

# Southern California Public Power Authority

## Proposal for Customer Engagement Programs

April 28, 2016

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Cutting-edge analytics. Unparalleled results.  
A new experience for utility customers.

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**OP@WER**

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# 1. Transmittal Letter

## A. Brief Statement of Work

i) statement of work specifications; and

Thank you for the opportunity to submit our response to SCPPA's RFP for Customer Engagement Programs. Opower is proud of our long-standing partnership with SCPPA and several of its member utilities, helping them to engage their customers to make informed energy choices. Twelve California utilities have launched Opower's Home Energy Report (HER) programs, including the SCPPA utilities of Burbank, Glendale, and Pasadena. Over 15 independent evaluations of our HER programs at California utilities have been completed. Each evaluation has verified significant, persistent savings.

Since 2009, we've saved 71,000 MWh for BWP, GWP, and PWP customers. We expect to see continued success delivering sophisticated Behavioral Energy Efficiency programs for these current clients, and we look forward to introducing all SCPPA member utilities to Opower's growing suite of customer engagement solutions.

Opower works with nearly 100 clients to support ambitious energy savings and customer engagement goals. Accordingly, we have invested more than \$200 million in our software platform, supported by the largest R&D team in the business – 250 people and counting. As a result, our platform for Behavioral Energy Efficiency (BEE) and customer engagement is the most advanced in the industry, offering exceptional customer experiences while maintaining significant flexibility. This unified platform supports a suite of customer-facing applications, integrates seamlessly and securely with legacy systems, and drives business outcomes quickly. Recognizing our success in delivering innovative solutions to utilities, Navigant Consulting recently named Opower the leader in the Home Energy Management (HEM) industry<sup>1</sup>.

- Please see the "Solution Summary Table" in Section 3.2, which outlines our Customer Engagement Core Platform, utility-facing tools, and customer-facing solutions, including:
- Behavioral Demand Side Management Programs (BEE and BDR with customized program designs)
- Digital Customer Engagement (web, alerts, loyalty and marketplace solutions)
- Customer Education Reports (regarding rates and power quality/reliability)
- Customer Outreach and Promotions (flexible and targeted messaging, program promotions, customer surveys)
- Customer Service Interface (CSR tools to address calls about Opower programs and billing)
- Program Management and Business Intelligence Tools (dashboards for Opower programs and robust BI for overall program management)
- Customer Engagement Partner Solutions including Commercial Customer Engagement (web-based engagement for SMB and C&I customers via FirstFuel) and Marketplace (via Enervee)

Section 3.3 "Solution Details" describes each of these in greater detail. Section 4 describes our general fee structure for the Core Platform and Customer Solutions. We believe our products, technology, and expertise across behavioral science, program design, and big data analytics will serve the SCPPA utilities well. We look forward to working with each utility to leverage the Opower platform and design a customized program to address their specific customer engagement priorities.

<sup>1</sup> <https://www.navigantresearch.com/research/navigant-research-leaderboard-report-home-energy-management>

ii) reference to any proposed contractual terms and conditions required by the Respondent; and

Opower proposes using the Master Professional Services Agreement Between Southern California Public Power Authority and Opower, Inc. (SCPPA Contract No. 20170630-OP) effective as of July 1, 2014 (the "Agreement") to govern the provision of Services requested in the RFP. Opower has provided similar services under the Agreement to those sought in the RFP, and Opower has successfully managed the delivery of its services under the Agreement.

iii) a summary of exceptions taken to the RFP requirements; and

The following is a list of Opower's exceptions to the RFP requirements:

Section VI (12): Opower cannot agree to this requirement as it is generally not applicable to the type of Services contemplated under this RFP.

Section V (13): Opower cannot agree to this requirement as the Services are being provided on a fixed-fee basis which will be inclusive of any such costs.

Section VII (3): Opower cannot agree to this requirement. While Opower is an Equal Opportunity employer we do not currently have an Affirmative Action Plan.

Section VII (7): Opower is committed to helping SCPPA achieve its diverse supplier goals. However, the Services will be provided through Opower's proprietary software-as-a-service (SaaS) technology platform, and not through custom-build or work-for-hire services. As such, we do not currently plan to hire new contractors to help deliver the Services. The contractors Opower use to support the Services work under existing contracts to support large portions of our client base and not any particular client, which allows us to keep our costs down and offer our clients more favorable pricing. Our response assumes we will continue to use our existing stable of contractors. Due to the proprietary and highly technical nature of the Services, and the scale at which we provide across our client base, we have to rely on large national firms to support the Services and are not aware of opportunities to work with small, women-owned or minority-owned businesses that can meet the requirements of supporting the Services.

Section VII (8): Opower agrees with this requirement but notes that SCPPA-furnished property may be shared with certain third parties in order to provide the Services pursuant to the terms of the Agreement.

Section VII (9): As a SaaS company, Opower deploys the same or substantially the same intellectual property to each of its clients. This has the effect of maximizing stability, ensuring highest-tier performance, and lowering costs. To accomplish this, it is essential that Opower retain full ownership of its intellectual property, even if the intellectual property was generated in connection with a specific engagement. Accordingly, Opower's services are not "work made for hire" and it must retain ownership in its proprietary platform, services, data analytics, and work product. Accordingly, Opower will retain ownership of all Opower related intellectual property in accordance with Section 2.6 of Exhibit B to the Agreement.


iv) any and all expectations from SCPPA including, but not limited to: requirements definitions, strategy refinement, and staffing requirements to support the proposed project or program implementation.

The following document describes the Opower Core Platform and a wide variety of Customer Solutions that SCPPA member utilities may select to meet their respective objectives. Opower has vast experience working with utilities of all sizes (including several SCPPA members) to implement a variety of programs. We will bring this expertise to our work with SCPPA member utilities to minimize the level of effort required to put a customer engagement program in market. Once selected, Opower can engage in scoping discussions with SCPPA and/or its member utilities to better define requirements and identify specific product capabilities to address those needs. This in turn will allow all parties to mutually agree upon timeline, cost, staffing, data integration needs, and other project factors.

## B. Declaration and Signature

Opower attests that this proposal is genuine, and not sham or collusive, nor made in the interest or in behalf of any person not herein named; we have not directly or indirectly induced or solicited any other Respondent to put in a sham bid, or any other person, firm or corporation to refrain from submitting a proposal; and we have not in any manner sought by collusion to secure for ourselves an advantage over any other Respondent.

Kind regards,



Adnan Chaudhry  
Senior Vice President, Americas Sales

## 2. Respondent Information

**Company Name** Opower, Inc.

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<i>Phone</i>	+1 415 867 5576 (mobile)
<i>Email</i>	<a href="mailto:abbie.mcbride@opower.com">abbie.mcbride@opower.com</a>

## 3. Description / Definition

### 3.1 Opower Customer Engagement Programs Overview

The following Solution Summary Table in Section 3.2 outlines Opower's Customer Engagement Core Platform and a wide array of available Customer Solutions that SCPPA member utilities may select to meet their objectives. Next, Section 3.3, Solution Details, describes each of these in more depth.

Once selected, Opower can engage in scoping discussions with SCPPA and/or its member utilities to better define requirements and identify specific product capabilities to address those needs. We can tailor the programs to accomplish one or more of the following objectives:

1. Energy savings goals
2. Demand savings goals
3. Customer engagement goals
4. Low-income customer engagement and energy savings goals
5. Other utility goals, pending further discovery

Opower will develop the best program for each utility, taking into consideration each utility's budget constraints, business objectives (e.g., energy efficiency targets, digital engagement goals, customer program participation, etc.), and unique customer base.

### 3.2 Solution Summary Table

Opower Customer Engagement Solution Summary	Section
<b>Customer Engagement Core Platform</b>	
<p>Opower's solutions are enabled by the most advanced technology platform for utility customer analytics and engagement. Our Core Platform is required to power all Opower solutions, meaning that once a utility has implemented one solution, it is easy and low risk to layer on others.</p> <p>The Core Platform includes the:</p> <ul style="list-style-type: none"> <li>• <b><i>Analytics Engine:</i></b> Actionable and one-of-a-kind insights</li> <li>• <b><i>Personalization Engine:</i></b> Get the right message to the right customer at the right time</li> <li>• <b><i>Delivery Engine:</i></b> Scalable, multi-channel information delivery</li> </ul> <p>Included in the Core Platform fees, as shown in Section 4, are capabilities for:</p> <p><b>Program Management and Business Intelligence Tools</b></p> <ul style="list-style-type: none"> <li>• Customer Service Interface for Opower programs</li> <li>• Inside Opower program reporting tool</li> <li>• Data Exploration for robust utility business intelligence</li> </ul>	<b>3.3.1</b>

Opower Customer Engagement Solution Summary	Section
<b>Customer Outreach and Promotions</b> <ul style="list-style-type: none"> <li>• Segmentation and Targeting capabilities</li> <li>• Marketing to promote participation in utility programs</li> <li>• Customer surveys (called Customer Engagement Trackers) for insights into customer engagement, satisfaction, and more</li> </ul>	
<p style="text-align: center;"><b>Customer Solutions</b></p> <p>All solutions listed below require a single Core Platform license (one-time setup and annual fees). Each solution then requires a setup fee and annual fee, as described in Section 4.</p>	
<b>Behavioral Demand Side Management Programs</b> <ul style="list-style-type: none"> <li>• Behavioral Energy Efficiency with Home Energy Reports for predictable, sustained energy savings</li> <li>• Behavioral Demand Response for peak-focused reductions and additional EE savings</li> </ul>	<b>3.3.2</b>
<b>Digital Customer Engagement</b> <ul style="list-style-type: none"> <li>• Customer-facing web portal (called NextWeb) with flexible integration options</li> <li>• Targeted Web Marketing</li> <li>• High Bill Alerts for AMI and non-AMI customers</li> <li>• Weekly Energy Updates via email for AMI customers</li> <li>• Points and Rewards solution to enhance online customer engagement and drive high-value actions</li> </ul>	<b>3.3.3</b>
<b>Customer Service – Bill Advisor</b> <ul style="list-style-type: none"> <li>• Customer Service Interface with personalized insights to diagnose high bill calls</li> </ul>	<b>3.3.4</b>
<b>Customer Education Reports</b> <ul style="list-style-type: none"> <li>• Online Rate Analysis Tool</li> <li>• Rate Education Reports</li> <li>• Electric Quality and Reliability Reports</li> </ul>	<b>3.3.5</b>
<b>Customer Engagement Partner Solutions</b> <ul style="list-style-type: none"> <li>• Web portal and analytics for SMB and C&amp;I customers via FirstFuel</li> <li>• Online Marketplace via Enervee to enable customers to research, purchase, and file rebates for energy efficient appliances online</li> </ul>	<b>3.3.6</b>

## 3.3 Solution Details

Opower's Core Platform is the foundation of any partnership that Opower enters into with a utility; it is comprised of a suite of tools and data engines that power the various solutions. The Core Platform is described below, followed by details on each of the Customer Solutions that can then be deployed to meet various customer engagement and business needs.

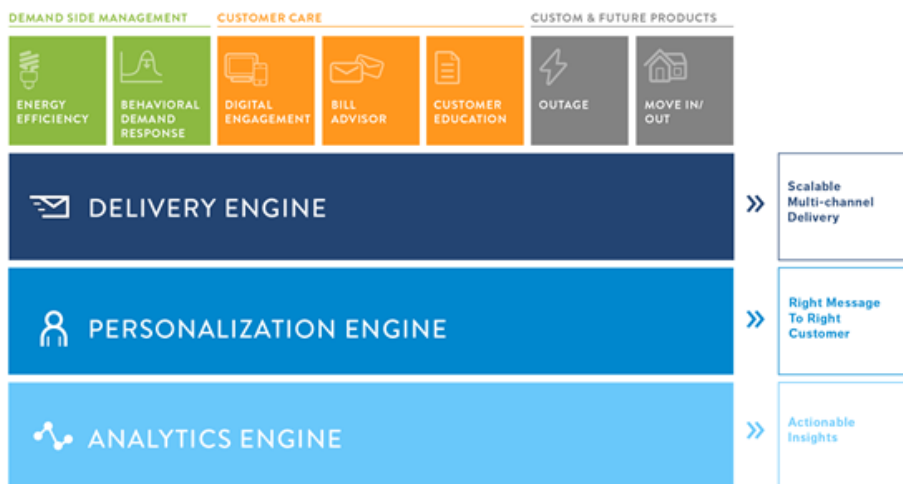
### 3.3.1 Customer Engagement Core Platform

Opower understands the need for a comprehensive yet nimble technology platform to meet customer engagement goals and utilize the immense volume of customer data ingested. Opower works exclusively with utility companies to help them engage their customers across all touchpoints. Opower's platform supports a full-suite of customer-facing solutions and delivers great customer experiences to drive SCPPA member's business outcomes.

Opower's platform offers unmatched depth in terms of data warehousing, proprietary analytics algorithms, number of channels incorporated, and breadth of utility goals supported—all through a unified experience and platform designed specifically to engage utility customers.

Opower has spent more than \$200 million in R&D building our utility-focused platform from the ground up – integrating analytics, automation, and coordinated outbound delivery to help utilities achieve their most important objectives. Illustrated below, each layer of Opower's platform provides business benefits to utilities:

- Actionable Insights through the **Analytics Engine**. Analytics alone do not drive business value. Because our analytics engine is part of our integrated platform, our analytics are automatically personalized and readied for delivery to customers. The feedback loop from our delivery engine helps us refine and improve our analytics over time. Our Analytics Engine delivers compelling and



- personalized insights to all customers regardless of whether or not they have AMI data.
- The Right Message to the Right Customer at the Right Time through the **Personalization Engine**. We are able to easily segment customers using customer attributes, based on third-party data, utility data, and customer behavior to deliver the most personalized, impactful messages for each customer.
- Scalable, Multi-Channel Delivery through the **Delivery Engine**. Our outbound delivery channels use the most optimal media [e.g. direct mail, e-mail, SMS, and interactive voice response (IVR)] to deliver these personalized messages at the right time, sending millions of communications in a few hours. Our inbound channels (e.g., web, mobile, and CSR tools) have flexible integration options. Opower can host full pages, embed widgets into utility-hosted pages, or use our APIs to surface Opower insights on utility-hosted pages.

In addition to the engines listed above, the Core Platform also includes Program Management and Business Intelligence Tools and customer outreach and promotions as described in detail below.

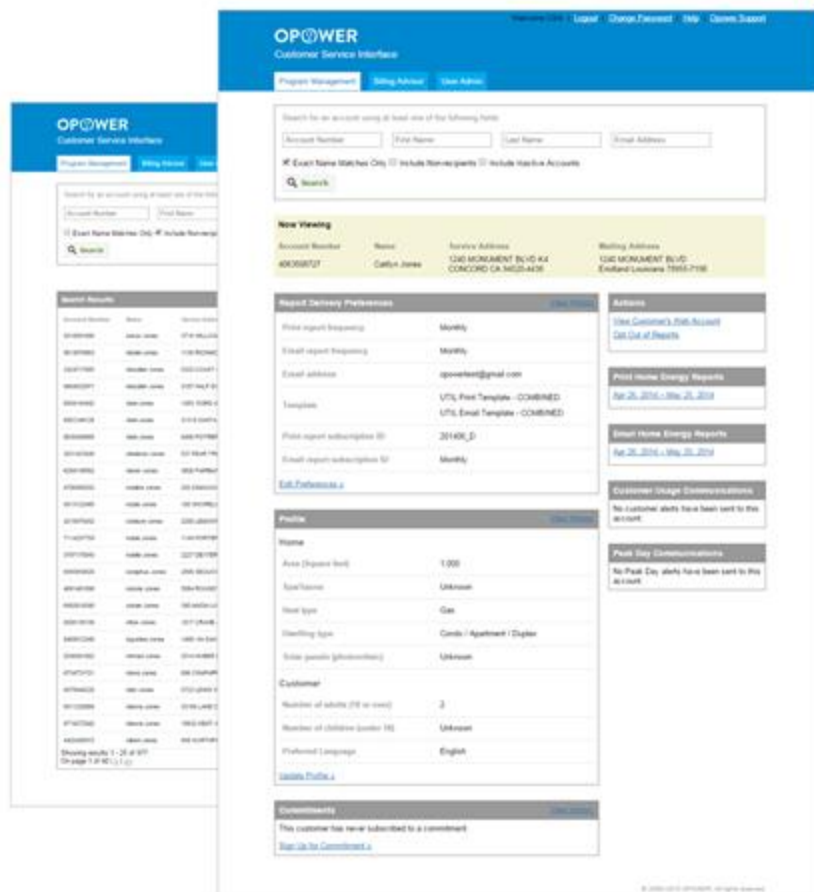
## Program Management and Business Intelligence Tools

### Customer Service Interface

Opower's Customer Service Interface allows utilities to maintain high customer service levels by supplying customer service representatives (CSRs) with the information they need to quickly respond to customer inquiries, keep call times down, enable first-call resolution, and enhance customer satisfaction.

The CS Interface enables CSRs, in real time, to:

- Access a customer's account on the customer web portal
- Modify household information based on customer input
- Manage customers' report delivery preferences and review PDF versions of all past reports
- Support customer login and password issues
- Recommend energy-saving actions
- Recommend other energy-efficiency programs, products, and services

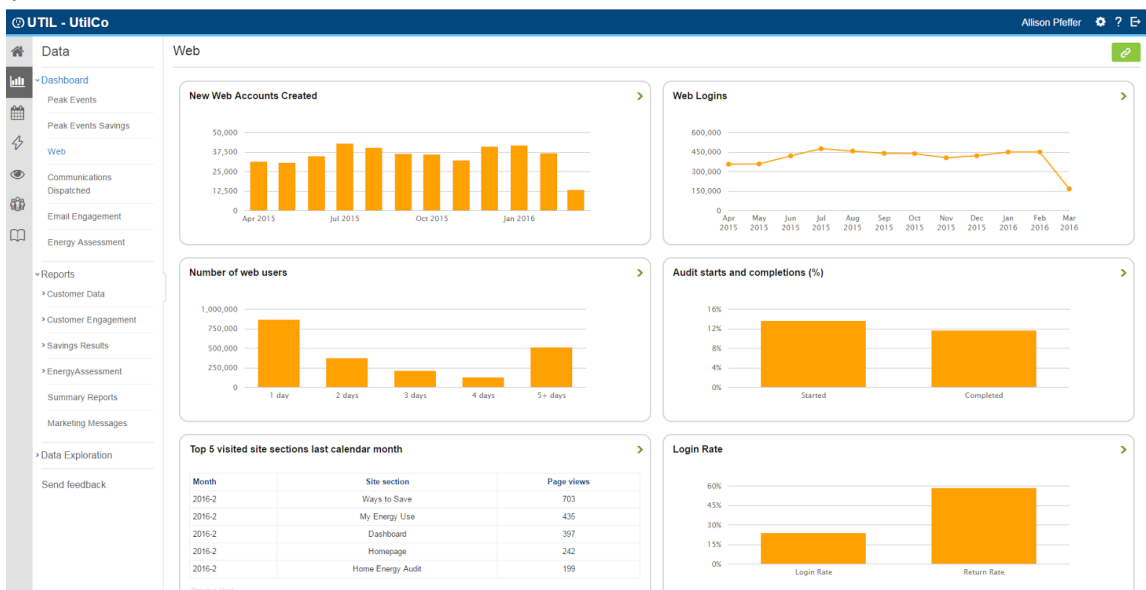


### Inside Opower

Opower's platform has been optimized to take in data from all utility operational systems and assimilate it with other data sources to uncover unique customer characteristics. Inside Opower, Opower's utility-facing web tool, was created to provide utility program managers with direct access to data extracts and results data through a customizable program performance dashboard. Utilities then have complete on-demand visibility into how customers use energy and interact with the Program—insights we use to improve the Program over time and which utilities can use to improve its other marketing efforts. Inside Opower provides a dashboard of key performance metrics on the Opower program and the ability to download program reports. SCPPA members will not need to endure the process of submitting requests and waiting for answers. Inside Opower extracts data from Opower's production servers and makes it available 24/7 to track, trace, and monitor data such as:

- Which customers are interacting with different parts of the program
- Report volume (e.g., number of overall reports delivered, number of reports delivered per month)
- Customer targeting information (e.g., what types of tips and programs were delivered to different segments of customers)
- EE savings results

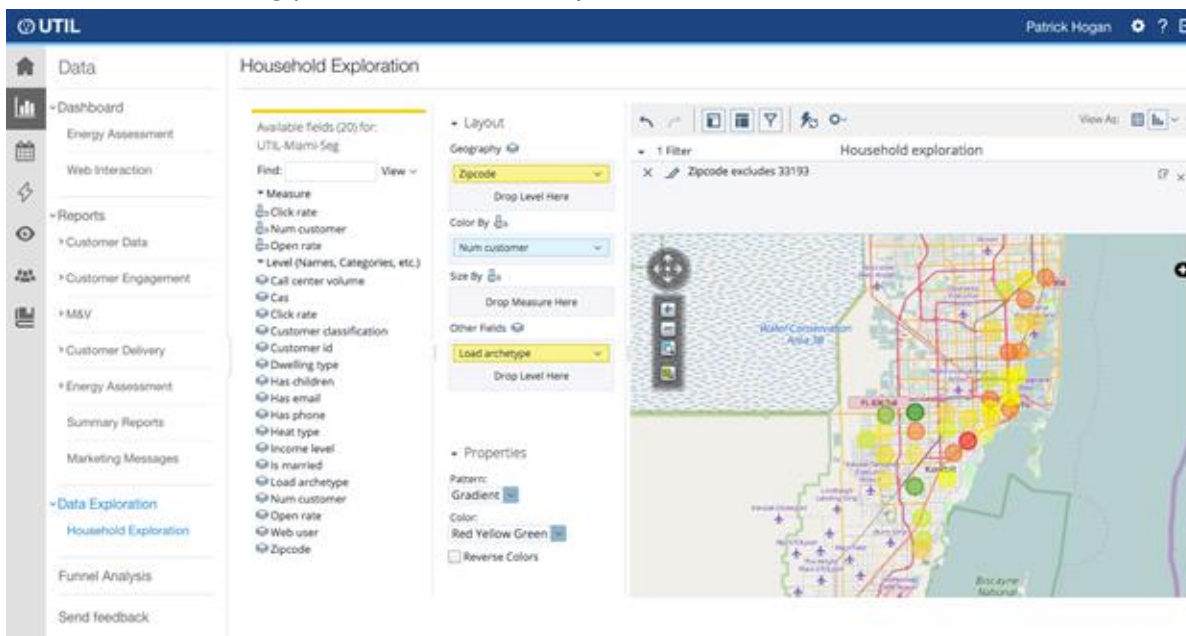
The intuitive dashboard provides our clients with immediate access to valuable data reports for their utility.



## Data Exploration Tool

Opower's business intelligence tool, known as Data Exploration, is available as an additional tab within Inside Opower. It allows utilities to combine its customer data, Opower's data, and third-party data to perform ad-hoc analysis, identify trends, create and export new customer segments, and create custom dashboards and data visualizations. Drawing from Opower's data warehouse, these robust analytics complement the program performance metrics from Inside Opower, improving the planning and monitoring of both Opower and utility-driven programs.

Reports can be run on unique customer actions, how customers interact with different parts of our solution (e.g., incomes of customers who are using the customer web portal or the postal codes of customers receiving alerts), and correlations between data (e.g., the difference in energy usage between customers with swimming pools and those without).

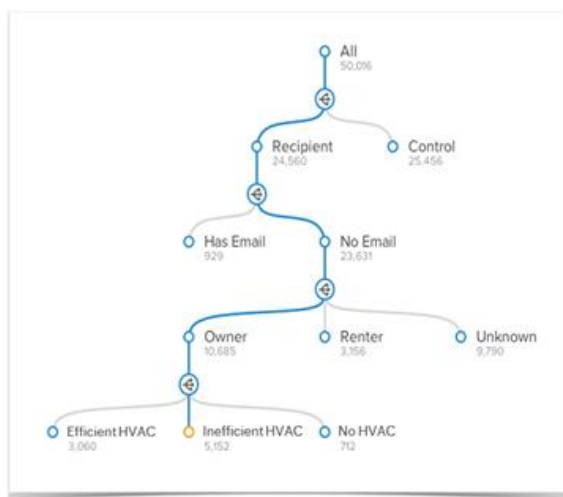


Examples of common use cases include:

- Utilizing Opower insights to identify customers with the highest propensity for participating in utility programs (e.g., identify afternoon peaking customers with high average usage for promotion of demand response programs).
- Monitoring performance of programs and campaigns (e.g., track web login and email click-through rates for customers with and without smart meters).
- Optimizing program performance (e.g., identifying that customers who log onto the web are more likely to enroll in utility programs).

## Customer Outreach and Promotions

### Segmentation and Targeting Capabilities



Identifying customers with similar needs that will respond to unique messaging is the cornerstone of a strong outbound communication strategy. And historically, it has been difficult for many companies to obtain all of the data necessary to initiate and maintain meaningful dialogues with their customers.

Opower's Platform enables advanced segmentation and targeting, allowing utilities to reach out to different customer segments with personalized messaging. These customer segments are created by combining demographic, psychographic, and behavioral data into a single profile. With aggregated data, sophisticated segmentation and targeting is unlocked, allowing utilities and Opower in partnership to:

- Visually explore customer data based on individual customer attributes
- Create unique customer segments based on logical combinations of customer attributes
- Create and trigger communications, outbound and inbound, based on segments
- Dynamically refresh segment-based customer interactions with Opower systems, utility programs, call center interactions, and third-party platforms

Opower's segmentation tool allows the creation of customer segments quickly—in seconds, not days. The segmentation service divides customers based on more than 90 attributes, including demographic, utility-provided, and Opower-derived characteristics.

Once unique segments are created, utilities can use Opower's multi-channel communications to promote other utility programs and products--anything from refrigerator recycling and home audit programs, high bill alerts and auto-pay programs, and smart thermostats and solar panels. In the context of the useful insights and actionable energy-efficiency tips provided by our platform, promotions for other utility-sponsored programs become more effective.

Opower maintains a robust library of over 100 tips and marketing modules, ready to be adapted quickly to meet the needs of SCPPA member utilities.

## Marketing to promote participation in utility programs

When a utility has specific programs it wants to advertise to customers, such as rebates for a new furnace or AC unit, home energy audits, and other utility-sponsored energy efficiency initiatives, marketing messages on Opower communications can be used to encourage participation.

- First, utilities can choose which customers they want to target for a marketing campaign (using Segmentation & Targeting).
- Next, they send out a series of messages promoting the program in a series of email and paper reports. Opower is building a library of marketing modules that utilities can choose from, or we can create custom modules.
- Finally, they monitor program results using Inside Opower.

By adding tailored, data-driven marketing messages to HERs or eHERs for customers most likely to engage, utilities are likely to see a significant increase in program participation. In fact, utilities that have used Opower communications to promote specific programs have seen up to a 60% lift in participation.

## Customer Engagement Tracker (Survey)

Opower tracks the impact of our programs on customer engagement, satisfaction, and sentiment through a survey called the Customer Engagement Tracker. Opower can conduct annual phone and e-mail surveys among program participants. This allows us to evaluate and determine our ongoing impact on:

- Satisfaction with utility: When customers know their utility supports programs that enable customers to have greater control over energy usage, they usually rate their utility more positively.
- Utility Program Participation: Engaged customers will frequently participate in more than one program, and sometimes ask for additional program opportunities from their utility.
- Customer Engagement Program Satisfaction: Monitoring customer feedback regarding the program enables the utility and Opower to work together to further customize the program as feedback is collected. Additionally, customers' reception of the platform is an important indicator of their perception of the utility as a valuable source of information and guidance.
- Energy Efficiency Orientation: The best indicator of lasting behavior change is when customers believe better managing their energy use is important, are motivated to take more active control over their energy use, and discuss their actions with their friends and family.

This survey can also serve as a valuable tool for the utility to assess customer engagement more broadly and, thanks to Opower's broad data set, also benchmark themselves against other peer utilities.

**All Opower Customer Solutions, listed below, require a Core Platform license.**

## 3.3.2 Behavioral Demand Side Management Programs

### Behavioral Energy Efficiency

#### Solution Overview

Utilities around the world rely on Opower to consistently deliver 1.5% to 2.5% reductions in energy use using our Behavioral Energy Efficiency programs. This consistent achievement relies on a blend of technology, industry expertise, and an understanding of the end-user. To date, Opower's BEE programs have saved over 9TWhs of energy, equal to the avoidance of the release of over 12 billion lbs. of carbon dioxide. Through a powerful combination of email, direct-mail, web, and call-center tools, Opower's solution delivers proactive, targeted messaging that drives energy savings and enhances each customer's experience with their utility.

Opower's EE solution doesn't just produce dependable energy savings; it does so cost effectively. Our EE programs are typically delivered at a cost of \$0.02-\$0.03/kWh. By comparison, lifetime cost-effectiveness of a traditional EE program, such as weatherization or in-home audits, is \$0.10 or greater.

Opower's solution utilizes our robust platform to deliver personalized, cross-channel customer experiences that drive energy savings, increase marketing effectiveness, and lift customer satisfaction. Backed by behavioral science principles proven to prompt change, Opower's recently redesigned Home Energy Reports are the culmination of years of research and testing and almost a decade of experience operating BEE programs. Each HER delivers a meaningful story to residential utility customers that encourages action. Main components of each HER include:

- **Neighbor comparison:** Customers see their energy use compared to their neighbors living in similar households in the form of a three bar graph on the front page of the HER. Normative comparison, the foundational behavioral science principle of the HER, triggers customers to act more than other common motivators, such as financial incentives.
- **Quick tips and energy-efficient investment opportunities:** HERs provide tips that require minimal behavior changes to encourage immediate energy-saving behavior, while also providing some customers with information regarding a larger efficiency investment, such as a new, energy efficient appliance. Recommendations are tailored for different customer demographics and SCPPA member utilities can tailor the tips content to steer customers toward specific EE initiatives.
- **Program information and FAQs:** Customers receiving HERs have similar questions when they first view their report. This section provides the answers to the most common inquiries and serves to reduce the already small number of calls made into the customer service center after Opower's program has launched.

## Direct-mail delivery

The traditional delivery method for HERs, like most utility correspondence, is direct-mail. White-labeled to match the utility's branding, customers receive the mail and immediately assume it contains valuable information from their utility, leading to high open rates.

We consistently see very strong engagement with the HERs, with 69% of customers typically reading the report. Direct mail campaigns normally only reach roughly 5% of its intended audience.

HER's strong engagement performance is the result of three powerful factors:

- People actually want information from their utility, and open what is sent
- The information is valuable, proven by the fact that 29% of all customers save the report and 40% share with others
- The information comes at a relatively regular cadence, providing multiple touchpoints for SCPPA members to reach customers

## Digital delivery

As customers are increasingly turning online for information, delivering the valuable information found on HERs through online and mobile channels is a crucial capability for SCPPA member utilities.

Complementary to paper HERs, e-mail HERs (eHERs) engage digitally-savvy customers with the same valuable information found on paper HERs.

Developed with a responsive, mobile-friendly design, eHERs are easy to read no matter the device a customer is using to read e-mail. Designed specifically to encourage customers to visit the web and learn more online, eHERs include direct links to the customer web portal, and any other web offerings utilities may want to market.

The power of multiple HER delivery methods is seen in both savings and customer satisfaction results. When customers receive both paper and digital HERs, SCPPA members can expect a 20% boost in energy savings and 10% increase in customer satisfaction.

## New: Fresh and Flexible HER Experience with "Agile EE"

Opower's newest Agile EE solution was designed around utilities' need to reach their customers at the moments that matter most. Research shows that customers are most receptive to information from their utilities at certain moments during the customer lifecycle, like seasonal changes or starting a new contract. To take advantage of these important opportunities to connect with the customer, Opower has developed a series of themed reports to be delivered, by direct-mail and/or email, at key moments.

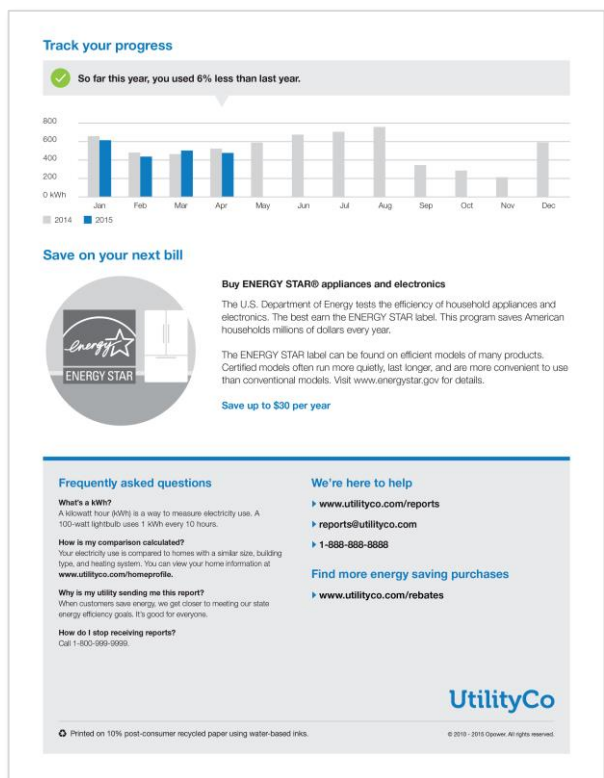
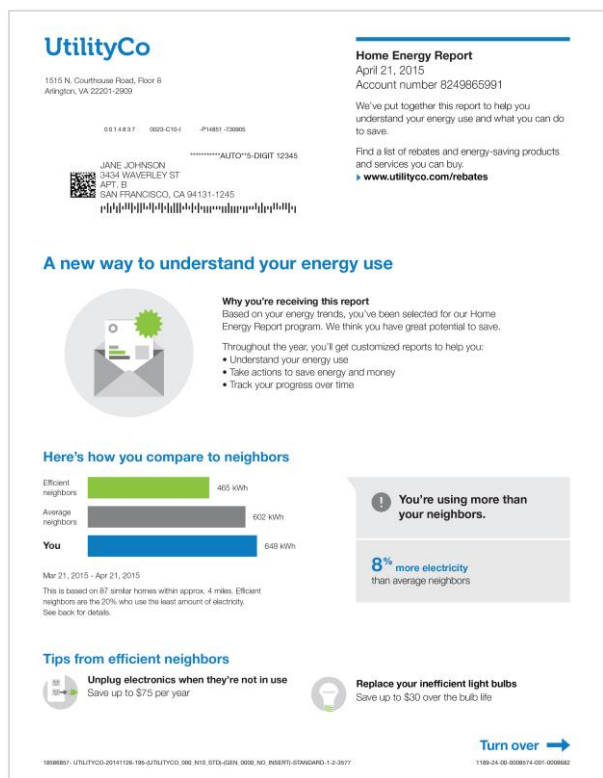
### Welcome Edition



When customers are enrolled in the HER program, the utility can first send them a special report, called a Welcome Edition, that introduces the program and provides a snapshot of their overall energy use.

When customers receive their first HER, they often question why they are getting this information from their utility and how the neighbor comparison is calculated. The Welcome Edition addresses most these questions and gives customers the opportunity to provide more information that could make their future experience more accurate and relevant. Educating customers at the start of the program directly on the report, versus with another piece of direct-mail, can greatly reduce the spike in call center volume sometimes seen in the early months of a program launch.

The key elements of the Welcome Edition HER are illustrated below.



## Summer Edition



We know that seasonal change is an important customer touchpoint. When the weather starts to warm up, a Summer Edition report will be delivered with tips about ways to save during the hotter months. If customer billing data is available, we can also provide personalized information about how much energy a customer is using for cooling.

## Winter Edition



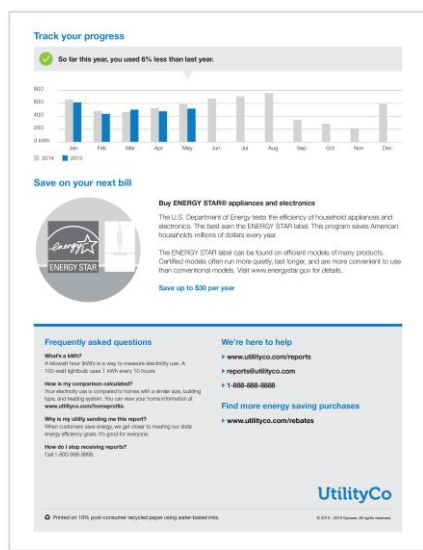
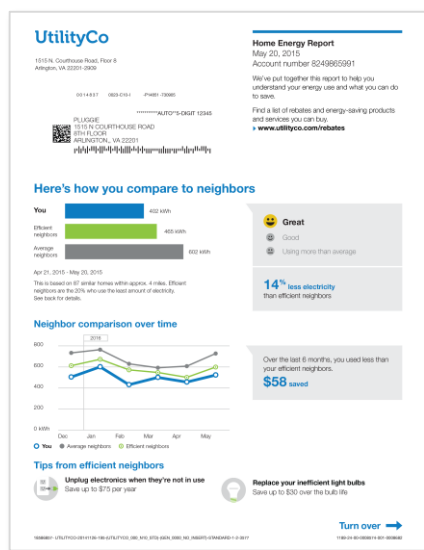
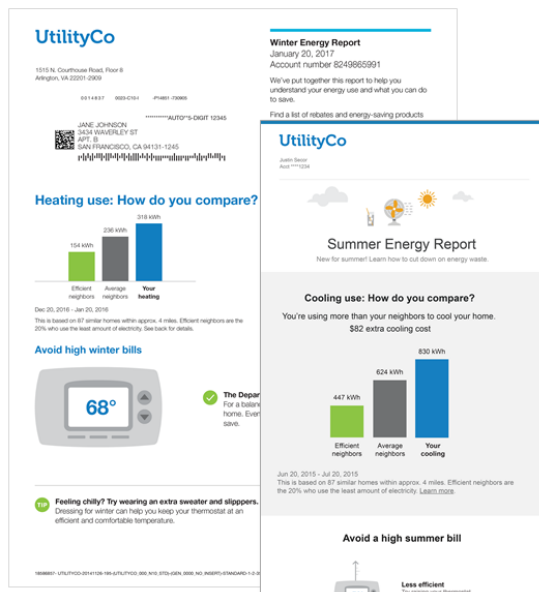
Then, as the weather starts to turn again, we'll send them another seasonal edition. Our Winter Edition is designed specifically to help the customer save energy in the winter months. With billing data for customers, we can provide personalized information about how much energy a customer is using for heating, and provide associated tips.

## Progress Report



All other times of the year, customers will receive Progress Reports, which provide updates on how they are doing relative to their neighbors, illustrate personal comparisons, and provide relevant energy efficiency tips. The Progress Report also provides an opportunity for SCPPA members to market specific EE programs or initiatives.

While the series of reports was designed to tell a cohesive story over time, the individual reports were also designed to work independently. Disengaged customers may read just one report and will still be able to understand the contents.



## Reliably engaging all residential customer segments

Different segments of utility customers have different information needs. Powered by the advanced segmentation and targeting capability of Opower's platform (described in Section 3.3.1), SCPPA members can offer special short-term experiences to different groups of customers within the variety of HER editions. For example:

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### Low Income Experience



The Low Income Experience, available in multiple languages, includes personalized messaging and low/no-cost energy saving tips targeted to the utility's low income population. For example, tailored messaging can boost the impact of your weatherization programs by increasing awareness and helping customers maximize the value of their installed measures. Plus, once they're aware of programs, low-income customers are more likely than other customers to participate.

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### AMI Experience and New Smart Meter Experience



Whether you've recently finished your smart meter rollout, or are about to embark on the project, it's vital to inform customers of the new technology while clearly illustrating the benefits of the investment. Opower's AMI Experience features specialized modules on Home Energy Reports that show customers more granular insights and information about their energy usage.

For customers receiving new smart meters, Opower's New Smart Meter Experience delivers welcome messaging relevant to the new AMI-specific data modules they will begin to see. Some of the country's largest utilities, including PG&E and BG&E, have used HERs as a vital channel to educate customers about their new smart meters.

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### New Movers Experience



Customers just moving into a new home in a SCPPA member's territory represent a significant opportunity for utility engagement. Take advantage of it with Opower's New Mover Experience, which provides customers with specialized tips, offers, and information for the first 3 months after they move into a new home. At National Grid Rhode Island, customers who received Opower's New Mover Experience showed a 19% increase in positive feelings toward the utility compared to customers who did not.

---

### High Users Experience



Some customers use much more energy than others, and Opower research indicates that these customers are also the ones who are often the ones most likely to be dissatisfied with reports. Quell them with a special High User Experience designed just for customers who use significantly more energy than average.

## History of BEE Success in California

Since 2008, Opower has been the trusted provider of behavioral energy efficiency for California's public power and investor-owned utilities. Following selection by Sacramento Municipal Utility District (SMUD) in 2008, Opower's Home Energy Report (HER) programs were launched by twelve other California utilities, including the SCPPA utilities of Burbank, Glendale, and Pasadena. In California, over 15 independent evaluations of our HER programs at municipal and investor-owned utilities have been completed. Each evaluation has verified significant, persistent savings. Given these results, Opower's public power clients have used savings from HER programs towards their AB 2021 targets every year since 2010. In the latest SB 1037/AB 2021 "Energy Efficiency in California's Public Power Sector: A 2016 Status Report", six municipal utilities report using Opower's HER program to reach their energy efficiency target. Since 2013, behavioral savings have been included in the California POU Energy Efficiency Resource Assessment Model (CalEERAM). The usage-based behavior savings in the CalEERAM are based upon the evaluated savings from Opower's HER program.

In addition to helping California public utilities achieve energy efficiency targets, Opower's HER programs have become central to the residential portfolios of the state's investor-owned utilities. In 2010, the California Public Utilities Commission established behavior-based energy efficiency as an eligible energy efficiency resource. In 2012, after positive evaluations of these HER programs, the CPUC then directed the state's IOUs to serve at least 5% of their customers with HER programs. The state's energy efficiency potential and goals studies also began to include behavioral energy efficiency in their potential assessments. Each year, Navigant Consulting's California Energy Efficiency Potential and Goal Study has included more behavioral energy efficiency from HERs in the study. In 2015, Opower's HERs were expected to generate 134.4 GWh of savings per year for the state's IOUs.

## Behavioral Demand Response

With Opower's Behavioral Demand Response (BDR) Program, SCPPA member utilities that deploy AMI can leverage this investment to generate demand savings by using personalized, timely communication with customers. BDR gives customers personalized insights on how to best trim their electricity use on days when the grid is strained or wholesale electricity prices are high. We use behavioral science to provide customers with normative comparisons about their peak usage performance, reinforcing peak-shaving behaviors. These motivating messages are delivered through pre-event notifications and personalized post-event feedback (via e-mail and interactive voice response [IVR] calls), as shown in Figure 3-1. BDR does not rely on costly devices, incentive payments, or price signals, so this solution can be deployed cost effectively across an entire AMI service territory.



**Figure 3-1: Shaving Peak through BDR**

*Purely through timely, personalized communications—not expensive installations or incentives—SCPPA member utilities with AMI can scale peak-shifting outreach across its entire customer base.*

BDR is the perfect complement to a utility's existing opt-in DR programs in that: 1) it can be deployed in a "default" basis to both generate significant peak reduction, and 2) BDR messages can encourage customers to enroll in a utility's other demand response programs. Through this process, BDR reaches the 95% of customers left unengaged by traditional demand response programs, and is a highly complementary component to an effective DR portfolio. BDR can also be used as a strategy to boost EE savings for groups already receiving Home Energy Reports.

SCPPA members can call up to 5 peak events. Opower will provide customers with:

- 1. Pre-season awareness campaign:** Educational materials sent to customers to build awareness about peak events, educate customers on reasons and ways to save and set expectations for program participation
- 2. Pre-event, personalized digital communication:** An e-mail, IVR call, or both before each peak event notifies customers about the event, provides actionable recommendations for reducing usage, and provides context on performance during previous events
- 3. Post-event, personalized digital communication:** An e-mail or IVR call following each event provides customers with feedback on their performance and comparisons to the performance of similar homes. This not only makes customers happier with their utility and peak experience, but it also motivates customers to reduce peak even more during future events through behavioral science techniques (such as showing customers how their peak day behavior compared to similar homes)

Figure 3-2 illustrates examples of pre- and post-event notifications.

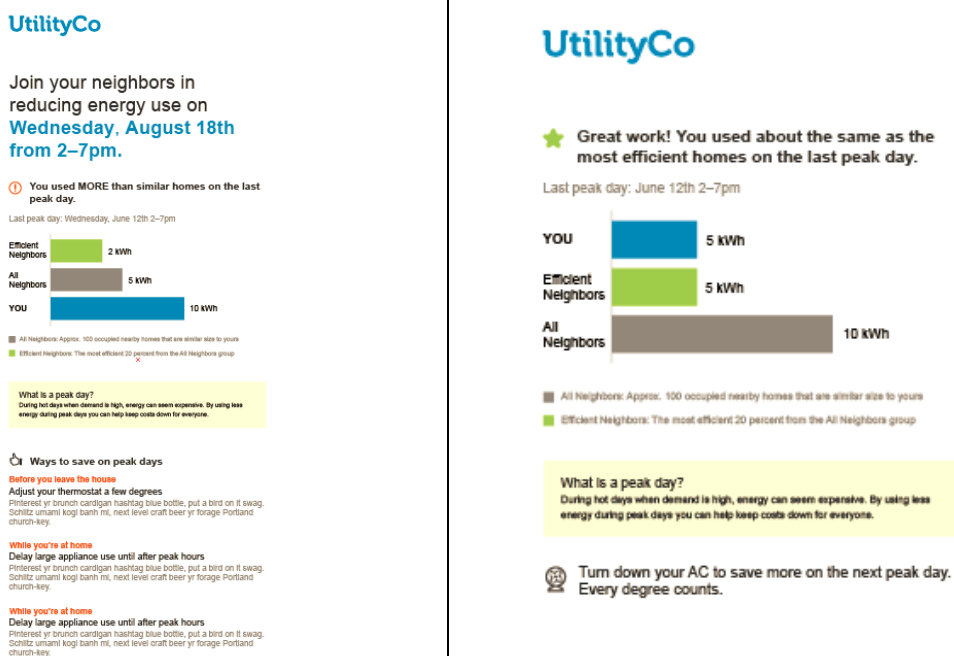


Figure 3-2: Pre- and Post-Peak Day Notification

### 3.3.3 Digital Customer Engagement

#### Customer-facing Web Portal (NextWeb)

Opower's customer-facing Web portal is the central place where SCPPA member's residential customers can access rich data and meaningful insights about their energy use. Customers have access to a variety of visuals that break down their usage and billing data. Personalized analysis and targeted tips guide them toward opportunities to take action. Across our utility deployments, customers consistently find these insights to be actionable and compelling. Up to 73% of visitors to Opower's Web portal take action, such as taking the online audit, opting into paperless billing, or participating in another DSM program.

Powered by Opower's NextWeb framework, SCPPA members are offered a flexible and extensible web solution designed to give customers the seamless digital experience they expect, while allowing the utility to deliver personalized insights and information on its own terms.

The NextWeb platform gives SCPPA members the capacity to:

1. Seamlessly integrate Opower web pages into your website
2. Embed Opower insights and UX into your pages
3. Surface Opower data through APIs

At its core, NextWeb enables robust, scalable, and secure web applications that are easily embedded within the utility's web navigation and authentication frameworks with simple integration to Opower's ecosystem of customer insight APIs.

The NextWeb experience has been created as a library of features, delivered via a modular widget based system. NextWeb's widgets are powered by data and insights from Opower's analytics and automation engines.



The look and feel of each widget is separated from the data services powering the widget. This framework gives us the flexibility to make the small design and text tweaks necessary to meet SCPPA member's design standards. We have a host of out of the box configurations available. If you have a specific need or design request that is not covered by our standard configuration options, Opower's professional service developers can further customize these widgets to meet your design needs.

Several widgets available with NextWeb can be embedded throughout the customer's web experience to make ensure they are getting the right insight in the moments that matter most. For example, our NextWeb platform allows you to embed our bill projection widget into your bill payment pages. And each widget on the NextWeb platform is mobile responsive.

Building widgets is an expensive and time-intensive endeavor for utilities, from the initial build to the continuous updates and improvements. Opower's investment in our updated web platform is spread across all our utility clients and provided to SCPPA members at a fraction of that cost. Plus, limited internal IT team involvement is required to utilize our SaaS solution.

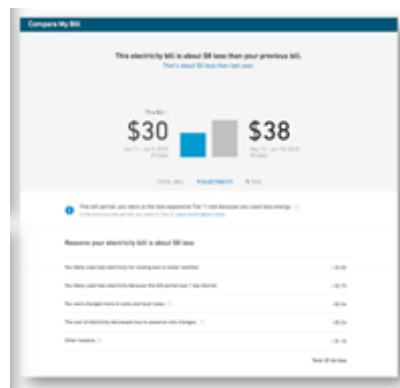
Widgets available or in development include:

### Neighbor Comparison

Display how a customer's energy consumption in a given month compares to that of a similar home.



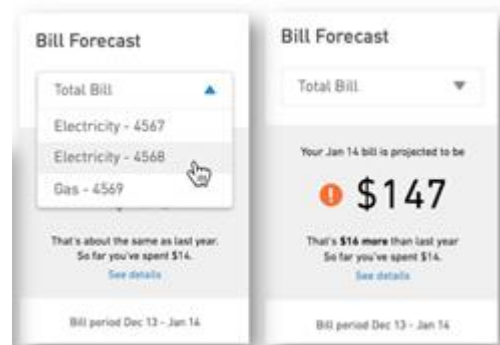
### Bill Comparison



Provides customers with necessary context to compare their current bill to their last bill, or to the corresponding bill from the same time period the previous year.

### Bill Forecast

Shows customers their usage or cost in the current billing period, their projected usage or cost, and their typical usage or cost for the period based on their past usage (AMI required).



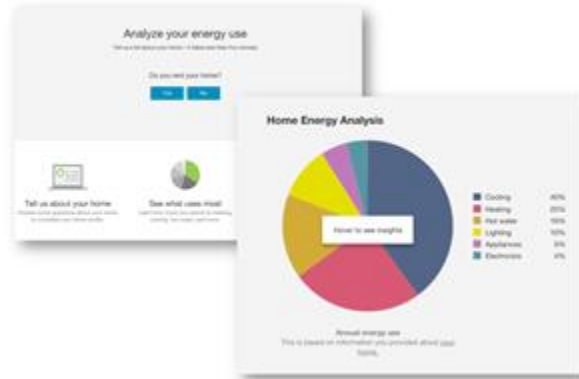
### Data Browser



Interactive insight that allows customers to visualize and explore their energy use trends and costs, and make comparisons to useful benchmarks like weather and neighbor usage.

## Home Energy Analysis

Customizable residential  
online audit, complete with  
detailed disaggregation of  
energy use.



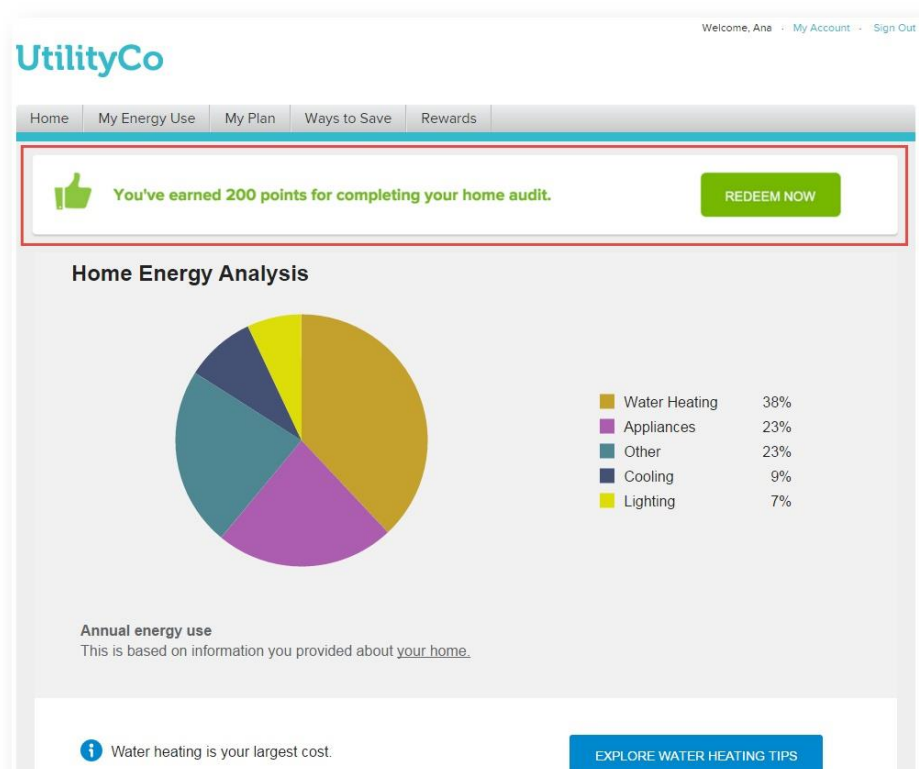
## Energy Savings Tips



Comprehensive library of energy saving tips organized in personalized guides allowing customers to explore the best recommendations for their homes.

## Targeted Web Marketing

Targeted Web Marketing, powered by our partner Optimizely, enables utilities to display web banners to various customer segments on any Opower web page. Banners can also encourage a customer to complete the online energy audit and collect additional household data.



## High Bill Alerts for AMI and non-AMI customers

In other industries, such as telecommunications and banking, customers are accustomed to receiving alerts when there is unusual activity, including high usage. The absence of this feature within the utility industry often leads to bill shock and drives calls to the call center as customers question their bills. According to our research, 40% of customers reported receiving a high bill during the previous 12 months, and most cited this as a source of anxiety. The antidote, of course, is to alert customers before they receive their next higher-than-average bill.

Opower's High Bill Alerts notify customers when they are trending toward a high bill and provide guidance on how they can adjust their energy use before the end of the billing period. They are designed for utility customers with and without smart meters and do not require any additional customer input.

**For non-AMI customers:** For utilities without AMI data, we deliver alerts to customers by applying a proprietary algorithm that considers each customer's historic sensitivity to changes in weather and compares that information to the number of heating and cooling days in the current billing period. Because customers can have different sensitivities to seasonal variations in weather, along with different billing periods, these algorithms run separately for each individual customer. While the messaging in these non-AMI alerts is designed to reflect a lesser degree of certainty, it is still optimized to empower your customers.

**For AMI customers:** When more granular usage data is available, typically from AMI meters, Opower can forecast a customer's bill based on to-date consumption in the billing period. We use a time-series based predictive algorithm, which takes into account current and historical energy use to project energy use for the remainder of the billing period. Our rate engine then analyzes the customer's usage and rate plan to predict the bill amount for the current billing period. This predicted bill amount is compared to the same period of their previous year's usage. When a large discrepancy is detected, then a High Bill Alert is generated and delivered.

Illustrated in Figure 3-3, High Bill Alerts include the following features:

- Insights delivered through email and interactive voice response
- The ability to model and display cost information associated with usage (requires rates modelling work; available for an additional fee)
- Personalized and targeted recommendations as well as promotions of energy-efficiency, demand-response, and dynamic rate programs, services, and rebates—all based on customer characteristics, actions, and time of year
- Messaging that is consistent and synchronized across channels for a seamless customer experience (e.g., customer insights are consistent with data shown on the self-service web and the Bill Advisor customer service (CS) Interface)
- Content and presentation of the communication is configurable to meet the utility's goals

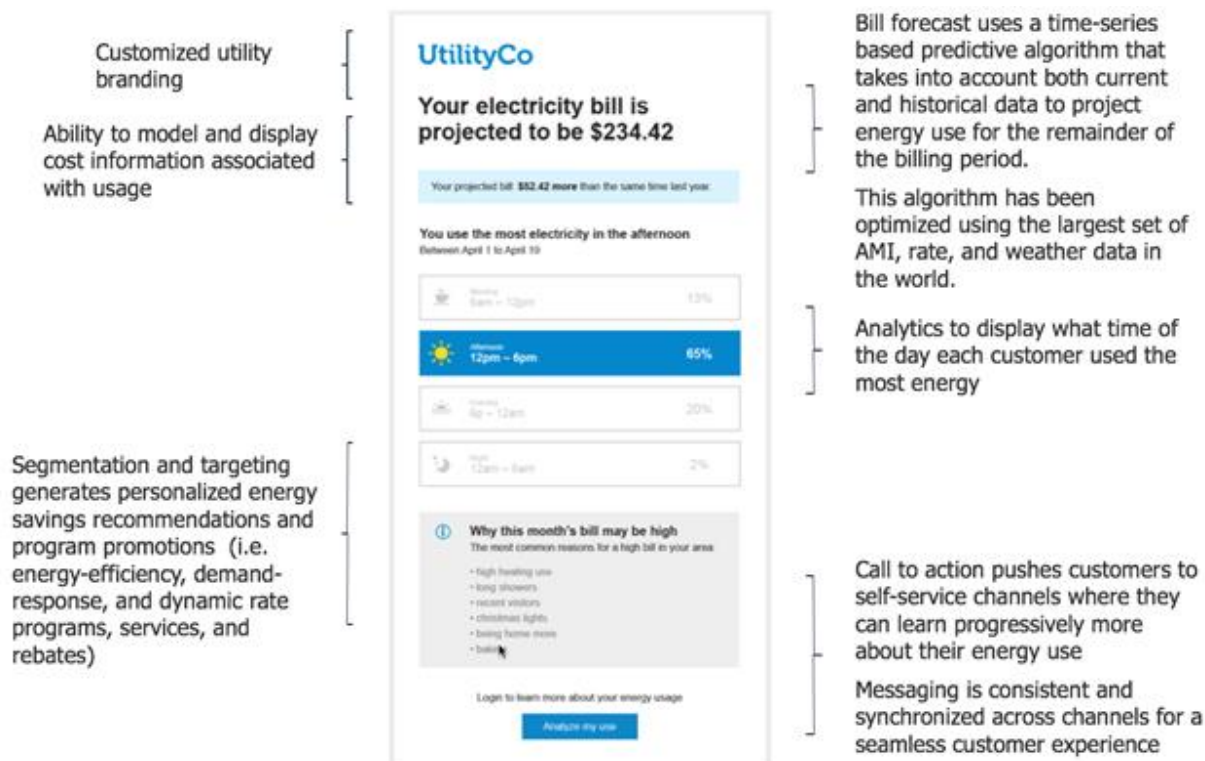
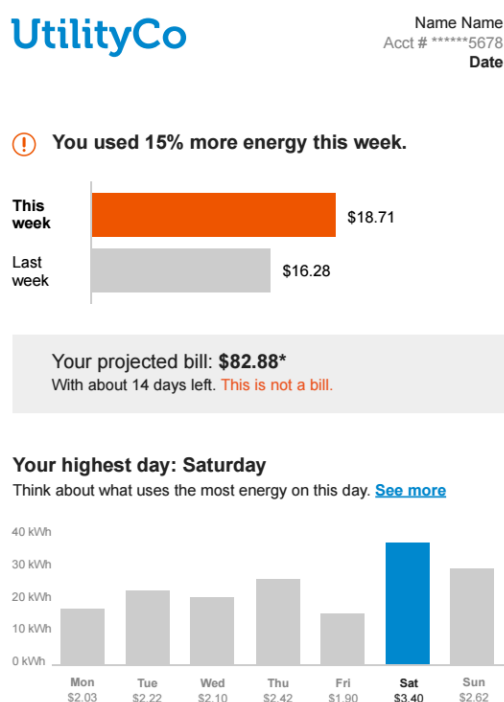


Figure 3-3: Email High Bill Alert

Operating on a massive scale, Opower has sent more secure outbound messages to utility customers than any other software system in the utility industry. Our outbound pipeline delivers over 100 million personalized data-rich communications per year and is designed for personalization at tremendous scale.

## Weekly Energy Updates via email for AMI customers



Weekly Energy Updates are a powerful, low-cost way that utilities can maintain a frequent dialogue with smart metered customers. These emails use AMI data to provide useful usage and billing insights that customers appreciate. They begin by grabbing customers' attention with a projection of their upcoming bill and a comparison of their usage this week against last week. The messages go on to educate customers about their daily usage, specifically highlighting which days see higher usage than others, and provide savings tips chosen specifically for their household. For customers who still want to learn more, the email links to more insights online.

SCPPA members can choose to proactively deliver Weekly Energy Updates to all customers for whom it has email addresses, or allow customers to opt in to receive these emails via the customer web portal.

## Points & Rewards

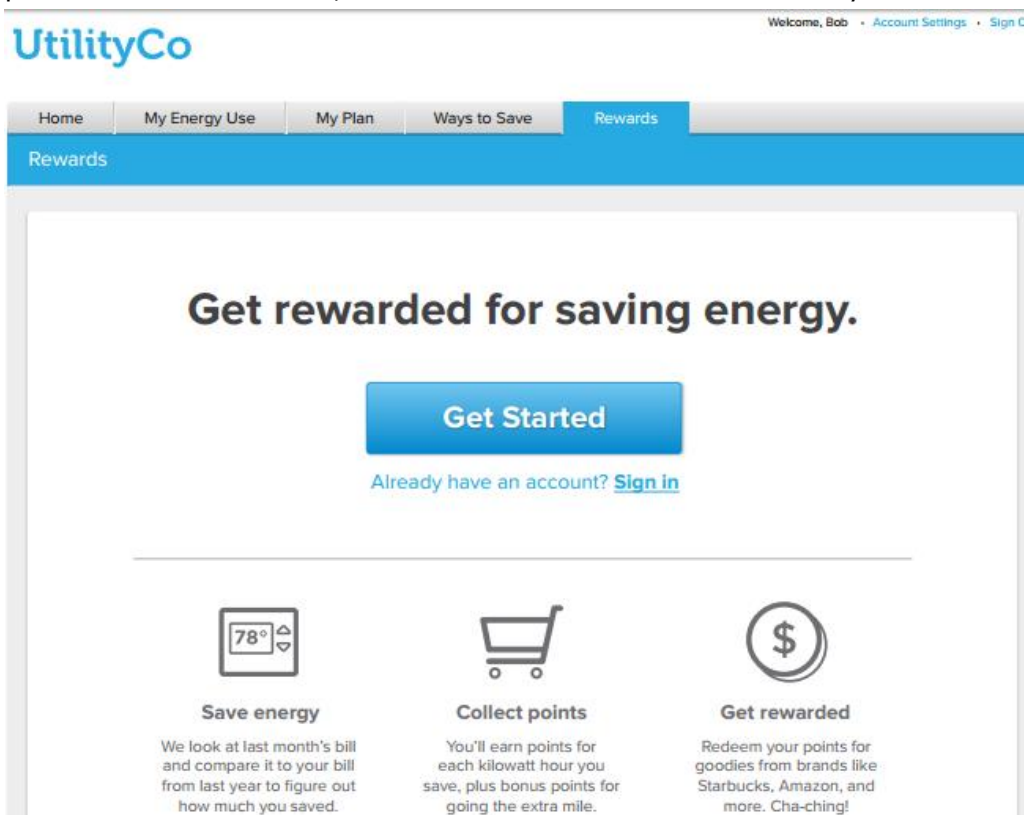
The Opower Points & Rewards program awards points to customers for saving energy and participating in selected programs, and enables them to redeem these points for digital gift cards to certain retailers or to make donations to select charities. The solution has proven to engage customers and to drive high value actions such as completing online audits and sharing e-mail addresses. For example, at National Grid, the Points & Rewards program:

- Increased web portal logins by 900%
- Yielded 54% e-mail open rates and 40% click-through rate
- Boosted online audit completion from 9.2% completion rate to over 36%
- Increased overall satisfaction with their utility by 11%
- Increased perception of their utility as a value provider by 19%

Customers can be made aware of the rewards program through various channels such as the web and digital outbound communications. Customers follow a simple online enrollment process and those with the rewards offering will have access to a rewards tab within the Opower web portal. Customers can monitor their points balance via monthly e-mail statements, or they can proactively log onto the web to view their latest balance. Once enrolled, customers will also receive notification about opportunities to earn more points in several different ways, including:

- Creating an online account to participate in the rewards program and earn a signup bonus
- Achieving a certain amount of energy savings over a specific time frame
- Taking one-time actions determined by the utility, such as an online audit completion

After earning points, customers can visit the online rewards portal tab to redeem their points for digital gift cards to popular retailers, such as Starbucks and Amazon, or donate their points to reputable charities such as Habitat for Humanity. The rewards redemption process is simple: customers choose a reward, provide their e-mail address, and click send. The reward is then instantly sent to their inbox.



### 3.3.4 Customer Service - Bill Advisor

Today, most call center tools make it difficult for representatives to answer high bill questions credibly and effectively, requiring them to flip through many screens to diagnose and remedy. Fewer than 60% of customers who we surveyed said that their last call experience was pleasant. Only 38% reported that their most recent call featured any discussion or advice about bill savings and energy efficiency.

Opower's Customer Service - Bill Advisor tool (Figure 3-4) can change this dynamic. This tool arms CSRs with a single, easy-to-use interface that allows them to quickly respond to customer inquiries, keep call times down, enable first-call resolution, and enhance customer satisfaction. The tool improves the customer experience and helps reduce the average handle time by providing CSRs with customer-specific energy usage and billing insights. Specific features include:

- Single easy-to-use page that pulls from multiple utility and third-party data sources to generate personalized insights to help CSRs diagnose high bill situations
- Access to a set of personalized energy saving tips and program promotions to help customers manage their energy use and prevent future high bills
- Ability for CSRs to collect email addresses and enroll customers in proactive communications that will likely reduce future call volumes.
- Consistent messaging that is synchronized across channels (HERs, Web, Alerts) for a seamless customer experience

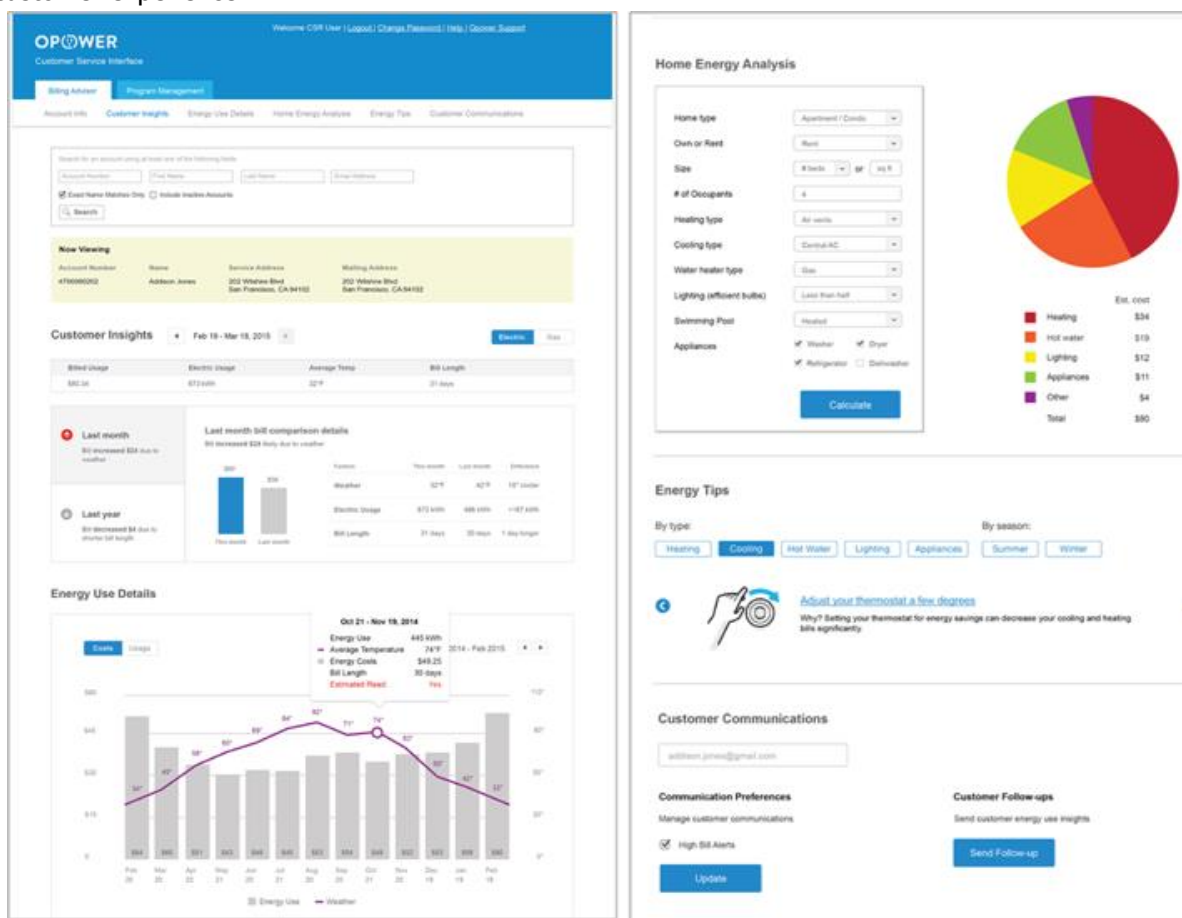


Figure 3-4: Customer Service - Bill Advisor tool for billing-related inquiries

Puget Sound Energy (PSE) launched Customer Service - Bill Advisor in 2015. PSE CSRs are benefitting from improved call center tools to more quickly and accurately answer customers' questions and provide tailored advice about taking energy efficient actions. Early results are promising, showing an average call handle time reduction of 40 seconds for a select number of common CSR tasks. PSE has also been encouraged to find that 7% of customers who were supported by the tool subsequently became users of the utility's energy management web portal.

### 3.3.5 Customer Education Reports

#### Online Rate Analysis Tool

Customers have many questions when utility pricing structures change, whether that's a rate increase or the implementation of variable pricing. In either case, utilities benefit when they can give their customers proactive information to learn about these changes and intuitive tools to model their impacts. By letting customers explore the new rates and seeing how small adjustments can lower their bills, SCPPA utilities can help their customers answer questions online using Opower's "Rate Analysis Tool."

The tool is designed with simplicity in mind. Customers are first shown a list of available rates for which they are eligible (Figure 3-5). The list of rates includes pre-calculated cost estimates, which the rate engine bases on the customer's historic energy usage.

If the utility is deploying variable rates, Opower understands that customers may not easily see an inherent savings potential. Customers often ask three questions:

1. What rate options do I have?
2. Which rate is best based on my historic energy usage?
3. How can I adjust my usage to take advantage of a new rate?

Customers can answer their questions by using the Rate Analysis Tool to:

- View their existing rate and learn about new rates by reading brief summaries and detailed information about each rate
  - This can reduce the number of lengthy calls from customers
- Project their annual costs under each rate
  - Projecting future costs under different rates requires Opower to incorporate each rate structure into our calculation algorithms. This "rate modelling" service is available for an additional fee
- Learn how to enroll in new residential rates

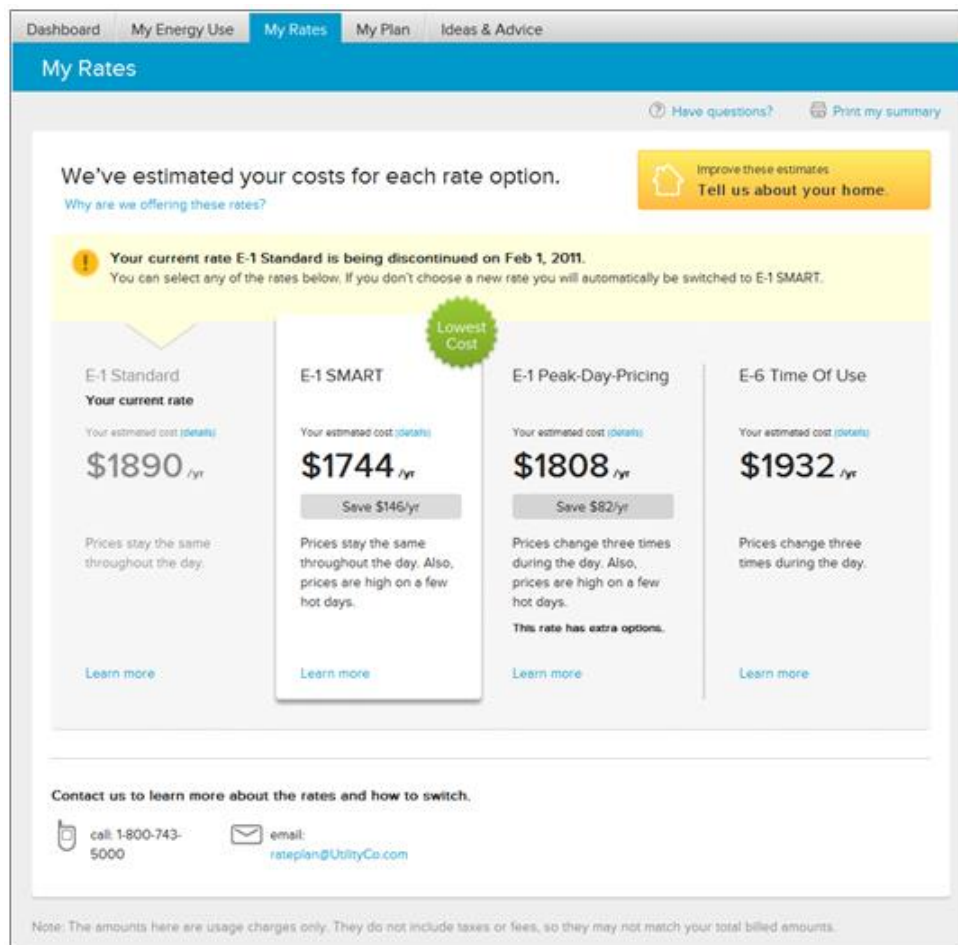


Figure 3-5: Opower's online Rate Analysis Tool

## Rate Education Reports

SCPPA members can build customer awareness and enthusiasm around dynamic rates with Rate Education Reports (RERs) which can be used to notify customers of new default rates or encourage customers to adopt new rates if the utility is running an opt-in campaign. To support outreach and education goals for TOU rates, Opower designed the Rate Education Report with the primary goal being to demonstrate the benefits of TOU rates to customers. Rate Education Reports can also be used to educate customers about rate plan changes absent TOU rates.

Leveraging the data-rich rate analysis generated by our rates engine, these personalized reports will communicate the impact of a rate change to customers using historical data while also providing energy savings tips relevant to new rate structures. In particular, Opower compares costs for the lowest-usage month, highest-usage month, and annual usage to show how a customer's bill changes on a dynamic rate. Notably, report content is specifically tailored to address the different experience anticipated for each household with a rate change, accounting for both structural winners and losers in a mandatory TOU-rate migration. Each report includes:

- Education about the rate options available to each customer
- Individualized comparisons of a customer's bill under different rates based on the customer's historic and current energy use patterns derived from AMI interval data, showing them their energy use in the context of alternative rate structures

- Call to action to enroll in TOU rates if applicable and a marketing module for additional utility products and services that are ideal for this customer

Typically, we deliver these Reports as needed in advance of imminent rate changes, in coordination with the utility's broader dynamic marketing strategy.

The front and back page of a sample RER are shown below. Opower and the utility can work together to customize the RER to best serve their effort to educate and enroll customers in dynamic pricing.

**Your Peak Event Pricing Rate Comparison**

Report ID: 0029400789

For your service at:  
555 MAIN STREET  
ANYTOWN, ST 54321

Based on data through 07/01/18

Log into your UtilityCo account to explore your Peak Event Pricing options.

[UtilityCo.com/peakeventpricing](http://UtilityCo.com/peakeventpricing)

DOB: SMITH  
555 MAIN STREET  
ANYTOWN, ST 54321

06/01/18 04:15

Peak Event Pricing provides a risk-free opportunity to save on your energy bills. Take advantage of our Bill Protection guarantee and maximize your savings.

**Maximizing your savings with Peak Event Pricing is as easy as 1-2-3:**

1. Enroll in Peak Event Pricing and set up your alert preferences in your UtilityCo account.
2. Make small changes in your home during Peak Event Pricing Days to lower use.
3. Earn credits and save on your energy bill.

**Why should I move to Peak Event Pricing?**

Peak Event Pricing customers can earn credits during all summer peak and part peak times and are subject to higher priced surcharges during Peak Event Pricing hours. By lowering your use during these times, you can save on your energy bills.

UtilityCo is here to help with your energy decisions. If you are considering participating in Peak Event Pricing, use the contact information below.

Make your decision and find additional savings tips.

[UtilityCo.com/peakeventpricing](http://UtilityCo.com/peakeventpricing)  
1-800-555-1234

Flip over for your detailed monthly bill analysis.

**Your guide to Peak Event Pricing**

**How might Peak Event Pricing affect my bill?**

Here's what your electric bills would have looked like last year on Peak Event Pricing. Peak Event Pricing Days typically occur during the summer season, from May through October.

	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	Annual Total
Current Rate	\$100	\$110	\$445	\$400	\$725	\$210	\$800	\$145	\$750	\$300	\$100	\$400	\$4,725
Peak Event Pricing	\$100	\$400	\$425	\$445	\$775	\$240	\$175	\$145	\$145	\$445	\$100	\$100	\$4,680

1. This estimate is based on last year's energy use and a total of 12 Peak Event Pricing Days, beginning as of May 1, 2016. Values only reflect past use and assumed to be future savings. They are not a guarantee. Peak Event Pricing will vary based on your future energy use, rates, time of day and the actual number of annual Peak Event Pricing Days. Small changes in energy use may be necessary to realize savings.

**What if I end up with higher bills on Peak Event Pricing?**

**Bill Protection lets you try Peak Event Pricing risk-free for a full year.** With Bill Protection, your costs for the first year on Peak Event Pricing will be compared to what your costs would have been under your current time-of-use rate plan. If you paid more on Peak Event Pricing, you will automatically receive a bill credit for the difference.

**What steps can my home take to lower energy use on Peak Event Pricing Days?**

- Set your thermostat to 78° for cooling in the summer.
- Close curtains, shades and blinds when your home is unoccupied.
- Select ENERGY STAR® models when purchasing appliances.

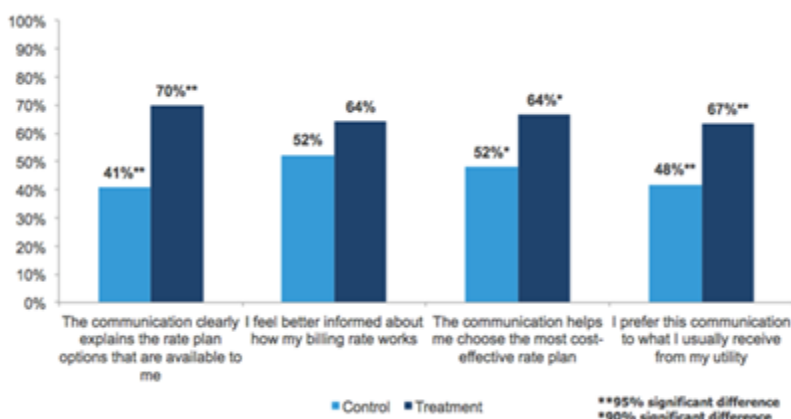
Learn more and enroll: [UtilityCo.com/peakeventpricing](http://UtilityCo.com/peakeventpricing)  
1-800-555-1234

UtilityCo

UtilityCo.com/peakeventpricing | 1-800-555-1234 | peakeventpricing@utilityco.com

Runs on OPOWER®

A recent Opower experiment proved that these reports convey new rate plans to utility customers better than typical utility mailings, as shown below.



## Electric Quality and Reliability Reports

SCPPA member utilities can communicate their commitment to reliable service and publicize potential grid improvement investments by delivering annual reliability performance reports, illustrated below, to customers. Providing this level of transparency can deliver measurable impacts on customer satisfaction and serves as an easy way to garner support for upcoming infrastructure projects.



## 3.3.6 Customer Engagement Partner Solutions

### Web portal for SMB and C&I customers via FirstFuel

#### Opower and FirstFuel: Customer Engagement Partnership

Opower and FirstFuel have partnered to offer a unified digital engagement solution that is specifically tailored to each customer class. The unique solution caters to diverse customers' needs and supports cohesive brand experience with minimal technological effort and disruptions.

Since the formation of FirstFuel and Opower's strategic partnership in 2013, the two companies are successfully deploying digital engagement platforms to all customer classes at leading utilities including SCE, PG&E, and SMUD. The FirstFuel/Opower partnership has become the utility industry's leading customer engagement platform across customer bases. Three years of tight collaboration has led to a seamless, integrated, single-user customer engagement experience.

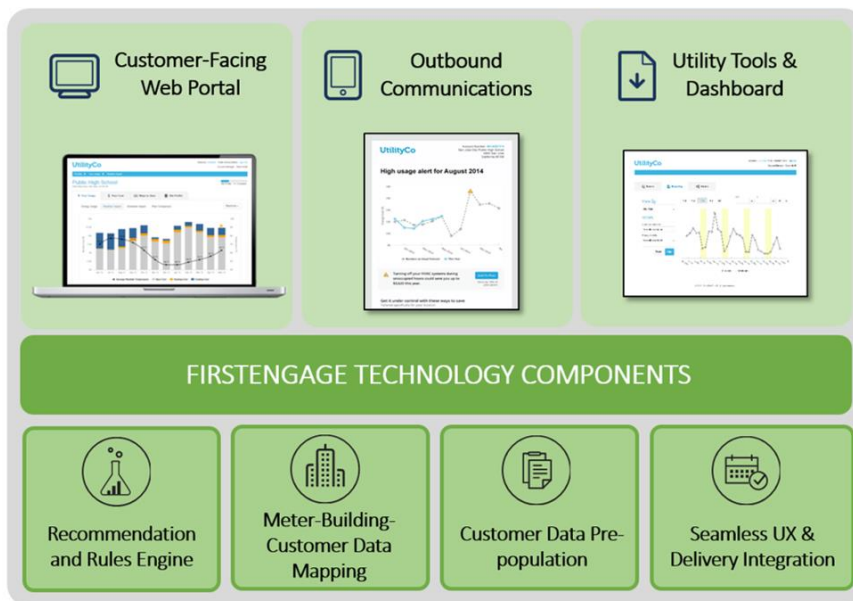
FirstFuel and Opower have aligned business, technical and product standards, including:

- Engagement approaches across heterogeneous customer classes: Opower and FirstFuel bring the best of behavioral science, building science, and data science to engage each customer class differently (based on years of empirical research, testing, and industry expertise). This leads to a world-class experience for every customer.
- Consistent UI/UX look and feel for all customers: All digital engagement components from both Opower and FirstFuel are white-labeled, tab-integrated with the utility's website, and designed to be web and mobile responsive.
- Single secure data feed: All files are processed through Opower to mitigate ongoing vendor management and data integration efforts.
- Single sign-on authentication: FirstFuel and Opower use SAML 2.0 as the standard for exchanging authentication and authorization data and supports two-way Single Sign On.
- Simple project management and Single SLA for execution support: Opower acts as primary contact, but FirstFuel staff is readily available. Any business changes can easily be communicated and enforced across the deployments. Such executive governance best practices enable quick resolution of any deployment issues.
- Complementary product and functionality: FirstFuel and Opower's deployment and product teams stay aligned on customer deployments and roadmaps, avoiding business costs and challenges that can arise from varied engagement methods.

## FirstEngage Product Overview

FirstEngage is FirstFuel's digital, customer self-service product for business customers. It leverages both interval and monthly meter data, easily scaling across entire business customer portfolios to drive greater customer engagement and satisfaction. The California Municipal Utilities Association has stressed that "customers are ultimately responsible for achieving savings from energy efficiency." By delivering highly personalized, building-specific energy insights and savings tips to business customers, FirstEngage drives awareness, engagement, and action throughout a progressive customer journey and adds a critical avenue in helping SCPPA members meet SB 350 goals with existing resources.

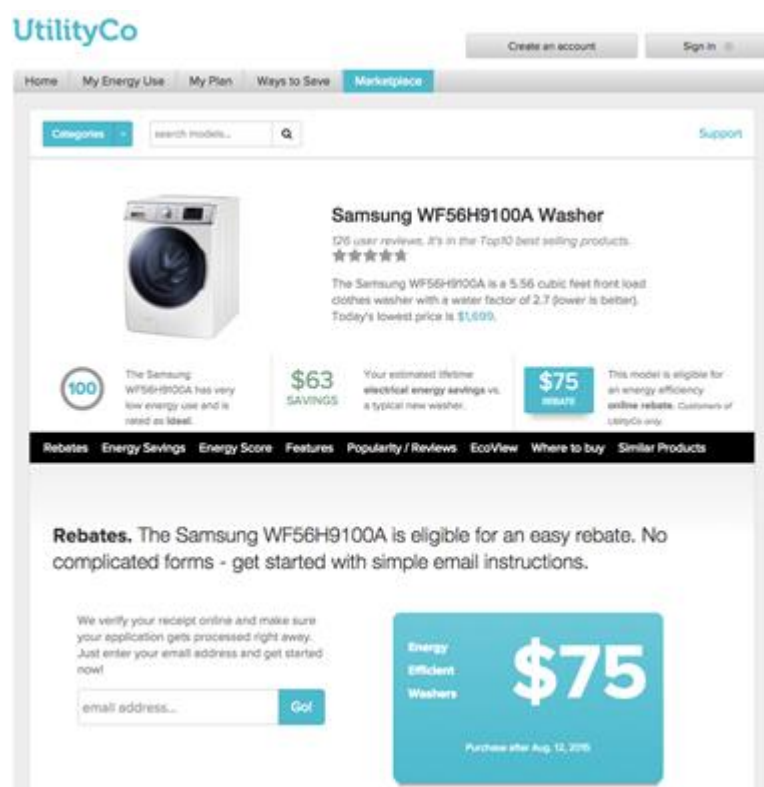
FirstEngage is designed to deliver intuitive customer intelligence and a logical self-service experience for business customers. Through its unique design, FirstEngage will help SCPPA members improve customer awareness and engagement, decrease reliance on CSRs and accelerate program participation, all while reducing the cost to serve. These value drivers are delivered across three core components of FirstEngage: (1) customer-facing web portal, (2) outbound customer communications, and (3) utility tools and dashboard.



The key capabilities of FirstEngage support major utility customer care initiatives and translate into direct business value. The business value drivers below demonstrate how FirstEngage can enhance performance across EE, marketing, customer service, and customer care initiatives.

- **Drive EE Program Uplift:** A new inbound channel drives incremental lift in utility EE programs through customer self-selection. Deployment across business customer territories helps reach more customers and secure participation from a wider set of participants cost-effectively.
- **Improve Customer Sentiment:** FirstEngage delivers a holistic customer experience through sophisticated tools and insights, establishing utilities as trusted advisors to business customers and elevating key indicators of customer sentiment and satisfaction.
- **Optimize Marketing Channels:** Additional intelligence about each customer drives more effective results from existing marketing channels, including outbound telemarketing, e-mail, bill inserts and mailers. Customer segmentation and cohort-based marketing campaigns can deliver better performance from every marketing dollar spent.
- **Reduce Cost to Serve:** Highly engaging digital experiences encourage more customers to self-serve and utilize a broader set of tools, such as e-billing. Customer service representatives (CSRs) have access to resources that enhance their effectiveness, which directly improves key call center metrics, including call-handling time and first call resolution.

## Marketplace via Enevee



Once customers have decided to purchase a new product or appliance, 80% turn to their utility first for advice on potential energy savings.

Traditionally, customers have been met with limited information. Opower's Marketplace solution, through our partnership with Enevee, transforms this experience by giving customers access to an e-commerce platform that aggregates information from over 600,000 products and services. The Marketplace helps utilities raise demand-side management (DSM) participation rates through closed-loop marketing and provides utilities with a new opportunity establish themselves as trusted energy advisors.

When customers are looking for information on product efficiency and rebates, Marketplace provides insights that can influence those downstream decisions. This positions utilities as advisors at the early stage of the buying process and also makes the

marketplace an attractive place for manufacturers and retailers to allocate advertising dollars to influence consumer choices. By driving high volumes of traffic, utilities can open up advertising revenue streams by charging for advertising space on the Marketplace.

Marketplace is currently deployed to over 8 million households via utilities such as Pacific Gas & Electric, Los Angeles Department of Water and Power, United Illuminating, and Eversource. Opower and Enevee are deploying integrated solutions for clients such as Consolidated Edison and San Diego Gas & Electric.

Opower's strategic partnership with Enervue facilitates a seamless integration of Marketplace into Opower's behavioral engagement programs for utilities. This integration includes:

- Tab integration of the Marketplace digital experience into the Opower-supported utility web portal
- Tailored marketing modules in Opower paper and email Home Energy Reports, High Bill Alerts, and ad hoc emails which promote customer benefits of the Marketplace as well as incentivized products
- Energy efficiency tips within Opower's Home Energy Analysis tool that suggest more efficient Marketplace appliances and products based on customer's usage disaggregation

## 4. Fees

Based on our long-standing partnership with SCPPA, Opower is pleased to provide a competitive pricing structure by which SCPPA member utilities are able to tailor an Opower program to meet their unique objectives. Figure 4-1 describes Opower's pricing menu in response to SCPPA's RFP. This pricing is valid until December 31, 2016.

SCPPA Opower Pricing Menu						
CUSTOMER ENGAGEMENT CORE PLATFORM	What's included: » Analytics Engine: Manage data integration, data storage, Inside Opower reporting capabilities and Data Exploration tool: In essence, the power to turn raw data into robust insights » Program Management: Account Team, Campaigns, and Customer Surveys » Automation Engine: Segmentation and targeting of customers; Content layout for all communications » Call Center Portal - Opower Program Information for Call Center Representatives					Annual Fee: \$0.50-\$1.25/HH Setup (one-time): \$50k - \$100k
Customer Solutions Setup Fees: \$50k - \$400k (variable depending on specific solutions selected)						
Select Customer Solutions (annual price per solution)						
BEHAVIORAL ENERGY EFFICIENCY	BEHAVIORAL DEMAND RESPONSE	DIGITAL CUSTOMER ENGAGEMENT	CUSTOMER SERVICE - BILL ADVISOR	CUSTOMER EDUCATION REPORTS	MARKETPLACE (via Enervee)	COMMERCIAL ENGAGEMENT (via FirstFuel)
What's included: » Home Energy Reporting (paper and email) » Targeted EE Campaigns and marketing promotions » Tip Editing Functionality » Customized program design » Forecasting and Results Reporting	What's included: » Welcome letter » Pre- and Post-Event Notifications » Digital Pre and Post-Event Reporting for up to 5 events » Manage events via Customer Service Interface	What's included: » Website (Home Energy Analysis, Ways to Save, Bill Comparison /Forecast, Neighbor Comparison) » Targeted Marketing » Points & Rewards » High Bill Alerts » Weekly Energy Update Emails	What's included: » Customer Service Interface with personalized insights for call center reps to diagnose high bill calls » Bill usage with weather » Program promotion » Follow-up email	What's included: » AMI welcome experience » Seasonal Readiness Letter » Reliability Report » Rate Education Report <i>*some solutions require rates modeling or AMI meters</i>	What's Included: » Storefront » Online ads » Product recommendation engine » Rebate processing	FirstEngage: » Meter Analytics » Building Analytics » Data Mapping » Recommendation Engine  Optional Solutions: » Alerts » Business Energy Reports » Rates Engine
\$5.00/HH	\$3.50/HH	\$0.50-\$1.80/HH	\$0.30/HH	\$0.50-\$0.75/HH	Priced by Partner	Priced by Partner
Print & Mail Fees (where applicable)						
\$0.90 / Report	N/A			\$0.90 / Report	N/A	

Figure 4-1: SCPPA Opower Pricing Menu

## Core Platform License

All Opower Customer Solutions require a Customer Engagement Core Platform license as shown in the top portion of Figure 4-1. The Opower Customer Engagement Core Platform License includes ongoing account management for each SCPPA member utility, along with a number of capabilities that are described in Section 3.3.1. The annual price per household (\$/HH) for Customer Engagement Core Platform (\$0.50 - \$1.25 per household (HH)) and Setup (\$50,000 - \$100,000) varies by size of utility, the size of the overall program, and complexity of data integration.

## Solutions License

With a licensed and integrated Customer Engagement Core Platform, SCPPA member utilities are able to select from a number of Opower Customer Solutions to meet their respective objectives. Each of the available Customer Solutions, along with partner-enabled Customer Solutions such as Marketplace and Commercial Engagement, are shown in the bottom half of Figure 4-1. See Section 3.2 "Solution Summary" and Section 3.3 "Solution Details" for details about each of these Customer Solutions.

The annual price per household (\$/HH) for each Opower Customer Solution varies as shown in Figure 4-1. Setup Fees vary by which Customer Solution is licensed, the number of Customer Solutions licensed and the size of the overall program. The one-time Setup Fees for Customer Solutions vary from \$50,000 to \$400,000 and are in addition to the Customer Engagement Platform setup fee. The Behavioral Energy Efficiency and Customer Education Reports solutions have an additional \$0.90 price per report for print and mail costs. Pricing for Opower's partner-enabled solutions will be offered directly to SCPPA by our respective partners Enervue (Marketplace) and FirstFuel (Commercial Customer Engagement).

Opower offers **strategic discounts to the prices listed above** for utilities that wish to license multiple Customer Solutions, engage in a multi-year relationship, are strategic partners of Opower, or otherwise qualify for discounts. Opower will work with each SCPPA member utility to understand their objectives, establish a portfolio of Customer Solutions to meet the objectives, and arrive at a corresponding strategic discounted price. We look forward to additional pricing and scoping discussions.

## 5. Experience

### A. Company Experience

Describe your firm's experience as may be applicable to this RFP including but not limited to: experience working with or for publicly-owned utilities providing electric and water services and/or with utilities of similar size to SCPPA Members; your organizational structure, management qualifications; and other contract related qualifications, including number of years firm has been in business.

Founded in 2007 and publicly traded on the NYSE under the stock ticker symbol OPWR, Opower is recognized as the industry-leading company in energy management. Most recently, Navigant Research awarded Opower the top ranking in its Leaderboard Report of Home Energy Management solutions for the second consecutive time<sup>2</sup>.

Opower exists to help energy providers succeed. We have spent nearly 10 years building the utility industry's leading customer engagement platform. Our software is 100-percent dedicated to the customer side of the business, and our applications are helping 100 utilities and energy retailers enhance the experiences they deliver to homes and businesses. On behalf of our clients, we currently serve more than 50 million customers. This number is growing as existing clients expand their current programs and new clients embrace our platform.

We work with a number of publicly-owned utilities, including SCPPA members and others of similar size, including:

- Alameda Municipal Power
- Burbank Water and Power
- City of Loveland Water and Power
- City of Roseville
- Clark Public Utilities
- CPS Energy
- Fort Collins Utilities
- Glendale Water and Power
- Pasadena Water and Power
- Rochester Public Utilities
- Sacramento Municipal Utility District
- Seattle City Light

### Organizational Structure & Management Qualifications



Dan Yates,  
CEO & Founder



Alex Laskey,  
President & Founder



Thomas Kramer,  
Chief Financial Officer



Michael Sachse,  
Executive Vice  
President & Chief  
Marketing Officer



Ed Peters,  
Chief Technology  
Officer



Jeremy Kirsch,  
Executive Vice  
President & General  
Manager, Worldwide  
Sales



Marcella Butler,  
Senior Vice President  
of People



Rick Juneja,  
Senior Vice President,  
Client Success

<sup>2</sup> <https://www.navigantresearch.com/research/navigant-research-leaderboard-report-home-energy-management>

*Daniel Yates, CEO & Founder*

As CEO, Dan Yates is responsible for the vision, strategy, and leadership of Opower. Under his leadership, Opower has become one of the fastest growing enterprise SaaS companies in the world: Opower has been cited as an example of innovation and success by President Barack Obama and Prime Minister David Cameron. Dan has been recognized as one of the leading SaaS CEOs through honors such as Washington Business Journal's Power 100, Ernst & Young's Entrepreneur of the Year®, Fortune's "40 under 40," and Washingtonian's "Tech Titans." Through his work at Opower, he is able to marry his love of the environment with his passion for building world-class software products. Dan co-founded Opower with Alex Laskey in 2007. Prior to Opower, he was founder and CEO of Edusoft, an educational software company that provided assessment platforms to US public school districts. He sold the 150-person, \$20M company to publisher Houghton Mifflin in 2004. Dan received his BA in Computer Science, summa cum laude, Phi Beta Kappa, from Harvard.

*Alex Laskey, President & Founder*

Alex Laskey is the President and Founder of Opower, the global leader in cloud-based software for the utility industry. Opower's technology platform combines behavioral science, data management, and insightful analytics to transform the way utilities relate to their customers. Under Laskey's leadership, Opower has grown from a two-person startup to a publicly-traded company whose software is used by more than half of the largest electric and gas utilities in the world. Alex leads all external relations for Opower, frequently speaking on topics ranging from innovation in software to the evolving utility business model. Recently, Alex delivered a keynote presentation at TED's annual conference, was listed on Fortune's 40 under 40 list and was a Technology Pioneer at the World Economic Forum in Davos. Alex serves on the board of the Conservation Lands Foundation and received his BA from Harvard College.

*Thomas Kramer, Chief Financial Officer*

Thomas Kramer is responsible for financial management and administrative stewardship at Opower. Previously, he was CFO and co-founder at Cvent, the largest cloud based event-management technology company in the US, where he helped grow the organization from zero to profitability and 850 employees, and where he led the largest private software financing round in the US since 2007. Prior to joining Cvent, Thomas was a consultant at Boston Consulting Group—where he developed e-commerce strategies and management analyses for North American corporations—and a senior consultant at Accenture. Thomas was named one of the 10 best CFOs in Washington, DC by SmartCEO in 2011, and CFO of the year by Washington Business Journal in 2014. He earned a Master's at the Norwegian School of Economics, and an MBA at Harvard Business School, with a focus on strategy and finance. While at HBS, Thomas co-authored the Amazon e-commerce strategy case study, which went on to become part of the school's core curriculum.

*Michael Sachse, Executive Vice President & Chief Marketing Officer*

Michael Sachse is the global head of marketing, business development, and regulatory affairs at Opower. In this role, he leads the teams responsible for developing Opower's strategy and marketing, building partnerships, and engaging with government stakeholders. Previously, Michael guided Opower through a successful IPO as its general counsel. Prior to joining Opower, Michael ran communications for a successful congressional campaign, and practiced as a litigator in New York. Michael received his JD from Harvard Law School and his BA from Amherst College.

*Ed Peters, Chief Technology Officer*

Ed Peters has over 10 years of experience in leading technology teams to build scalable, reliable and highly performant software systems. He's a passionate problem-solver and a relentless advocate for pragmatic development practices. His fingers itch if he goes more than a week without coding something. Prior to joining Opower, he served as a software architect at AddThis (formerly Clearspring), where he worked on the first generation of their industry-leading advertising analytics platform. Before that, he was a veteran of Software AG, where he led the team that designed and built their industry-leading business process management platform. Ed has an MS in Computer Science from the University of Illinois at Urbana-Champaign, and a BA in Economics from the University of Virginia.

*Jeremy Kirsch, Executive Vice President and General Manager, Worldwide Sales*

Jeremy Kirsch has been leading high-performance teams, working with customers and partners, and building businesses for over 12 years. Prior to joining Opower, he was an executive in the Viisage Secure Credentialing business at L-1 Identity Solutions (NYSE:ID). While there, Jeremy held a series of positions including VP Sales and Business Development and VP Marketing and Strategy. Jeremy's team was critical in the division's rapid growth to more than \$100M in annual revenue through expanded direct sales. Jeremy has also held a leadership role at Art Technology Group (NASDAQ: ARTG), and was a founder of InvestTree.com: both companies developed Jeremy's experience in bringing new products and services to the market. Earlier in his career, Jeremy was a Special Operations Officer in the U.S. Navy, where he served as a member of elite Mobile Diving and Salvage Unit Two. He completed his service with the rank of Lieutenant. Jeremy received his BA in Economics from Stanford University and his MBA from the MIT Sloan School of Management.

*Marcella Butler, Senior Vice President of People*

As the global head of Opower's People organization, Marcella Butler leads the company's Human Resources, Recruiting, Rewards, and Leadership & Development teams. As a member of the management team, she helps shape Opower's continued growth strategy in the U.S. and abroad. Marcella brings more than 25 years of experience in human resources, finance, and operations to Opower. She previously held senior management positions at Google, Alliance Bernstein, and Pershing Square Capital. Most recently, Marcella worked as Chief Administrative Officer at Wagner Oil Company, where she was responsible for HR, Recruiting, IT, Purchasing, and Real Estate. She began her career in positions with Morgan Stanley and McKinsey & Company. Marcella received her BA summa cum laude from the University of North Carolina at Chapel Hill and her Master's in Public Policy from Harvard University's Kennedy School of Government.

*Rick Juneja, Senior Vice President, Client Success*

Rick Juneja is the global head of Opower's customer success organization, a team of account managers, project managers and implementation and operations professionals. In this role, Rick, who joined Opower in 2010, leads the teams responsible for the successful implementation of and ongoing support for Opower's products & services for our customers worldwide. Previously, Rick built Opower's global team of account managers across five Opower offices and has managed the implementations for some of Opower's largest and most complex accounts. Rick has held technology roles at Accenture and Amazon.com. Prior to Opower, Rick was a Senior Director at Alvarez & Marsal, where he specialized in IT & Operations for private-equity sponsored portfolio companies. Rick holds a MA in Chemistry, cum laude and Phi Beta Kappa, from Miami University (Ohio) and an MBA from the Tuck School of Business at Dartmouth.

*Opower is headquartered in Arlington, Virginia with additional offices in San Francisco, London, Odessa, and Singapore.*

## B. Key Employees

Specify key employees and describe their qualifications, experience and duties related to this RFP, including the office location(s) where work will be performed, in addition to the physical street address referenced above.

Opower's assigned Sales Representative will act as the primary liaison to address any client business needs during the account relationship. The assignment of key personnel for project implementation will depend on the timing of contracting, expected implementation duration, and the solution line(s) selected by SCPPA member utilities. In general, SCPPA and its member utilities can expect to receive dedicated support from a number of key Opower professionals, in the following roles:

<b>Client Success Manager</b>	Primary point of contact during implementation and post-launch. Responsible for program scope, marketing decisions, customer service training, project scheduling, resource management, technical dependency management, engineering coordination and test coordination. Post-launch responsibilities include program performance and optimization, reporting, and strategic planning.
<b>Implementation Engineering Lead</b>	Technical point of contact during implementation. Responsible for data integration, file transfer automation, and platform configuration.
<b>Implementation Quality Assurance Engineer</b>	Testing during implementation. Responsible for all quality assurance activities and execution of user acceptance test, data integration, file transfer automation, and platform configuration.

Opower is headquartered in Arlington, Virginia. Client support for SCPPA member utilities will continue to be coordinated from Opower's West Coast office, located at 680 Folsom Street, 3rd Floor, San Francisco, CA 94107.

## C. Commitment Statement

Provide a commitment statement for the retention and use of key employees as proposed, their availability to initiate and sustain the proposal, as well as planned supplemental employees if key personnel are not available to assure project delivery.

Opower partners with our utility clients to help them better connect with their customers. As such, customer service and support is key to our work and our joint success on projects. Our implementations rely heavily on dedicated resources at both the utility and at Opower. Opower will assign an Engagement Manager and Technical Project Manager to each client for the duration of the project, in addition to ongoing assistance provided by the Client Support team. We are dedicated to maintaining consistent key points of contact throughout the project. We reserve the right, however, to substitute similarly qualified project resources if necessary due to unforeseen circumstances.

Opower's client service model is coupled closely to our SaaS model—it is designed to scale efficiently with each new utility client. We deliver products and services for fixed fees according to a pre-defined Scope of Work. If assigned staff determines that there is a need for surge support or additional capabilities, then they are empowered to draw upon other corporate resources to meet our obligations to our customers. This approach ensures that client relationships, client-specific knowledge, and unique aspects of the project are maintained throughout the life of the project, and allows Opower to deliver exceptional client service. This model is in place across our entire portfolio.

## D. Subcontractors

State whether Respondent will use subcontractors to perform services pursuant to the contract. Should the use of subcontractors be offered, the Respondent shall provide the same assurances of competence for the subcontractor, plus the demonstrated ability to manage and supervise the subcontracted work. Subcontractors shall not be allowed to further subcontract with others for work. The provisions of any contract resulting from this RFP shall apply to all subcontractors in the same manner as to the Respondent.

Opower has contracts in place with certain vendors to provide some of the Services contemplated by this RFP. In order to successfully leverage these relationships, Opower requires the ability to continue such contracts and potentially initiate new contracts, in its sole discretion. In the event that Opower does utilize subcontractors to provide the Services, Opower's use of such subcontractors shall be in compliance with the terms of the Agreement.

## E. Litigation

Respondent shall indicate any and all pending litigation that could affect the viability of Respondent's proposal, continuance of existing contracts, operation or financial stability.

There is no pending litigation that could affect the viability of Opower's proposal, continuance of existing contracts, operation or financial stability.

## 6. References

### A. SCPPA Member Utility History

Describe whether the Respondent has, within the last five (5) years, rendered any service to SCPPA or to any of SCPPA's Members, either as a contractor or subcontractor, either under the current Respondent's name or any other name or organization. If so, please provide details (status as prime or subcontractor, brief description of the contract, contract start and end date, the contract administrator name, and total actual contract expenditures).

Opower has partnered with four SCPPA members within the last five years. This history is outlined below:

#### *Glendale Water and Power (GWP)*

Since 2009, Opower has partnered with GWP to provide a comprehensive, AMI-enabled, behavioral energy efficiency and customer engagement program. This includes Home Energy Reports (paper and email) to 50,000 customers, High Bill Alerts, and a web portal that displays AMI usage, neighbor comparison data, and a home audit among many features. Opower's platform also powered GWP's Behavioral Demand Response program for 40,000 customers in Summer 2015 and 2014, which achieved peak demand usage reduction of 5%. These programs continue to run to this day.

Total annual contract expenditures: (\$304,500 for BEE program, \$65,000 for BDR program)

Program Administrator: Herbert Garcia, Public Benefits Coordinator

#### *Pasadena Water and Power (PWP)*

Since 2011, Opower has partnered with PWP to provide a behavioral energy efficiency program that includes Home Energy Reports (paper and email) to 46,000 customers, and a web portal that displays energy usage, neighbor comparison data, and a home audit among many features. These programs continue to run to this day.

Total annual contract expenditures: (\$399,000 for BEE program)

Program Administrator: John Hoffner, Program Manager

#### *Burbank Water and Power (BWP)*

Since 2011, Opower has partnered with BWP to provide a behavioral energy efficiency program that includes Home Energy Reports (paper and email) to 20,000 customers. BWP has also deployed Opower's High Bill Alerts and a web portal that displays energy usage, neighbor comparison data, and a home audit among many features. These programs continue to run to this day.

Total annual contract expenditures: (\$266,000 for BEE program)

Program Administrator: Jeanette Meyer, Marketing Manager

#### *Anaheim Public Utilities (APU)*

From 2010 to 2014, Opower partnered with Anaheim to provide a behavioral energy efficiency program that included Home Energy Reports to 15,000 customers, and a web portal for all 80,000 customers that displayed energy usage, neighbor comparison data, and a home audit among many features.

Total annual contract expenditures: (\$302,000 for BEE program)

Program Administrator: Phil Hayes, Residential Programs Manager

## B. Alternate References

If the Respondent has not rendered any service within the last five (5) years to SCPPA or to any of SCPPA's Members, then please provide references over that period with the details described above including the counterparty for which services were provided.

Not applicable. Opower has worked with several SCPPA member utilities in the last five years, as described in our answer to RFP Section 6 A.

## C. Relevant Programs and Services

Identify existing related or relevant Programs or Services which Respondent developed and/or implements that would demonstrate Respondent's capabilities in this area.

Opower solutions consistently generate results that are most important to our utility partners – including sustained energy efficiency, reliable peak reduction, increased adoption of programs and services, and meaningful impacts to customer satisfaction and cost-to-serve. Benefits and results that SCPPA utilities can expect include:



Third-party Verified Energy Savings: Opower offers the only behavior-based solution proven to engage the vast majority of customers and deliver verified energy savings of 1.5 – 2.5 percent.



Program Participation Increases: Motivated by Opower marketing content, customers are more likely to participate in other utility programs, services, and rebates; average program participation lift is between 10 and 30 percent.



Customer Sentiment: Measured by the results of Opower's Customer Engagement Tracker, there is an average increase of 3–5 percent in customer sentiment from our BEE programs, even when the utility already has strong customer relationships.



Demand Reduction: Generally, savings are greatest during the peak times of the day and year, driving energy reduction when it matters most.



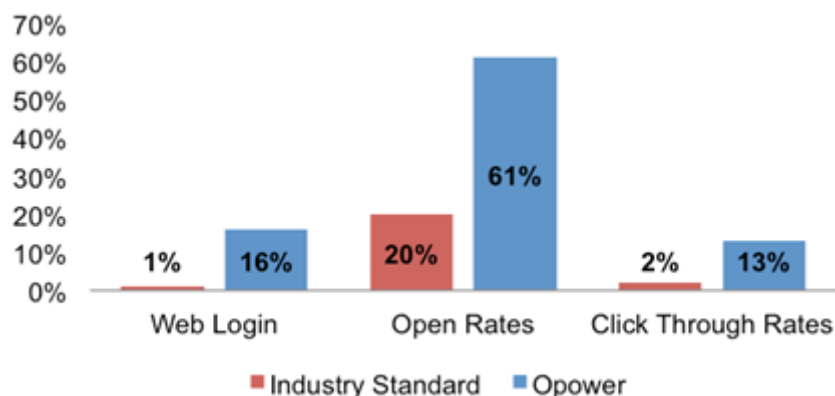
Reaching Diverse Demographics: Leveraging behavioral science principles ensures Opower programs engage customers across every customer segment, regardless of customers' income, age, or access to technology.



Committed Customers: Our programs average a less than 1 percent opt-out rate after one year in market. For example, 85 percent of customers open Home Energy Reports according to recent survey results, proving that customers are engaged, and stay engaged, by Opower's product.

In addition to driving offline behavior, Opower solutions motivate customers to engage online -- raising their likelihood to log into the utility web portal or complete an online audit. Opower's web tools give customers more information about programs and ways to save energy, and they benefit the utility by shifting customer interactions to lower cost channels. For example, two of our clients have tracked call center volume reductions of 19% year over year as a result of our High Bill Alerts.

Opower's programs regularly drive digital engagement metrics that exceed industry averages. Starting with web traffic, our seamlessly integrated web portals see average web login rates of 16%, where traditional usage portals only attract 1% of customers because they are clunky and hard to find. Our email open rates are 2-3 times the industry average of 20%.



Opower programs also boost customer sentiment and satisfaction. For example, an analysis of Home Energy Reporting programs at several dozen utilities found that they raise customer sentiment and JD Power metrics for statements like “my utility helps me manage my monthly energy usage” by 5% on average.

## D. Examples and Client Contact Information

Identify previous related or relevant Program development, Service offerings and implementation experience including a list of references for these related Services provided to other utilities.

Opower has worked with 100 utilities around the world to deliver meaningful energy savings and significantly improve the utility-customer relationship. Highlighted below is Opower’s experience with a selection of relevant utility clients:

Utility Name	City of Loveland, CO Water and Power
<b>Project Summary</b>	Deliver HERs, paper and e-mail, to Loveland’s residential utility customers. Eligible Loveland customers also receive High Bill Alerts. Loveland’s CSRs leverage Opower’s advanced Bill Advisor CSR tool to provide insightful energy consultations to customers who call with questions or are worried about a high bill. We have adhered to schedule and budget and there have not been any quality issues.
<b>Project Timeframe</b>	February 2009 – Present
<b># utility customers in program</b>	Territory-wide deployment: up to 25,000 households
<b>Contact Person</b>	Gretchen Stanford, Customer Engagement Director

<b>Utility Name</b>	<b>Clark Public Utilities, Vancouver, WA</b>
<b>Project Summary</b>	Opower delivers HERs, paper and e-mail, to Clark's residential utility customers. Clark's customers also have access to the customer-facing web application. We have adhered to schedule and budget and there have not been any quality issues.
<b>Project Timeframe</b>	August 2012 – Present CIS migration completed in 2015
<b># utility customers in program</b>	Up to 17,000 households
<b>Contact Person</b>	Matt Babbitts, Energy Services Project Manager (360) 992-3365

<b>Utility Name</b>	<b>Sacramento Municipal Utility District</b>
<b>Project Summary</b>	Provide an integrated web portal that gives customers personalized insights into their energy usage. Insights include information on energy usage by category, and specific tips - tailored to individual homes and businesses - on how to cut energy consumption and reduce electric bills. Opower is also currently implementing the Points & Rewards solution for SMUD.
<b>Project Timeframe</b>	Web portal launched in November 2015 Points & Rewards launching late July 2016
<b># utility customers in program</b>	Territory wide web deployment to 625,000 residential and commercial customers
<b>Contact Person</b>	Farres Everly, Director of Marketing and Communications (916) 452-3211

<b>Utility Name</b>	<b>Southern California Edison</b>
<b>Project Summary</b>	At SCE, Opower is providing a Behavioral Energy Efficiency program for approximately 500,000 households, generating 70+ GWh of savings. We have also deployed a customer-facing energy management web portal for all residential customers, and for 5,000 commercial customers via our strategic partnership with FirstFuel.
<b>Project Timeframe</b>	2008 - present
<b># utility customers in program</b>	500,000 households
<b>Contact Person</b>	Natalie Martinez, Senior Manager - Information Governance

## Addendum A

### Additional Analytical Support Services

LADWP is interested in obtaining consultant services to assist with documentation and improvement of internal processes and analytics. Specifically, LADWP requests that respondents are able to provide services related to: Business Process Definition, Analysis and Planning; Customer Journey Mapping, Analysis and Planning; Technology Analysis and Planning; Analytics Review and Assistance; Organizational Analysis and Planning, and; Implementation Assistance for all changes identified as a result of the aforementioned items.

Many Opower utility clients have taken bold steps, leveraging our product and service expertise, to reinvent relationships with their customers, sharing common goals to:

- Improve customer satisfaction, engagement and the overall digital customer experience
- Strengthen their utility brand across DSM and Customer Care
- Create a consistent experience between web and mobile
- Expedite time to market

Opower has significant experience performing customer experience strategy activities such as User Research, Personas and Customer Journeys, and Proof-of-Concept prototypes. For example, we spend nearly 12 months performing customer experience strategy work ahead of developing our own products.

In addition, many of our innovative clients such as Exelon, National Grid, Pacific Gas & Electric, Mercury (NZ) and E.ON (UK) have undertaken “digital experience transformation” journeys over the past few years. In partnership with their chosen strategy services provider, all these utilities have enlisted Opower to participate in workshops to help create a vision for the premier customer experience.

Members of our team can attend key LADWP strategy workshops. Our participation can highlight the best customer experiences that have been designed in partnership with our network of utility clients. At the conclusion of your workshops, if LADWP elects to embed Opower into any chosen experience redesign, the Opower Core Platform can be implemented in a flexible fashion that allows LADWP to leverage its significant investments in backend IT systems and analytics, while maintaining ownership and control of the overall customer experience.