



An Exelon Company

# How energyOrbit Helps Utilities Increase Energy Efficiency Program Participation

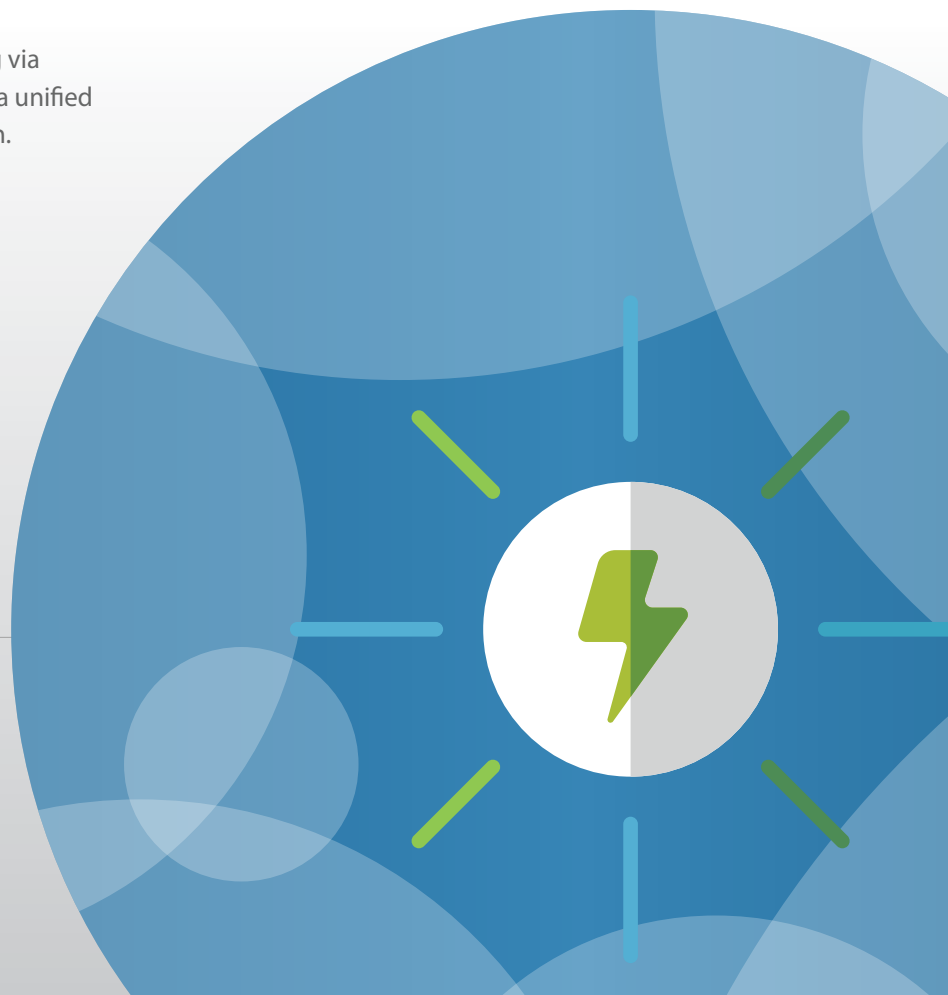
**CHALLENGE:** How do we increase customer participation in energy efficiency? How do we gain visibility into the impact of outreach on energy efficiency participation?

**SOLUTION:** Segment-based customer targeting via coordinated marketing and outreach, leveraging a unified business customer database and tracking solution.

**BENEFITS:**

- ➔ Improved program management
- ➔ Increased customer participation rates
- ➔ Consolidated forecasting & tracking

[www.energy-orbit.com](http://www.energy-orbit.com)  
866-628-8744  
[demo@energy-orbit.com](mailto:demo@energy-orbit.com)



# COMMONWEALTH EDISON SOLUTION

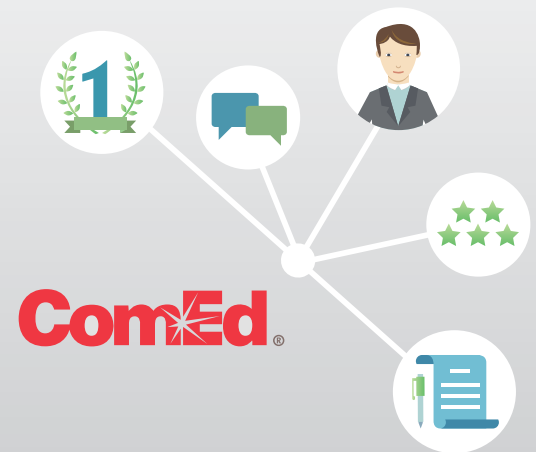
## BACKGROUND

Commonwealth Edison (ComEd) manages a portfolio of commercial and industrial energy efficiency incentive programs known as **Smart Ideas for Your Business**<sup>®</sup>. In 2010, ComEd began to focus on segment-based strategies and coordinated, multi-party outreach to increase program participation among business customers.

## FINDING THE RIGHT SOFTWARE SOLUTION

To meet legislatively-mandated energy savings goals in a cost-effective manner, ComEd wanted a verticalized customer relationship management (CRM) system that would:

- ➔ Manage relationships effectively across multiple parties
- ➔ Accurately track the outreach pipeline and results in real time
- ➔ Streamline the opportunity assessment process
- ➔ Fully coexist with existing IT paradigms
- ➔ Continually adapt, evolve and scale to meet ComEd's needs

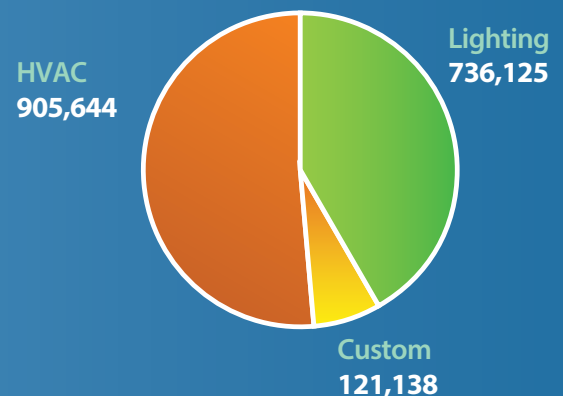


## COMMONWEALTH EDISON ADOPTS ENERGYORBIT

energyOrbit deployed its initial solution within three weeks of contract signature, and over a series of iterations enabled ComEd to:

- ➔ Implement a unified and verticalized CRM solution and set of automated workflows.
- ➔ Work more efficiently with a variety of third-party implementation partners to conduct market segment and solutions-based outreach.

## ComEd kWh Savings by Measure



“energyOrbit has proven to be a powerful, flexible solution and a key enabler of our marketing and sales strategies for Smart Ideas. Their organization and team are knowledgeable, responsive, and committed to our success.”

- Steve Baab, Manager, Energy Efficiency Programs,  
Commonwealth Edison

# ENERGYORBIT FEATURES

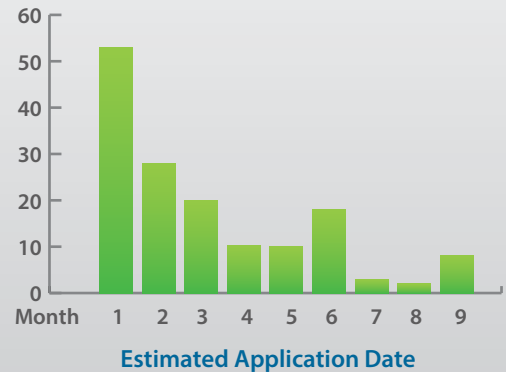
## MANAGE RELATIONSHIPS EFFECTIVELY ACROSS MULTIPLE PARTIES

- ➔ Provide a central, consistent view of customer and contractor account information to ComEd program managers, engineers and implementation partners.
- ➔ Coordinate customer outreach and track lead sharing across program implementation partners.

## TRACK PIPELINE & RESULTS IN REAL TIME

- ➔ Assess, prioritize, and assign energy efficiency opportunities for customers and trade allies.
- ➔ Track and report on each program's project pipeline, customer conversion, historical program participation and assessments.
- ➔ Provide real-time estimated savings and forecast probabilities, while implementing different sales processes for different programs.

Forecast kWh Savings (Millions)



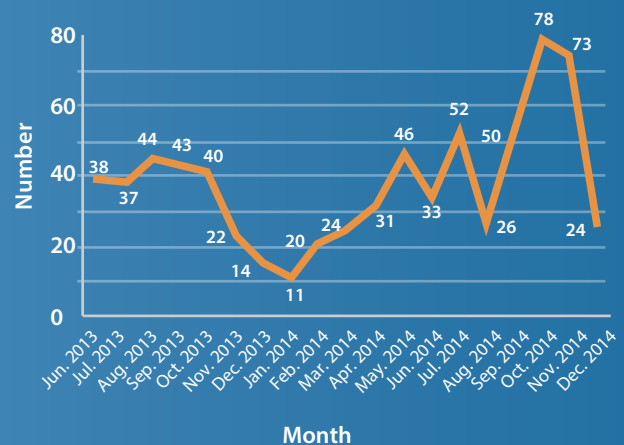
## STREAMLINE THE OPPORTUNITY ASSESSMENT PROCESS

- ➔ Prioritize, assign, schedule, and conduct opportunity assessments by ComEd engineers and through workflow rules; notify account managers and requestor when assessment is complete.

## FULLY INTERGATE WITH EXISTING IT

- ➔ Leverage a single source of business customer data that includes in-house energy, contact and program information.
- ➔ Integrate with ComEd's emailing platform and marketing information.
- ➔ Promote greater self-sufficiency for business users through easy-to-use sales reporting and dashboards.

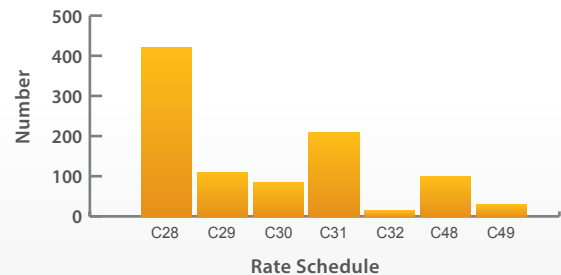
Energy Assessments by Month



## energyOrbit Solution Customized to Meet ComEd's Needs

- ➔ Record and track calls received by ComEd Smart Ideas for Your Business call center.
- ➔ Add validation rules to ensure consistency and high data quality.
- ➔ Determine effectiveness of marketing campaigns through customized reporting.
- ➔ Create new report types to meet ComEd's complex reporting requests.

Projects by Rate



Project kWh Savings



## Results

- ➔ Improved visibility into outreach's impact on customer participation
- ➔ More systematic sales tracking and follow-up
- ➔ Targeted reporting by customer size, usage data, industry, geography and participation
- ➔ Enhanced management of energy assessment process, from initial request to customer presentation
- ➔ Easily accessible, 360-degree view of customer participation and outreach history
- ➔ Seamless hand-offs between ComEd's implementation trade allies
- ➔ Improved Trade Ally management and tracking
- ➔ High amount of data integrity and consistency



One Market Street – Spear Tower, Suite 3600  
San Francisco, CA. 94105



An Exelon Company