



EnergySavvy



Technology Innovations in Support of DSM

Jamie Peters, EnergySavvy

February 18, 2014



Agenda

1

Introduction to EnergySavvy

2

Technology-Enabled Solutions

3

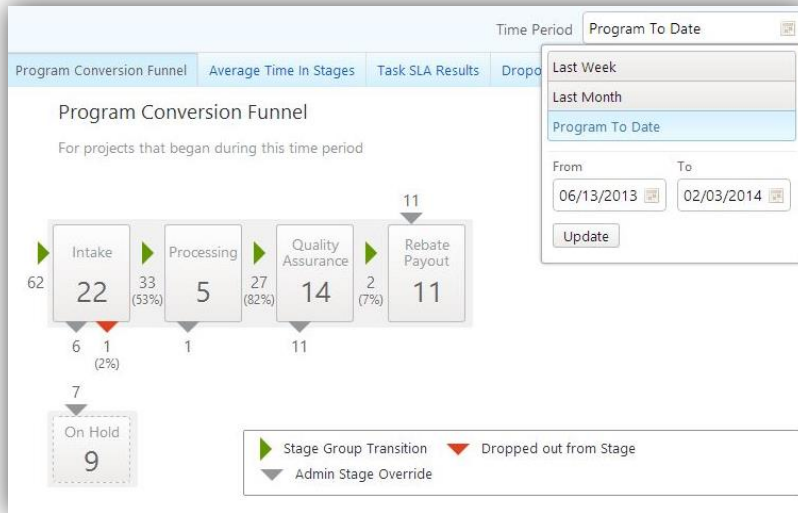
Customer Snapshots & Uses

4

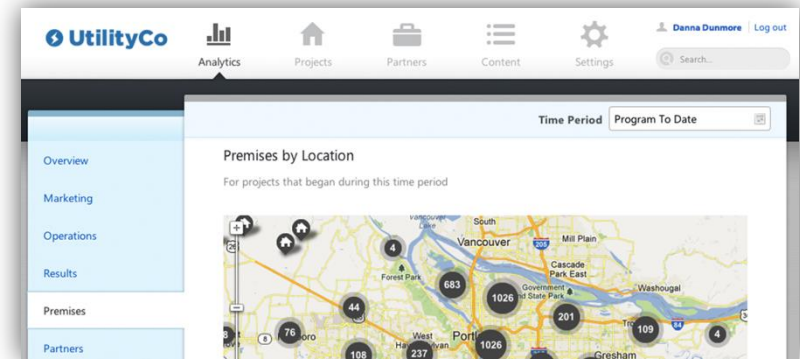
Discussion – Relevance to Michigan

Our DNA

DSM software product company



Better user experience, better results



A unique approach

- Data-driven best practices built into platform – 130,000+ projects
- Product-based delivery model reduces risk and launch time
- Modular platform with API integration

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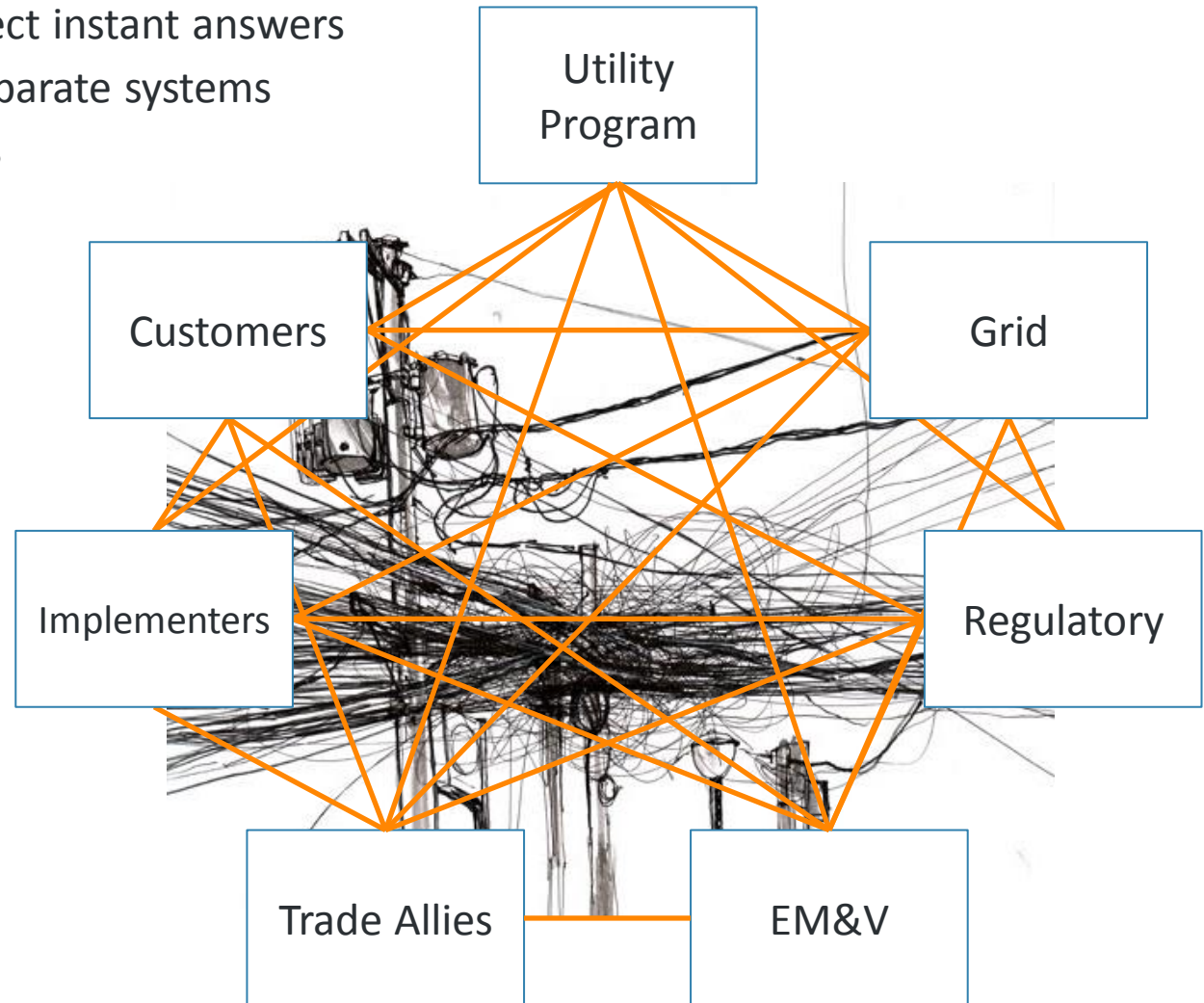
Discussion – Relevance to Michigan

DSM is Hard to Manage & Quantify



Today's Challenges

- Stakeholders expect instant answers
- Data stored in disparate systems
- Manual processes



Our Mission

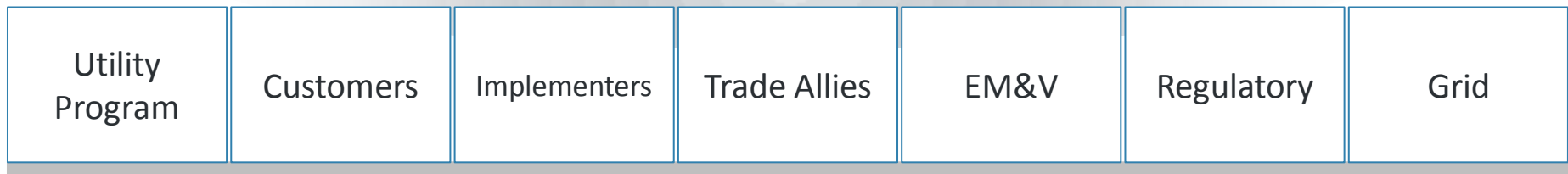
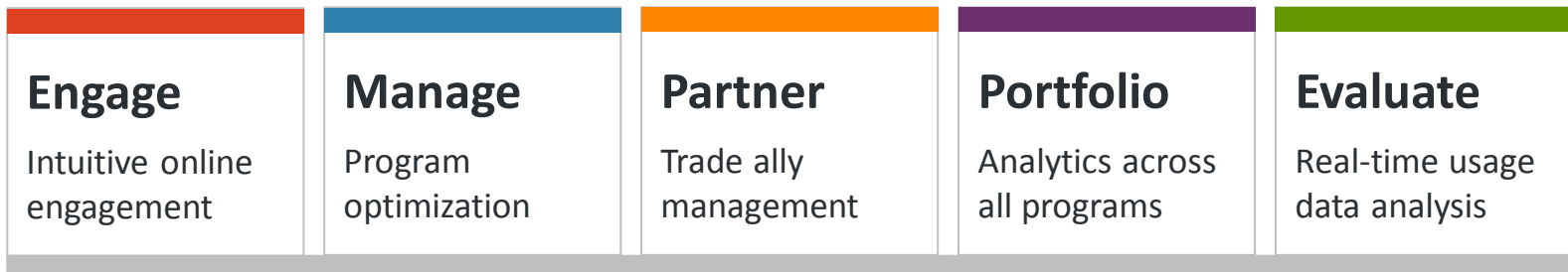
Transform the Way DSM is Quantified & Delivered Through Software



Optix Demand-side Management System



Cloud-based Software for Utility DSM



Technology-Enabled Solutions

- **Portfolio Performance**
Lean processes, lower costs
- **Customer Experience**
Continuous engagement & seamless lead transfer
- **Risk & Compliance Management**
Well-managed pipeline, data integrity



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EnergySavvy Customers



Continuous Customer Engagement

- Educate customer on their energy savings potential
- Spur action
- Provide personalized portal & automatic follow-up



Discover

Are you wasting energy?

Take our easy survey

You'll get an energy audit and recommendations

It takes less than 10 minutes and no personal information



Questions for a 1200 square foot home

✔ STRUCTURE

What fuel does your home use?



Electric

Do you use a spa?



Yes



Your Energy Profile

You look like a great candidate for the Utility Co. Performance program.

With an energy upgrade, you could save 38% on your utility bills.

The next step: meet with one of our home performance experts to verify your savings potential and upgrade your home.

Your home in Lansing, MI is one of the least efficient apartments or condos in your neighborhood

\$2,550

POTENTIAL 3-YEAR SAVINGS

[Start Your Project](#) →

[Save your profile](#) | [Start over](#)

Your Customized Action Plan

Upgrade or get rid of your second refrigerator

Refrigerators built before 1993 can cost twice as much a year to run as a new ENERGY STAR® energy-efficient model. Recycling a pre-1993 fridge and replacing it with a new ENERGY STAR® qualified model, could save you more than \$100 a year on energy costs.



Upgrade to efficient lighting

Upgrade to a modern high efficiency refrigerator

Consider a modern efficiency air conditioner

Typical 3 Year Savings: \$2,550

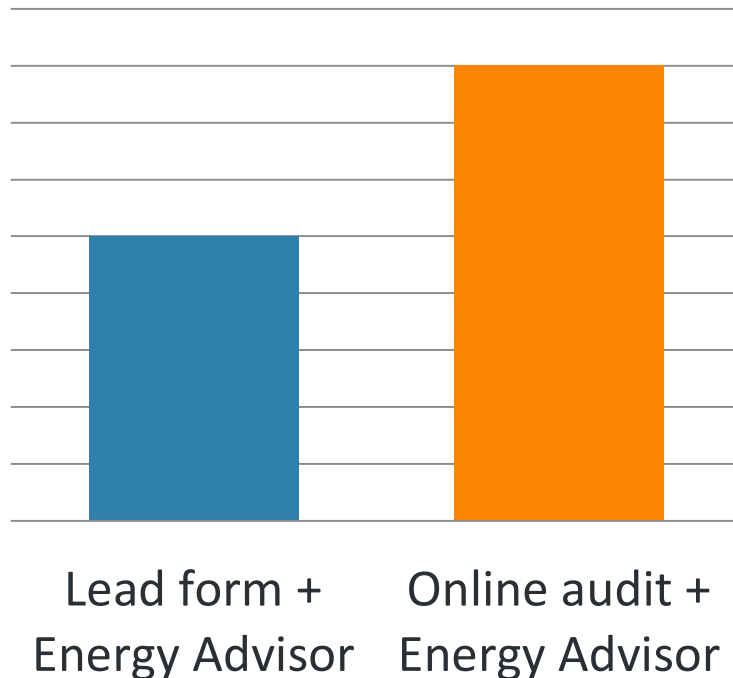


- Air Conditioning
- Water Heating
- Electronics & Lights

Customer Snapshot

Optix Engage customer since 2010

60% Higher Conversion



Customers were 60% more likely to follow through with an energy improvement project if they first used Optix Engage.

Source: Energy Trust of Oregon



STEP

A. Scheduling

B. Home Energy Assessment

C. Report

D. Bid

Program

1. Contact

Thanks! No
* Required field

Project Location
This can be different
second or vac

Street address

35 S Stripe

Street address

City *

Traverse Cit

State *

Michigan

Zip code *

Tracking code

Next Steps



Pyramid He
The Northwe

Next availab

Sunday	Monday	Tuesday
Jan. 19	20	
26	27	8:30 a

- Back to today

NEXT STEPS

Share Your Story - Be A Star!

Keep making a difference! Refer a friend or tell us about your experience with CEWO. Your home may be a star feature in our marketing. [Share your story >>](#)

WHAT TO EXPECT



Welcome to your new, old home!

Now that your home's transformation is complete, enjoy a transformation yourself. No more bulky sweaters in winter and dripping sheets in summer. It's state-of-the-art, energy-efficient comfort year-round for you. You're going to love your home more than ever before!

TRANSFORM FAQs

- + Can I get multiple bids?
- + Can I use my own contractor?
- + Can't I do all of this on my own?
- + How do I reach an Energy Advisor?
- + How long will this take?
- + Is Solar included?
- + What if I am unhappy with my contractor and want a different one?
- + What upgrades can I make through Clean Energy Works Oregon?
- + When will an Energy Advisor be involved in my project?
- + Why isn't solar offered?

Loan Calculator

What can you afford?



Your Team



Customer Service
(855) 870-0049
info@cleanenergyworksoregon.org

CEWO Energy Advisor
(855) 870-0049
energyadvisor@cleanenergyworksoregon.org

A Contractor
503-555-7857
lunncorp@msn.com

Best Bank
503-555-6043

Project Docs (5)



Home Energy Assessment Report
uploaded by Home Farmer Specialists
July 23, 2012

Upgrade Options
uploaded by A Contractor
Aug. 24, 2012

Bid
uploaded by A Contractor

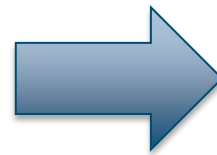
Customer Snapshot



Launched Optix Engage, Manage, and Partner in 2013

Before

- Conserve To Preserve Program suffered from low participation despite lots of spending
- Existing online tool not effective
- 1,640 unique visitors in 2013 (annualized)



Now with Optix

In four months:

- 5,538 visitors
- 3,096 online audits
- 1,873 direct program enrollments

Web-Based Trade Ally Tools

- Lessen admin burden & maximize participation
- Reduce incomplete/inaccurate applications
- Shorten rebate payment times

All Programs



Bob the Builder
159 S. Jackson
Seattle, WA 98101

HPWES

Jean Smith

Project ID: 125

Next Action

Full Details

Premise View Details »
20 N Upper Wacker Dr
Chicago, IL 60606

Participant View Details »
Jean Smith
jamie+10@energysavvy.com
234-567-8909

Program Info
Stage Retrofit
Updated 162 days ago

Complete Upgrade Work

14 days past due

Assigned Jan. 23, 2014
Extended 22 days

[Jump to Timeline](#) ▼

Due date: Feb. 4, 2014

Extend Due Date

This task can not be completed

Add Note

Test-in audit data

Blower door test results:	1750.00 CFM50
Wall insulation R value:	5.00
Window U value:	1.25
Duct leakiness:	500.00 CFM25

Installed Measures

Attic Insulation

Air Sealing

Area in square feet
3000

Existing AC capacity in tons
3

Existing AC efficiency SEER
15

Heat type
Gas

Update
14%

Select a measure

+ Add

Total Savings: 14%

* Deemed savings calculations are estimates for planning purposes only. Results subject to change after review and verification.

* Required fields

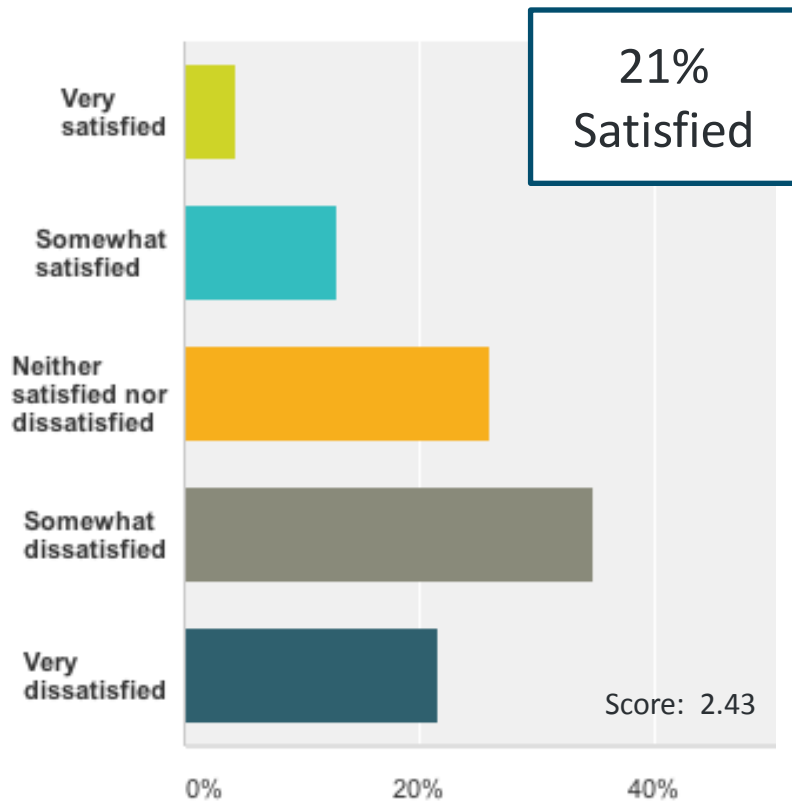
Retrofit start date *

Customer Snapshot

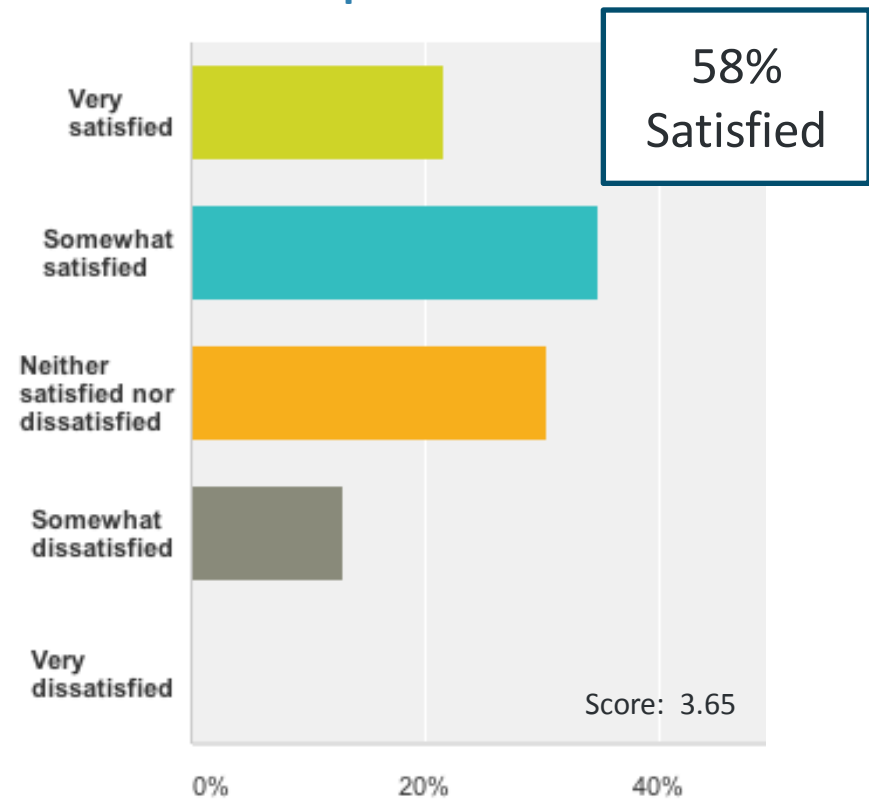


Launched Optix Engage, Manage & Partner in 2013

Previous Software



EnergySavvy Software: 50% improvement



Source: APS

Please correct the errors below.

Program Application

1. Contact 2. Project 3. Address

Thanks! Now tell us about your project.
* Required fields

Project Location

Organization name *

Jim's Landscaping

Street address *

25 University Ave SE

Street address two

City *

Minneapolis

State *

Minnesota

Zip code *

ⓘ This field is required.

Tracking code

jbc

Notes

Interested in natural gas rebates

Please enter a valid address.

Program Application

1. Contact 2. Project 3. Additional details 4. Complete

Thanks! Now tell us about your project.
* Required fields

Project Location

Organization name *

Jim's Landscaping

Street address *

25 University Ave SE

Street address two

City *

Minneapolis

State *

Minnesota

Zip code *

55041

Tracking code

jbc

Notes

Interested in natural gas rebates

You entered:

25 University Ave SE, Minneapolis, MN 55041

We found multiple matching locations. Please select the correct location.



- 25 University Ave SE, Minneapolis, MN 55414
- 25 3rd Ave SE, Minneapolis, MN 55401

Continue

Enter a Different Address



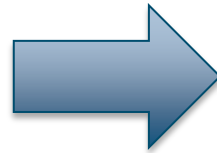
Customer Snapshot



Optix Engage customer since 2011, adding Manage & Partner

Before

- Trade allies used paper forms for HomePrint program
- Program team manually rekeyed all the data
- Processing rebates took multiple weeks each month



Now with Optix

- Electronic forms
- Trade ally interactions automated
- Processing rebates takes 1.5 days each month

Source: PSE

Program & Portfolio Optimization

- Track workflow & ID drop-off points
- Transfer leads from one program to another
- Manage trade ally activity across the portfolio

- Overview
- Marketing
- Operations
- Results
- Premises
- Partners
- Incentives
- Custom



A Contractor

Accepting tasks

Summary

Full Details

Edit Partner

Users

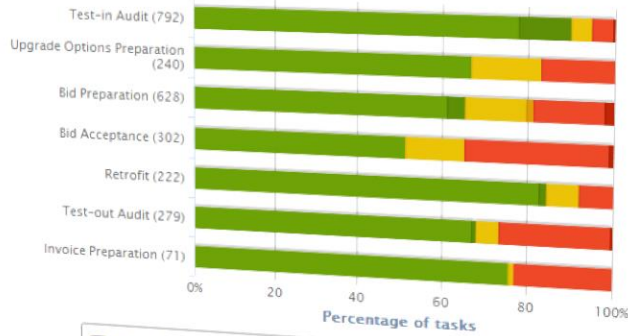
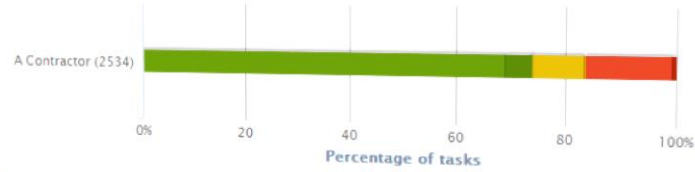
Campaigns

Contact Info

1000 Forest
Chicago, IL 60028
503-555-7857
lunncorp@msn.com
<http://www.lunncorp.com/>

- Partner SLA Results
- Referral Results
- Partner Report Card
- Average Time To Reach Stable Conversion Rates

For tasks that were active during this time period



- Within SLA (Closed)
- <50% over SLA (Closed)
- >50% over SLA (Closed)
- Within SLA (Open)
- <50% over SLA (Open)
- >50% over SLA (Open)

Referral Results

How are this partner's referrals doing in the program?



- Didn't Complete
- In Progress
- Completed

Customer Snapshot



Optix Engage, Manage, Partner customer 2010 – 2012

	Before EnergySavvy	After EnergySavvy	Improvement
Audit-to-retrofit conversion rate	48%	70%	46% more
Audit-to-test-out time period	103 days	62 days	40% faster
Contractor satisfaction	15%	89%	6x happier
Up-front incentive \$ per MBTU acquired*	\$6.80	\$5.27	23% cheaper

Sample of 1,834 in-home audits

* Based on internal analysis

Real-time Savings Analysis

- Project-by-project automated usage data analysis
- Continuous feedback enables continuous improvement
- ID trends, make mid-year adjustments

Home Retrofit

Angelique Alleyne
Project ID: 3002212274
Complete

Next Action

Full Details

Edit Project

Edit Application

Premise View Details »

5767 N Marshall Rd
Dayton, OH 45429

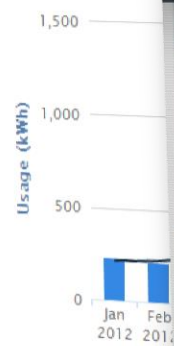
Participant View Details »

Angelique Alleyne
evaluate.test@energysavvy.com

Program Info

Stage Evaluation
Updated More than a year ago

Project Cost



Project Timeline

- Dec 8 ✓ Test-Out / Advanced to
- ✓ Upgrade V
- Nov 1 Upgrade Wor / Advanced to
- ✓ Test-In Au

Home Retrofit

Overview

Marketing

Operations

Evaluate

Premises

Partners

Incentives

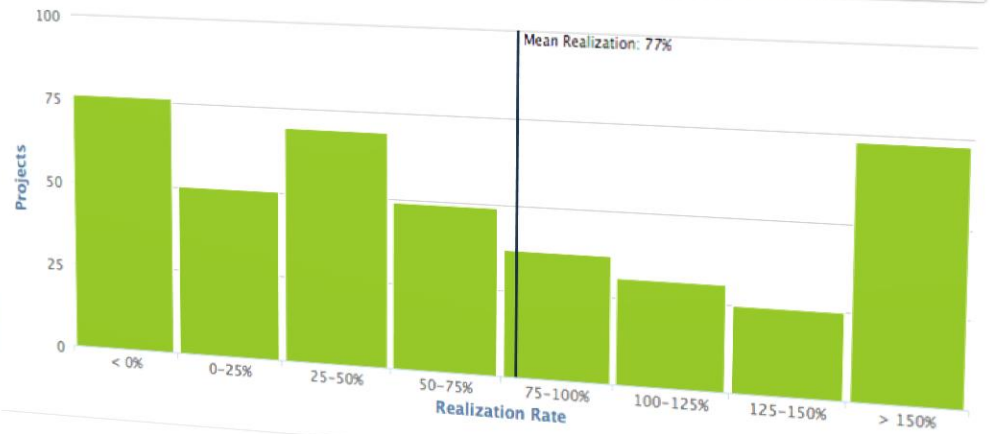
Time Period 12/1/2012 - 9/10/2013

Realization Rates | Realization Rate Convergence | Savings Comparison | Top Influencers

Realization Rates

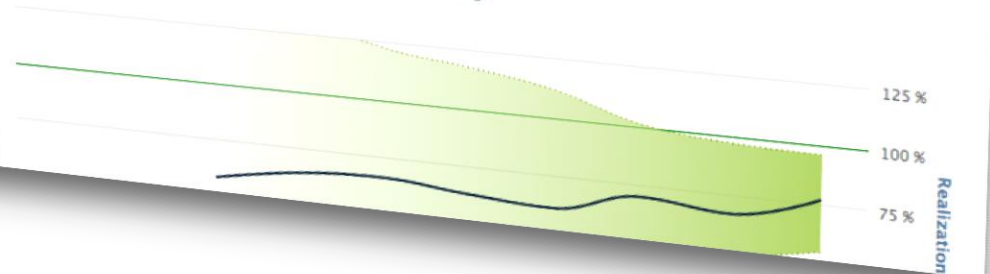
Project level realization rates

583 MWh Actual Savings	750 MWh Expected Savings	77% Realization Rate
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Realization Rate Convergence

Expected program realization rate given observable savings



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Thoughts on Applicability in Michigan

Balance 1st-Year & Persistent Savings

- Technology can reduce admin costs & risk typical of more complex program models
- Track multiple touch-points & staged retrofits

Increase Contractor Buy-In

- Tools to better track program pipeline
- Reduce data entry requirements
- Provide prescreened leads (& track how well they are turned into projects)

Maximize EO Potential

- Calibrate deemed savings or modeling tools
- Quickly analyze pilots
- Build upon MI's energy leadership