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## Agenda

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Monday, September 16

**6:00–7:30 p.m.                    Opening Reception**

Tuesday, September 17

**7:30–8:15 a.m.                    Breakfast and Registration**

**8:15–8:45 a.m.                    Making Connections**

We'll lead an engaging exercise to get to know one another and gain an understanding of how market research is evolving in the energy industry. What successes and innovations did you celebrate recently, and where do you want to steer your team in the next year? This exercise will provide context around how utilities are making gains and what challenges remain.

**Rachel Cooper**, Associate Director, Market Research, E Source

**8:45–9:30 a.m.                    Organizing for Success**

Department structures can significantly affect internal communication as well as project success, and we've learned that the ways in which utilities organize their market research and customer insights departments vary. Some utilities employ a centralized approach; others have a decentralized structure with market research living in several individual departments. In this hands-on session, we'll explore the motivation behind these org structures and job title considerations for market research and insights professionals.

**Heather Hilgenkamp**, Lead Analyst, Market Research, E Source

**9:30–10:15 a.m.                    Bridging Research and Analytics**

We'll explore a best-case scenario for bringing research and analytics together to grow efficiency, solar, electric vehicle, and renewable programs. We'll hear how Austin Energy uses analytics and segmentation to determine who will participate, resulting in a map of top segments for the programs and a map of potential customers based on similarities. We'll also learn how this approach informs the utility's other customer research. Be prepared to be inspired to implement this innovative approach at your organization.

**Julie Black**, Economist, Austin Energy

**Meredith Jagger**, Business Intelligence Consultant, Austin Energy

**10:15–10:30 a.m.                    Break**

**10:30–11:30 a.m.                    Using Market Research to Meet Organizational Objectives**

In this guided, interactive discussion, we'll highlight utilities that are using market research and government survey data to meet objectives such as improving customer satisfaction, informing electric vehicle initiatives, forecasting and modeling, and boosting participation. We'll also discuss how utilities are consolidating insights and metrics from various sources and drawing conclusions to provide the best insights to their stakeholders.

**Chad Garrett**, Managing Director, Consulting and Advisory Services, E Source

**Oxana Humphreys**, Marketing Research Manager, Southern Company

**Melanie Wemple**, Senior Managing Director, Consulting and Advisory Services, E Source

- 11:30 a.m.–12:00 p.m. Q&A**  
Let's pause to digest what we've discussed so far and take time to ask each other questions, build on ideas, and start talking strategy.  
**Rachel Cooper**, Associate Director, Market Research, E Source
- 12:00–1:00 p.m. Lunch**  
Meet the rest of the E Source market research team (designated tables).
- 1:00–2:00 p.m. Best Practices for Telling Stories with Data**  
The data you have might be terrific information, but if management isn't convinced of how it will help them, it will gather dust on a shelf. We'll use a hands-on approach to learn how to evolve from presenting data to presenting stories to successfully bring the voice of the customer to bear on strategic business decisions.  
**Heather Hilgenkamp**, Lead Analyst, Market Research, E Source  
**Arthi Padmanabhan**, Analyst, Market Research, E Source
- 2:00–3:00 p.m. Principles of Human-Centered Design and How to Do It**  
How are utilities getting the insights they need when they need them, and what are they doing with those insights once they have them? In this interactive session, we'll focus on approaches to gathering customer feedback that will help evolve your operations and product and service offerings. We'll cover ethnography and design thinking, journey mapping, customer co-creation, and corporate intelligence. We'll practice diving deep into customers' wants and needs to keep decision-making and design focused on the customer.  
**Adam Maxwell**, Head of Human-Centered Product Strategy, E Source  
**Melanie Wemple**, Senior Managing Director, Consulting and Advisory Services, E Source
- 3:00–3:30 p.m. Next Steps**  
We'll wrap up the day by consolidating what we've learned and committing to the next steps we'll take to continue moving utility market research and customer insights forward. Then we'll get out of our seats and have some fun.  
**Rachel Cooper**, Associate Director, Market Research, E Source
- 3:30–4:00 p.m. Gallery Walk and Learning Lab Scavenger Hunt**  
We'll introduce you to the E Source market research web page and show you our data tools, plus we'll take a tour of our research and solutions gallery.
- 5:30–6:30 p.m. Forum Welcome Reception**
- 6:30–8:30 p.m. Market Research Leadership Council Dinner**  
Complimentary; preregistration requested.