

Technology Solutions and Programmatic Approaches:

Driving Innovation in Residential Energy Efficiency Strategies

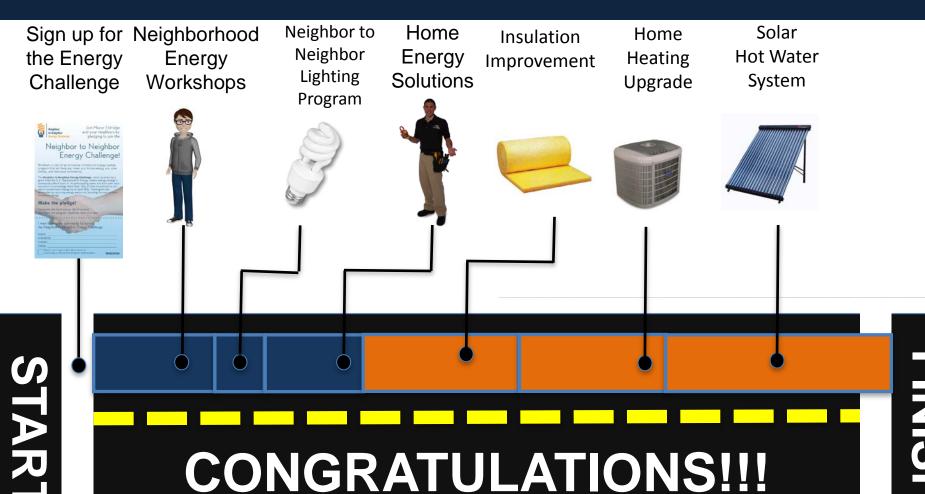
Kat A. Donnelly

July 11, 2012

www.CTEnergyChallenge.com



## The Road from Start to Finish





# N2N Program Development

- Action Research
  - Real-time data collection
  - Analysis of approaches
  - Course correction
- Qualitative and Quantitative Data
- Technology Platform
- Program Dashboards



## Our Technology

- Consumer Engagement Tools
- Contractor Tools
- Program Administration Tools



# Centralized Platform

# N2N has deployed an extensive customer relationship management (CRM) database that tracks:

## **Outreach Data**

- Leads/Contacts
- Households
- Outreach Activities
- Referrals
- Coalition Partners

## **Upgrade Data**

- Project Information
  - Savings, Rebates, Costs
- Contractor Scorecards
  - Close, Bid, Upgrade

Contact



# Example of a real-time field tool to easily:

- Enter leads
- Connect to events
- Track referrals

## **Upcoming Events**

Take Action

Home

A list of all upcoming events and their unique URLs. These URLs have the event code at the end so that each person signed up using this URL will become a member of that event automatically.

· Wilton Welcoming Service (referred by)

Towns

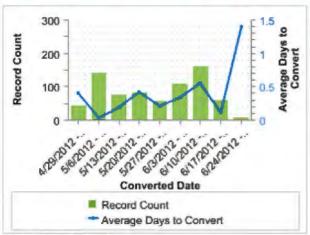
- Friday, September 21, 2012 10:15:00
- . HES Visit Request Web Form
- . Contact Form Web Form
- HES Follow-Up Survey (draft)
- Lighting Sign-Up Web Form
- Dashboard Invitee Email Blast
- Join The Challenge Web Form
- Dashboard Signup HES
- LIGHTING Call-in sign ups
- HES Sign-Ups from Lighting
   Thursday, September 30, 2010 23:00:00 Tuesday, July 31, 2012 20:59:00
- Friends of the Eleanor Buck Wolf Nature Center (referred by)
   Friday, October 01, 2010 06:00:00 Wednesday, July 31, 2013 14:00:00
- Westport Woman's Club (referred by)
   Friday, October 01, 2010 06:00:00 Wednesday, July 31, 2013 14:00:00
- Glastonbury Welles-Turner Memorial Library (referred by)
   Friday, October 01, 2010 06:00:00 Wednesday, July 31, 2013 14:00:00
- Homes with Hope (referred by)
   Friday, October 01, 2010 06:00:00 Wednesday, July 31, 2013 14:00:00
- Wethersfield Corpus Christi Church (referred by)
   Friday, October 01, 2010 06:00:00 Wednesday, July 31, 2013 14:00:00
- Westport Y (referred by)
   Friday, October 01, 2010 06:00:00 Wednesday, July 31, 2013 14:00:00



### **Unconverted Leads**

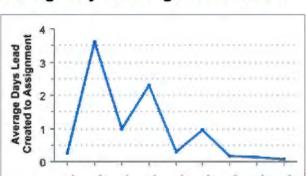
Full Name	Interest	Lead Age	Record Count
	HES	0	1
	HES	0	2
Total			3

## **Converted Web Leads Summary**



This & Last Month

## Average Days to Assign to Contractor



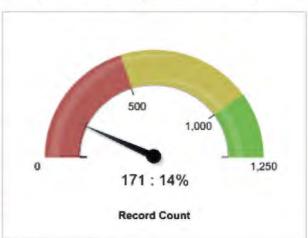
## Open Projects by Type

Project Record Type	Record Count
HES Assessment	467
HES Improvement	227
IE: HES Assessment	222
IE: HES Improvement	4
Lighting Retrofit	63
Total	983
All Open Projects	

## Open HES Assessments by Owner

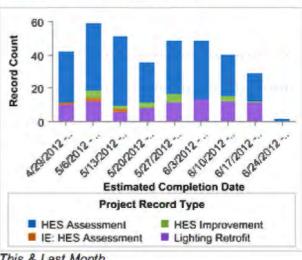
Project Owner	Record Count
	14
	36
	7
	30
	26
	108
	74
	14
	48
	6
	37
	2
	3
	10
	4
	2
	46
Total	467

## Completed HES Improvement Projects



This Calendar Year

## **Projects Completed by Type**



This & Last Month

## **Earned Points by Town**

800 □

4/1/2012

		Progra	am to Da	ate Dasni	oard
Signed Utility Re	eleases	Completed HES	Assessments	Completed HES Imp	provements
Opt In Date (Electric)	Record Count	Date HES Assessment Co		Date Upgrade Completed	Record Count
November 2010	2	December 2009	1		1
December 2010	16	October 2010	2	December 2010	2
January 2011	22	November 2010	4	January 2011	2
February 2011	25	December 2010	14	February 2011	1
March 2011	69	January 2011	22	March 2011	3
April 2011	110	February 2011	28	April 2011	10
May 2011	161	March 2011	63	May 2011	3
June 2011	87	April 2011	117	June 2011	7
July 2011	102	May 2011	175	July 2011	3
August 2011	103	June 2011	103	August 2011	5
September 2011	91	July 2011	100	September 2011	5
October 2011	130	August 2011	96	October 2011	13
November 2011	127	September 2011	69	November 2011	23
December 2011	198	October 2011	91	December 2011	18
January 2012	163	November 2011	108	January 2012	14
February 2012	214	December 2011	173	February 2012	10
March 2012	192	January 2012	167	March 2012	13
April 2012	192	February 2012	163	April 2012	12
May 2012	148	March 2012	222	May 2012	12
June 2012	35	April 2012	194	June 2012	1
Total	2K	May 2012	148	Total	158
		June 2012	45		
Completed Lighting		Total	2K	Completed HES-IE In	
Date of Lighting Visit	Record Count			Close Month	Record Count
December 2010	12	Completed HES-II		10/1/2011	3
January 2011	17	Close Month	Record Count	12/1/2011	1
February 2011	13	3/1/2011	1	1/1/2012	2
March 2011	20	7/1/2011	6	2/1/2012	2

8/1/2011

April 2011



## Pipeline and Close Rate Analysis

## Poor Close Rate (26% of leads completed assessment)

## **Outreach Team:**

- Low Quality Leads
- Customer Confusion
- Information Barriers

## **Course Correction:**

- N2N All-Staff Analyses
- Refine pitches/materials
- Prime for upgrades
- Staff Training
- Sign up "receipts"
- Multiple customer touches



## Pipeline and Close Rate Analysis

## **Contractors:**

- Lost leads
- Poor contractor follow up
- Low Bid Rates (& limited upgrade priming)

## **Course Correction:**

- N2N Assign Leads
- Contractor Scorecards
- N2N Contractor RFQ
- Energy Advisors
- Customer Sales Training
- Lead "swim lanes"



# Contractor Dashboards

Published scorecards every month – to everyone

	Project Owner						Grand Total OR		
HES Program Status (9/1/11 to 6/30/12)	1	2	3	6	7	9	10	11	Program Average
HES Total Leads	159	155	94	418	173	445	218	287	2239
HES Visits Completed	108	66	58	232	111	348	113	173	1362
Avg. Days to Complete	45	31	40	58	25	39	38	41	44
% Completed	68%	43%	62%	56%	64%	78%	52%	60%	61%
% Scheduled	2%	10%	0%	5%	8%	2%	0%	2%	4%
% Inquiries/Multiple Attempts	1%	8%	0%	8%	19%	3%	0%	3%	5%
% Lost Projects	25%	40%	34%	30%	7%	14%	46%	33%	28%



# Contractor Dashboards

D. I. I'alaa I aaaaa									
		Project Owner						Grand Total OR	
HES Savings Data									Program
(9/1/11 to 6/30/12)	1	2	3	6	7	9	10	11	Average
# Visits w/ Savings Data	28	16	12	82	33	159	62	71	514
Avg % Savings from HES	9.3%	5.2%	8.9%	6.9%	11%	10%	9.1%	8.1%	8.8%
Savings >15% (% of visits)	7%	6%	0%	10%	15%	14%	6%	7%	11%
Bids and Upgrades									
Bids Delivered	10	23	26	69	35	63	13	17	278
Bid Rate	9%	35%	45%	30%	32%	18%	12%	10%	20%
Upgrades from HES Leads	5	1	3	13	17	33	5	7	88
Total Completed Upgrades	7	1	2	18	17	48	5	8	117
Upgrade % (of bid)	50%	4%	12%	19%	49%	52%	38%	41%	32%
Upgrade % (of HES)	5%	2%	5%	6%	15%	9%	4%	4%	6%



# Transparency Leads to Market Innovation

- N2N Process Improvements
  - Automatic emails
  - Customer segmentation
  - Social media integration
- Customer Acquisition Cost Model (Lifetime Customer Value)
  - Business Lens—Portfolio of cost-effective strategies
  - Policy Lens—Compare community-based to other models

Achieved through transparent publishing of N2N data.



## Transparency Leads to Market Innovation

- Contractors—Huge increase in close rates
  - June 2011=26%, April 2012=50%, June 2012=60%
- Policy—focus on broader Statewide oppty and issues
  - Release forms, utility data partnerships, marketing efforts, technology solution RFPs, performance metrics
- NORC—building demographics and psychographics

on top of housing characteristics to build repeatable Achieved through transparent publishing of N2N data.



## Thank you

## **Questions?**

## **Key N2N Evaluation Contacts:**

- Kat A. Donnelly, EMpower Devices
   (619) 263-2472, <a href="mailto:kdonnelly@empowerdevices.com">kdonnelly@empowerdevices.com</a>
- Kerry O'Neill, Earth Markets
   (203) 956-0813, <a href="mailto:kerry@earthmarkets.com">kerry@earthmarkets.com</a>



# Screen Shots of N2N Program Admin Tools on Salesforce.com

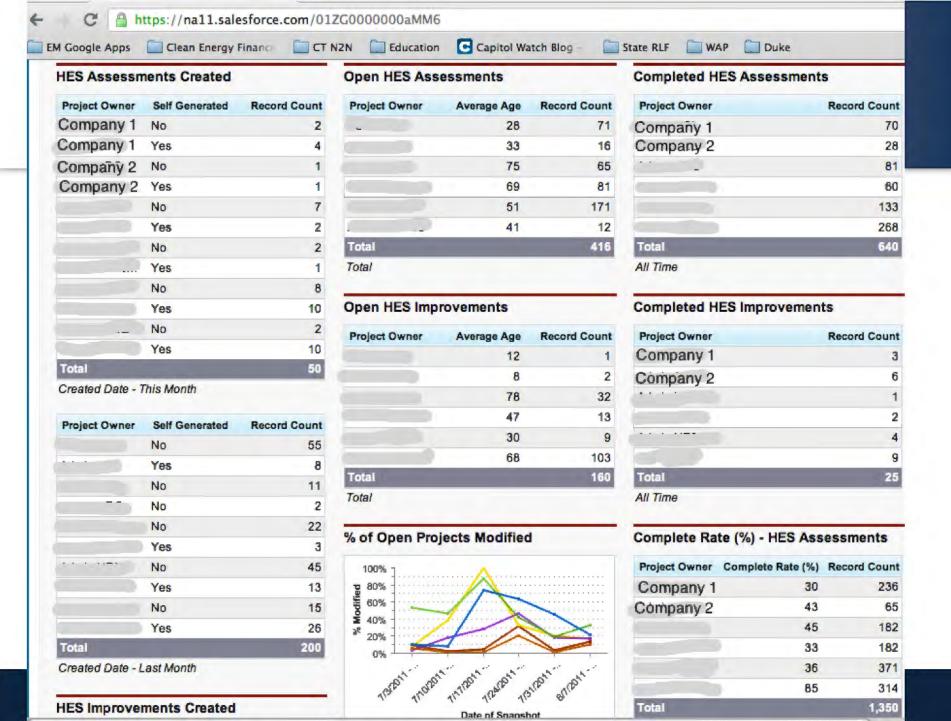
N2N's Platform provider is Snugg Home. They have customized Salesforce.com to N2N's needs, including all marketing, outreach, HES, upgrade and DOE reporting (via XML transfer). N2N staff and contractors enter data into a Salesforce portal. We live on Salesforce!

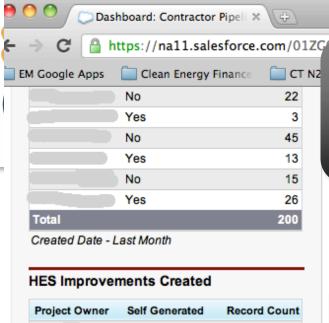


## **Contractor Dashboard**

All HES vendors are required to use the contractor portal to enter pipeline/status data for all HES assessments and upgrades, from lead to completion. This includes bid info, uploaded HEY tools post-HES and post-upgrade, uploaded release forms.

We can click on any box and drill down to a detailed report.





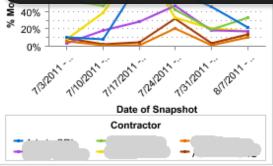
# Project Owner Self Generated Record Count Yes 1 Yes 2 Yes 2

Yes 4
Yes 13
Total 22

Created Date - This Month

Project Owner	Self Generated	Record Count
	Yes	3
	Yes	5
	No	1
	Yes	9
	Yes	6
Total		24

Note the wide swing of Inquiry-to-Complete rate amongst the vendors – 30% to 85%



Modified within 7 Days Prior to Snapshot

## Contractor Last Login to SF.com

Full Name	Record Count Last Login
	1 8/5/2011
	1 8/8/2011
	1 8/8/2011
	1 8/8/2011
	1 8/8/2011
	1 8/8/2011
	1 8/5/2011

	WAP	Duke	
_	Rate (	%) - HES Ass	essments
6 24	ner Co	mplete Rate (%)	Record Count
		30	236
		43	65
		45	182
		33	182
		36	371
		85	314
Total			1,350
All Time			

## Complete Rate (% of Bids) - HES Improvements

Project Owner	Complete Rate (%)	Record Count
	100	3
	0	1
	16	37
	8	12
	40	5
	5	76
Total		134

Complete Rate (% Assess) - Improvements					
Household Organizatio		Improvement Complete Rate / HES			
2		4			
2		0			
2		7			



## **Program Dashboards**

A variety of Weekly, Monthly and Program-to-Date dashboards for outreach, sign-up, lighting, HES and upgrade activity.

We can click on any box and drill down to a detailed report.



## **Program to Date Dashboard**

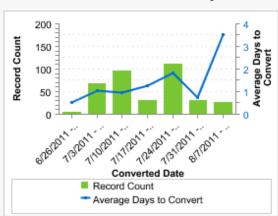
**EM Google Apps** Clean Energy Finance

view Dashboard | Type here to search for a dashboard...

#### **Unconverted Leads**

Age	Record Count
8	1
1	1
1	1
1	1

### **Converted Web Leads Summary**



## Average Days to Assign to Contractor

This & Last Month

## Open Projects by Type

Record Count
457
162
154
773

All Open Projects

#### Open HES Assessments by Owner

Project Owner	Record Count
	71
	16
	65
	81
	171
	12
	1
	3
	4
	1
	9
	23
Total	457

### Open HES Improvement by Owner

Project Owner

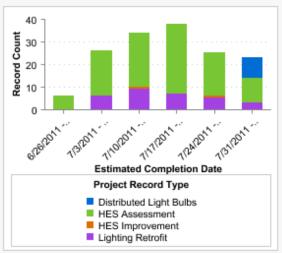
Record Count

#### Completed HES Improvement Projects

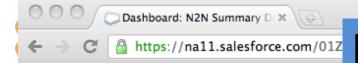


This Calendar Year

## **Projects Completed by Type**



This & Last Month

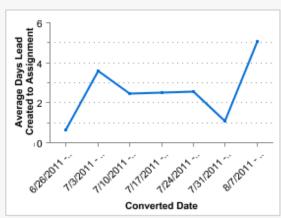


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## **Program to Date Dashboard**

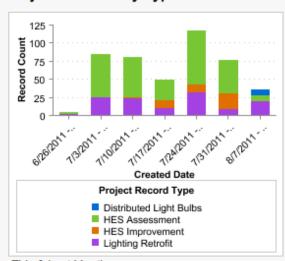
#### Average Days to Assign to Contractor



This & Last Month

**EM Google Apps** 

#### **Projects Created by Type**



This & Last Month

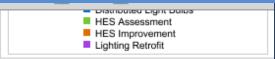
## Open HES Improvement by Owner



## Open HES Assessments Not Modified

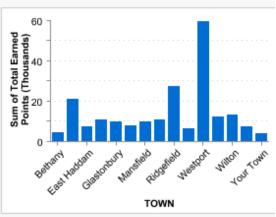
Project Owner	Record Count
	56
	11
	59
	73
	154
	10
	1
	3
	4
	1
	9
	22
Total	403

Last 7 Days



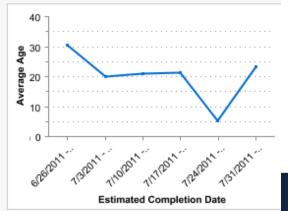
This & Last Month

### **Earned Points by Town**



All Time

#### Average Age of Completed HES Assessments



This & Last Month

EM Google Apps

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## **□ CT N2N** Monthly Activity Dashboard

Monthly Reporting Dashboard - Congruent With Weekly Rep

#### **Outreach Activities**

Event Town	Record Count
Bethany	4
Cheshire	11
East Haddam	2
East Hampton	6
Glastonbury	3
Lebanon	3
Mansfield	1
Portland	1
Weston	7
Westport	6
Wethersfield	4
Wilton	2
Windham	3
Total	53

#### Event Date Last Month

### Volunteer Sign-ups

Contact TOWN	Record Count
Lebanon	1
Total	1
Sign-up Date Last Month	

#### Volunteer Hours Worked

Contact	Record	Sum of Event
TOWN	Count	Hours

### N2N Sign-up Information

Bethany       2         Cheshire       33         East Haddam       5         East Hampton       8         Glastonbury       65         Lebanon       36         Mansfield       42         Ridgefield       6         Weston       13         Westport       43         Wethersfield       14         Wilton       2         Windham       18         Your Town       43         Total       330	TOWN	Record Count
East Haddam       5         East Hampton       8         Glastonbury       65         Lebanon       36         Mansfield       42         Ridgefield       6         Weston       13         Westport       43         Wethersfield       14         Wilton       2         Windham       18         Your Town       43	Bethany	2
East Hampton       8         Glastonbury       65         Lebanon       36         Mansfield       42         Ridgefield       6         Weston       13         Westport       43         Wethersfield       14         Wilton       2         Windham       18         Your Town       43	Cheshire	33
Glastonbury       65         Lebanon       36         Mansfield       42         Ridgefield       6         Weston       13         Westport       43         Wethersfield       14         Wilton       2         Windham       18         Your Town       43	East Haddam	5
Lebanon       36         Mansfield       42         Ridgefield       6         Weston       13         Westport       43         Wethersfield       14         Wilton       2         Windham       18         Your Town       43	East Hampton	8
Mansfield       42         Ridgefield       6         Weston       13         Westport       43         Wethersfield       14         Wilton       2         Windham       18         Your Town       43	Glastonbury	65
Ridgefield       6         Weston       13         Westport       43         Wethersfield       14         Wilton       2         Windham       18         Your Town       43	Lebanon	36
Weston       13         Westport       43         Wethersfield       14         Wilton       2         Windham       18         Your Town       43	Mansfield	42
Westport       43         Wethersfield       14         Wilton       2         Windham       18         Your Town       43	Ridgefield	6
Wethersfield         14           Wilton         2           Windham         18           Your Town         43	Weston	13
Wilton 2 Windham 18 Your Town 43	Westport	43
Windham 18 Your Town 43	Wethersfield	14
Your Town 43	Wilton	2
	Windham	18
Total 330	Your Town	43
	Total	330

#### Created Last Month

### Clean Energy Options Sign-ups

TOWN	Record Count
Lebanon	1
Portland	1
Total	2
Sign-up Date Last Week	

## **Lighting Retrofits Created**

#### **HES Assessments Created**

TOWN	Record Coun
Bethany	2
Cheshire	25
East Haddam	8
East Hampton	9
Glastonbury	27
Lebanon	35
Mansfield	15
Portland	2
Ridgefield	6
Weston	12
Westport	46
Wethersfield	10
Wilton	1
Windham	9
Your Town	13
Total	220

#### Created Last Month

### **HES Assessments Completed**

TOWN	Record Count
Bethany	1
Cheshire	5
East Haddam	2
East Hampton	5
Glastonbury	9

Completed HES Improve Proj × 
https://na11.salesforce.com/000G0000003vN8s

## **Upgrades to Date Report**

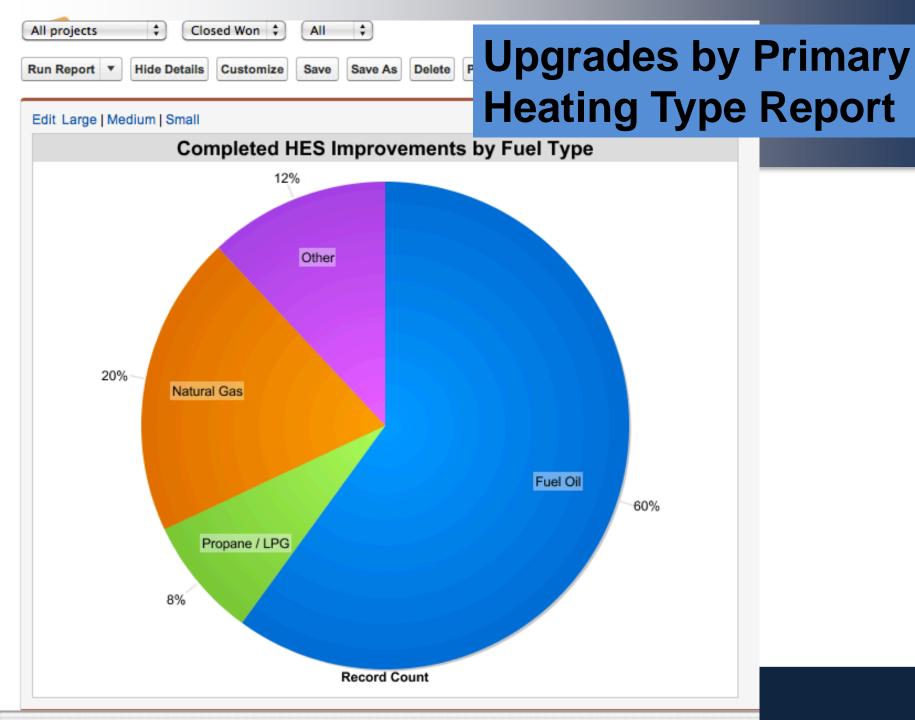
EM Google Apps

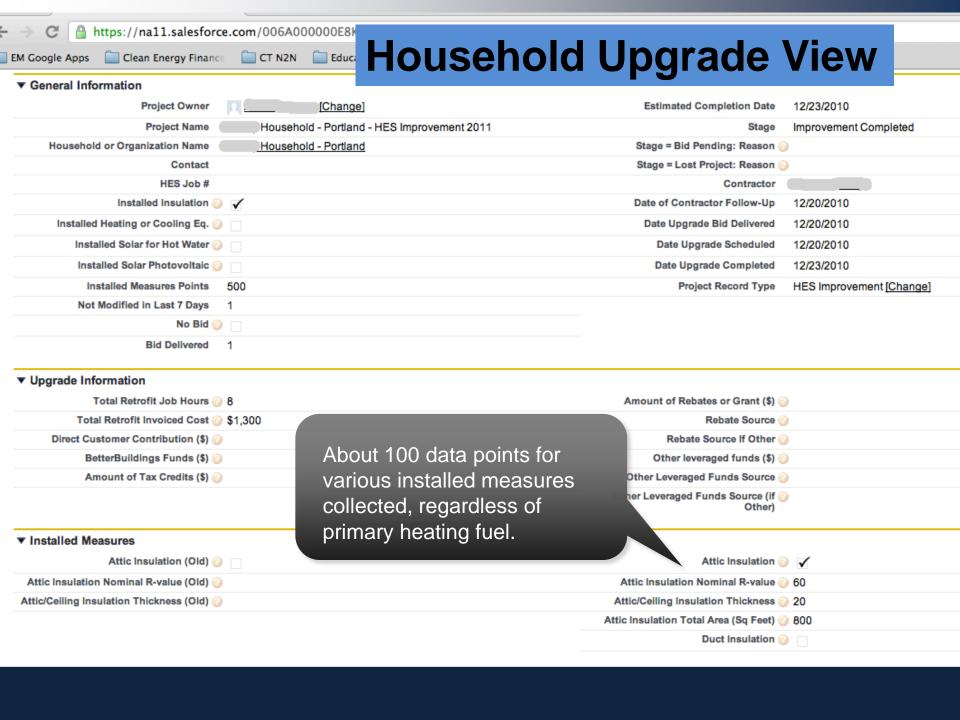
Filtered By: Edit

EM Google Apps 🔲 Clean Energy Finance 🔲 CT N2N 📋 Education

Project Record Type equals HES Improvement Clear

Project Name	Project Record Type	Stage	Date Upgrade Bid Delivered	Date Upgrade Scheduled	Date Upgrade Completed	Es
Project Owner: (3 records)						
Household - Cheshire - HES Improvement 2011	HES Improvement	Improvement Completed	5/11/2011	5/11/2011	6/4/2011	
Household - Cheshire - HES Improvement 2011	HES Improvement	Improvement Completed	4/1/2011	4/6/2011	4/6/2011	
Household - Willimantic - HES Improvement 2011	HES Improvement	Improvement Completed	6/7/2011	7/7/2011	7/11/2011	
Project Owner:(6 records)						
dousehold - Ridgefield - HES Improvement 2011	HES Improvement	Improvement Completed	2/15/2011	2/21/2011	2/28/2011	
Household - Ridgefield - HES Improvement 2011	HES Improvement	Improvement Completed	4/19/2011	5/10/2011	5/11/2011	
Household - Ridgefield - HES Improvement 2011	HES Improvement	Improvement Completed	12/8/2010	4/11/2011	4/11/2011	
Household - Ridgefield - HES Improvement 2011	HES Improvement	Improvement Completed	4/2/2011	4/5/2011	4/13/2011	
Ridgefield - HES Improvement 2011	HES Improvement	Improvement Completed	4/14/2011	4/19/2011	4/29/2011	
- Ridgefield - HES Improvement 2011	HES Improvement	Improvement Completed	4/18/2011	4/21/2011	4/29/2011	
Project Owner: (1 record)						
lousehold - Portland - HES Improvement 2011	HES Improvement	Improvement Completed	12/20/2010	12/20/2010	12/23/2010	
Project Owner: (2 records)						
Household - HES Improvement 2011	HES Improvement	Improvement Completed	12/7/2010	12/10/2010	12/16/2010	
Household - Portland - HES Improvement 2011	HES Improvement	Improvement Completed	5/19/2011	6/3/2011	6/17/2011	
Project Owner: (4 records)						
Improvement 2011 - Insulation	HES Improvement	Improvement Completed	3/23/2011	3/23/2011	3/25/2011	
lousehold - Westport - HES Improvement 2011	HES Improvement	Improvement Completed	6/30/2011	7/25/2011	7/26/2011	
Household - Weston - HES Improvement 2011	HES Improvement	Improvement Completed	12/2/2010	1/14/2011	1/14/2011	
improvement 2011 - Insulation	HES Improvement	Improvement Completed	12/10/2011	1/7/2011	1/25/2011	







Clean Energy Finance

## **Household Upgrade View - HEY**

▼ HEY Tool Values		
HEY7: Pre-HES Annual Elec. Consum. (kWh)	3,700.00	HEY7: Goal Annual Elec. Consum. ② 3,620.00 (kWh)
HEY7: Pre-HES Annual Oil Consum. (gal)	530.00	HEY7: Goal Annual Oil Consum. (gal) ② 416.00
HEY7: Pre-HES Nat Gas Consumption (ccf)	0.00	HEY7: Goal Nat Gas Consumption (ccf) ② 0.00
HEY7: Pre-HES Propane Consumption (ccf)	0.00	HEY7: Goal Propane Consumption (ccf) ② 0.00
HEY7: Pre-HES Wood Consumption (cords)	0.00	HEY7: Goal Wood Consumption (cords) ② 0.00
HEY7: Pre-HES Pellets Consumption (tons)	0.00	HEY7: Goal Pellets Consumption (tons) ② 0.00
HEY7: Pre-HES Kerosene Consumption (gal)	0.00	HEY7: Goal Kerosene Consumption ② 0.00 (gal)
HEY7: Pre-HES Coal Consumption (tons)	0.00	HEY7: Goal Coal Consumption (tons) 0.00
HEY7: Pre-HES Estimated Annual Cost (\$)	\$2,574.00	HEY7: Goal Estimated Annual Cost (\$) \$2,148.00
▼ Estimated Energy Savings Based	on Improvements	
Source or method for prediction	Other .	Estimated annual cost savings (\$) ② \$426
HEY:Electricity:Expected save/yr (%)	2.16%	HEY:Electricity:Expected save/yr (kWh) @ 80.00
HEY:Oil:Expected save/yr (%)	21.51%	HEY:Oil:Est. save/yr (gal) 📀 114.00
HEY:NatGas:Expected save/yr (%)	0.00%	HEY:Nat Gas:Expected save/yr (ccf) ② 0.00
HEY:Propane:Est. save/yr (%)	0.00%	HEY:Propane:Est. save/yr (ccf) ② 0.00
HEY:Wood:Est. save/yr (%)	0.00%	HEY:Wood:Est. save/yr (cords) ② 0.00
HEY:Pellets:Est. save/yr (%)	0.00%	HEY:Pellets:Est. save/yr (tons) ② 0.00
HEY:Kerosene:Est. save/yr (%)	0.00%	HEY:Kerosene:Est. save/yr (gal) 🥝 0.00
HEY:Coal:Est. save/yr (%)	0.00%	HEY:Coal:Est. save/yr (tons) ② 0.00
HEY: Estimated annual cost savings (\$)	\$426.00	