



Beyond the Meter Working Group

Kickoff Webinar
March 2nd, 2022

Recording Link Password: BTM_2022

About DEFG



DEFG is a research and advisory firm with a core expertise in customer strategy, experience and operations in the utility sector. We serve many of the largest utilities in North America and provide support on all aspects of our clients' relationships with their customers.

Founded in 2003, DEFG is widely recognized for its progressive vision on customer experience and thought leadership to ensure that service to low-income and vulnerable customers continues to improve.

Our areas of expertise include:

- Customer Strategy, Operations and Experience
- Payment Strategy and Customer Solutions
- Low Income
- Clean Energy and Customer



Today's Agenda



- I. Introductory Remarks
- II. Beyond the Meter Working Group
- III. 2022 Scope And Deliverables
- IV. Calendar
- V. Questions

Today's Agenda



Introductory Remarks

Beyond the Meter Working Group

Scope & Deliverables

Calendar

Questions

Contact



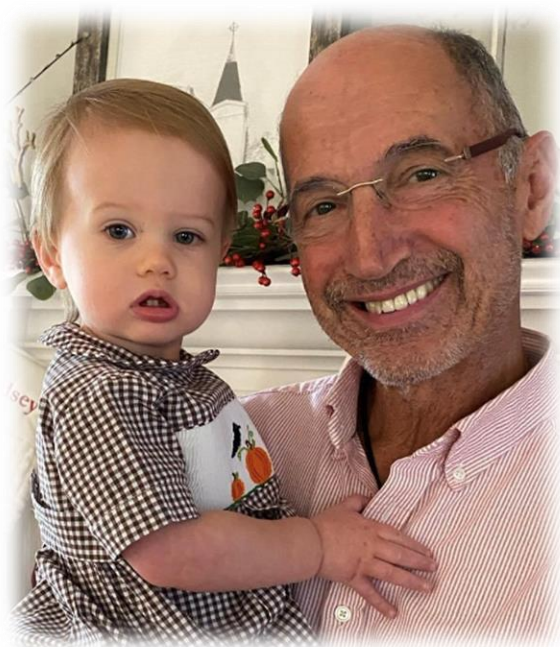
Meter Readers, Truckmen and Linemen Sell Washers

According to telegraphic advices from Portland, Ore., the Pacific Power & Light Company, with operating headquarters in Portland, conducted a most successful washing-machine sales campaign during October. The company serves about 24,000 residential customers in seventeen smaller communities in Oregon and Washington and, although electrical devices are already well distributed in the community, 855 more washers were sold during the month in this campaign. The best previous month's record on the Pacific company's system was in October last year, when 236 washing machines were sold.



Beyond The Meter:

A range of value-added services and products offered through the local utility that increases customer satisfaction and new sources of non-usage revenue for the utility.



Rob Gilpin

Executive Director Beyond The Meter Working Group

For over 20 years, Rob has been helping utilities improve customer satisfaction and drive customer engagement. For the past 4 years, Rob has been solely focused on helping utilities develop Beyond The Meter program designed to generate non-usage revenue and increase customer satisfaction.

As Executive Director of the Beyond The Meter Working Group, Rob's primary focus is to help utilities connect and foster peer-to-peer beyond the meter discussions.

Sample of Utilities with BTM Offerings



Angi Estimate for U.S. Home Services Market

Angi Research: Home Services Market Statistics

Size of the Home Service Market:	\$595B
Average Home Maintenance Spending:	\$3,192
Average Home Improvement Spending:	\$8,305
Year of Year Annual Growth:	17%

Source: <https://www.angi.com/research/>

Beyond The Meter (BTM) Working Group



Utilities increasingly need to leverage their customer base for growth and future earnings. Beyond The Meter (BTM) is a proven partnership model with vendors to bundle together products and services in order to create greater value for the customer and revenue for the utility.

The BTM market is estimated to be worth almost \$600B and growing at 17% annually. Utilities have a direct link into every home coupled with a high degree of trust and loyalty. Utilities are in a unique, and highly desirable, position to provide value-added services while saving homeowners time and money.

We hope you will join us as a member of the BTM Working Group and help shape the future of all things Beyond The Meter.

Jamie Wimberly, CEO, DEFG LLC



2022 BTM Working Group Members



Why Now?

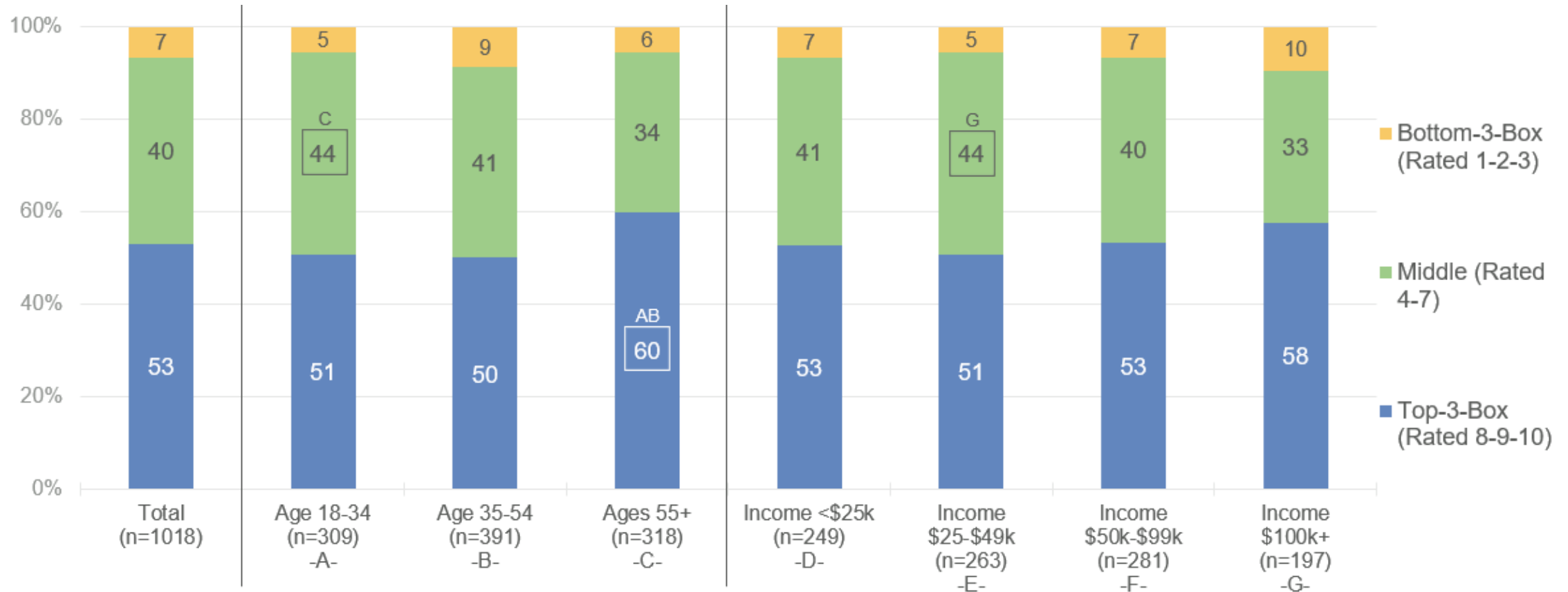


Utilities have been offering value added services for 100 years to generate additional revenue. BTM programs include home repair & maintenance, smart home / alarm technologies, solar panels, EV chargers and home battery storage. In just 5 years, 40% of utilities have already adopted a marketplace site.

While many leading utilities have already launched BTM programs with great success, many others are just beginning to evaluate these programs. Yet, there's been no place for utilities to come together to collaborate and share experiences. The BTM Working Group is intended to directly facilitate the market growth of BTM offerings and increase revenue opportunities for our members.

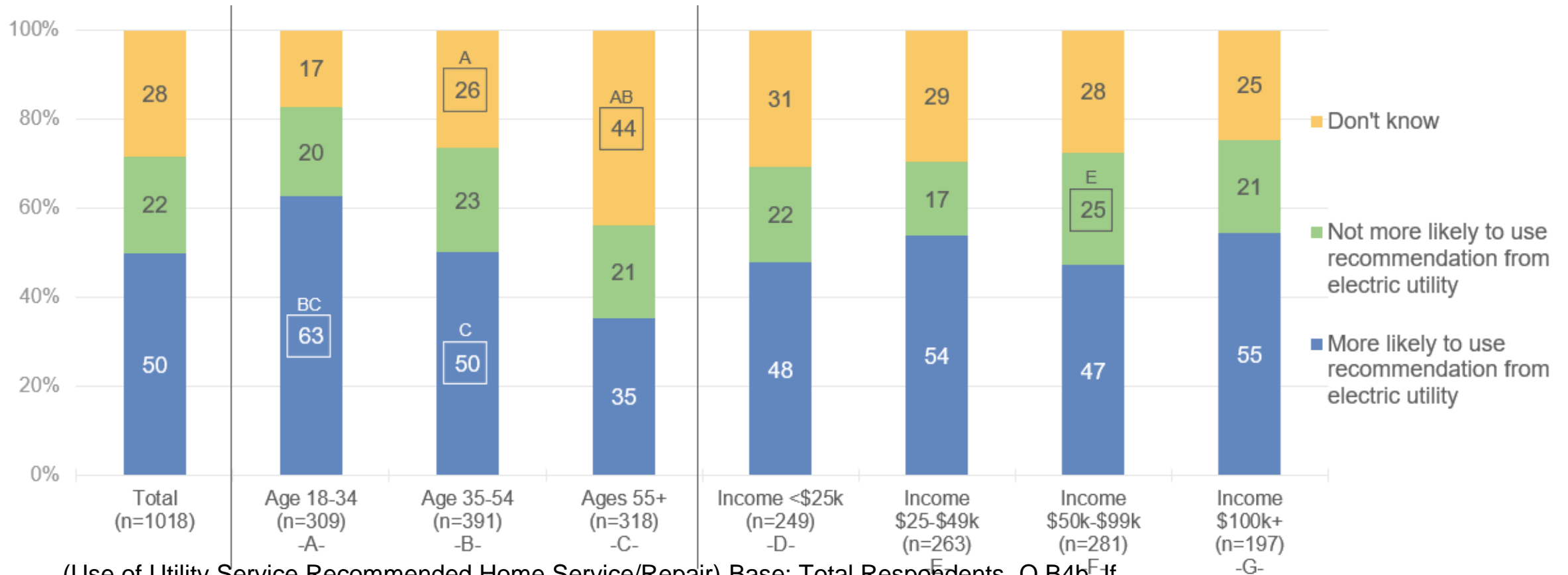


Majority of Customers View Electric Utility as a Trusted Energy Advisor



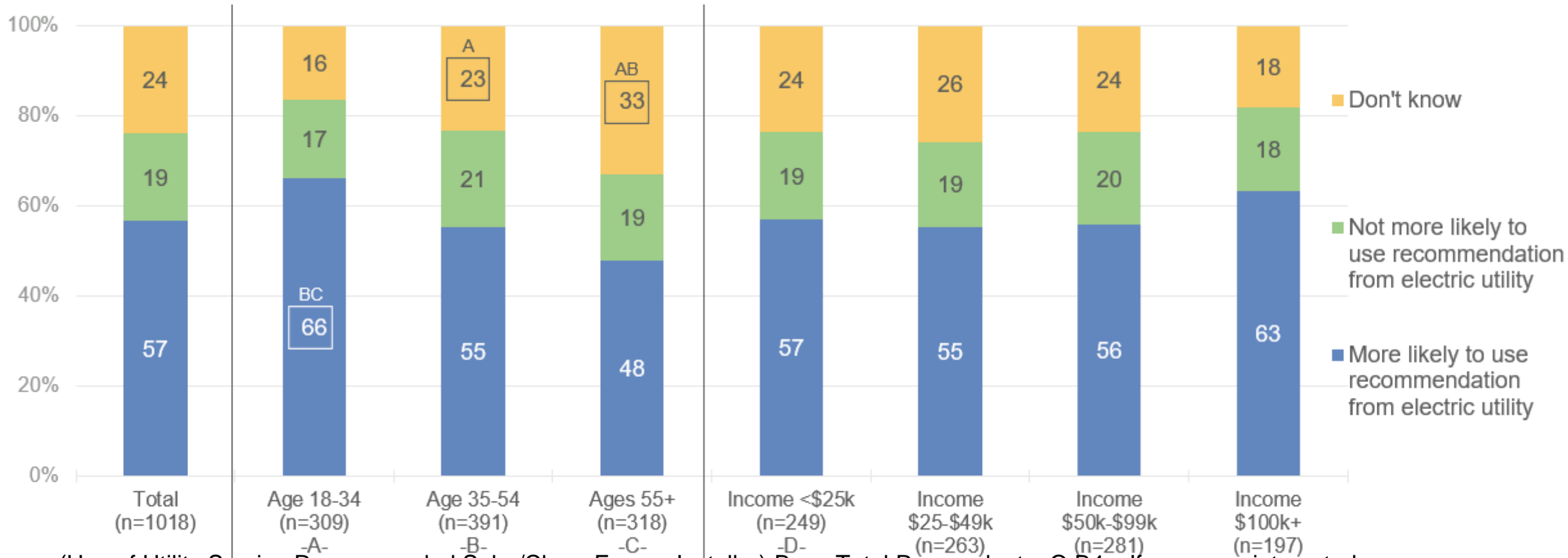
Base: Total Respondents. Q.B3. How would you rate your electric utility as a trusted energy advisor?

Utilities Have Influence Over Customer Choices Relating to Home Services



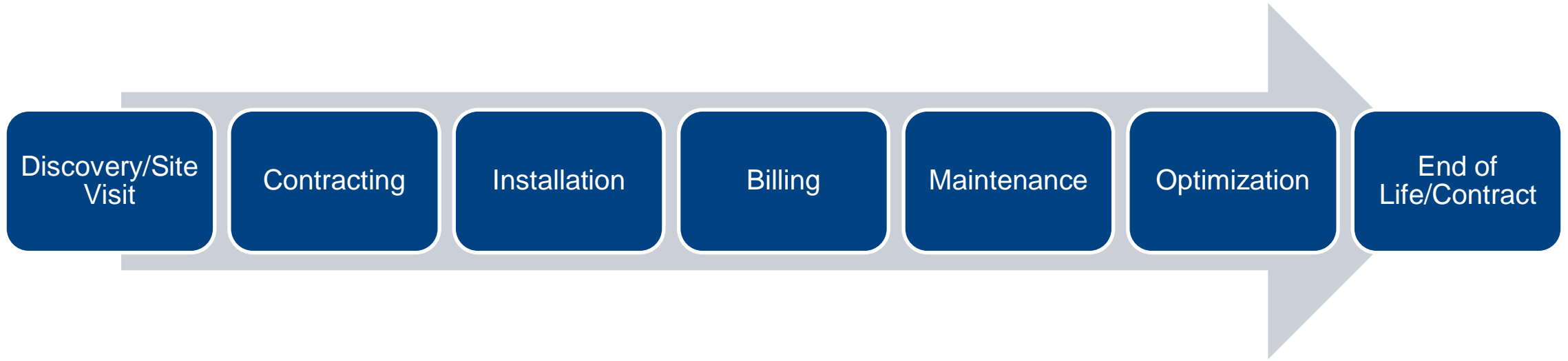
(Use of Utility Service Recommended Home Service/Repair) Base: Total Respondents. Q.B4b. If you needed home services or repairs, would you be more likely to use a service that was recommended by your electric utility?

Utility Leverage Increases for Customer Choices Relating to Solar/Clean Energy Recommendations



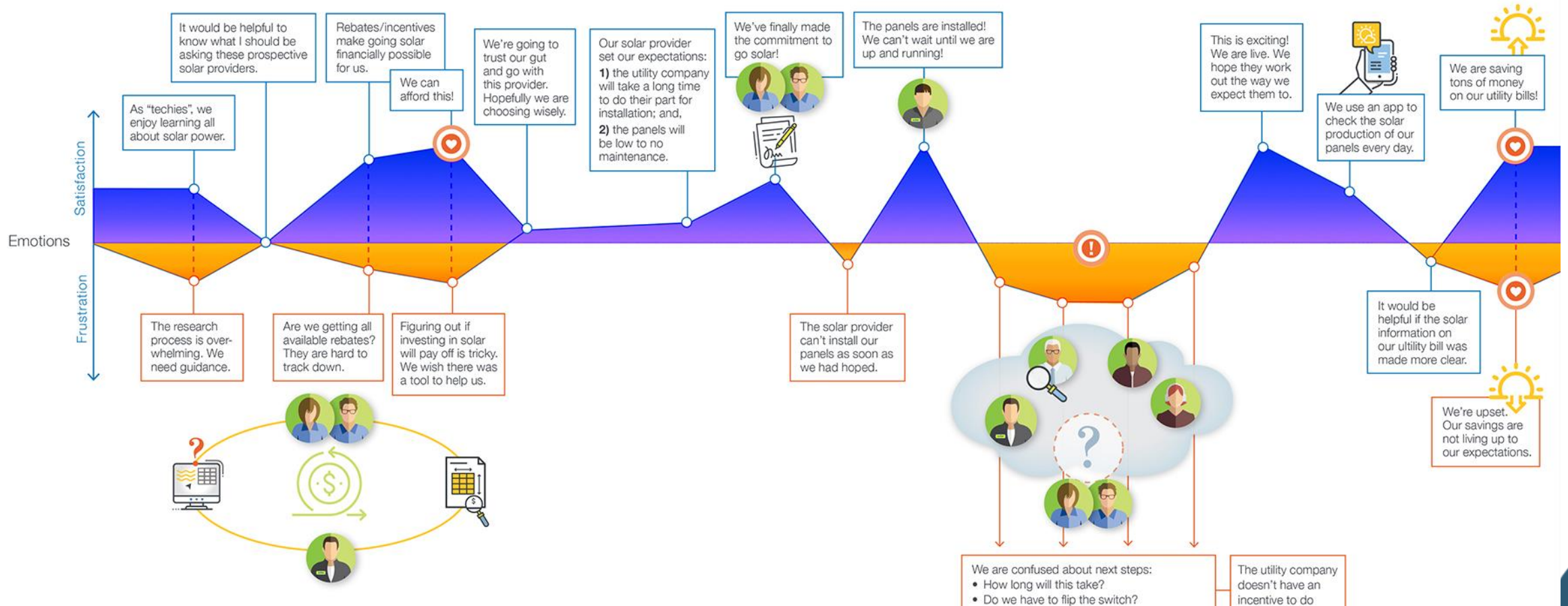
(Use of Utility Service Recommended Solar/Clean Energy Installer) Base Total Respondents. Q.B4c. If you were interested in solar energy or other clean energy options, would you be more likely to use a solar energy installer recommended by your electric utility?

Different BTM Customer Journey



Journeys

Phases	Deciding to "Go Solar"						Contracting			Installation					Usage				
	Panel Installation		Post-Installation "Mystery Phase"																
Actions	Contact Providers	Conduct Research	Obtain Design/Bid	Find Rebates	Financial Analysis	Choose Provider	Finalize Design/Cost	Learn about Installation/Maintenance	Sign the Contract	Schedule Installation	Install Panels	Inspect Installation	Install Meter	Add Solar to Utility	Flip the Switch	Go Live	Monitor Energy Production	Review Bills	Track Savings



Overview of “Beyond The Meter” Working Group

This new working group of the UCRC will bring together utilities and vendors for a full scope of work in 2022.

- Business case development
- Program design
- Performance metrics & benchmarking
- Voice-of-the-customer surveys and research
- Case studies of innovation and market success
- Regulatory considerations
- Utility-Vendor partnership models
- Marketing / Messaging Strategies



BTM Working Group Differentiator



The BTM Working Group is an initiative of the Utility Customer Research Consortium (UCRC), bringing together senior executives (VP or above) from 30 of the leading utilities and vendors in North America. The utilities in the UCRC serve over 70 million customers.

- ✓ Like with the UCRC, the BTM Working Group is designed to facilitate peer-to-peer networking and collaborative research
- ✓ The scope represents a full year of ongoing research and member interactions
- ✓ The only organization to specifically focus on the growing BTM and home services market in the utility sector
- ✓ Helps utilities to better understand the short and long-term benefits
- ✓ Allows utilities to fast track BTM roadmaps as well as new or existing journey mapping

Working Group Details



Interactions

- Annual in-person meeting (Fall of 2022)
- Webinars every 4 - 6 weeks; no restriction on number of participants



Deliverables

- The membership fee covers everything in the prospectus, including all the deliverables and interactions
- All members will have access to any research, presentations or analysis conducted by the BTM Working Group.



Requirements

- Primary representative at executive level (Director or above), supported by unlimited number of team members; Participation in industry survey; Updates on your BTM initiatives

BTM Working Group Deliverables



The BTM Working Group offering includes:

- Facilitated peer-to-peer interactions, including an annual in-person meeting per year and webcasts
- Collaborative research initiatives, including in-depth analysis, research findings and workshops/ webcasts
- Member presentations and case studies
- Ongoing trend analysis and new product evaluation
- Annual survey reports and findings: customer and industry
- Key performance indicators analysis and evaluation
- Ongoing research on utility-vendor models and performance
- RFP templates and recommendations
- On going networking access to all other UCRC BTM members

Current BTM Q1 – Q2 2022 Schedule



Month	Event
January - March	Member Onboarding and Interviews
March 2 nd	2022 Official Kickoff Webinar
March	BTM Market Landscape Analysis and Review
April	BTM Vendor Panel Discussion
April	National BTM Consumer Survey
May	Utility BTM Roundtable
Ongoing	Utility Presentations
TBD	Regulatory White Paper & Panel

Questions

DEFG

Customer Insights & Advisory Firm

For more information
please contact:

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