

# NEXT-GEN HERs

## BEHAVIORAL ENERGY EFFICIENCY

that is Data-Driven, Personalized, Equitable and Future Proof



Bidgely's next-generation Home Energy Reports (HERs) amplify the impact of customer intervention in a utility's modern energy management toolset. Our UtilityAI™ platform empowers energy utilities to understand what's happening behind the meter for each customer and then use that insight to deliver cutting-edge customer engagement that is hyper-personalized across all interactions. This personalization means that a new generation of HERs deliver a more effective and dynamic means of achieving energy savings and shifting load.

Utilities worldwide turn to Bidgely to facilitate their Demand-Side Management (DSM) program evolutions, upgrading to HER programs that deliver timely, personalized, and relevant energy experiences to every customer. Next-Gen HERs give them the tools to improve realization rates for energy efficiency savings, boost customer satisfaction, and increase program/service uptake.

### Bidgely's HERs deliver multiple pillars of value:



**Removal of Friction:** Consumers today are more tech savvy and expect streamlined experiences that deliver personalized insights and recommendations they can act on immediately via their preferred channels. Bidgely's behavioral programs offer dynamic digital experiences that meet those demands while also providing more cost effective and faster-to-launch programs for utilities to implement.



**Democratized EE Programs:** Bidgely's program design expands participation by giving utilities an in-depth understanding of each customer's energy use profile and what appliance loads the customer is able to reshape. Low income and medium consumption households traditionally excluded from behavioral energy efficiency programs can be included in Bidgely HER programs without increasing the budget, as can consumers with Distributed Energy Resources (DERs) such as electric vehicles (EVs) and solar. Each customer has a unique capacity to reshape their consumption, and Bidgely can enable that participation.



**Data-Driven Design:** Traditional energy efficiency programs only treat the highest consuming homes. Using our patented disaggregation technology, Bidgely is able to identify variables beyond traditional high consumption to create superior treatment groups with the highest propensity to save. Maximum savings is determined by a combination of consumption, appliance usage, energy lifestyle, and behaviors—a customer profile that Bidgely is uniquely positioned to define.



**Relevance & Impact:** Through advanced AI-enabled disaggregation, we can now go beyond segmented groups, tailoring messaging to each individual customer—a segment of one. Bidgely's Next-Gen HERs can be fully customized, with dynamically changing content, to fit each recipient's energy profile, accounting for:

- DERs such as an EV or solar
- Customer-specific recommendations based on behavioral usage patterns
- Appliance efficiency, degradation and related utility program offerings
- Alignment of channels, messages, timing, incentives, and calls to action

The impact of these enhancements is greater realized energy savings that benefit both customer and utility.

Bidgely's behavioral energy efficiency HER programs employ machine learning and other artificial intelligence techniques, so our programs are self-learning and optimized to realize not only efficiency improvements but also utility objectives like electrification, DER, load shaping, TOU rate adoption, and more.

**Key Benefits:**



**Higher Customer Satisfaction** - Bidgely's holistic customer experience drives high engagement with greater than 45% open rates and 93% thumbs-up ratings.



**Scalable to All Customers** - We have helped our customers expand their treatment population on average by more than 40%, including low-consumption, hard-to-reach, and DER-enabled customers.

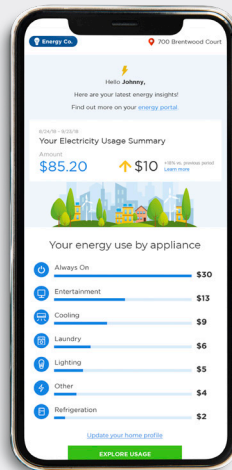


**Dynamic Savings** - Our ability to dynamically deliver insights to customers through more targeted and timely messaging has resulted in more savings in peak months and peak periods for utilities who implement our hybrid digital energy report programs versus paper-only programs.

**Bidgely is the Pioneer of Dynamic Engagement, Utilizing AI for Messaging and Delivery**

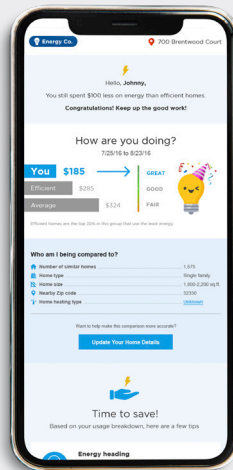
**DIGITAL BEHAVIORAL ENERGY EFFICIENCY ALERTS**

**PROACTIVE AND IMMEDIATE**  
Being Top-of-Mind with Customers Requires Proactive Outreach



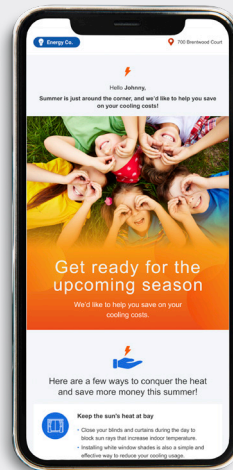
**MONTHLY SUMMARY**

Day 6



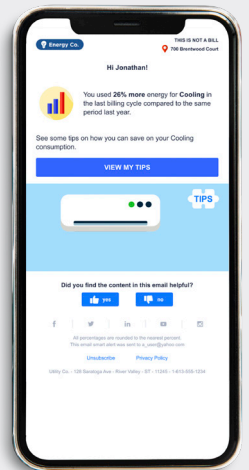
**PEER COMPARISON**

Day 12



**SEASONAL**

Scheduled



**ENERGY HIGHLIGHT**

Scheduled



Bidgely's behavioral programs are omni-channel with email, SMS, paper, and dynamic, mobile-ready web capabilities. Insights are delivered by our Next-Best-Interaction engine that covers a wide library of insights and recommendations depending on each customer's profile and a utility's specific program objectives.

In addition to delivering energy savings and load shaping benefits, we've helped utilities achieve a 50% reduction in high-bill calls for customers receiving alerts, a 50% increase in online audit completions, and increased customer satisfaction indicators such as JD Power. Our behavioral alerts include:

- DER Support & Enablement
- Decarbonization Modules
- Budget Alerts
- High Usage Alert
- Rate Plan Optimization & Enrollment Alerts
- Flex Demand: TOU Alerts
- Behavioral Demand Response Alerts

# BIDGELY'S NEXT GENERATION OF PAPER HOME ENERGY REPORTS

**Energy Co.**  
1234 W. Main Street, San Francisco, CA 94102

**Your Home Energy Report**  
Created on Aug 22, 2020  
Account Number: 0002331725  
**THIS IS NOT A BILL**

This report covers your last bill cycle and contains insights that you might appreciate including your overall energy efficiency, top energy-consuming appliances, and money-saving energy tips.

**How You Compare to Similar Homes**  
You're using less than average, but can improve further!

Efficient Homes	Your Home	Average Homes
\$78	\$83	\$105

**You spent \$13 more on energy than efficient homes**

**Who are you being compared to?**

- Group size: 1479 Homes
- Nearest ZIP code: 94133
- Home type: Single family
- Home size (sq. ft.): 1,100-2,200
- Heating type: Electric

**Your Top Appliances & Where You Can Save**

Total Energy Charges: **\$83**

- \$29 Heating
- \$20 Always On
- \$17 Water Heating
- \$11 Lighting
- \$6 Cooking

Save up to 25% less per appliance

**Use a Smart Power Strip to save automatically!**

Using a smart power strip is a simple change to reduce your phantom power loads and save money.

**MONTHLY REPORT**

**Energy Co.**  
1234 W. Main Street, San Francisco, CA 94102

**Your Seasonal Summer Report**  
Created on May 25, 2020  
Account Number: 0002331725  
**THIS IS NOT A BILL**

This report covers your last bill cycle and contains insights into your energy usage including your overall energy efficiency, top energy-consuming appliances, and money-saving energy tips.

**Your Heating Usage In The Winter**  
(11/15/2019 - 2/16/2020) | Winter months in bold. Values displayed are energy charges!

**Your Cooling Usage In The Summer**  
(6/15/2020 - 9/16/2020) | Summer months in bold. Values displayed are energy charges!

**How Much Did Your Heating Cost?**  
(11/15/2019 - 2/16/2020) | Total over winter months. Values displayed are average of efficient homes.

**How Much Did Your Cooling Cost?**  
(6/15/2020 - 9/16/2020) | Total over summer months. Values displayed are average of efficient homes.

**Who are you being compared to?**

- Group size: 1479 Homes
- Nearest ZIP code: 94133
- Home type: Single family
- Home size (sq. ft.): 1,100-2,200

**Consider cooling for free!**

When it is cooler outside than inside, open up the windows and get fans to take advantage of free cooling.

**SEASONAL REPORT (ELECTRIC & GAS)**

**Programs For Our Customers**

**Consider purchasing and installing a smart thermostat.**

Consider purchasing and installing a smart thermostat. Average savings could add up to \$36 off your total energy costs. Find discounts on a variety of smart thermostats at our Online Savings Store, at [energysavings.com/store](http://energysavings.com/store)

You used 15% more energy in the previous period compared to same time last year.

**A Few Things That Can Help You Save**

**Use vacation mode**

Whenever you're away for an extended period of time, use the vacation mode setting on your water heater to reduce its energy consumption.

You used more 12% energy in water heating compared to similar homes.

**View More On Your Interactive Web Portal**

**Instant Access To Your Web Portal**

- Open the camera (or download and open any free QR code scanner app) to your mobile phone.
- Focus the camera over the QR code displayed here on the right and you'll be taken to your web portal.
- Change display if you have access to the back camera and recommendations to help you learn more about.
- If you can't scan, you can sign up to go digital at [energysavings.com/go-digital](http://energysavings.com/go-digital).

Scan this QR-code

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**PERSONALIZED RECOMMENDATIONS**

At Bidgely, we believe innovation is paramount to ensuring that energy efficiency savings don't stagnate. Within each report, modules featuring personalized next best interactions guide customers to the optimal rate plan and identify high usage categories like lighting, heating, or EV charging. Equipped with a more accurate and specific assessment of their energy usage today, customers are empowered to take action on their best savings opportunities with helpful monthly challenges to motivate them to save. Paper reports are delivered at cost for utilities, saving money and achieving on average 2% energy savings for both electric and gas customers.



## NEXT BEST INTERACTION ENGINE

Bidgely home energy reports take advantage of our next best interaction engine. This engine takes into account each customer's 100-point profile, context, weather and the utility's objectives in order to select the best next interaction possible for every household. Each interaction is a combination of an insight and a recommended action pulled from a library of behavioral tips, education, programs, and product offerings. This ensures that customers only see recommendations that are directly relevant to them, and are never shown recommendations upon which they can't act. Our targeted HER programs are able to take into account multiple objectives like making sure your customers are aware of other utility programs, such as behavioral demand response, that could benefit them.

# BIDGELY'S LEADERSHIP IN INNOVATION MAKES US VENDOR OF CHOICE

## TECHNOLOGIES DISPLACED:

OPower

ORACLE

uplight

Aclara

APOGEE

## AT LEADING UTILITIES AROUND THE WORLD:

ROCKY MOUNTAIN POWER

- 330k-600k treatment group expansion
- 228+ GWh savings
- 4 month launch
- CSAT expansion of 130K+
- Expanded to SMB customers

Columbia Gas of Ohio

- 700k customers treated
- 5.23MM Therms, exceeding first year target by 36%
- Non-smart meters

SoCalGas

- 670k customers treated
- 100% digital
- Tier 3 & 4 consumption customers

NV Energy

- 240k customers treated
- 13 GWh in first 6 months
- 30+ GWh in savings to date
- 3 month launch
- 91% of customers on digital HERs
- 50% open rates
- 3.8% cross-program uplift

SDGE

TEP

Georgia Power

TACOMA PUBLIC UTILITIES

entergy  
NEW ORLEANS

BEHAVIORAL / HERs PROGRAMS

2023 PROGRAM LAUNCHES

## NEXT STEPS

Learn more about Bidgely's Next-Gen HERs and access additional resources at:

[www.bidgely.com/solutions/home-energy-reports-her-2-0](http://www.bidgely.com/solutions/home-energy-reports-her-2-0)

Get the [NV Energy Case Study](#) and [Rocky Mountain Power Case Study](#) to learn how Next-Gen HERs from Bidgely are driving energy savings.

