

# Case Study *Audits | Surveys*

## About the Utility

The utility is a million+ home utility in the Western United States.

**Results** | For the utility's customers, the solution provides a seamless experience via integration with their account portal. With disaggregation, changes in their energy usage are detected and analyzed without depending on them to revise their survey responses. For field auditors, productivity is increased via integration with the utility's scheduling system.

**Challenge** | The utility's goal was to drive increased customer engagement and collect customer data to support its customer intelligence strategies. The utility decided they needed a survey tool to increase customer engagement and interaction and gain greater insight into customer behaviors, preferences and needs. The challenge with typical utility survey solutions is that they lack a way to encourage survey participation and completion and are static in nature. The utility's requirement was a solution that would provide pre-survey value to drive engagement and participation. The solution also needed to be integrated into the utility's existing infrastructure, and it also needed back-end functions to support field auditors. The utility needed a platform and a solution partner to fulfill this tall order.

**Solution** | Bidgely's disaggregation was deployed to provide pre-survey engagement and drive participation. Consumers receive personalized views with insights on usage and savings opportunities, and a call to action to answer the survey to fine-tune their results. After the survey, the consumer is provided a personalized recommendation report and savings plan. In addition, the utility-facing version of the survey which enables field representatives to perform in-home energy assessments. The system interfaces with the utility's scheduling system to set up customer appointments. Advanced features include co-browsing where utility staff get a 360o view of the consumer interactions, as well as reporting of metrics and key performance indicators.



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