TO: East Bay Community Energy Board of Directors
FROM: Annie Henderson, VP Marketing and Account Services
SUBJECT: SMUD Presentation (Informational Item)
DATE: July 17, 2019

Recommendation

Receive a presentation from Director of Community Energy Services at SMUD regarding their services to EBCE

Background

SMUD was selected by the EBCE board in November 2017 to be the Data Management, Billing and Call Center Services vendor. SMUD has been providing these services throughout the original enrollment of municipal and commercial customers in June 2018 and residential customer enrollment in November 2018. Their contract ends in November 2020.

SMUD will provide an overview of their services and an update on lessons learned to date.

Attachment
  A. SMUD Presentation
SMUD Community Energy Services
EBCE Operations Overview

Tracy Carlson
July 17, 2019
SMUD
Who We Are

Providing Reliable, Affordable Electricity
Sacramento and Placer County

70+ Years
Est. 1946

6th Largest
Publicly Owned,
Not-for-profit
Electric Utility in the Nation

7 member
Elected Board of Directors

10,233 GWh
2018 Load

2,278 Employees

Mission
• Local Control • Renewable Energy • Greenhouse Gas Reduction •
• Customer Choice • Price Stability

A Community Energy Services
SMUD
Community and Customer Commitment

- #1 Brand Trust & Customer Engagement
  Western US Electric Utilities

- #1 Business Customer Satisfaction
  J.D. Power

- 1st Time-of-Day Standard for Residential Customers

- American Public Power Association
  2019 Community Service Award

Recognized Nationally and Internationally
Innovative Energy Efficiency Programs & Renewable Power Technologies
Community Energy Services
Core Services

- Contact Center M-F 7A–7P
- Interactive Voice Response 24/7
- Email Communications

- Standard & Net Energy Metering Bill Processing
- Exception Management & Resolution
- Customer & Usage Data Management
- Quality Assurance

- Accounting
- Payment Management
- Analytics
- Reporting

- CAISO Settlement Quality Meter Data
  - Using EBCE Share My Data

Community Energy Services also provides service to
Community Energy Services
Billing, Data Management, & Contact Center Services

- System design, configuration, development
- Infrastructure design, development
- Information security
- Rate & tariff configuration
- Data integration
- Financial models
- PG&E policies
- EBCE policies
- Subject matter experts
- Contact center
- CRM
- Telephony
- IVR
- Website
- Process design, development
- Share My Data SQMD
- Commercial & Municipal customer enrollments
- Residential customer enrollments
- NEM customer enrollments
- Enrollment validation
- Notifications
- Daily billing
- Customer interactions
- Workforce management
- Daily, weekly file ingestion
- EBCE communication
- PG&E communication
- Exceptions
- Quality assurance
- System maintenance
- Ongoing enrollment
- Data analytics
- Rate changes
- Continuous improvements
As many as 32,321 bills daily
0.63% required manual processing
Collaboration & analysis
Robust Quality Assurance
Daily Load Profile
Share My Data

PG&E vs EBCE Load Shape

Peak Period

Hour

kWh

PG&E 3/6/2019  EBCE 4/30/2019
Customer Communication Channels

**EBCE**
- Social Media
- In Person
- Letter

**SMUD**
- Email M-F 7 a.m.–7 p.m.
- CSR M-F 7 a.m.–7 p.m.
- VM
- IVR 24/7

- CPUC Inquiry
- Escalated Customer inquiry
- PG&E data clarification
- EBCE programs
- Public events
- Marketing & mailers
- Press releases & news coverage
Operations by the Numbers

- Successful mass enrollment for the largest CCA in California (2018)
- 547,179 Customers-to-date
- Processed over 4,200,000 bills...
  ...totaling more than $405,000,000
- 21,364 calls and counting
- 1,500 emails
- 500 customer call-backs
- Over 1,000 customer saves!
Customer Contacts
Expect the Unexpected

Contacts and Average Handle Times

Daily Contacts Range From 40–300+

Handle Time: 2 Mins – >1 Hour

April 2018 - Present
Contact Center Tracking Performance

### Average Speed of Answer (ASA)
- **Goal**: < 60 seconds
- **Average ASA**: 0.81%

### Abandon Rate Percent
- **Goal**: < 3%
- **Average Abandon Rate**: 1.01%

### Average Handle Time (AHT)
- **April 2018 - Present**: 9.49 minutes
Customer Opt Out Saves (1000+ Saves)

- Oakland: 32.0%
- Hayward: 23.0%
- Fremont: 10.0%
- San Leandro: 9.0%
- Livermore: 7.0%
- Berkeley: 5.0%
- Castro Valley: 4.0%
- Dublin: 3.0%
- Union City: 2.0%
- San Lorenzo: 2.0%
- Piedmont: 1.0%
- Emeryville: 1.0%
- Albany: 1.0%
- Sunol: 0.1%
What EBCE customers say about us…

Thank you for the explanation to help me understand my bill! – Elliot

I hope EBCE will be successful! – John

I am grateful to you for providing energy efficiency tips and how to manage my heating. – Angie

Thank you for taking the time to explain my charges in detail to help me understand. – Jill

Thank you for your patience and professionalism. – Roberto

You did a great job explaining EBCE charges. – Andrew

I am so grateful for you taking the time to explain the charges to me. I appreciate your patience and expertise. – Bonnie

Thank you for explaining the bill so thoroughly. – Pamela
Contact Center
Ongoing Expertise

- Wildfire Safety & Impacts
- Public Safety Power Shut-Off
- Complex Calls:
  - NEM, AB 117
  - Programs & EBCE Customer Relationship Options

- Time-of-Use
- Educating on Load Shift, Load Shed, Energy Efficiency
- Load Impacting Activities
- Rate Changes
Thank you!