The Future of Nexant iEnergy

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Agenda

Addressing Utility Challenges

The Future of iEnergy

Public User Experience
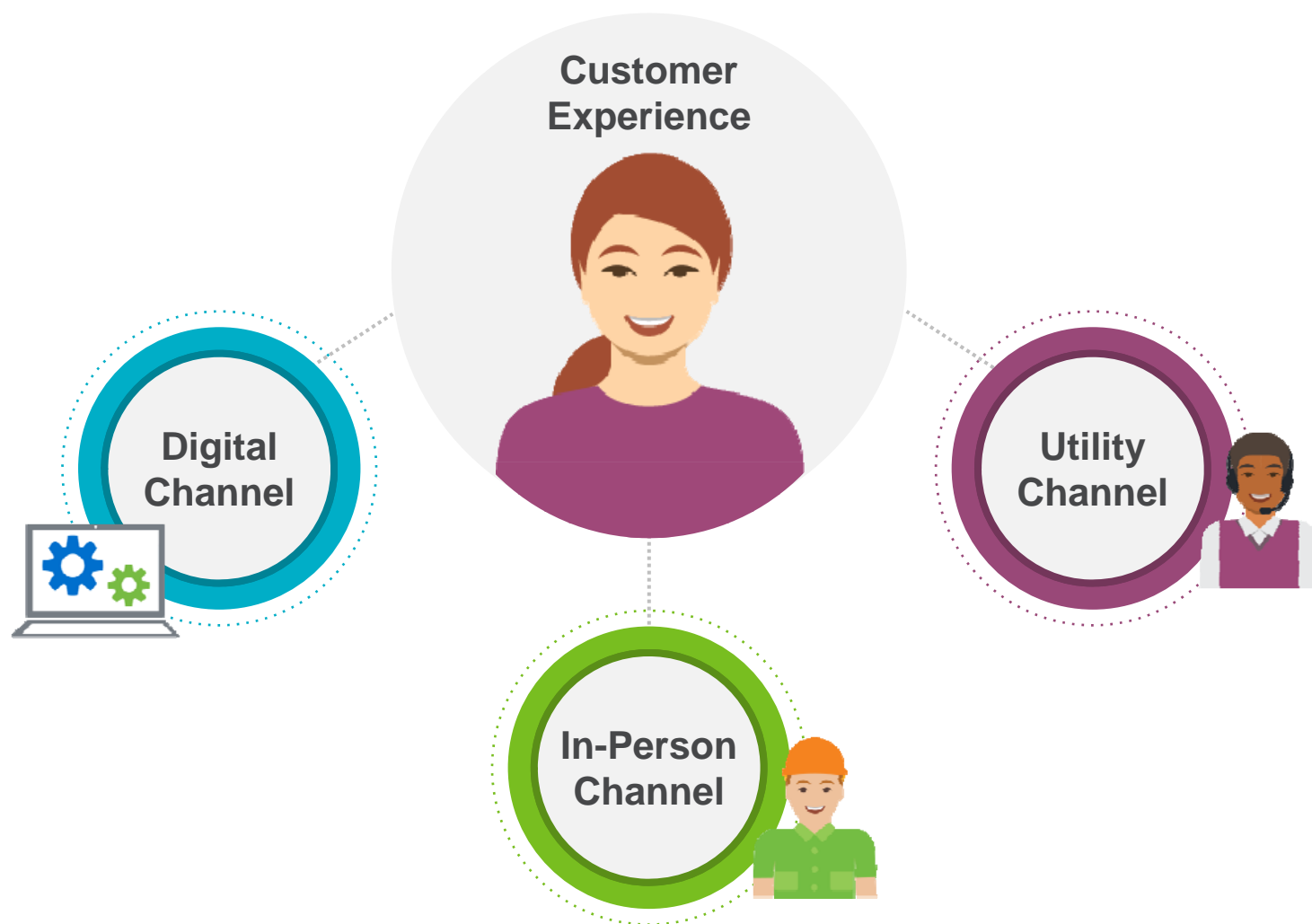
Customer Success

Next Steps

UTILITY PROGRAM CHALLENGES

Low Cost Effectiveness

Low Penetration

Poor Customer Experience

CUSTOMER CENTRIC OMNI-CHANNEL EXPERIENCE

Customer Experience

Digital Channel

Utility Channel

In-Person Channel

CHANGES DRIVING TRANSFORMATION

ALL WILL CHANGE

Technologies
- Efficiency
- Renewables
- Electric Vehicles
- Batteries

Opportunities
- PUC Opening to New Rev Streams
- Market Changes (new entrants)

Process
- Customer!
- Trade Allies
- Grid Interconnect
- Rate Design

Customer
- Expectations
- Demographics
- Consuming Behavior

Regulation
- Local Rulings
- PUC Mandates

Platform Needs
- Configurable Business Rules
- Complex Calculations
- Open Integrations
- Centralized Data
- Technical Library
- Flexible Reporting

WILL NOT CHANGE

CUSTOMER EXPERIENCE TRANSFORMATION
Application fulfillment time for complex rebate programs

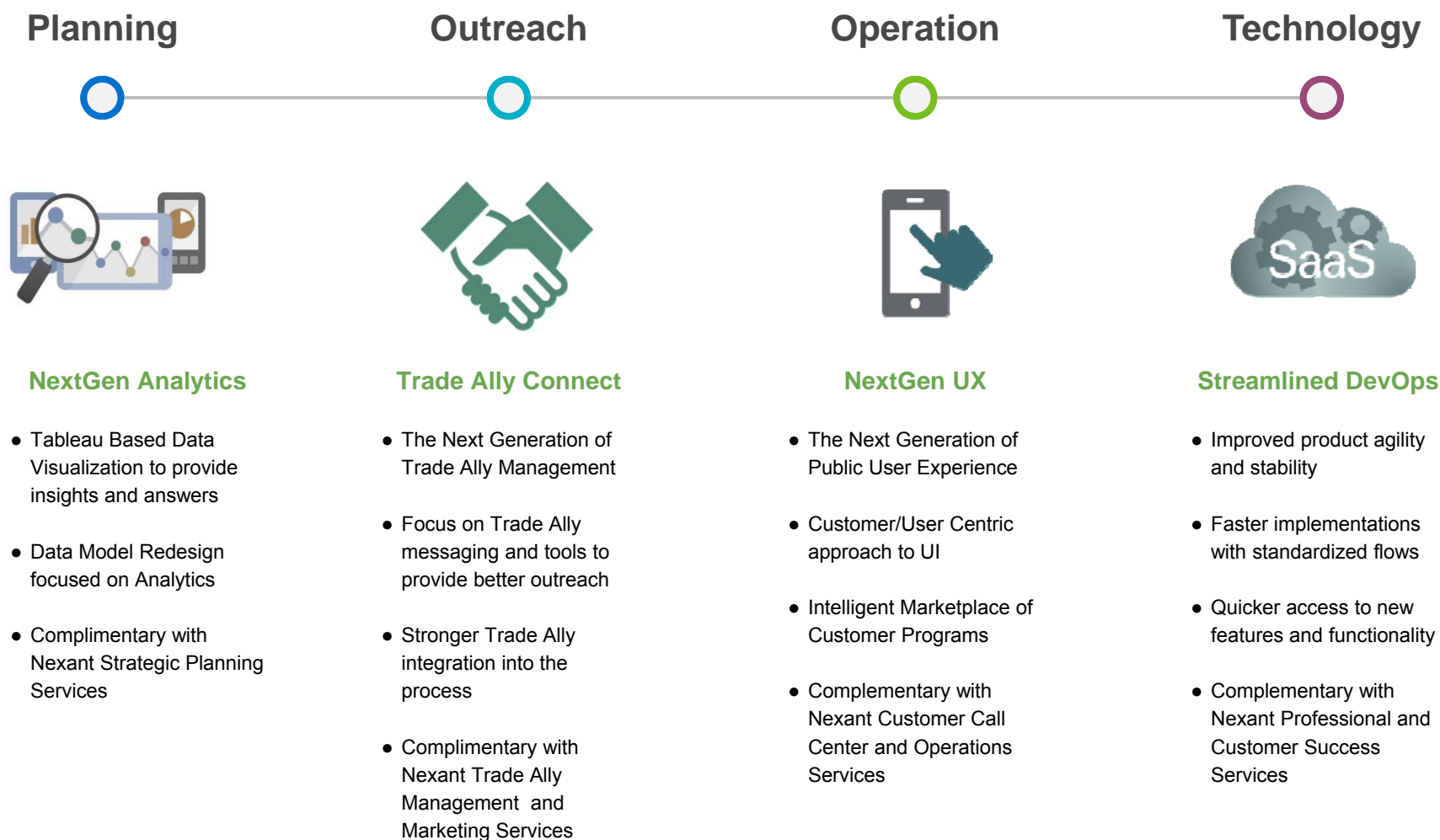Achieving this today for some customers
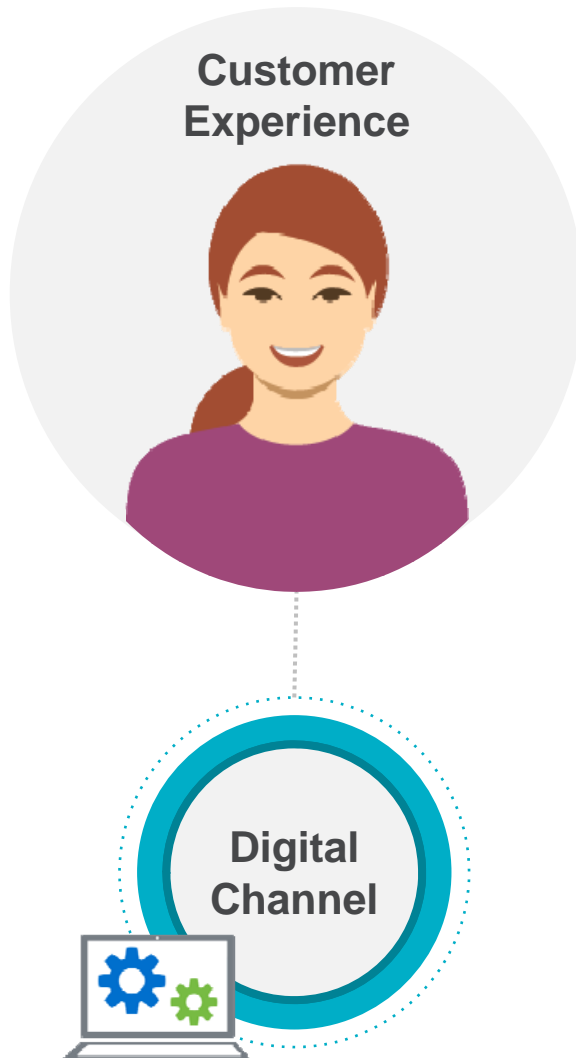
Industry Standard	Nexant	Our Goal
6-8 weeks	**2 days**	**Same day**

The Future of iEnergy Gets us Closer to this Goal

Planning

NextGen Analytics

- Tableau Based Data Visualization to provide insights and answers

- Data Model Redesign focused on Analytics

- Complimentary with Nexant Strategic Planning Services

Outreach

Trade Ally Connect

- The Next Generation of Trade Ally Management

- Focus on Trade Ally messaging and tools to provide better outreach

- Stronger Trade Ally integration into the process

- Complimentary with Nexant Trade Ally Management and Marketing Services

Operation

NextGen UX

- The Next Generation of Public User Experience

- Customer/User Centric approach to UI

- Intelligent Marketplace of Customer Programs

- Complementary with Nexant Customer Call Center and Operations Services

Technology

Streamlined DevOps

- Improved product agility and stability

- Faster implementations with standardized flows

- Quicker access to new features and functionality

- Complementary with Nexant Professional and Customer Success Services

PUX Demo: Appliance Rebates

Customer Experience

Digital Channel

Kelly wants rebates for her new appliances

➤ Kelly logs into her utility account and browses appliances with rebates

➤ She selects the dryer she purchased

➤ She fills out the information to process her rebate form

➤ She browses more appliances and applies for another rebate on a refrigerator

➤ She submits her rebate application

➤ She checks her application status on-line

Live Demo: Appliance Rebates

PUX Demo: Electric Vehicle Charger

Digital Channel

In-Person Channel

Utility Channel

Kelly needs an EV charging station

➤ Kelly logs in and browses for eligible EV chargers and program

➤ She selects one and applies for the program

➤ iEnergy refers Trade Allies to install her EV charger

Trade Ally continues the application

➤ Trade Ally logs into the PUX and continues the application workflow

Reviewer requests an inspection

➤ Utility reviewer logs into iEnergy and requests an inspection

Third-Party Inspector continues the workflow

➤ Inspector logs into the system and continues the application workflow

Reviewer approves the application

➤ Utility reviewer logs into iEnergy and approves the application

Kelly's application was approved

➤ Kelly logs in and sees that her application was approved
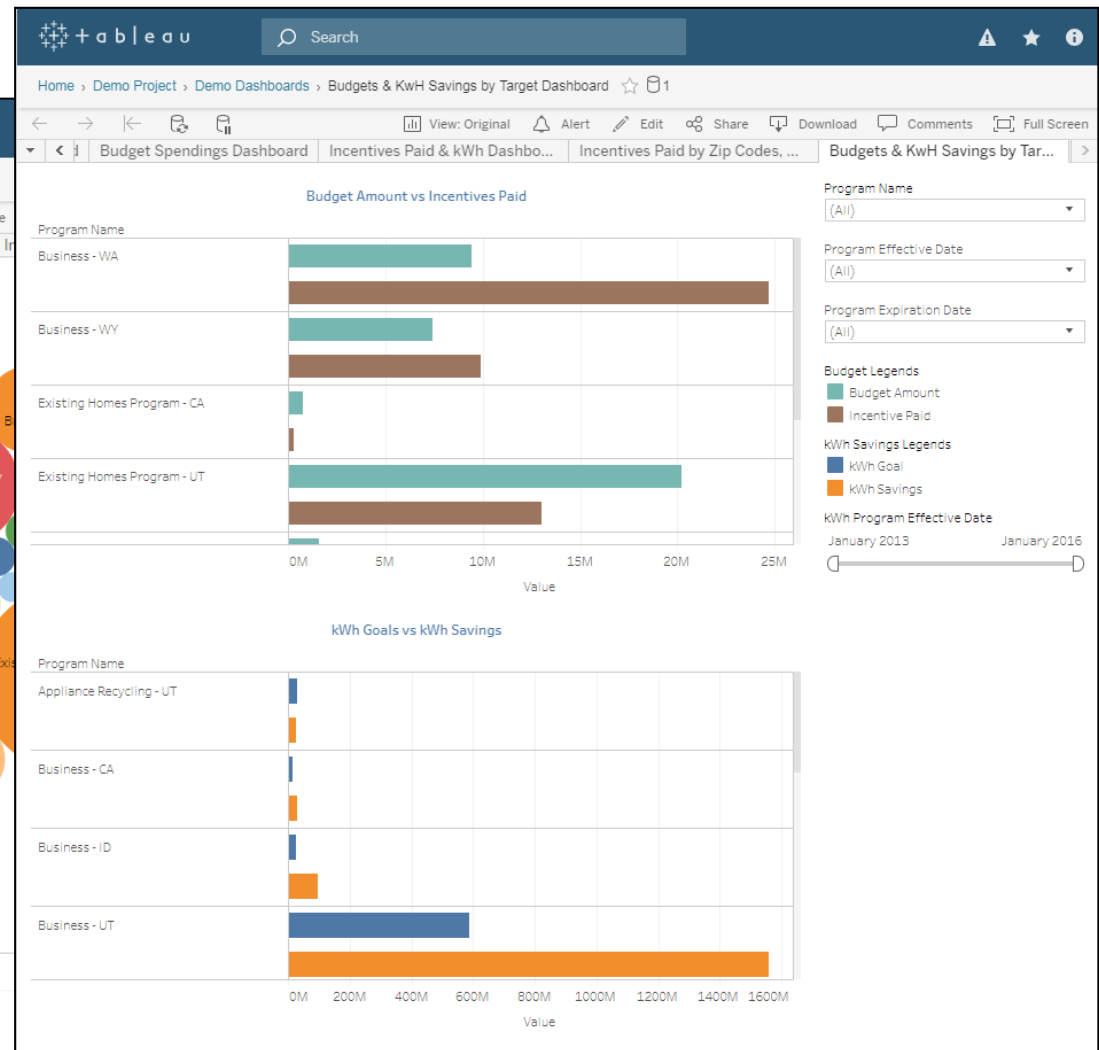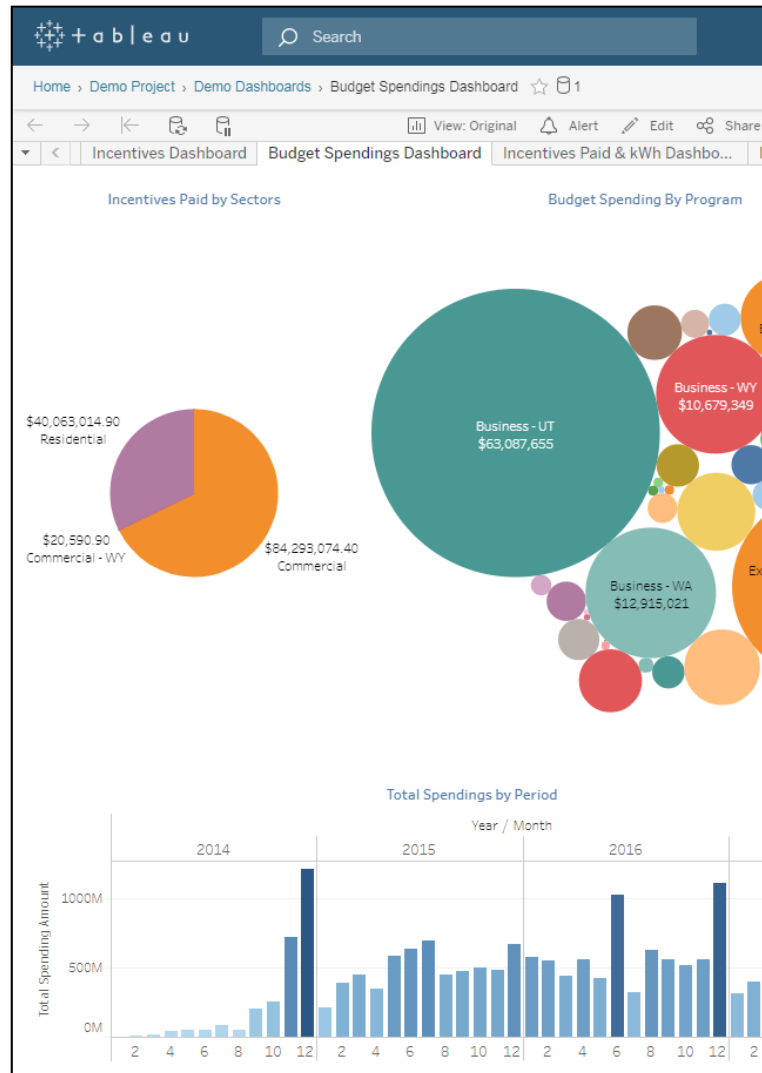
Live Demo: Electric Vehicle Charger

Next Generation Trade Ally: Trade Ally Connect
Best Practices session on Trade Ally Driven Program Delivery this afternoon

Assistance/Information

Customer

Information

Software

Services

Utility

Reduced $

Services / Products

$ & Training

Retailers/ Trade Ally

kWh/therms
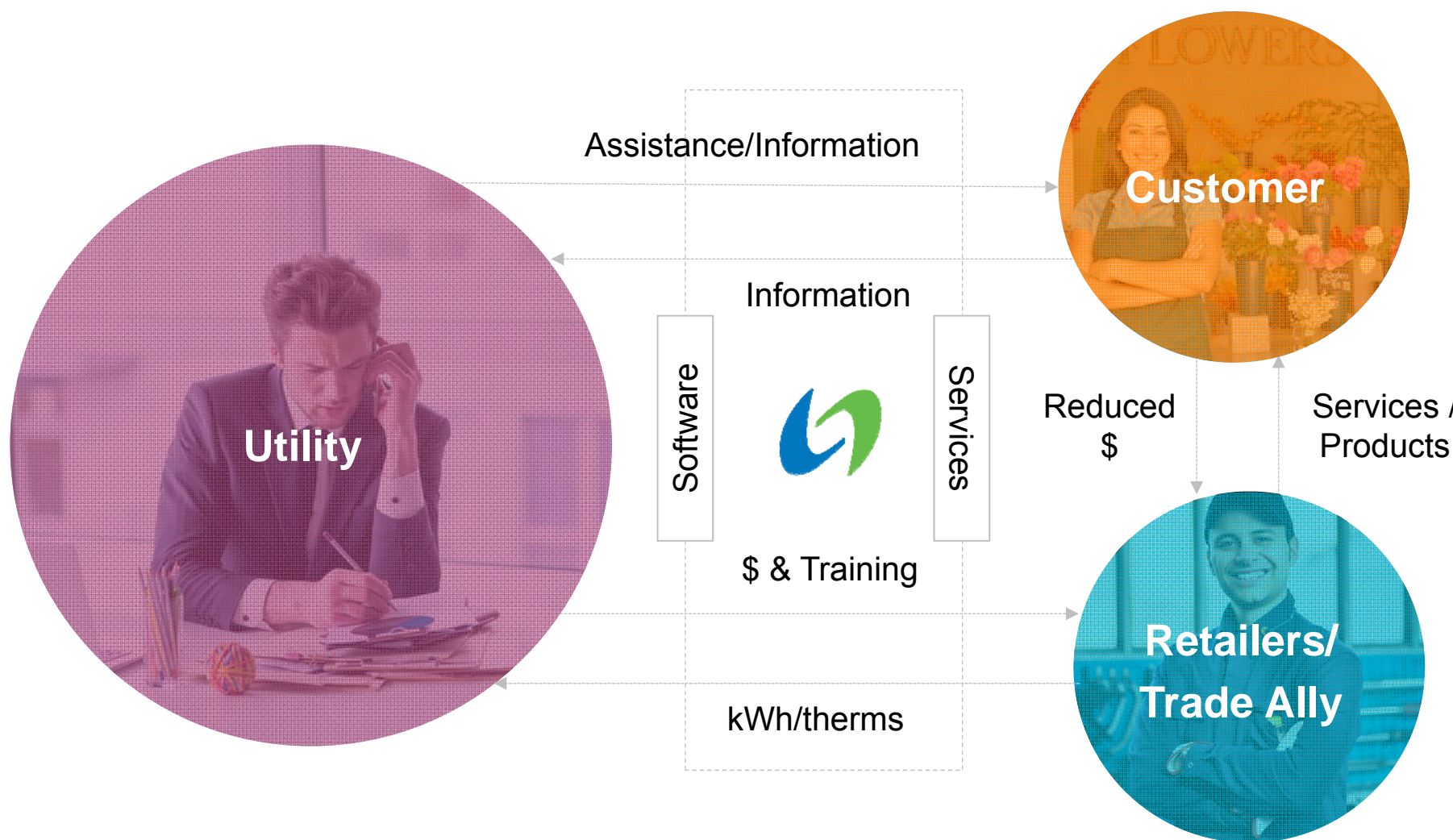
Next Generation Analytics: Tableau
Best Practices session on Analytics this afternoon

Export

+ live data
+ all data
+ scripts for automation
+ OOTB

Operate

+ live data
+ clickable
+ personal searches
+ sort options
+ OOTB

Report

WASHINGTON - November, 2016

Running Project Counts

Running Cost $/kWh

Running Ave. kWh/Project
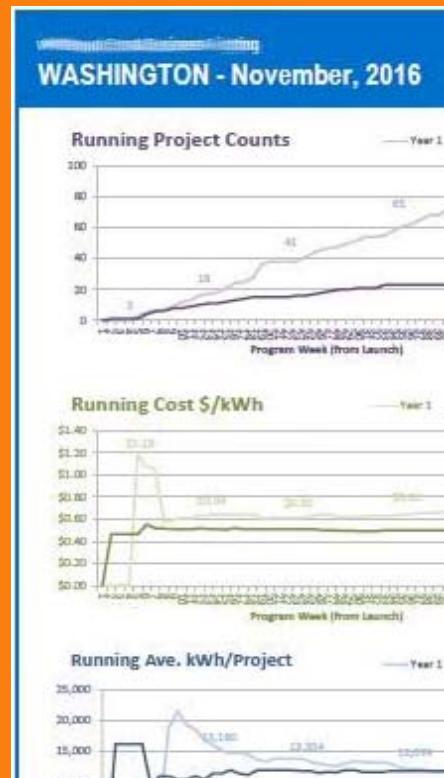
+ custom design
+ for external consumption
+ for specific custom logic

Analyze
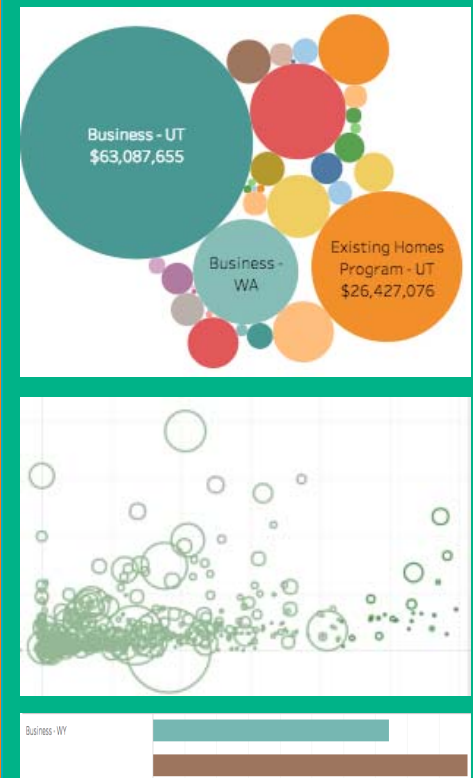
+ Self serve data exploring
+ Advanced visual tools

Customer Success

Some Implementations Need a Tune-Up

- **Application is stable**

- **Multiple workarounds**

- **Programs and Reports configured years ago**

- **Upgrades may or not have been made**

- **Process improvements implemented in a reactive way or limited in order not to change the configuration.**

- **Change requests / configurations are implemented very slowly**

iEnergy Tune Up

Identify Opportunities for:

- **Process Improvements**

- **Streamline Usage habits**

- **Configuration Optimization**

- **Product Roadmap Alignment**

Activities

- Workshop and Interviews with all stakeholders

Deliverable Reports

- State of the Application and Usage

- Suggested actions

  - Training

  - Upgrades

  - Configuration Changes

  - Plan for project

iEnergy Care Packages

Achieve continuous improvements:

- **Implement changes faster (less Change Orders)**

- **Make training available on a continuous basis**

- **Reduce need to train staff on tool – reduce risk on rotation.**

We propose

- Ongoing engagement from
  - Program Managers
  - Product Experts
  - Configuration Managers
  - Reporting Consultants
  - Product Operations
  - Trainers

Bronze	20	Hours /month
Silver	45	Hours /month
Gold	90	Hours /month

Next Steps

I Want These… How Do I Get It?

Customer Success (Available Now)

- iEnergy Tune Up
- iEnergy Care Packages

Public User Interface

- Implementations can start in July

NextGen Analytics

- Implementations can start in August

Trade Ally Connect

- Start Now with Trade Ally Management
- Migrate to Trade Ally Connect

Talk to

- Kim Page
- Karen Hennessey
- Ebby Dabiri

Schedule

- Set time to review Care Packages and SOWs

Implement

- Go Live with the Next Generation of iEnergy

Questions?