



## BIDGELY UTILITYAI LEAD GENERATION FOR ENERGY RETAILERS

### Generate 70% More Leads to Non-kWh Products and Services

Energy retailers throughout Europe are turning to product and service sales to generate sustainable revenue beyond the supply of commodity kWh. They have been adding home appliances, EV chargers, smart thermostats, PV panels, heat pumps, energy storage solutions, innovative tariffs and other offerings to their existing lines of business.

In markets where intense competition is the norm, and churn rates approach 20-25% in some cases, diversification promises a wide range of benefits:

- Improved brand perception as energy retailers evolve from a commodity provider to a trusted partner for the home
- Increased profit per customer
- Improved customer stickiness and long-term customer retention
- Demonstrated progress toward electrification and decarbonisation targets

Despite the compelling business case, many utilities and energy retailers pursuing this strategy have not yet realised the revenue they anticipated.

#### WHY?

The answer is simple. In today's world of B2C consumer sales and engagement, relying upon generic, one-size-fits-all marketing and static online marketplaces is insufficient.

Major global brands like Amazon and Netflix have forever changed customer expectations by harnessing the power of customer's browsing habits and purchasing/viewing behavior to tailor recommendations and greatly improve a customer's overall experience. The result is a new generation of more sophisticated consumers who demand that same level of one-to-one insight and service from all of their vendors and providers.

How can energy retailers bridge this gap and increase their product and service revenue by generating up to 70% more leads?

## IT STARTS WITH DEEP CUSTOMER INSIGHTS

By leveraging the power of AI and sophisticated analytics, Bidgely has developed the world’s most accurate and actionable customer energy profile – based entirely upon actual customer behavior. Bidgely’s AI-driven insights are derived from energy usage and enhanced by customer data (e.g. customer digital interactions) to enable a deep understanding of each home. This includes detailed household appliance attributes and usage characteristics, the relative efficiency of key appliances, a customer’s lifestyle patterns, and their propensity for adoption and engagement with programs, products and services.



**EMMA**

**Contact details**

- Via Cradisca, 9
- 00198 Roma, Italy
- emma1234@gmail.com

**Contract info**

- Contract start date
- Tariff information

**Billing information**

- Payment mode
- Payment history

**Electricity and Gas Usage**

- Smart Meter or Non Smart Meter
- Data

**100% Itemisation of the bill**

- Up to 11 categories
- Monthly, Month-to-Date and Time of Use
- Based on a combination of machine learning + dynamic rules based model (sensitive to regions, seasons, vacations, weather...)

<p><b>Self comparison trends</b></p> <ul style="list-style-type: none"> <li>• Ongoing analysis of unusual trends</li> <li>• Week over week</li> <li>• Month over month</li> <li>• TOU</li> <li>• Year over year</li> <li>• Week vs Weekend days</li> <li>• ...</li> </ul>	<p><b>Neighbourhood insights</b></p> <ul style="list-style-type: none"> <li>• Efficiency comparison to similar homes</li> <li>• Neighborhood insights, ie 'your neighborhood used 20% more in 2019 than 2018. Let's do better in 2020'</li> </ul>	<p><b>Bill insights</b></p> <ul style="list-style-type: none"> <li>• <b>Bill analysis</b> - Key reasons why your bill might be higher / lower</li> <li>• <b>Bill projection</b></li> <li>• <b>Budget / Challenge</b></li> </ul>
<p><b>EV &amp; PV Details</b></p> <ul style="list-style-type: none"> <li>• EV Detection, EV usage estimation, EV TOU, EV tariffs recos, EV chargers recos...</li> <li>• PV detection, PV generation estimation...</li> </ul>	<p><b>Personalised recommendations</b></p> <ul style="list-style-type: none"> <li>• Energy tips in context of personalised insights</li> <li>• Energy efficient products and services</li> <li>• Best tariffs</li> </ul>	<p><b>Engagement profile</b></p> <ul style="list-style-type: none"> <li>• Actively engaged vs engaged vs Passive</li> <li>• Content preference (green, comfort, budget...)</li> </ul>
		<p><b>Propensity modelling</b></p> <ul style="list-style-type: none"> <li>• Likelihood of a customer to do something (buy, churn...)</li> </ul>

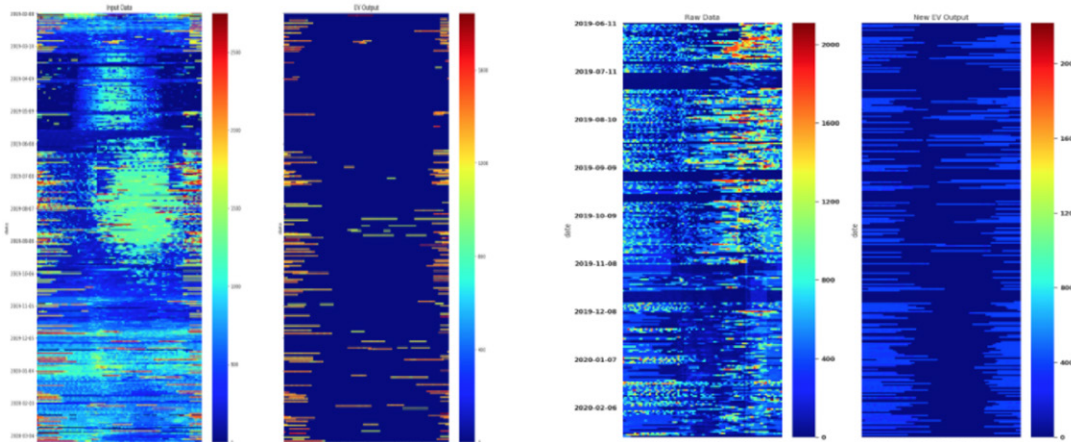


Consider EV users. Many retailers offer compelling EV tariffs, EV chargers and other emerging services, including programs focused on vehicle-to-grid integration (V2G). Yet few retailers are able to identify the EV users who are the ideal targets for such programs. Bidgely’s UtilityAI platform accurately identifies all EV customers and when and how they charge. This opens the door for upselling EV chargers, designing and suggesting EV tariffs, as well as engaging EV customers with personalised insights and suggested actions, such as on- versus off-peak charging.

Another exciting opportunity is clustering. EV adoption often emerges in clusters as critical mass builds. Once the number of people, vehicles and chargers within an area reaches a certain threshold, the volume of EV adoption increases dramatically. UtilityAI’s identification tools reveal where these clusters are forming, allowing forward-thinking utilities to develop marketing and operational strategies to support them.

ELECTRIC VEHICLE (L2)

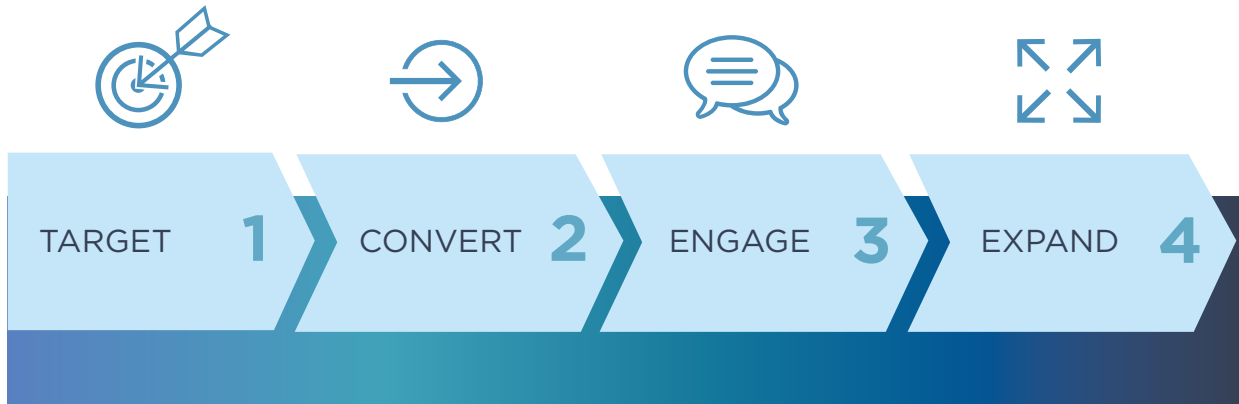
ELECTRIC VEHICLE (L1)



FIND THE EV OWNERS USING METER DATA

Bigdely's data science allows energy retailers to develop customer energy profiles that provide a unique understanding of customers' home and EV usage, which is a prerequisite to customer engagement strategies that successfully target the right customers with more successful promotions of new tariffs, products, and services, ultimately scaling adoption and revenue growth.

### TARGET, CONVERT, ENGAGE, EXPAND: FOUR STEPS TO LEAD GENERATION SUCCESS



#### 1. Target

As we saw in the EV example above, the UtilityAI Lead Generation Solution begins by enabling energy retailers to detect and target customers who have a higher propensity to buy a particular value-added product or service. Using Bigdely's Analytics Workbench tool, the customer target identification process is both highly accurate and efficient. After defining the customer population by geography, appliance of interest, average usage, seasonal and weekday vs. weekend usage, energy retailers are able to generate lists that include customers best suited for a particular product or service offer.

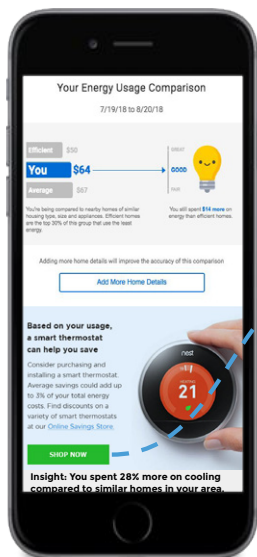
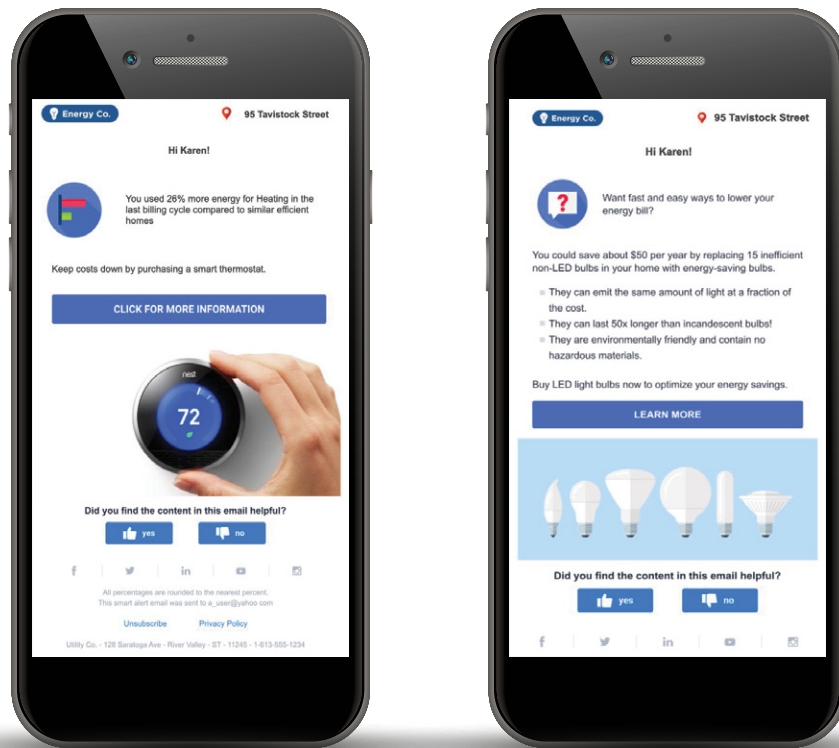
Beyond EVs, energy retailers are also able to pinpoint the efficiency of various other consumer appliances that might be suited for replacement or maintenance, including:

CATEGORIES	PRODUCTS & SERVICES	EXAMPLE OF TOP CANDIDATES
EV	EV CHARGERS, EV TARIFFS	Customers who are charging an EV at home at specific times
	EV CARS	Customers with higher bills, solar customers, neighborhoods where there are EVs
HEATING	SMART THERMOSTATS, HEAT PUMPS, BOILER MAINTENANCE, SMALL SPACE HEATERS	Customers with inefficient gas or electricity heating
	WATER-SAVING SHOWER HEADS, WATER HEATER FILTERS	Customers with inefficient water heating based on age of appliance, neighbours' usage patterns, usage per occupancy
	UPGRADE OR MAINTENANCE OF HEATING UNIT	Customers with a low Seasonal Energy Efficiency Ratio rating, heating appliances with higher consumption per sq meter per occupancy, degradation of appliance on long-term usage
SOLAR	PV PANELS	Customers who have not yet installed solar panels in specific locations where PV is more prevalent, i.e. owned by neighbours, high overall consumption, and high daylight hours consumption
	SOLAR WATER HEATER	Customers with inefficient or heavy usage of water heating, in specific locations/ neighbourhood where PV is more prevalent, high engagement with related green messaging
	ENERGY STORAGE	Customers who have solar and low usage during the daylight hours but high during other times
LIGHTING	LED LIGHTS, SMART LIGHTS	Customers with inefficient lighting or with lighting usage that is trending high based on benchmark of lumens per sq ft required
REFRIGERATION	EFFICIENT REFRIGERATOR OR FREEZER	Customers with inefficient refrigeration compared to standard benchmark or usage of multiple old refrigerators
ALWAYS ON	SMART PLUGS, SMART POWER STRIPS	Customers with high base load or with a base load that is trending high
POOL PUMPS	POOL PUMP MAINTENANCE, UPGRADE TO EFFICIENT VARIABLE SPEED POOL PUMP	Customers who demonstrate inefficient pool pump usage based on the size, usage pattern, ownership of single/multi-speed pump
TARIFFS	TIME OF USE, GREEN	Customers with high/low on-peak energy usage, customers with and without EVs, customers with and without electric heating customers who interact with green content
HOME	HOME INSURANCE, INSPECTION, WINDOW REPLACEMENT, INSULATION MAINTENANCE	Increase in major appliance (heater, water heater) usage activity based on living area, occupancy, appliance age, usage pattern, degradation in the home compared to standard
	SECURITY SYSTEMS	Customers with low energy activity due to work outside the home or vacation homes

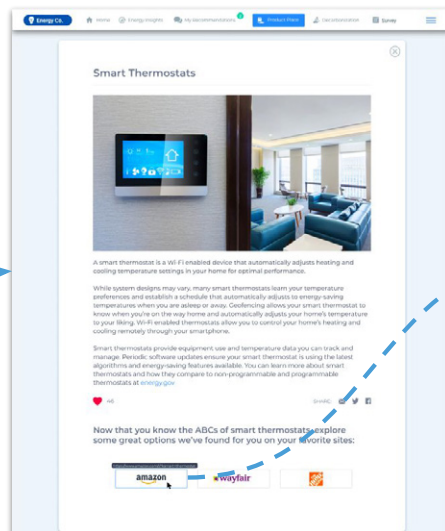
## 2. Convert

To drive increased sales, not only do you need to target the right customers, you also need to provide those customers with personalised, compelling and action-oriented communications. Bidgely's UtilityAI Lead Generation Solution develops product and service offers in context of relevant customer insights and ROI calculations. Using this approach, our retail energy partners are able to realise higher product and services conversion rates by maximising the likelihood that those customers will respond favorably to offers and convert.

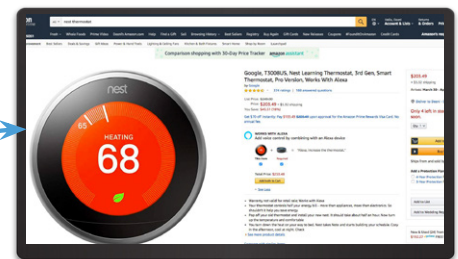
For example, if data reveals that a customer has electric heating and that this customer is using significantly more heating than similar homes, or perhaps had a month of really high heating usage, a personalised offer might promote a smart thermostat or a heat pump in context of these insights.



Bidgely Email



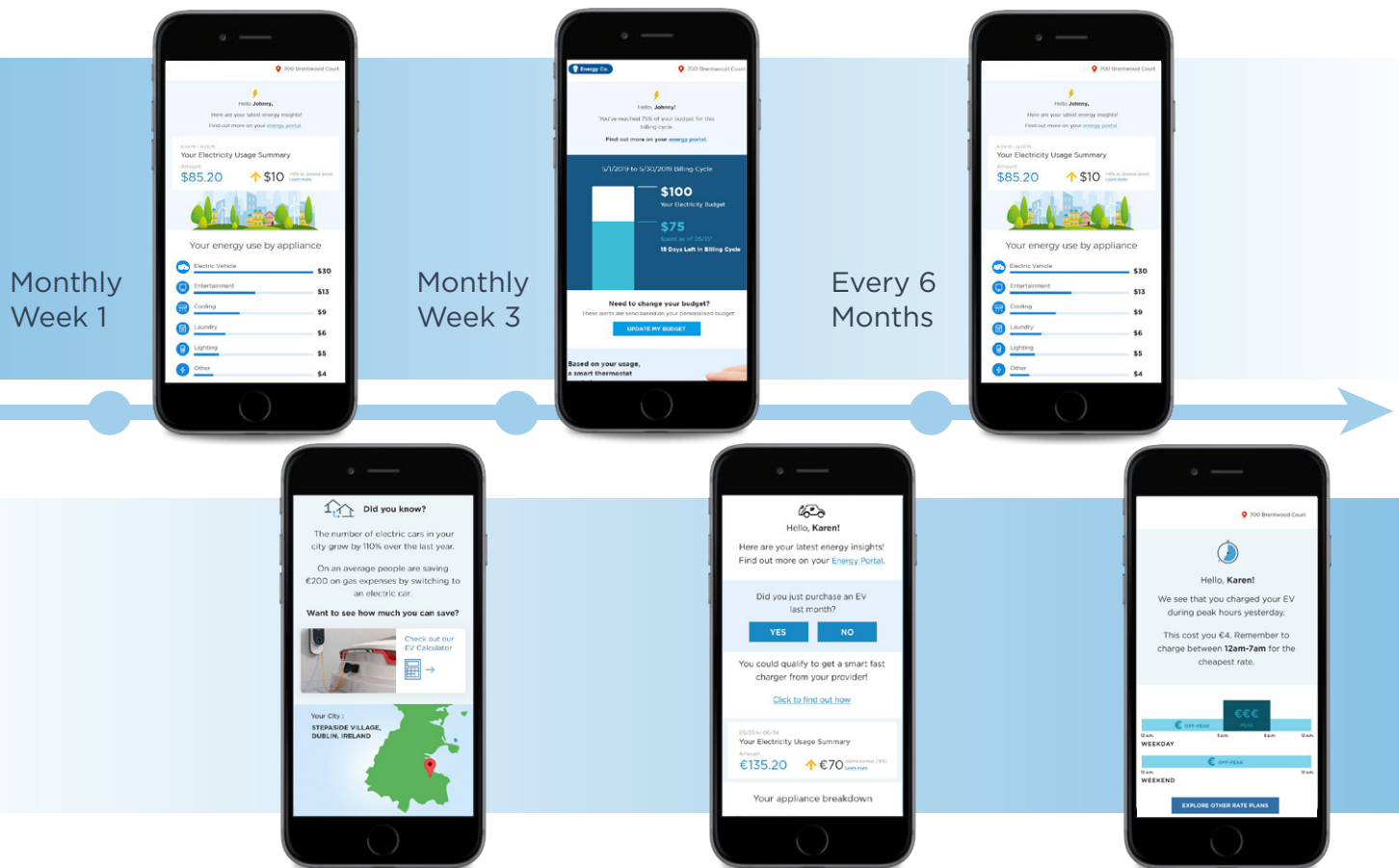
Product Education Page on Bidgely Web Portal



Fulfillment Site of User's Choosing

With Bidgely's UtilityAI platform, customers participate in an ongoing dialogue with energy retailers through a regular cadence of useful, relevant, personalised communications that provide meaningful guidance as to how they can become greener and save money. Product and service recommendations are introduced seamlessly into this dialogue.

## REGULAR TOUCHPOINTS



## HYPER-PERSONALISED TOUCHPOINTS

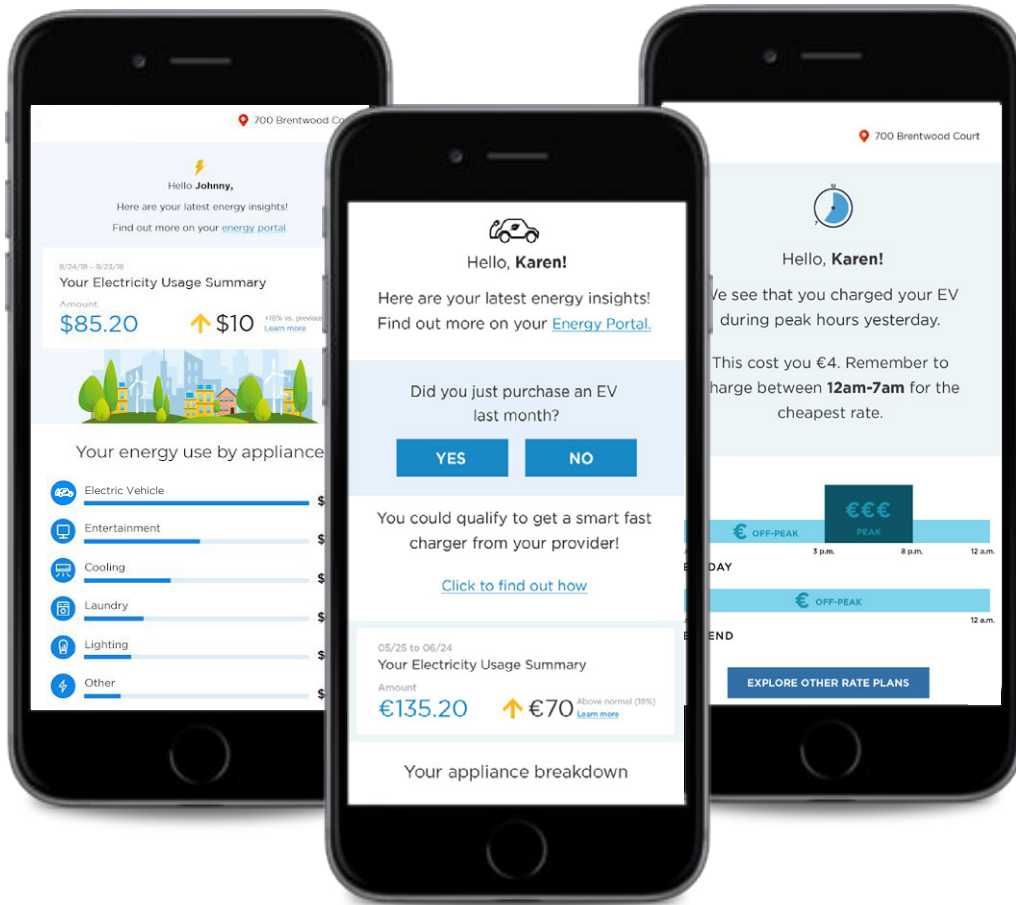
### 3. Engage

Successful long-term lead generation does not end when a customer buys a single product or service. Instead, a purchase signals a new opportunity for the energy retailer to deepen its relationship with the customer by providing ongoing guidance. The UtilityAI Lead Generation Solution includes a full suite of highly personalised alerts and web widgets designed to engage and delight customers with their new purchase and optimize performance.

For example, post-purchase communication with EV owners includes tools to help those customers understand how much they spend on EV charging, guidance as to when to charge their EV for maximum decarbonisation benefit and cost savings, and suggestions for additional EV-related products and services.

**Bidgely has deployed its UtilityAI in the EU and across the world with proof points that show the ability to drive traffic and generate leads.**

- a. >50% Open Rates
- b. >10% click through
- c. >70% increase in leads generated for non kWh products and services
- d. 97% wants the service to continue
- e. 10% improvement in CSAT
- f. +20 in Net Promoter Score



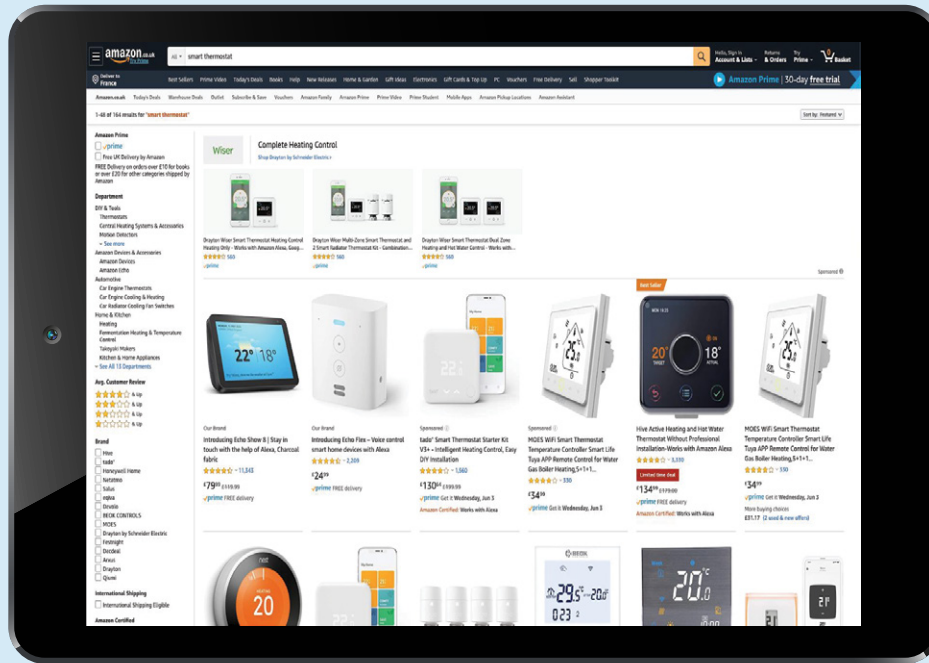
## 4. Expand

The UtilityAI Lead Generation Solution makes it possible for energy retailers to both drive new leads to existing products and services as well as further increase non-kWh revenue with the addition of a Bidgely-managed third-party affiliate program.

Bidgely-managed relationships with third-party eCommerce platforms such as Amazon or regional online stores allow energy retailers to broaden their product portfolio and revenue potential without adding any complexity to existing operations.

Bidgely's AI-powered lead generation can be put to work to soft-sell a greater volume of current product offerings through existing channels, as well as to deliver click-throughs to an affiliate portal as a means to secure new revenue streams.

For the existing products and services sold by the energy retailer, all transactions and fulfillment are handled by the energy retailer according to processes already in place. On the other hand, the transactions and fulfillment of new products and services are completed by Bidgely partners. This approach ensures that customers receive efficient, end-to-end service with minimal liability borne by the energy retailer. Third parties fulfill orders, provide customer support, and handle all returns and refunds.



Beyond affiliate programs, Bidgely is partnering directly with manufacturers to offer special deals and incentives to our utility partner's customers. This creates a unique buying experience and a channel that customers will keep coming back to.

## VSE CASE STUDY AND RESULTS



Slovakia's leading utility, **Východoslovenská energetika a.s. (VSE)**, part of the RWE Group, is an industry leader when it comes to expanding the utility business model beyond the supply of kWh to include a wide range of products and services for the home. VSE turned to Bidgely's UtilityAI Lead Generation Solution to further improve customer engagement and expand its non-kWh revenue generation by creating new

value from its customers' recently installed smart meters and to create a utility-wide, omni-channel personalized customer advisory and sales program delivered through email, web, the call center and field energy advisors.

The utility tapped UtilityAI's patented disaggregation technology for both smart and non-smart meters to build its program based on detailed understanding of the energy consumption in every home. The web platform provides further insights together with an opportunity for customers to efficiently complete a home profile in order to receive greater personalization. The VSE call center is then able to schedule in-home visits by a field agent to discuss highly-relevant products and services for the customer. With AI integration, all teams within the utility know the full history and outcome of every digital and in-person communication with each customer to inform future interactions.

The initial pilot showed very high customer satisfaction with the services, with 97 percent of customers opting in to continue to receive personalized communications and recommendations from VSE and 95 percent rating them as "useful." Very importantly it resulted in a 70% increase in sales of non commodity products like smart thermostats, efficient water heaters, home insurance and more.

Find out more about Bidgely's lead generation and advanced targeting capabilities by downloading our Analytics Workbench Solution Brief [here](#).

