

# 2010 Marketing & Customer Experience Best Practices Workshop for Utilities

May 5-6, 2010

St. Petersburg Bayfront Hilton  
St. Petersburg, Florida



Organized and Facilitated by:



Workshop Sponsor:



## Learning Objectives

Find out about innovative marketing and customer experience initiatives that utilities, and other industries, are using to:

- ✓ Improve customer satisfaction and loyalty
- ✓ Market energy efficiency programs
- ✓ Market smart grid initiatives
- ✓ Promote customer self-service programs
- ✓ Understand customer segments, and how to serve them better (and more cost-effectively)
- ✓ Employ multi-channel communications and customer relationship management (CRM) strategies
- ✓ Improve the customer's overall perception of your utility's brand and image

Participants will learn about these and other matters related to trends and best practices in utility marketing:

- Understand who are utility leaders in marketing & CRM, and why/how they became leaders
- Hear about best practices in leveraging marketing

## WHO SHOULD ATTEND?

Utility Customer Experience & Customer Service Managers/Directors/VPs

Utility Energy Efficiency Program Managers

Utility Marketing & Communications

Utility DSM Marketing Professionals

Self-Service Program Developers

Utility Customer Experience and Customer Service Managers

Utility Marketing & Communications Professionals

Utility Marketing & Member Services

Utility Market Researchers

Anyone involved in marketing, CRM and customer segmentation in the utility industry.

and CRM techniques in order to promote and market various utility programs (ie paperless billing, ebilling, green choice programs, demand response, smart grid, energy efficiency programs, etc.)

- Learn how and why utilities are revamping their marketing and customer-centric strategies
- Understand what utilities are 'up and comers' in the marketing space, what they are planning, and why
- Share utility marketing, CRM and customer segmentation case studies among participants
- Understand how leading utilities are creating and managing relationships with customer segmentation and marketing vendors, and what vendors they are partnering with (and why)
- Understand how leading utilities, including at least one case study from Europe, have already developed an innovative marketing strategy that employs techniques from other industries never yet used in the utility space – and learn from their successes
- Gain insight into how specific utilities will handle marketing/CRM planning. Will they do it themselves, and what drivers lead them to doing it by themselves? Or will they turn to longer term partnerships, and what are they looking for in those partnerships?
- Five (5) critical factors, according to leading utilities, to consider BEFORE signing agreements with customer segmentation and marketing vendors/consultants
- Hear how utilities are integrating customer segmentation initiatives into their credit and collections program strategies
- Learn how utilities avoid the age-old problem of having a vast amount of data – but not using it. Instead, gain insight into actionable steps your utility can take to optimally leverage your existing data for meaningful marketing initiatives.
- Understand innovative initiatives related to utility marketing, and create a collaborative environment where participants can network/brainstorm new and **innovative** ideas for the utility sector

***DRAFT AGENDA***  
*(subject to change)*

**May 5, 2010**

**Continental Breakfast and Registration**

**Tracking Utility Customer Touchpoints to Maximize Behavioral Marketing: Utility Case Studies on Leveraging Behavioral Marketing to Communicate the Right Message, to the Right Customer, at the Right Time, Through the Right Channels**

This presentation will highlight case studies from ten (10) electric utilities that implemented a simple – yet effective - Customer Relationship Management (CRM) program in three days, and at little to no cost. With utilities leveraging this program from Alaska to Florida, you will learn from their experiences with implementing a simple program that helped them to better understand, segment, track, and serve their customers.

***REGISTER BY  
3/19/2010 and get an  
incredible room rate of  
\$89 per night at the  
Hilton Bayside! After  
3/19, regular room  
rates apply.***

This presentation will highlight:

- ✓ How these utilities, ranging from Alaska to Florida, leveraged a free CRM program to optimize marketing
- ✓ How effective marketing influenced customer behaviors
- ✓ Lessons-learned from the quick-start program
- ✓ Ideas for how your utility can leverage a similar CRM/marketing initiative at no/low cost – without IT intervention and without integration into your utility's billing system

### **Best Practices in Marketing Your Utility's "Smart Grid" and "Smart Meter" Initiatives: If You Build It, Will They Come?**

Effective "utility marketing" is all about engaging customers with relevant information, impacting and influencing customer behaviors, and effectively communicating results by tracking energy use patterns that encourages and sustains positive behavior change.

Key items of this presentation on marketing best practices include:

- ✓ Informing the customer about the "Smart Grid" and assuring the message resonates from a customer's perspective?
- ✓ Marketing to and engaging your utility's customers
- ✓ Influencing customers to take action
- ✓ Future-proofing designs and related marketing initiatives – thinking ahead to the next level of grid innovation and how to market such innovations appropriately

### **Segmenting Customers to Optimize Utility Marketing Efforts**

Learn about best practices in utility customer segmentation planning:

- ✓ Understand who are utility leaders in the customer segmentation marketplace, and why/how
- ✓ Understand how leading utilities are creating and managing relationships with customer segmentation and marketing vendors, and what vendors they are partnering with (and why)
- ✓ Understand how leading utilities, including at least one case study from Europe, have already developed a customer segmentation strategy – and learn from their successes
- ✓ Hear about how customer segmentation techniques can be leveraged in order to sell and market various programs (ie paperless billing, ebilling, green choice programs, demand response, smart grid, energy efficiency programs, etc.)

### **Marketing Energy Efficiency Programs**

What's working, and what's not working, with marketing techniques utilities are leveraging to market programs, offers, smart grid products and self service. Attendees will hear about innovative marketing techniques that leverage customer data, and case studies from leading utilities.

### **Social Marketing for Utilities**

Best practices in leveraging Social Marketing to promote utility programs and to influence customer behaviors.

5pm  
**Adjourn Day One**

**May 6, 2010**

9:00am  
*Continental Breakfast*

9:15am  
**Best Practices in Selecting a Customer-Centric Marketing/CRM Solution for Your Utility**

This presentation will provide you with knowledge that is guaranteed to lessen the frustration -- and save your utility time and money – when selecting and implementing a new marketing/CRM solution. Nowadays, sophisticated marketing relies heavily on data, and data manipulation relies heavily on technology – so choosing a solution is getting more complicated and more technical.

- ✓ Learn how a leading electric utility evaluated marketing/CRM solutions, and determined the best fit for their needs
- ✓ Learn about new types of marketing solutions your utility should be considering
- ✓ Hear about innovative marketing solutions being leveraged in other industries that could be leveraged by your utility
- ✓ See a detailed list of business requirements utilities should be considering when evaluating CRM solutions – and how utilities have ranked vendors on those ‘functionalities’ in order to make a decision
- ✓ Be informed of pitfalls to avoid when evaluating and implementing new marketing solutions

10:30am  
**Facilitated Networking Among Participants to Share Innovative Strategies for Marketing in the Utility Industry**

All participants will receive a post-workshop copy of input provided during this session.

*Noon*

**Adjourn**

**ABOUT YOUR TRAINERS**

***John Hoggard, Managing Director & Utility Industry Analyst, Utility Planning Network***

A highly-recognized utility industry trainer and analyst, Mr. Hoggard specializes in assisting utilities worldwide with Smart Grid, Customer Experience and related technology based strategies. He has been centrally involved with implementing marketing and customer experience strategies for over twenty (20) utilities worldwide.

Mr. Hoggard is also the Founder of “The Utility CIS/CRM and Customer Experience Consortium” and “The Global Smartgrid/AMI Utility Peer Group”, which are utility networking groups dedicated to educating utilities globally on a variety of special topics, including Smart Grid, Advanced Metering, CIS/CRM, data warehousing and call center management best practices. As such, he holds the distinct honor of being chairperson of Annual Utility Awards for CIS/CRM Excellence™ Program which honors utilities worldwide for customer experience, marketing and related technological initiatives. In the early 1990s, John was a utility industry marketing consultant for Teradata – a market leader in CRM and data warehousing.

John has expertise in utility marketing strategies, related IT/CIS/CRM project management, customer data warehousing, customer systems selection, and over sixteen years of experience with utility customer care strategy and supporting systems.

In the late 1980s, John founded and managed the National Accounts Marketing Department for Washington, DC-based Edison Electric Institute (EEI), the worldwide association of investor-owned utilities. He started his career at Pennsylvania Power & Light Company as a Marketing Engineer. He holds a BS in Mechanical Engineering and continues to be published in leading utility trade publications.

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**UPN’S UTILITIES-ONLY WORKSHOP ON MAY 4, 2010  
FOCUSED ON UTILITY ENERGY EFFICIENCY PROGRAM MANAGEMENT**

On May 4, a separate utilities-only group is meeting to intimately network and share best practices in managing and marketing energy efficiency programs at utilities. Founding members of this group who first met in May 2009 in Austin Texas at the first kickoff meeting are:

- Salt River Project (SRP)
- Toronto Hydro
- Austin Energy
- SMUD
- DTE Energy
- Avista
- Public Service New Mexico
- Dominion Resources

The purpose of this ‘closed membership’ group of utilities is to:

- Gather and network a relatively small group of utilities at a similar level of output and commitment (i.e., not a wide differential between up-and-comers and been-doing-this-for-years utilities). Please note: not all utilities are guaranteed participation (i.e., utility members are pre-approved.)
- Enable member utilities to share best practices in creating/managing Energy Efficiency and related Utility Marketing programs to promote energy efficiency programs.

If you are a utility and interested in learning more about this group, which is not open to the public and not open for registration without prior approval, please contact your UPN representative. No walk-in registrations are permitted whatsoever for this closed-door meeting on May 4.

**Registration Form: UPN's 2010 Marketing & Customer Experience Best Practices Workshop**  
Complete and fax the form below to 978-264-0654.

**Registrant**

Please complete the following and fax (978-264-0654) or mail to UPN with payment.

Name: \_\_\_\_\_

Title: \_\_\_\_\_

Utility: \_\_\_\_\_

Address: \_\_\_\_\_

City/State/Zip: \_\_\_\_\_

Phone: \_\_\_\_\_ Fax: \_\_\_\_\_

Email: \_\_\_\_\_

***Please sign below*** to acknowledge that you understand that faxing and/or mailing this registration to UPN commits you to the fees, whether or not you attend. Your signature below also indicates that your utility agrees to the "Utility Member Commitment" terms outlined in this document:

Signature (required): \_\_\_\_\_

**You MUST choose one of the following two boxes:**

**REGISTRATION FEE (please check one box):**

For employees of electric, gas or water utilities ONLY:

- Registration paid before 3/24/10 \$795  
 Registration paid after 3/24/10 \$995

For all others:

- Registration paid before 3/24/10 \$995  
 Registration paid after 3/24/10 \$1195

Add \$150 per person if paying after 3/24/10: \$ \_\_\_\_\_

Add \$15 per credit being used: \$ \_\_\_\_\_

Your total (all in USD)^: \$ \_\_\_\_\_

I will pay by credit card (**Mastercard and VISA only\* please!**), and agree to a \$15 USD service fee to do so.

Name on Card: \_\_\_\_\_

Card Number: \_\_\_\_\_

^Total to be charged in USD: \$ \_\_\_\_\_

\*Card Type: \_\_\_\_\_ Expiration Date: \_\_\_\_\_

I will pay by check, payable to UPN to the address below. Note: checks must arrive by 3/24/10 to avoid the late fee(s).