



Vendor Huddle
August 2022



Brought to you by
DEFG
Customer Insights & Advisory Firm
An **E Source** Company



BTM
BEYOND THE METER

Today's Agenda

- Overview and Introductions
- Vendor Questions
- Roundtable Discussion
- Updated BTM Schedule

SAVE THE DATE!



December 8th-9th
(Thursday & Friday)

**DOUBLETREE BY HILTON MCLEAN TYSONS
MCLEAN, VA**



**BEYOND THE METER (BTM)
WORKING GROUP
1ST ANNUAL MEETING**

HOSTED BY



ALARM.COM



You are invited to join 50+ senior utility and vendor executives for two days of visioning and interaction around the future of all things beyond the meter; Plus a tour of the Alarm.com HQ and a group excursion to the Alarm.com smart Demo House in Falls Church, Va.

More details to come!
Contact crogers@defgllc.com with inquiries.





Vendor Questions

- 1) Planning for BTM Annual Meeting with two vendor panels. We would like input on the focus of the vendor panels. Some initial ideas are:
 - The role of services in the BTM market
 - The future of BTM from a vendor perspective
 - Vendor business planning and outlook

- 2) We will be conducting another residential customer survey for the annual meeting. What new questions should we consider?

- 3) What are some of your ideas for Sponsorship Opportunities for our Annual event?

- 4) Any suggestions for a BTM keynote speaker or Subject Matter Experts?

- 5) What utilities might benefit from a free membership for the remainder of 2022?

Alarm.com Customer Survey Questions

We will be conducting another residential customer survey for the annual meeting. What new questions should we consider?

- How important is the security of your home?
- Would you like the convenience of home automation in your home?
- Would you like to receive important notices to your security panel from your utility provider? (i.e., weather alerts, safety alerts, new cost-saving program)
- Is water management important to you and your family?
- Is solar something you already have or are interested in learning more about to save money with your utility provider?
- Have you bought an electric vehicle or going to in the next 2 years?
- Is battery storage important to you as a back up to your solar or utility electric?

BTM Updated Schedule

Month	Event
January – March	<ul style="list-style-type: none"> Member Onboarding and Interviews
March	<ul style="list-style-type: none"> 2022 Official Kickoff Webinar (March 2nd)
April	<ul style="list-style-type: none"> (April 21st) BTM Roundtable Discussion (Utility Only) (April 20th) BTM Roundtable Discussion (Vendor Only)
May	<ul style="list-style-type: none"> BTM Market Landscape Analysis & Review
June	<ul style="list-style-type: none"> BTM Vendor Panel (Public Facing)
July	<ul style="list-style-type: none"> Next Gen – Customer Requirements w/ Futurist Amber Mac (July 20th @ 2:00 EDT) BTM Customer Survey Findings Released (July 28th @ 2:00 EDT)
August	<ul style="list-style-type: none"> Quarterly Member & Vendor Roundtable Discussion (Aug 10th@ 3:00 EDT)
September	<ul style="list-style-type: none"> Future Utility Revenue Model Framework & Analysis (by Karen Lefkowitz)
Ongoing	<ul style="list-style-type: none"> Regulatory White Paper, Panel Discussions, Roundtables & Utility Presentation

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DEFG, An E Source Company, is a customer insights and advisory firm in the utility space. Through collaborative research, data analysis and peer-to-peer networking, we help our clients achieve ways to better serve their customers.