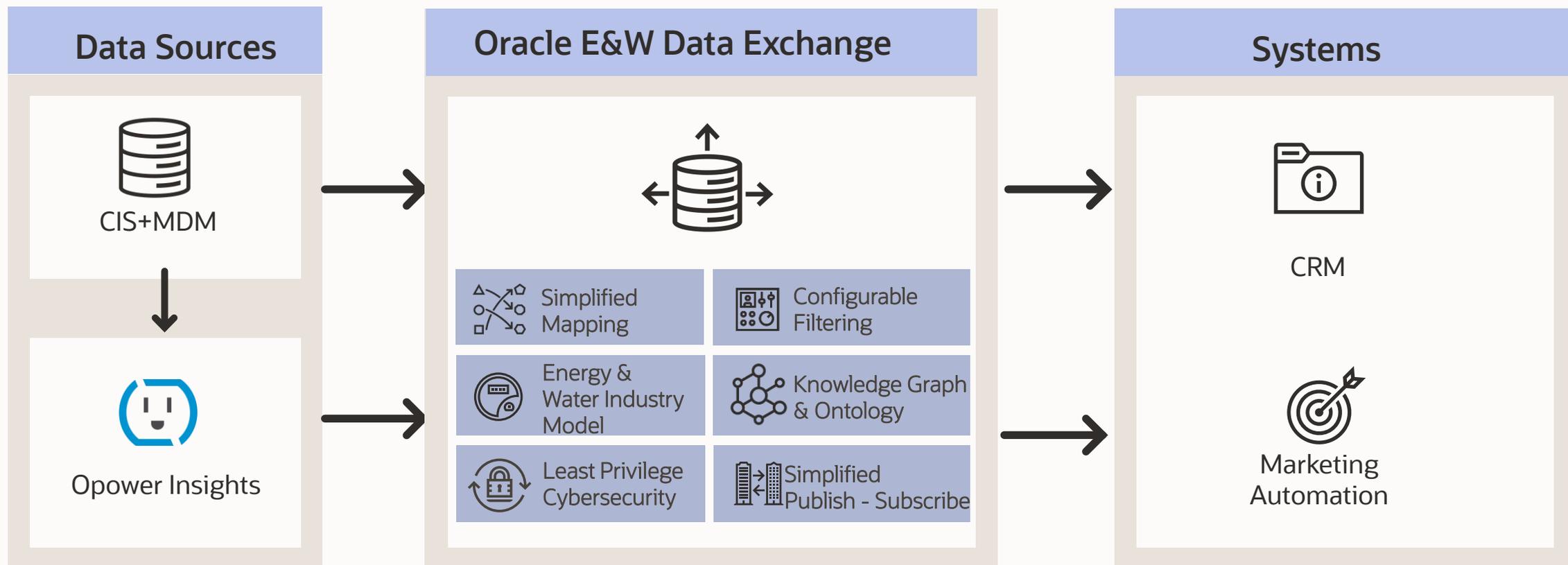
**Connected Data**



# Integration Hub enables frictionless, on demand access to customer insights



# Data Exchange to enable bulk customer data sharing across systems



# Let's hear from you!

How are you accessing customer insights today for your systems?



How would you like to access customer insights for your systems?



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## **Under the Hood**

How can you get access to these insights and what's available?

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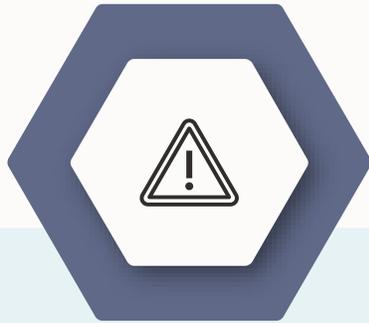
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## **Conclusion**

Summary, next steps, and Q&A



# An insightful and care free customer service call



## Proactive Outreach

Opower sends out notice that customer is **projected to have a high bill** with actionable steps



## Call Center

Customer purchases thermostat but wants to know if there are **other options**



## CSR

Has access to insights like **energy disaggregation and engagement**



## Customer Response

Customer **enrolls on a new rate** to prevent a high bill in the future



# Proactive engagement can reduce customer inquiries at the beginning



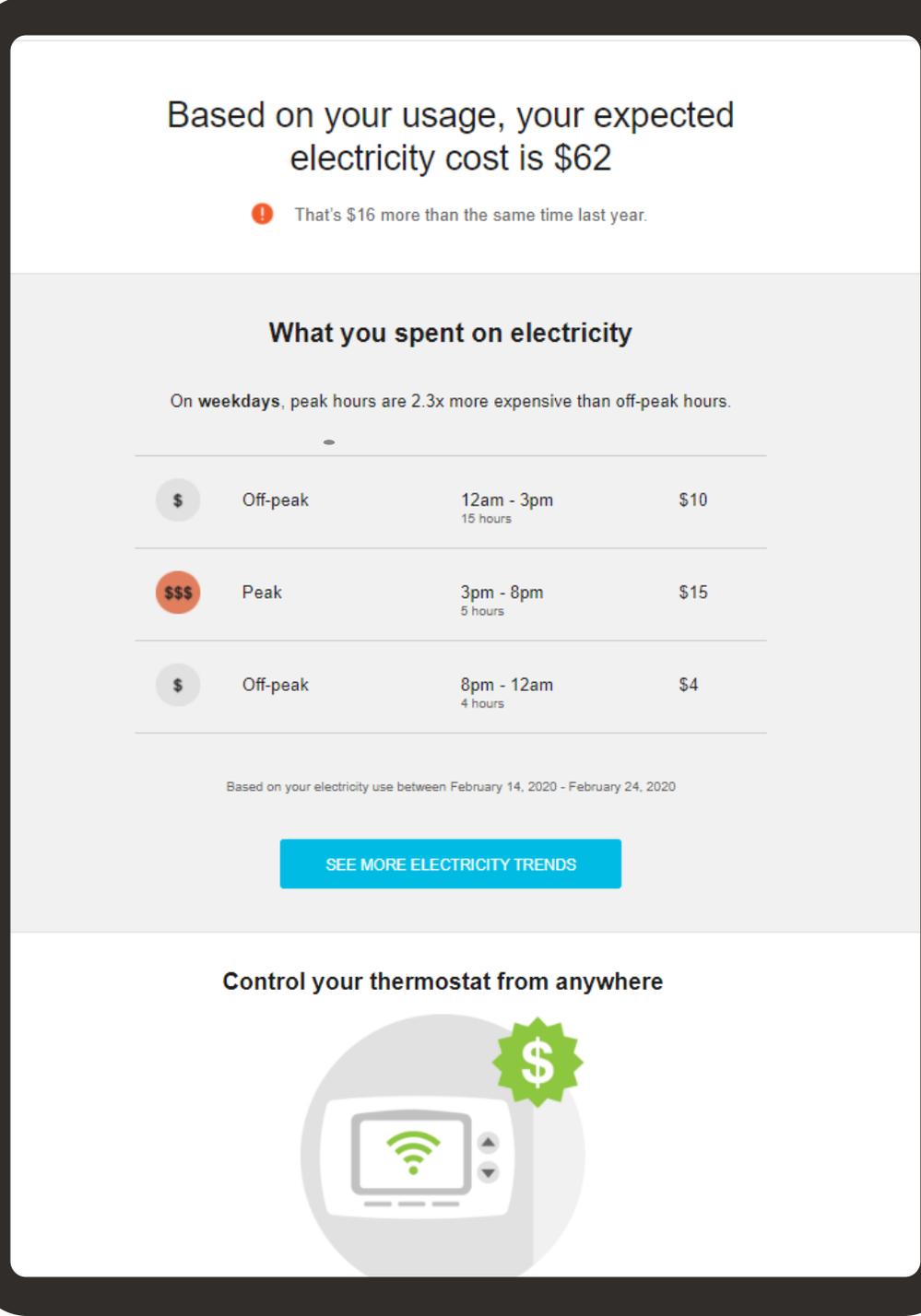
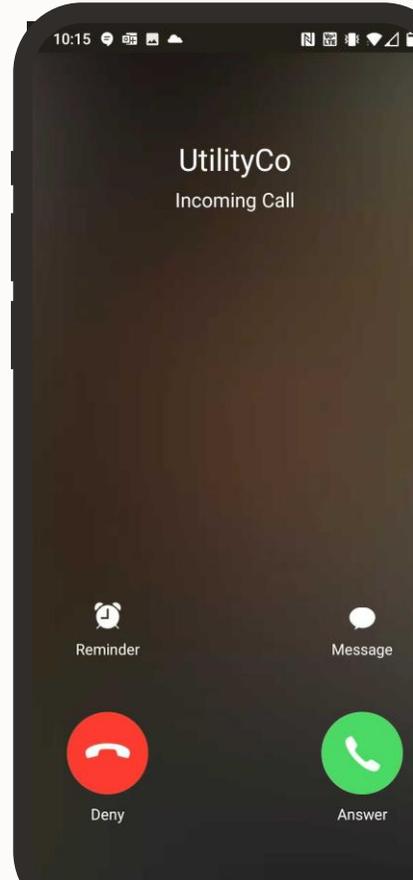
Highlight how much bill is expected to be



Highlight when they are using the most



Outreach in multiple communication channels



Based on your usage, your expected electricity cost is \$62

That's \$16 more than the same time last year.

## What you spent on electricity

On weekdays, peak hours are 2.3x more expensive than off-peak hours.

\$	Off-peak	12am - 3pm 15 hours	\$10
\$\$\$	Peak	3pm - 8pm 5 hours	\$15
\$	Off-peak	8pm - 12am 4 hours	\$4

Based on your electricity use between February 14, 2020 - February 24, 2020

[SEE MORE ELECTRICITY TRENDS](#)

## Control your thermostat from anywhere





# Customer follows next best actions but wants to do more

Daily Deals for Best Reviewed E... X +

Search by type, brand, model... Q

Welcome, Larry

**Filters:**

- APPLIED FILTERS (1) [Clear All](#)
- Direct Purchase** x
- ENERVEE SCORE: 38 - 100
- Direct Purchase**
- FINANCING AVAILABLE:  Financing Available
- PRICE: \$30.10 - \$730
- TOUCH SCREEN:  No

**Recommendation:** You are on track for a **high bill** Larry. We recommend a **smart thermostat** to keep your usage down during peak times when electricity is more expensive.

Your results range in Enervee Score from 77 to 100. [Show More](#)

Product	Enervee Score	Price	Financing
Google Nest T3007ES Google Nest Learning Thermostat - Stainless	100	\$249.99 - \$199.99	\$4.15/mo*
ecobee EB-STATE5-01 ecobee SmartThermostat with	100	\$249.99 - \$199.99	\$4.15/mo*
Google Nest T3017US Google Nest Learning Thermostat - White	100	\$249.99 - \$199.99	\$4.15/mo*
Honeywell Home RTH9585... Honeywell Home Wi-Fi Smart Color	100	\$169.99 - \$129.99	-
ecobee EB-STATE3LT-02 ecobee3 lite Smart Thermostat - Black	100	\$179.99 - \$149.99	-

**Learn more** with ONE



# CSRs can access key customer insights in a single window



**ORACLE**

**Maria Villa** 00:49

Account: 87654473881 Customer Class: Residential CIS Division: California Family Member: Dubois, Gabriel

Try "Suggestion here" Recently viewed

**Life Support Sensitive Load** **EV Owner**

Phone: 555-222-3333  
Email: maria@mymail.com  
Driver's License: CA-\*\*\*\*\*2342  
Current Balance: **\$289.31** [Take a Payment](#)

123 Hayes St. #304 San Francisco

**Electric (EV-TOU)** Smart Meter

- SA - Residential EV TOU
  - SP - Residential / A
  - Smart Meter / 1
  - MC - Electric
- Gas (STANDARD)** On
  - SA - Residential
    - SP - Residential / A
    - Smart Meter / 1
  - Lorem

**Programs**

- Budget Billing** Not Enrolled [Enroll](#)
- Auto-pay** Not Enrolled [Enroll](#)
- E-bill** Not Enrolled [Enroll](#)
- Weekly AMI Report** Not Enrolled [Enroll](#)

**Insights**

**EV Detection**

**Electric Vehicle detected**

Meter usage profile at this premise suggests the customer has an EV, for the best value suggest the EV TOU rate plan

[Sign up for EVTOU](#) [View Disaggregation](#)

Customer is using 24% more energy than efficient neighbors. [Ways to save](#)

**Usage and Billing** Financial History Payment Arrangements Credit & Collections

Cost: All premises Last 12 months [View Energy Insights](#)

Month	Electric (USD)	Gas (USD)	Water (USD)	Weather (F)
Nov 11 2019	10	15	5	55
Dec 12	15	15	5	45
Jan 15	10	15	5	40
Feb 12	10	15	5	35
Mar 12	10	15	5	30
Apr 10	10	15	5	25
May 12	15	15	5	20
Jun 11 2020	15	15	5	15
Jul 14	10	15	5	20
Aug 12	10	15	5	25
Sep 11	10	15	5	30
Oct 14	10	15	5	35
Nov 12	15	15	5	40

**Activity**

Filter by Last 12 month

**Outbound Communications**

- Weekly AMI Report** Delivered to maria@mymail.com
- Interaction - Chat Outcome: Positive Customer was asking about an ongoing program for a rebate on efficient appliances
- Service Request - Tree Trimming Critical severity, in status In Progress Tree branch broke during a storm and is near powerline on property

Yesterday, October 25

- Field Activity Meter Swap Completed meter swap on 123 Hayes as of 10/25
- Bill for \$254.89 Due October 25, 2020, 32 days in bill

Thursday, October 22

- Web Activity - Mariavilla123 Budget Billing Enrollment Budget amount is \$280, with a true up in October 2022
- Web Activity - Mariavilla123 Completed Home Energy Assessment





# See all the communications that your customer has been sent

**Maria Villa** Account: 87654473881 Customer Class: Residential CIS Division

Try "Suggestion here"

Life Support Sensitive Load EV Owner

Phone: 555-222-3333  
Email: maria@mymail.com  
Driver's License: CA-\*\*\*\*\*2342  
Current Balance: \$289.31 [Take a Payment](#)

**Programs**

- Budget Billing [Enroll](#)
- Auto-pay [Not Enrolled](#)
- E-bill [Not Enrolled](#)
- Web account [Not Enrolled](#)

**Usage and Billing**

123 Hayes St. #304 San Francis

- Electric (EV-TOU) [On](#) Smart Met
  - SA - Residential EV TOU
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      - Smart Meter / 1
        - MC - Electri
  - Gas [On](#) (STANDARD)
    - SA - Residential
      - SP - Residential / A
        - Smart Meter / 1
          - Lorem

**Weekly AMI Report** Account #\*\*\*\*\*1234

April 2, 2021 - April 8, 2021

Maria,  
Here's your weekly energy update

You used **33% more** electricity this week

Week	Electricity Used (kWh)
This week	800 kWh
Last week	600 kWh

Activity

Filter by Last 12 month

Today, October 26

- Weekly AMI Report  
Delivered to maria@mymail.com
- Interaction - Chat  
Outcome: Positive  
Customer was asking about an ongoing program for a rebate on efficient appliances
- Service Request - Tree Trimming  
Critical severity, in status In Progress  
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Thursday, October 22

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Budget Billing Enrollment  
Budget amount is \$280, with a true up in October 2022
- Web Activity - Mariavilla123  
Completed Home Energy Assessment



# See new changes to customer accounts



ORACLE

Maria Villa

Account: 87654473881 Customer Class: Residential CIS Division: California Family Member: Dubois, Gabriel

Try "Suggestion here" Recently viewed

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Smart Meter / 1  
Lorem

### Programs

Budget Billing **Not Enrolled** [Enroll](#)

Auto-pay **Not Enrolled** [Enroll](#)

E-bill **Not Enrolled** [Enroll](#)

Weekly AMI Report **Not Enrolled** [Enroll](#)

### Insights

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Meter usage profile at this premise suggests the customer has an EV, for the best value suggest the EV TOU rate plan

[Sign up for EVTOU](#) [View Disaggregation](#)

Customer is using 24% more energy than efficient neighbors. [Ways to save](#)

### Usage and Billing

Financial History Payment Arrangements Credit & Collections

Cost: All premises Last 12 months [View Energy Insights](#)

Month	Electric (USD \$)	Gas (USD \$)	Water (USD \$)	Temperature (°F)
Nov 11 2019	15	10	5	55
Dec 12	20	10	5	50
Jan 15	15	10	5	45
Feb 12	10	10	5	40
Mar 12	10	10	5	35
Apr 10	10	10	5	30
May 12	15	10	5	25
Jun 11 2020	15	10	5	20
Jul 14	10	10	5	25
Aug 12	10	10	5	30
Sep 11	10	10	5	35
Oct 14	10	10	5	40
Nov 12	15	10	5	45

### Activity

Filter by Last 12 month

Today, October 26

- Weekly AMI Report Delivered to maria@mymail.com
- Interaction - Chat Outcome: Positive Customer was asking about an ongoing program for a rebate on efficient appliances
- Service Request - Tree Trimming Critical severity, in status In Progress Tree branch broke during a storm and is near powerline on property

Yesterday, October 25

- Field Activity Meter Swap Completed meter swap on 123 Hayes as of 10/25
- Bill for \$254.89 Due October 25, 2020, 32 days in bill

Thursday, October 22

- Web Activity - Mariavilla123 Budget Billing Enrollment Budget amount is \$280, with a true up in October 2022
- Web Activity - Mariavilla123 Completed Home Energy Assessment



# Drill down to provide concrete details to impacts on customer bills



ORACLE

Maria Villa

Account: 87654473881 Customer Class: Residential

Try "Suggestion here"

Life Support Sensitive Load EV Owner

Phone: 555-222-3333

Email: maria@mymail.com

Driver's License: CA-\*\*\*\*\*2342

Current Balance: **\$289.31** Take a Payment

123 Hayes St. #304 San Francisco

Electric (EV-TOU) Smart Meter

SA - Residential EV TOL

SP - Residential / A Smart Meter / 1

MC - Electric

Gas (STANDARD) On

SA - Residential

SP - Residential / A Smart Meter / 1

Lorem

Activity

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< Jan 2020 - Jan 2021 >

Energy Costs

Top Energy Costs

Month	EV Charging	Cooling	Electronics	All Other
Jan 8	40	0	10	10
Feb 8	40	0	10	10
Mar 9	50	0	10	10
Apr 8	40	0	10	10
May 10	40	0	10	10
Jun 5	40	0	10	10
Jul 8	60	20	10	10
Aug 6	60	20	10	10
Sep 4	40	0	10	10
Oct 8	40	0	10	10
Nov 6	40	0	10	10
Dec 8	40	0	10	10
Jan 8	40	0	10	10

Dec 7, 2019 - Jan 8, 2020

EV Charging	\$43
Cooling	\$0
Electronics	\$16
All Other	\$55
<b>Total</b>	<b>\$114</b>

Your top energy costs between Apr 2020 and Apr 2021 came from EV charging, cooling and electronics

EV Charging Cooling Electronics All Other

How do we determine your energy breakdown?

Cost breakdowns are based on your past energy use, smart meter data, and information you provided about your home. Charges and credits applied at the account level are excluded. Minimum bill charges may impact accuracy. [Update my home profile](#)



# Identify the best rate for your customer and help them switch



**ORACLE**

Maria Villa  
Account: 87654473881 Customer Class: Residential

Try "Suggestion here"

Life Support Sensitive Load EV Owner

Phone: 555-222-3333  
Email: maria@mymail.com  
Driver's License: CA-\*\*\*\*\*2342  
Current Balance: \$289.31

123 Hayes St. #304 San Francisco

Electric (EV-TOU) Smart Meter  
SA - Residential EV TOU  
SP - Residential / A  
Smart Meter / 1  
MC - Electric

Gas (STANDARD) On  
SA - Residential  
SP - Residential / A  
Smart Meter / 1  
Lorem

### Rate comparison

## Your lowest cost rate plan

Based on your electricity use history, you'll save the most on a Time of Day 3-8pm rate plan.

Rate Plan	Estimated cost per year	Best for	Price highest
Monthly	\$1935	Homes with low energy use	Weekdays 4pm - 9pm
Time of Day	\$1605	Homes with low energy use	Weekdays 4pm - 9pm

Lowest Cost Save \$330

Weekly AMI Report delivered to maria@mymail.com

Interaction - Chat  
Outcome: Positive  
Customer was asking about an ongoing program for a site on efficient appliances

Service Request - Tree Trimming  
Critical severity, in status In Progress  
A branch broke during a storm and is near powerline property

Completed meter swap on 123 Hayes as of 10/25

Completed for \$254.89  
October 25, 2020, 32 days in bill

Completed Home Energy Assessment





# Customer experiences are automatically updated with the latest information

**UtilityCo**  
123 Energy Way, Austin, TX 12345-6789

0014837 0023-C10-1 #P4861-72005

**Home Energy Report: Usage Spotlight**  
May 14, 2020  
Account #1234567890  
1000 Sunshine Blvd, Apt. B  
Austin, TX 12345-6789

🗨️ ❄️ 💡

**Last year, your top 3 on-peak energy costs came from electric vehicle charging, cooling and laundry.**

**Where you spent the most on energy last year**  
May 3, 2019 – May 5, 2020

**EV Charging**

**24%**  
of your total on-peak use

**\$186**  
spent during peak hours

**\$47**  
spent during off-peak hours

You were selected to receive this report because you may be using more than the regional average for this energy use category. Numbers are approximate.

**A level 2 EV charger could help you save**

💰 **Save \$600 with a limited-time UtilityCo rebate.**

A level 2 charger will charge 2-3x faster than the level 1 charger that came with your car. This allows you to be more flexible with your charging times—helping you to avoid peak hours. Since electricity costs more on weekdays from 4pm-9pm, upgrading to a level 2 charger could help you save a lot more over time.

Plus, level 2 chargers help you schedule your charging times and add 12-20 miles of range per hour charged, improving your overall charging experience, so you can get back on the road.

To claim your rebate, visit [utilityco.com/level2-charger](http://utilityco.com/level2-charger).

**Curious about cooling and laundry?** Turn over for more ways to save. →

**UtilityCo**

**Neighbor Comparison**

You're using **11% more electricity** than your neighbors.

[SEE WAYS TO SAVE](#)

Category	Energy Usage (kWh)
Efficient neighbors	75 kWh
All neighbors	90 kWh
You	100 kWh

■ General home energy use    ▨ EV charging at home

Feb 28, 2011 - Mar 29, 2011  
Efficient neighbors are the 20% who use the least amount of energy.

▶ Who are my neighbors?  
▶ How do we calculate your EV charging?



# What's on tap next

**1**

## **Introduction**

What's the problem anyway?

**2**

## **Personalized Marketing**

Hear from Laura Baez on marketing and what it takes to get it right.

**3**

## **Under the Hood**

How can you get access to these insights and what's available?

**4**

## **Personalized CRM**

Let's walk through an example call that features critical customer insights

**5**

## **Conclusion**

Summary, next steps, and Q&A



# Personalization is essential for effective marketing and customer engagement outcomes

70% of customers want companies to personalize their communications

93% of businesses noticed **improved conversion rates** when their websites were personalized

80% of consumers are more inclined to **do business** with a company if it offers a personalized experience

**Customer loyalty and satisfaction** improved by 47% and 36%, respectively, when personalized marketing was used

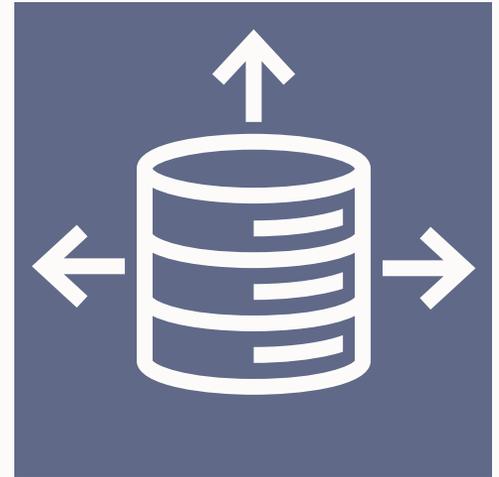
# There are a few ways to access these insights for marketing



**Professional Services**



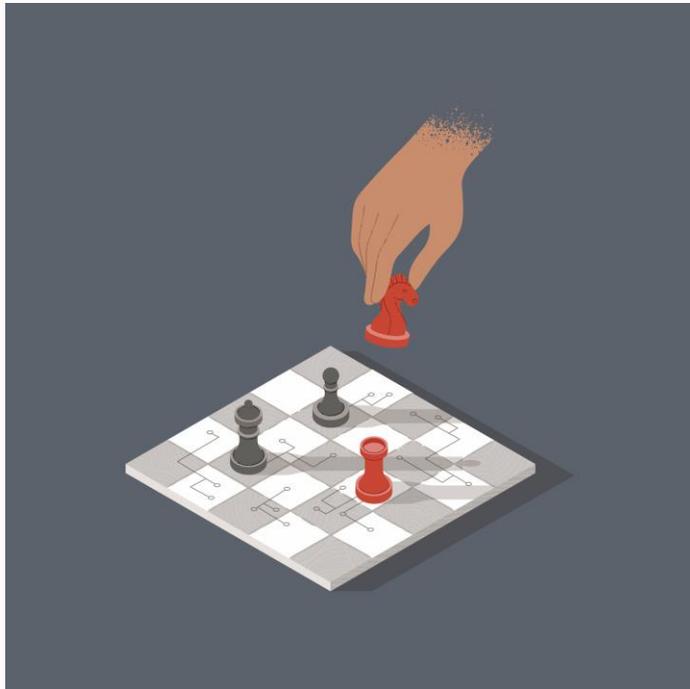
**Self Service BI**



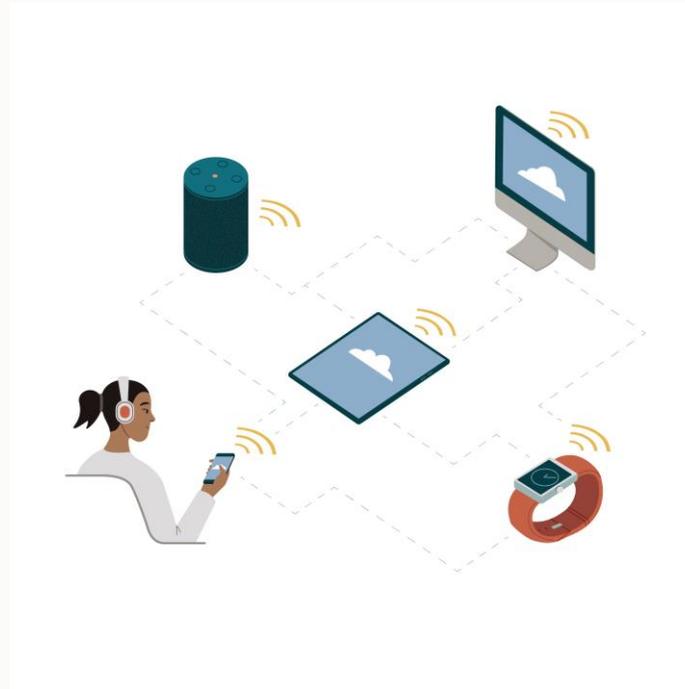
**Connected Data**



# Personalized insights can help you deliver the customer experience your customers demand and deserve



Develop a better strategy for reaching customers with marketing campaigns



Streamline access to your customer insights across platforms and systems



Provide outstanding customer experiences and service

