2019 MIDWEST ENERGY SOLUTIONS CONFERENCE

Workshop: Harnessing Technology to Engage Customers

Thursday, February 21, 3:30 – 5:00 p.m.

Workshop Description

As technology advances, the utility-customer relationship is changing. With more data available than ever before and devices that enable unparalleled engagement and interaction, utilities have the opportunity to connect with their customers in new and meaningful ways. During this interactive workshop, attendees will learn from subject matter experts about six promising technologies that enable this type of utility-customer interaction beyond a monthly bill payment or a traditional energy efficiency program. Attendees will also engage in facilitated small group discussions to identify opportunities, barriers and next steps for these technologies.

Featured Technologies

Smart Thermostats

Like traditional thermostats, the primary function of a smart thermostat is to control a home or businesses' heating and cooling. However, unlike traditional thermostats, smart thermostats are Wi-Fi enabled, allowing operability with smart device, and utility engagement through demand response and other programs.

Home Assistant Products

Sometimes called "smart speakers", home assistant products use voice commands to play music, make calls, control connected home devices, pay utility bills, identify efficiency programs and more.

Utility Marketplaces

A utility marketplace provides an online platform for customers to access and purchase products for their home or business, such as smart thermostats, LED bulbs and other efficiency products. Many times, users can automatically apply a rebate prior to check out.

Data Analytics – Customer Facing

The rollout of Advanced Meter Infrastructure (AMI), has dramatically increased the amount and level of sophistication of energy usage data. With online utility platforms, this data has become a vital tool for customers, helping them gain insights into their energy usage through digestible and personalized information.

Data Analytics – Utility Insights

With data from AMI, equipment sensors, rebate application forms and smart equipment, utilities can understand their customers and better align their offerings. By leveraging this data through sophisticated modeling, utilities can improve the customer journey, segment customers, conduct targeted marketing campaigns and identify new opportunities.

Connected Equipment

Manufacturers of HVAC and other equipment are seeing the value of including Wi-Fi capability for improved maintenance, among other reasons. As connected equipment becomes more ubiquitous in the marketplace, new opportunities for utilities and customers will emerge, enabling greater insight and control over their equipment.

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Workshop Agenda

3:30 – 3:35 p.m. **Welcome & Introduction**

3:35 – 4:15 p.m. **Technology Overviews**

- Smart Thermostats
- Home Assistant Products
- Utility Marketplaces
- Data Analytics – Customer Facing
- Data Analytics – Utility Insights
- Connected Equipment

4:15 – 4:40 p.m. **Breakout Discussions**

4:40 – 5:00 p.m. **Report-Out, Discussion/Q&A, Wrap-Up**

Meet Our Subject Matter Experts

Rob Kelter, Environmental Law and Policy Center, *Smart Thermostats*

Mr. Kelter is a Senior Attorney at the Environmental Law and Policy Center (ELPC) where he leads the organization's clean energy efforts and regulatory policy initiatives around the Midwest and before Congress. He has litigated energy efficiency, renewable energy, and rate design cases in Illinois, Ohio, Michigan, Wisconsin and Iowa. He is an experienced energy and public utilities regulatory attorney, who served as the Litigation Director at the Illinois Citizens Utility Board and was lead attorney on a wide array of electricity and natural gas rate and rulemaking cases and issues. His cases included not only rate and environmental issues, but a number of groundbreaking consumer fraud cases related to utility and competitor marketing abuse. Before then, he worked as a staff attorney on clean energy issues in Washington, D.C. at Environmental Action and the D.C. Office of the Peoples Counsel. He is the former Chairman of the Board of the Illinois Environmental Council and has served on a number of boards and committees at the national and state level. He has spoken at numerous conferences and is a frequent media spokesperson.

About the Environmental Law and Policy Center (ELPC)

The Environmental Law & Policy Center is the Midwest's leading public interest environmental legal advocacy and eco-business innovation organization, and among the nation's leaders. We develop and lead successful strategic advocacy campaigns to improve environmental quality and protect our natural resources. We are public interest environmental entrepreneurs who engage in creative business deal-making with diverse interests to put into practice our belief that environmental progress and economic development can be achieved together.

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Will Baker, Google, *Home Assistant Products*

Will is a customer success manager at Google, ensuring energy partners have the tools and resources to launch, implement, and evaluate successful smart home energy programs. Will actively participates in TRM, work paper, and evaluation discussions with stakeholder groups across the country. Prior to Google, Will spent 8 years at a regional energy efficiency non-profit, and the last 4 years as the Director of Programs overseeing residential, commercial, and market transformation programs in 11 states. Will has a B.A. in International Relations and Economics from Michigan State University and an M.P.A. in International Energy Management and Policy from Columbia University in New York.

About Google

Our mission is to organize the world's information and make it universally accessible and useful.

Jay Grinde, Simple Energy, *Utility Marketplaces*

Jay Grinde is Senior Vice President, Client Solutions at Simple Energy, the leading provider of utility-branded marketplaces, behavioral energy efficiency programs and customer engagement tools for the largest investor-owned, municipal, and cooperative utilities in North America. He leads market strategy, partnerships and sales.

Prior to joining Simple Energy, Jay lead the Utility Practice at Hawk Incentives, where he focused on enabling utilities to take control of their incentive validation and fulfillment process. Before working at Hawk Incentives, Jay lead Midwest operations for Honeywell's Smart Grid Solutions business.

About Simple Energy

Simple Energy is the leading provider of utility-branded marketplaces and customer engagement software for the largest investor-owned, municipal, and cooperative utilities like Exelon, Southern Company, Xcel Energy, National Grid, and SMUD. Simple Energy's software as a service ("SaaS") instant rebate, customer engagement, and e-commerce solutions engage customers, drive energy savings, facilitate energy-saving product and service sales, and serve as the platform for the utility of the future.

Headquartered in Boulder, CO, Simple Energy uses behavioral science, big data analytics, and digital marketing techniques to build tools that motivate and enables people to take energy-wise actions and helps utilities be a part of the clean energy future. The company reaches over 35 million households with its solutions. To date, it has helped utility customers save over $150 million on their energy bills and abated over 2 million metric tons of carbon dioxide.

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Jeff Wahl, Bidgely, *Data Analytics – Customer Facing*

Jeff Wahl is Director of Business Development at Bidgely. He works with utilities to develop and apply solutions using Bidgely's UtilityAI platform, which improves program outcomes and customer engagement driven by a deeper understanding of each customer's energy consumption and behaviors. Before joining Bidgely, he developed strategic solutions for a number of organizations across energy, real estate and technology sectors. In between completing his B.S. at Colorado State University and MBA from The University of Colorado he worked as US Peace Corps Volunteer in the Dominican Republic (08'-10') serving as an economic development advisor along the border region of Hispaniola.

About Bidgely

Bidgely is the indispensable innovation partner for UtilityAI. Bidgely's patented disaggregation technology unlocks opportunities for utilities to optimize shareholder value, personalize customer engagement, and modernize grid operations.

Julia Friedman, Oracle, *Data Analytics – Utility Insights*

Julia Friedman leads Oracle Utilities' regulatory affairs work in 10 states across the country to help clients achieve regulatory approval for their filings and open and expand markets for Oracle's energy efficiency, demand response, and customer engagement products. She was previously the Senior Policy Manager at the Midwest Energy Efficiency Alliance and held roles at the National Association of State Energy Officials and the National Association of Regulatory Utilities Commissioners. Midwest is the best.

About Oracle Utilities

Oracle Utilities provides a wide range of cloud and on premise solutions for utilities around the world. Oracle's technology and service offerings are informed by data from more than 1 trillion meter reads. Oracle has delivered more than 20 TWh of energy savings through behavioral energy efficiency.

Kevin DeMaster, Mitsubishi Electric, *Connected Equipment*

Kevin DeMaster is Manager of Utility & Efficiency Programs with Mitsubishi Electric Trane HVAC. Since 2014 his focused attention supports utilities and implementers of energy efficiency, demand response, and beneficial electrification for residential and commercial energy efficiency programs utilizing ductless mini-split and variable refrigerant flow (VRF) heat pump technology. Kevin brings 15 years efficiency consulting beginning as a School District Energy Manager reducing electric, gas and water, consumption by over 30% equating to over $1M per year in savings. He

expanded his role consulting to utilities as an Implementer with Wisconsin Energy Conservation Corporation (WECC) and CLEAResult designing, implementing and managing well over $100M of residential and commercial energy efficiency programs.

About Mitsubishi Electric

For over 30 years, Mitsubishi Electric Cooling & Heating has enhanced people's lives by improving comfort, conserving energy, and promoting environmental sustainability. As a leading marketer of variable refrigerant flow (VRF) zoning and ductless heating and cooling systems for commercial and residential installations; these highly efficient VRF systems can dramatically cut energy costs.

The Hyper-Heating INVERTER™ technology produces efficiency up to 33.1 SEER, heating performance to -13 degrees Fahrenheit.