

# METRICS CAPABILITIES

## Using Modern Metrics Tools to Optimize Customer Engagement

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### INTRODUCTION

Modern business intelligence (BI) tools are helping companies across industries optimize many aspects of their operations. As these tools become increasingly powerful and user-friendly, the benefits of faster, more insightful reporting and analytics will accrue to those who are best able to benefit from these insights.

For utilities, the combination of digitalization and modern metrics tools enables real-time analytics tracking with much greater precision, providing a clearer lens into key business drivers. This paper highlights four examples of how Bidgely is using modern metrics tools to help its utility partners improve their customer engagement outcomes.

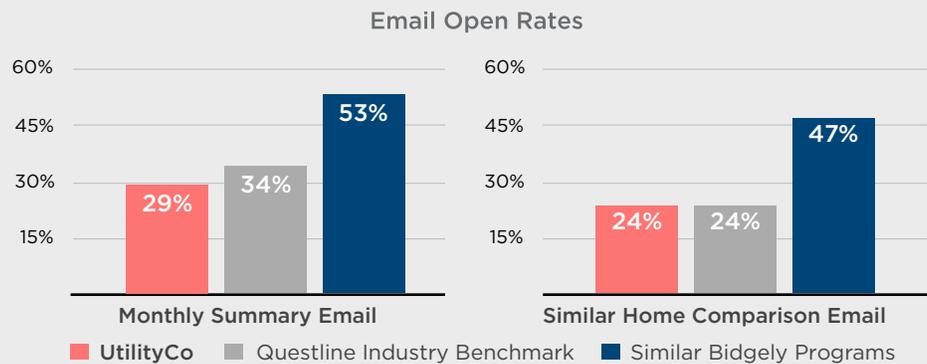
# 1. OPTIMIZING EMAIL OPEN RATES

Utilities are adopting Software-as-a-Service (SaaS) solutions in many aspects of their operations. Among the many benefits of SaaS solutions is the fact that learnings and best practices from one deployment can be applied to all customers on the platform. For example, utilities can use modern SaaS metrics tools to track their performance against that of their peers, thereby enabling cross-utility benchmarking on many key performance indicators. This results in data insights that might otherwise go unnoticed and unaddressed.

## CASE STUDY | *Low Email Open Rate*

### Problem

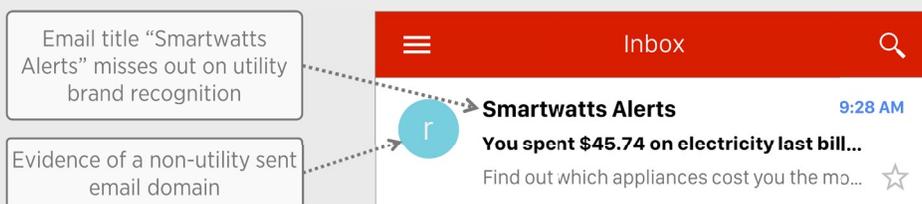
A large investor-owned utility (IOU) sends its customers monthly summary and similar-home comparison emails as part of a large-scale residential EE program. While the IOU's email open rates were in line with [Questline industry benchmarks](#), they were falling short of the open rates from similar programs run by Bidgely's other utility customers:



Without the benefit of a SaaS solution, the IOU would likely have been satisfied with email open rates that fell in line with the rest of the industry. After benchmarking against similar Bidgely programs, however, it became clear that the utility could do much better.

### Solution

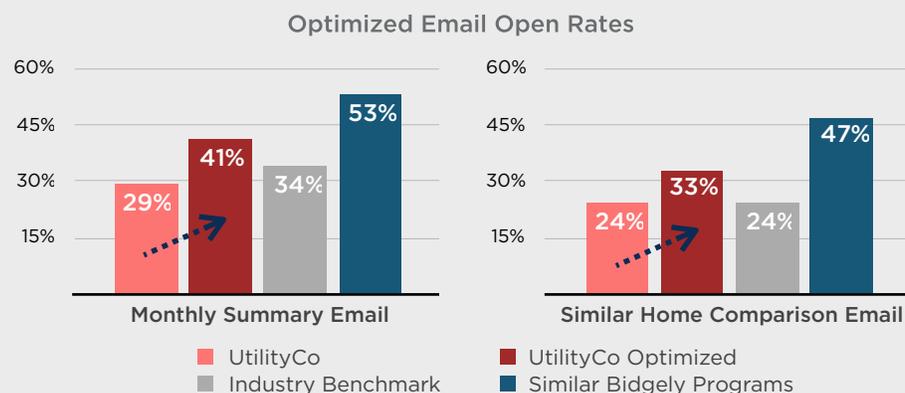
The Bidgely internal metrics system automatically alerted the deployment team regarding the low email open rates. The team reviewed key utility email elements and compared them with corresponding elements from similar Bidgely programs. Almost immediately, they identified two email elements that did not leverage best practices:



Over the next 2 weeks, Bidgely worked with the IOU to propose and implement changes to both the sender domain name and the email title, making both clearly recognizable as coming from the utility.

### Results

Within 2 weeks of implementing the changes, the monthly summary open rates increased from 29% to 41%, and the similar home comparison open rates rose from 24% to 33%.



## 2. ACCELERATING ROOT CAUSE ANALYSIS

In the past, addressing communication problems often required a patchwork of tools and resources from multiple functional groups across an organization. As a result, identifying the root cause of

these types of problems (let alone solving them) meant mining various data feeds manually, and conducting multiple rounds of research, trial and error, and diagnosis, a painstaking process that could take weeks, if not months. However, modern metrics tools can pull from many data feeds to resolve problems quickly and efficiently.

## CASE STUDY | *Email Deliverability*

### Problem

On behalf of its utility partners, Bidgely's SaaS platform sends out tens of thousands of emails daily. Our metrics system monitors the lifecycle of each email, from sending and delivery to open to click-through. Recently, we were alerted to low email delivery rates across all customers on three particular domains:

Email Delivery Rates by Domain

Type >	sent	delivery	open
Routing Domain	Count Emails	Count Emails	Count Emails
1 gmail.com	151,901 , 100% of total	149,278 , 98% of total	84,289 , 55% of total
2 yahoo.com	68,685 , 100% of total	28,851 , <b>42% of total</b>	7,001 , 10% of total
3 hotmail.com	53,408 , 98% of total	52,698 , 97% of total	23,616 , 43% of total
4 rogers.com	15,221 , 100% of total	7,588 , <b>50% of total</b>	2,600 , 17% of total
5 aol.com	15,197 , 100% of total	5,906 , <b>39% of total</b>	1,640 , 11% of total
6 sympatico.ca	7,295 , 100% of total	7,001 , 96% of total	4,264 , 58% of total
7 mac.com	4,620 , 97% of total	4,528 , 98% of total	2,717 , 57% of total

### Solution

We cross-referenced delivery success rates for the affected domains against a number of data feeds, such as sending dates/times, email type, and utility, and within a matter of hours identified the third-party email-delivery service as the root cause of the low delivery rates.

### Results

Within two weeks of receiving the original alert, Bidgely had worked with the email delivery service to implement the appropriate fixes, and delivery numbers returned to expected levels.

Email Delivery Rates by Domain

Type >	sent	delivery	open
Routing Domain	Count Emails	Count Emails	Count Emails
1 gmail.com	161,619 , 100% of total	158,826 , 98% of total	85,780 , 55% of total
2 yahoo.com	75,250 , 98% of total	73,647 , <b>96% of total</b>	25,800 , 34% of total
3 hotmail.com	56,507 , 97% of total	54,812 , 97% of total	22,606 , 39% of total
4 aol.com	15,865 , 100% of total	14,464 , <b>92% of total</b>	5,394 , 34% of total
5 rogers.com	13,991 , 100% of total	13,451 , <b>96% of total</b>	7,326 , 52% of total
6 sympatico.ca	6,411 , 100% of total	6,165 , 96% of total	3,705 , 58% of total
7 mac.com	5,094 , 97% of total	5,108 , 97% of total	2,930 , 56% of total

### 3. MODERNIZING CUSTOMER ENGAGEMENT

In today’s digital world, where customers expect a more personal experience, gathering timely customer feedback—ideally what they’re looking at when they’re looking at it—is critical to optimizing customer engagement. Companies setting the standard in customer engagement, such as Netflix, Facebook, and Spotify, use variations of the thumbs-up/like option to create more immediate feedback loops with their customers.

FACEBOOK



NETFLIX



SPOTIFY



BIDGELY



Compared to conventional methods of gathering feedback (surveys, etc.), the “like” method enables vendors to receive targeted feedback on a single experience—information that they can then use to continue fine-tuning the user experience. Bidgely takes this same approach with its digital communications, enabling end-users to provide thumbs-up/down feedback as part of each personalized message.

#### BEST PRACTICE | *Increasing Interactions*

Bidgely uses its metrics system to drive greater engagement by first measuring, then improving personalized communications. One of the more effective ways is including calls-to-action (CTA) in messaging. Given the ability to measure click-through rates across recommendation, message, and program types, Bidgely has found that, across all programs, including a CTA in at least one personalized program recommendation increases click-through rates by two-to-three times, a sizable increase, demonstrating that the specific program and associated CTA are meaningful to the customer.

Use a timer to automatically turn devices on/off



Timers automatically cut power to devices at night, and turn them back on in the morning.

2.7% Program Engagement

Renewable Energy Options



Choose a UtilityCo renewable energy source to reduce your environmental impact.

Use a timer to automatically turn devices on/off



Timers automatically cut power to devices at night, and turn them back on in the morning.

Renewable Energy Options



Choose a UtilityCo renewable energy source to reduce your environmental impact.

EXPLORE

7.3% Program Engagement

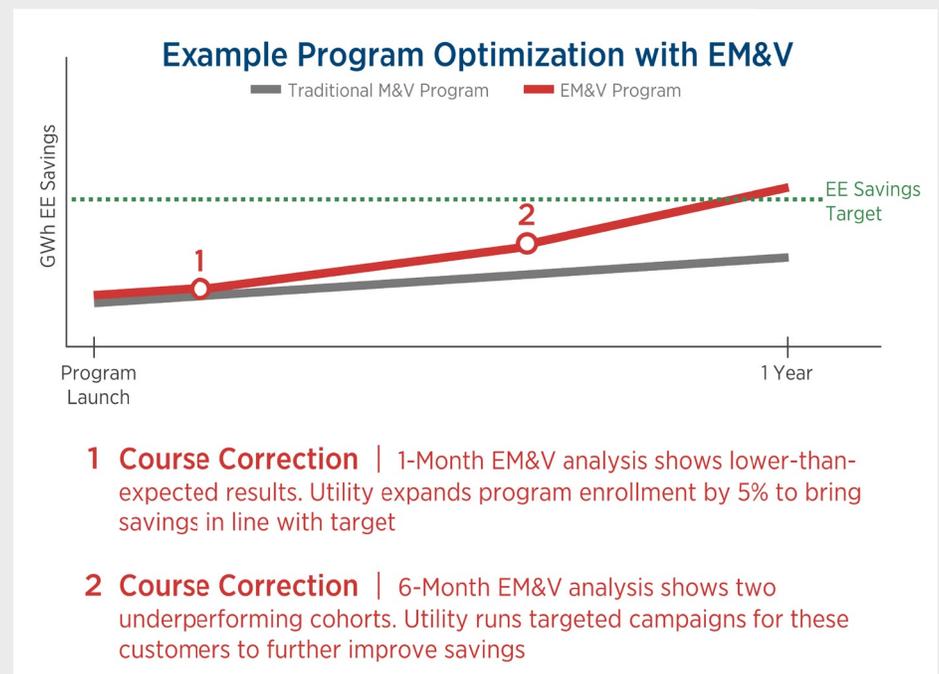
## 4. REAL-TIME MEASUREMENT & VERIFICATION

The current measurement and verification (M&V) process used by utilities to measure savings from energy efficiency (EE) programs can be a lengthy and expensive one. Typically, utilities hire third parties to conduct the M&V to avoid any conflict of interest arising from the vendor evaluating its own performance.

There are other shortcomings to the current approach. Because of the previously mentioned time and expense, evaluations are infrequent (often just once yearly), which inhibits program optimization. The resulting lack of timely visibility into savings trends restricts any course corrections and iterations necessary to achieve desired savings goals.

### BEST PRACTICE | *Accessing and Acting on Data*

Modern metrics tools can augment current M&V practices by utilizing a real-time metrics approach that incorporates the same industry-standard M&V methodology. This increased visibility into critical data enables the utility to run more frequent evaluations, iterate as needed, and course-correct to optimize each program. It also provides a greater degree of control over the M&V process for the utility and greater familiarity with the levers that drive successful programs. This increased involvement by utilities in the M&V process also enables them to have more targeted and insightful conversations with regulators, ultimately leading to more successful programs.



# SUMMARY

Across industries, modern business intelligence tools are turning unused data into a valuable asset. For utilities, that means a significant step forward in critical areas such as customer engagement, root cause analysis, program performance, and more.

As the leader in UtilityAI, Bidgely is at the forefront of this utility data revolution, leveraging tools that extract key business insights and provide real-time, actionable intelligence.

Combined with its extensive program experience, Bidgely's metrics and analytics capabilities enable utilities to gain clearer visibility into critical operations and better understand how those operations compare to cross-utility benchmarks.

This gives utilities the entire picture of where they stand, and where they can improve, creating a clear path on their journey towards industry leadership.