

**Orange & Rockland
REV Demonstration Project: Customer Engagement
Marketplace Platform**

Q2 2017 REPORT

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Q2 2017 Report

1.0 Executive Summary

Orange and Rockland Utilities, Inc. (O&R or Company) submits this quarterly report on the progress of the demonstration project it is implementing as part of the Reforming the Energy Vision (REV) proceeding, as required by the Order Adopting Regulatory Policy Framework and Implementation Plan, issued by the New York State Public Service Commission (NYPSC or the Commission) on February 26, 2015.

This demonstration project, known as the Customer Engagement Marketplace Platform (CEMP), was designed to build partnerships with a network of third-party product and service providers to help increase customer awareness and education of energy consumption, motivate customers to participate in O&R programs, increase distribution and adoption of Distributed Energy Resources (DER) and develop new revenue streams for O&R and its partners.

The beginning of 2016 was the official launch of the My ORU Store offering a selection of Wi-Fi thermostats. Since then additional energy savings products have been added to the store ranging from LED lights, advanced power strips, connected home and water-energy saving devices. By mid-year, the offerings expanded beyond the sale of products to include no cost in-home energy assessments, as well as a variety of fixed-priced services provided by local contractors in the community. Weekly messaging highlighted new product introductions, seasonal promotions and limited time offers (LTO). Efforts to build awareness of the My ORU Store continued throughout the year and in Q4 the team included media buys in radio and digital advertising in preparation for the upcoming holiday shopping season.

By the first quarter of 2017, the focus shifted beyond building the assortment and brand awareness, to furthering customer engagement through more targeted messaging. A new campaign was launched comprised of a four week journey where timing, content and the number of emails sent to a customer were based on the customer's engagement, actions and purchase decisions. Initiatives continue in an effort to expand the product line, offer more LTOs, increase traffic and stimulate sales. Post-transaction engagement strategies were designed and implemented to solicit feedback and provide additional messaging that was highly customized and relevant to the recipient.

The second quarter of 2017 capitalized on a number of holidays to promote specific product and service offers on the My ORU Store. Many new styles with connected home features were launched as well as an entirely new outdoor living category. A variety of LTOs and a summer sales campaign generated interest, increased site visits and stimulated purchases. June marked the beginning of a unique collaboration with O&R and Suez Water NY (Suez) designed to help customers save water and energy while lowering their utility bills. Mutual customers are now offered additional instant rebates on a number of products available on the My ORU Store.

The My ORU Advisor also incorporated many of these seasonal themes to engage customers with relatable content and interesting summer tips. Since the official launch last June, there have been consistent increases in customer engagement with the online portal. The team surveyed hundreds of engaged customers who were willing to share feedback about the platform and provide suggestions for future enhancements.

1.1 Cybersecurity and Personally-Identifiable Information Protection

Consistent with corporate instructions and Commission policy related to cybersecurity and the protection of personally-identifiable information (PII), each partner agreement executed for the implementation of the REV demonstration projects includes specific protections related to cybersecurity and PII. Assurance of this protection is critical in encouraging customers to sign up for new and innovative services offered by utilities.

2.0 Demonstration Highlights

2.1 Major Tasks Completed

Launch of Additional Products

- Connected home
- Wi-Fi thermostats
- New manufacturers
- Outdoor living category
- Water saving devices

Seasonal promotions/Limited time offers

- LED lighting offer
- Thermostat manufacturer rebates
- Seasonal/holiday promotions
- Enhanced rebates

My ORU Advisor

- Activation campaign
- Customer survey

Suez Water

- Project launch
- Preliminary results

Marketing Strategies

- Seasonal messaging
- Engagement initiatives
- Outreach and education
- Employee communications

Customer Insights

- Demographic data

2.2 Activities Overview

Launch of Additional Products and Services

Throughout Q2 there were a number of new connected home products that generated customer interest and helped drive additional traffic to the My ORU Store. Many of these devices are equipped with smart home technology which provides added control and convenience which appeals to many O&R customers. Wink Hub 2, Luma Home and [name of smart thermostat] are among the new products. Wink Hub 2 is the latest smart home hub that allows everyday appliances, from different manufacturers, to easily be controlled through a single app on a smart phone or tablet. Luma Home delivers strong and fast Wi-Fi support to manage the growing number of gadgets in each household. The Ecobee4 is equipped with multi room sensors, allowing customers to manage the temperature in many areas of their house.

The team introduced colored varieties of the very popular Nest thermostat appealing to each customer's aesthetic style. The new Ecobee4 combines unique learning and Amazon Alexa voice capability, allowing customers to adjust their home's temperature, hear the latest news, and set timers, all through voice activated commands. Another brand of LEDs was introduced to customers to add variety in lighting at lower price points. Some of the newer styles of LED lights are fitted with security cameras and Bluetooth music speakers, providing energy savings and enhanced functionality, all in a stylish design. A novel, easy to use smart plug allows remote control access to other electronic devices, such as lamps, fans, coffee pots, etc. from an app on a smartphone or tablet, making Wi-Fi technology more accessible and affordable. A new category of outdoor living products was launched for summer. These include solar powered, waterproof, Bluetooth music speakers that can drive additional energy savings.

Through a unique collaboration between Suez and O&R, there are now additional rebates for mutual customers on showerheads which provide water and energy savings. Other water conservation products will also be added to help customers manage their water usage particularly during the high consumption months of summer.

Seasonal Promotions/Limited Time Offers

Throughout Q2, the seasonal promotions and LTOs continued to drive increased traffic and conversions in a variety of categories including lighting, Wi-Fi thermostats and connected home devices. An "Earth month" sale in April focused on energy and bill savings for a better home and environment. (Appendix A) Combined energy efficiency and manufacturer rebates on Nest and Ecobee products drove higher sales and a summer sales campaign focused on increasing adoption of additional smart home technology. (Appendix D)

In May, email themes featured Mother's Day gift-giving ideas. Products that could save mom time and provide her peace of mind, such as Wi-Fi home security cameras and smart locks were promoted to demonstrate both safety and security. (Appendix B) New outdoor living items celebrated the start of summer and making the most of the outdoors. (Appendix B) The seasonal sale promotion offered reduced prices on many of these outdoor living products. Father's Day was celebrated with gift ideas for dad that included some of the newly launched connected home devices. (Appendix B) An early preview of the upcoming Fourth of July sale began at the end of June featuring new products and price discounts that would encourage customers to be more energy conscious throughout the summer months. Seasonal messaging was sent to customers promoting services such as central air conditioning tune-ups and free in-home audits. (Appendix C) The home energy audits continue to generate interest with customers looking for long-term solutions to make their homes more comfortable and efficient.

My ORU Advisor

The My ORU Advisor continues to cultivate interest with many of our high usage customers through insightful data reports and personalized energy saving recommendations. Since the launch of email and paper reports last June, more than 15,000 people have logged in to view their customized usage reports and interact with the portal. To date, more than 17,000 energy saving tips and 2,500 home profiles have been completed.

The team continues to experiment with email frequency to test customer engagement. The customers that regularly open emails and interact with the online portal are sent more messages, while only the most compelling offers are sent to those customers who are less engaged. Email campaigns focused on relatable seasonal themes were designed to encourage energy reduction through simple DIY projects. (Appendix J) Moreover, customized tips and insights were provided to show how best to decrease energy usage in the summer in general, as well as for those who have children home from school. Additional messaging was sent reminding customers about easy low or no cost solutions to reduce usage, like replacing old light bulbs, changing air filters, and line drying clothes when possible.

In April, the team launched an activation campaign with prize incentives to help encourage customers to log in to the My ORU Advisor for the first time. Additionally, a survey was distributed to active customers, soliciting feedback on the current platform that could be used for program enhancements. More than 300 customers responded to the survey questions used to gauge their level of interest, key motivators, desired rewards and ideal frequency of messages. As the program moves forward, the team will continue to explore additional opportunities to promote energy savings and grow lasting customer engagement.

Suez Water

By mid-June, Suez launched a comprehensive conservation program for its residential customers in Rockland and Orange counties that will offer monetary rebates on select water saving products. This program is part of an innovative collaboration between O&R and Suez to help customers save water and energy while lowering their utility bills. Combined rebates for select products are available to mutual customers on the My ORU Store. In only a few weeks, more than 200 customers have visited the My ORU Store from a link on the Suez company website.

A number of marketing initiatives were implemented by both utilities to support this launch including specific water saving messages in emails, bill inserts, social media and radio. (Appendix F) O&R promoted rebates internally through an employee newsletter and on eboards, as well as distributing marketing materials in several Company customer service centers. O&R and Suez employees partnered together at a local Environmental Day held at a town park as an opportunity to promote the synergies of water and energy savings. (Appendix I)

Marketing Strategies

In Q2, many of the marketing strategies for both the My ORU Store and My ORU Advisor centered on personalization, retargeting, and increasing engagement through a multi-channel media approach. By utilizing customer demographics and engagement data, such as past purchases, page views, and abandoned carts, the team has been able to more appropriately target high value customers. Reminder emails have been used to reengage customers based on past interactions and buying patterns. Another segmentation approach was used to identify customers who have never purchased in an effort to send relevant product offers designed to persuade them to make their first purchase. (Appendix E)

Utilizing home profile information provided by customers in the My ORU Advisor treatment group has allowed the team to segment this data and to send targeted messages with energy efficient tips and product suggestions. Testing various subject lines, known as an A/B testing methodology, has helped to measure customers' response rates in an effort to maximize overall engagement levels.

Below are some examples of how some of these segmentation strategies were used to develop personalized and relevant targeted emails throughout the second quarter.

Email messages were sent to those identified as homeowners who have purchased on the My ORU Store, but have never bought a Wi-Fi thermostat from the store.

Sales data and click rates were used to identify customers who have not purchased a smart thermostat, but have expressed interest by clicking on recent emails advertising thermostats.

Varied messaging to home renters were sent out providing affordable, easy to install products, such as LED light bulbs, that can help them save money

A “next product” was suggested for individual customers based on logic determined from past engagement and other purchases. For instance, the team sent additional smart home connected product offers to previous Wi-Fi thermostat purchasers

Data was analyzed from page views of buyer guides to determine the right products to promote to particular customers that would best meet their needs and expressed interest

Another primary focus of the Q2 marketing strategy was to experiment with email frequency to drive increased engagement. For example, demographic, engagement and purchase data were analyzed to identify customers with a higher propensity to purchase. In addition, time of day tests were conducted with various groups to determine optimal hours for effective messaging.

Incorporating various holidays in Q2, allowed the team to design campaigns around the seasonal themes and provide relevant product tie-ins. The month of April began with a celebration of Earth Day and a general focus on the environment. Messages such as “Do a favor to your wallet and mother earth by shrinking your carbon footprint and your bill” were sent to encourage customers to do their part. (Appendix A & B) Other references to holidays were seen in social media posts. (Appendix H)

The new outdoor living category celebrated the recent start of summer with an introduction to a suite of innovative merchandise guaranteed to make the most of outdoor entertaining. Recognizing this time of year as one when energy consumption is high, frequent messages were sent addressing customers’ need to manage their usage and utility bill. Moreover, storms and the need for surge protection during the summer months provided an opportunity for the team to describe the benefits of advanced power strips.

In collaboration with Suez, drought concerns and water savings were tied to messages introducing rebate offers and new water conservation products. (Appendix F) Mother’s Day and Father’s Day promotions included gift giving ideas such as security and connected home devices. (Appendix B)

In an attempt to increase awareness of the My ORU Store, a new radio spot was recorded and aired throughout June on WCBS-AM news radio station. WCBS reaches millions of listeners each week and has a large, experienced local news team.

O&R participated in a number of outreach events in order to educate customers on energy efficiency and build awareness of the products and services offered on the My ORU Store. The second quarter began with the Rockland Business Association Spring Mall Marketplace and an exhibit at the Community Connection & Business Expo. These events provided opportunities to engage with residential and business customers and distribute brochures and information about the My ORU Store.

In terms of community engagement, the team sponsored the 1st Annual Goshen Home & Garden show and participated in the 6th Annual Orange County Senior Health and Fitness Day. In addition, throughout April, in support of Earth Month, O&R promoted energy conservation in conjunction with the Cub Scouts, at school science fairs, in local libraries, at a Film Festival, and at the local community colleges. Additionally, the team participated in street fairs and community days throughout the service territory.

Internally, the company held its annual Safety Day, where the team focused on promoting available connected home and safety-related products, such as the Nest security cameras and the Nest Protect smoke and carbon monoxide detector. Many O&R employees are also customers in the service territory and have already helped to heighten awareness. In addition to having those products on display, the team distributed special discount cards to the first 100 employees who visited the booth. The team also coordinated several feature articles in the Company newsletter along with promoting recent limited time offers through employee email blasts and eboards. (Appendix G)

Customer Insights

Utilizing data analytics to develop useful customer insights remained a focus throughout the second quarter. Continued customer segmentation allowed the team to define the target audience based on interests determined from website page views, click and open rates, and product purchase history. Demographic information has been used to create customized messages and promote unique offers. Google Analytics has been a useful tool in presenting overall marketplace metrics but has also provided a deeper level of detail needed to achieve a more meaningful personalization.

Based on Q2 data, nearly 61% of the My ORU customers are male. This is slightly higher than last quarter, but the number of new female customers seemed to grow in response to the Mother's Day email messages. Nearly 60% of the customers visiting the online store are age 45 and older, with the majority of the site visits coming from the 55-64 age range. The 55-64 age group also had the highest conversion rates, when comparing overall site traffic to the amount of purchases. The team saw a slight increase in site visits from 18-24 year olds. Despite lower conversion, this group spent the longest amount of time per visit, viewed the most pages, and had a lower bounce rate overall than every other age group. Many of the newer tech products and outdoor living items can be linked to the increased interest from this younger demographic.

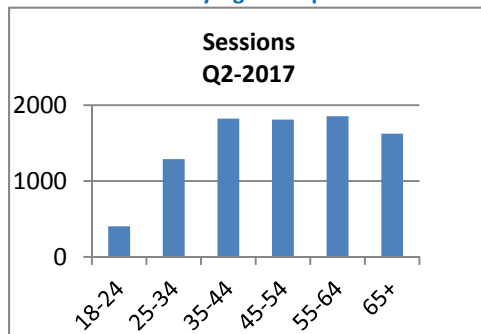
Analyzing data to determine the best times to send messages is critical to achieving meaningful engagement and increased conversions rates. The most common hours to shop on the My ORU store are between the hours of 9 and 11 am. This correlates directly to the time of day that email messages are distributed on a weekly basis.

The team continues to test the frequency of email messages based on a customer's level of engagement. Strategic decisions to send active customers more messaging than those less involved have proven successful at increasing overall engagement and conversion.

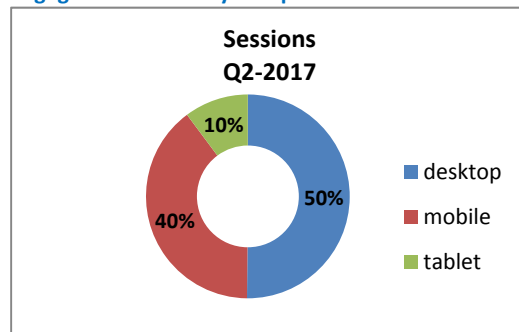
Although most of the traffic to the online store is driven by email messages and direct visits (i.e., typing the URL directly), the highest conversion comes from organic search methods (i.e., visitors coming from a search engine such as Google and Bing). Referral traffic contributes to 11% of overall site visits. More than 12% of this traffic came from the mysuezwater.com website and more than 100 of the 200 total visitors were new customers.

Through these analytics, the team is better understanding the website traffic and the fundamental role it plays in understanding what marketing is working and what is not. The data collected is being used to turn insights into action with the goal of delivering a more relevant customer experience. Varying content depending on the source of the traffic and the type of visitor can play a critical role in developing key messages that lead ultimately to transactions. The team is looking to layer on specific data obtained from past participants of O&R's energy efficiency programs in order to create more targeted messages to an already energy conscious consumer.

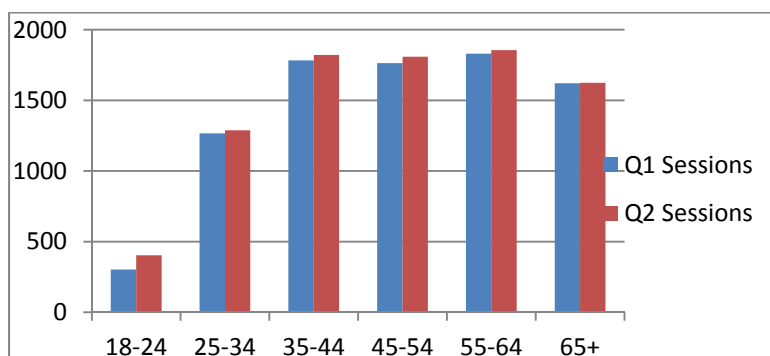
Traffic to website by Age Group



Engagement Levels by Computer Device



Sessions by Age (comparison Q1 and Q2)



High Traffic Hours of Day (Sessions per Hour)



3.0 Key Metrics

In Q2, traffic to the My ORU store increased by 5% with a growth of 8% more customers compared to prior quarter. Although page views declined, conversion rates rose significantly. Sales in units decreased, but there was a sizable increase in revenue due to a higher average value of products purchased. The leading revenue drivers in 2017 were Wi-Fi thermostats and LED lighting. To support continued growth in these categories, additional products were introduced in Q2. As many customers concerned themselves with energy savings and home comfort during the summer months, the no cost in-home energy audits represented 30% of revenue this quarter.

As the project team continually adjusts messaging and product offerings, email open rates for Q2 have exceeded the industry average by nearly 2%. Email continues to be the dominant source of site visits; however, as discussed above, organic and referral channels have increased as well.

By the second quarter there were more than 6,600 site visits, with nearly 4,000 customers viewing over 75,000 pages. Since the launch last year, more than 15,000 consumers logged in to the My ORU Advisor portal and completed more than 17,000 energy savings tips. In both Q1 and Q2, O&R outperformed the industry average with regard to email open rates, click rates and click to open rates, demonstrating effective marketing and consumer interest in energy efficiency.

3.1 My ORU Store Metrics

My ORU Store		
Ecommerce Metrics	Q2	% Var LY
Sessions	13,884	107%
Users	10,021	110%
New Users	59%	8%
Page Views	37,738	92%
Transactions	305	27%
Units Sold	508	24%
Conversion Rate	2.2%	-38%

My ORU Store		
Email Performance	Q2	IA*
Email Open Rates	21.1%	19.7%
Email Click Rates	1.2%	1.4%
Email Click to Open Rates	6.9%	6.9%
* Industry average (IA) - 2016 Epsilon Email Benchmarks - Retail Specialty Category		

My ORU Store		
Visits by Channel %	Q2	% YTD
Email	58.2%	60.0%
Direct	14.7%	16.2%
Referral	11.4%	10.7%
Organic Search	9.0%	8.8%
Paid	6.0%	3.0%
Social/Other	0.8%	1.4%

My ORU Store		
Product Categories	% TTL Sales Units Q2	% TTL Sales Revenue Q2
Advanced Power Strips	22.0%	7.0%
Connected Home	3.0%	4.0%
LED Lighting	41.0%	19.0%
Home Services	9.0%	30.0%
Outdoor Living	1.0%	0.0%
Wi-fi Thermostats	12.0%	36.0%
Water Saving Devices	12.0%	3.0%
Window A/C Control	0.0%	0.0%

3.2 My ORU Advisor Metrics

My ORU Advisor		
Ecommerce Metrics	Q2	YTD
Logins	2,643	7,069
New Users	581	1,543
Tips	2,672	8,082
Badges Earned	1,127	3,363
Home Profile Completed	242	836
Reward Redemption	54	204
Unsubscribes	284	676

My ORU Advisor		
Email Performance	Q2	IA*
Email Open Rates	20.1%	18.2%
Email Click Rates	1.3%	0.9%
Email Click to Open Rates	6.3%	4.8%
* Industry average (IA) - 2016 Epsilon Email Benchmarks - Retail Specialty Category		

My ORU Advisor		
Visits by Channel %	Q2	% YTD
Email	86.3%	87.5%
Direct	8.0%	6.7%
Referral	0.5%	0.4%
Organic Search	1.0%	1.0%
Other	4.3%	4.4%

3.3 Demand Response Metrics

To date, smart thermostats purchased from the MY ORU Store represent 13% of the total enrollments in O&R's Bring Your Own Thermostat Program (BYOT), with 207 customers connecting 254 smart thermostats. The energy savings from these Wi-Fi thermostats represent up to 207 kW of demand reduction when a load reduction event is called. During the Lux/Geo auto-enrollment pilot in May, there were 71 new customers to the program which contributed to the second highest month of enrollments since the launch in October 2015.

Demand Response/BYOT		
Metrics	Q2	PTD*
# of Customers Enrolled	21	393
# of Connected Devices	26	482
kW Savings	21	393
* Program to Date (original launch October 2015)		

4.0 Strategic Objectives for 2017

With more than a year since the launch of the My ORU Store, the project team continues to expand the assortment of products and services in order to meet the growing needs of our customers. The introduction of new smart technologies has provided innovative product alternatives that help customers save energy and money while providing control, convenience and comfort in their lives.

Beyond email messaging, marketing initiatives this quarter were expanded to include monthly bill inserts, a new radio commercial, various mentions in company communications, social posts and participation at more than twenty Company outreach events so far this year. The project team has been working with the corporate communication department to develop a new custom catalog that can be distributed to customers bringing awareness of the My ORU Store and all of the products and services currently available.

In Q3, there are plans to capitalize on seasonal themes such as the July 4th holiday and the ending of the summer season that will be incorporated into specific messaging. The My ORU Advisor leverages the ability to provide tips and advice on energy savings, co-markets the online store by promoting products that will help them save energy and money.

Valuable information gathered from data segmentation and customer demographics will be used to drive engagement and enhance the customer experience. The project team continues to identify opportunities to promote energy saving tips and encourage participation in the demand response program through the newly designed O&R website.






















Various initiatives are being explored to increase the number of customer emails O&R has on record in order to promote the My ORU Store to a wider audience of customers. The project team is collaborating with the Customer Assistance department to determine next steps, including the possibility of promoting the online store in some type of welcome or mover packet. As AMI is rolled out to parts of the service territory, the team is preparing ways to leverage customer usage data.

In order to enhance the customer's transactional experience, the team is experimenting with a new shipping provider that provides timely tracking and more detailed information for customers.

The unique collaboration with Suez provides opportunities to attract more customers, increase product offerings, and generate new revenue. Bi-weekly meetings are used to discuss mutual goals, discuss future initiatives, and develop long term business procedures.

The team recently retained Cadmus as the impact evaluator of the entire Customer Engagement Marketplace Platform (CEMP). They will survey My ORU Store participants and nonparticipants to better evaluate the amount of electric and gas energy savings and demand reduction attributable to this platform, as well as understand reasons for why products/measures were installed or not, removal and nonparticipation. Cadmus will also provide O&R with suggestions for improvements to the current offerings and guidance with appropriate rebate levels. They will perform a thorough QA/QC of customer usage data and behavioral saving analyses. Regarding services on the My ORU Store, Cadmus will conduct interviews with participating and nonparticipating contractors to gain insights into how to increase contractor engagement and customer participation.

5.0 Checkpoints/Milestone Progress

Checkpoint *	Projected Date	Completion Date	Progress Status
Marketplace Launch	1/15/2016	2/2/2016	  
Add Additional Products	2/5/2016	3/30/2016	  
Add Fixed Price Services	2/5/2016	6/29/2016	  
Marketplace Quarterly Check in	3/22/2016	5/1/2016	  
Launch HERs and Engagement Platform	5/7/2016	6/12/2016	  
Add Variable Priced Services	4/1/2016	In Progress	  
* These timelines are pending and subject to change as the program evolves			
 Complete  In Progress  Delayed			

6.0 Work Plan & Budget Review

The project team continues to evaluate customer and contractor interest with variable priced home services. The work flow process on the My ORU Store is still in development as is a need for an enhanced web platform to accommodate additional third party providers and services.

6.1 Expected Changes

	2015		2016												2017												2018				
Phase	November	December	January	February	March	April	May	June	July	August	September	October	November	December	January	February	March	April	May	June	July	August	September	October	November	December	January	February	March	April	May
Phase 0: Implementation - Design and develop program components																															
Phase 1: Launch – Implement marketplace with limited offerings																															
Phase 2: Category Expansion – integrate data analytics and implement complete line of product and offerings.																															
Phase 3: Decision on Project Expansion – evaluate program performance to determine next steps.																															
Phase 4: Revenue Optimization – streamline product and service line to maximize revenue opportunities.																															
Phase 5: AMI Integration – upon implementation of AMI evaluate rate design plans for peak time rebates, TOU analytics, integrate TOU enrollment.																															
Project Schedule																															
Completed																															

6.2 Challenges

Offering larger appliances on the My ORU Store has remained an ongoing challenge with regard to fulfillment and delivery from the Simple Energy warehouse. O&R, Simple Energy, and Suez are working as a team to pilot energy and water efficient washing machines on the My ORU Store to local retailers later this year.

In Q2, O&R chose a new advertising agency. During the transition between advertising agencies, there was a pause in development of new creative and additional media placement. In preparation for this pause, a new radio ad was launched at the start of the transition. The new agency, Havas will begin working with O&R in July. The team will be partnering with them to explore new advertising campaigns and initiatives.

Increasing the Company email list is a critical component to building awareness and growing the overall customer base. The team has experienced challenges with data integration that have delayed the automatic update of Company records.

7.0 Work Plan & Budget Review

Actual costs to date will be filed confidentially with the NYPSC concurrently with the filing of this document.

7.1 Phase Review

The program has met key milestones described in the work plan exhibited in previous reports.

7.2 Updated Budget

The program is still currently running under budget at this time due to lower than projected payroll expenses because two positions have remained vacant for longer than anticipated. One full-time position is being filled with a temporary worker until a new employee is hired.

7.3 Lessons Learned

As LED lighting continues to drive the most traffic and sales on the My ORU Store, the team continues its efforts to source additional styles from a variety of manufacturers in a broader range of price points. By promoting the latest technology in Wi-Fi thermostats, sales in this category have grown. The new outdoor living category has generated customer interest and has led to increased traffic on the website.

The team has seen positive feedback since the recent enhancements made to the buyer guides last quarter. With more visuals and easy to digest product information, customers who viewed these guides had a higher conversion rate overall.

Monetary discounts may drive more customer interest than offering free products. The team offered a promotion where a purchase of the Ecobee4 smart thermostat came with two free room sensors. It produced lower than expected sales despite the \$79 value of the room sensors. The team is to explore whether monetary discounts are better received by customers.

LTOs and consistent introduction of new products are paramount to generating interest and maintaining lasting customer engagement. The team continues to source new technologies and manufacturers in the market to expand the current product line.

The team will continue to utilize Google Analytics as a tool to turn customer data into actionable insights. By testing various messaging tactics, O&R is able to more quickly determine successful strategies and evaluate the reasons for less than positive results.

The recent survey on My ORU Advisor has helped to provide valuable information on customer preferences and opinions. This data will be used to make program enhancements, such as adjusting the frequency of messages or the point rewards system.

The team recently began using a “net promoter score” to evaluate the My ORU Store customer journey. This is based on an online poll that goes beyond the typical satisfaction survey to further identify if customers who purchased are likely to be “promoters” or “brand advocates” based on their experience. The methodology is based on asking customers a single question that predicts the likelihood of both repurchase and referral. It is a highly regarded loyalty metric that has already provided the team useful data and customer feedback that can be used to drive future business strategies.

7.4 Recommendations

The project team suggests the following recommendations:

- 1) Continue to evaluate consumer data and utilize market segmentation when possible to deliver meaningful, personalized messages to O&R customers.
- 2) Utilize internal resources to create new marketing materials that will help to increase awareness of the online store; promote through employee communications when possible; create welcome and mover packets with information for new account holders based on available customer data (e.g., home owners, renters, electric and/or gas service).
- 3) Expand efforts in social, digital and broad-based media in conjunction with the newly hired advertising agency.
- 4) Maintain a constant presence at outreach events and participate in educational programs within schools (e.g., develop interactive kits to engage students).
- 5) Partner with cross-functional teams to arrange focus group discussions with local contractors and solar providers to measure interest and increase participation.
- 6) Develop internal and external strategies to increase the company email addresses list; leverage customer data collected through traditional rebate applications; develop contests to generate excitement internally.
- 7) Continuously educate the customer assistance team about the online store and provide support and guidance when answering questions about the My ORU Advisor energy insight reports.
- 8) Provide education, and determine realistic goals to be met through a variety of new initiatives (e.g., internal contests with customer service representatives).

- 9) Make recommendations for cross-promotion of the My ORU Store on the Company website; add information and links to the online audit tool.
- 10) Continue cultivating the recent collaboration with Suez Water NY for the benefit of our mutual customers.

8.0 Appendices

Appendix A: My ORU Store: Homepage Banner Ads

Appendix B: My ORU Store: Marketing Email – Seasonal Focus

Appendix C: My ORU Store: Marketing Email – Home Services

Appendix D: My ORU Store: Marketing Email – New Products & LTOs

Appendix E: My ORU Store: Personalized Emails

Appendix F: My ORU Store – Marketing Email - Suez and Water Saving Emails

Appendix G: My ORU Store – Bill Inserts/Newsletters

Appendix H: My ORU Advisor – Social Media Posts

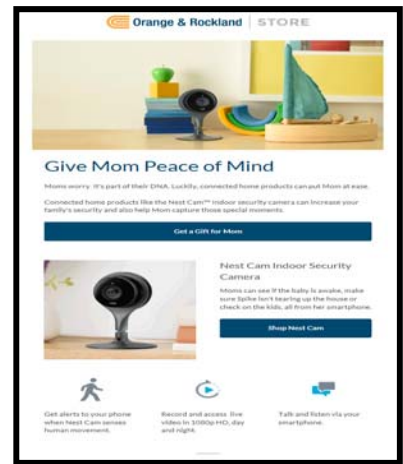
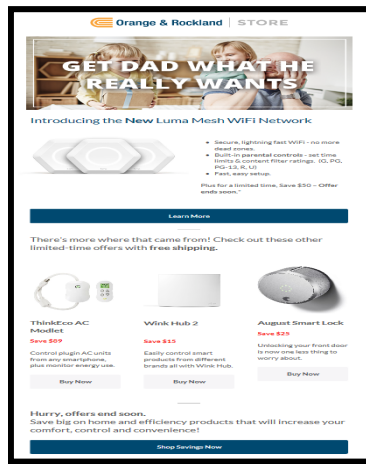
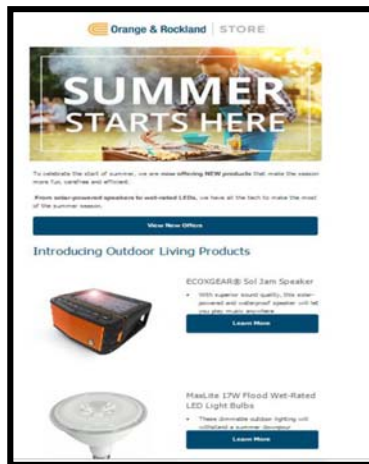
Appendix I: My ORU Store: Internal Communications

Appendix J: My ORU Advisor: Sample Email

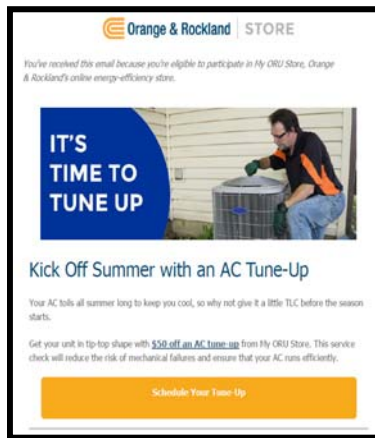
Appendix A: My ORU Store: Homepage Banner Ads



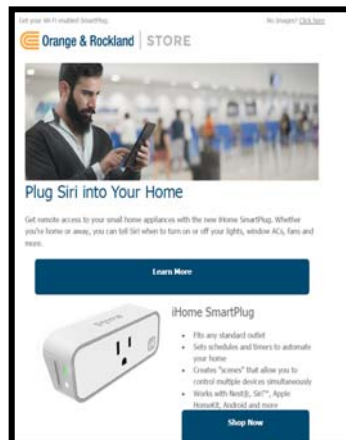
Appendix B: My ORU Store: Marketing Email – Seasonal Focus



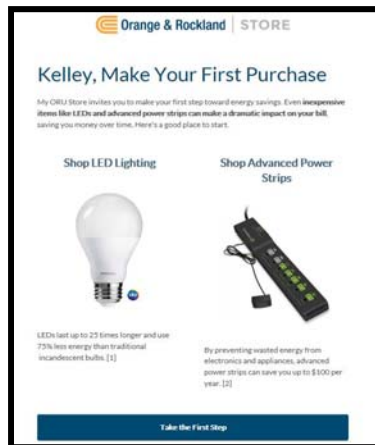
Appendix C: My ORU Store: Marketing Email - Home Services



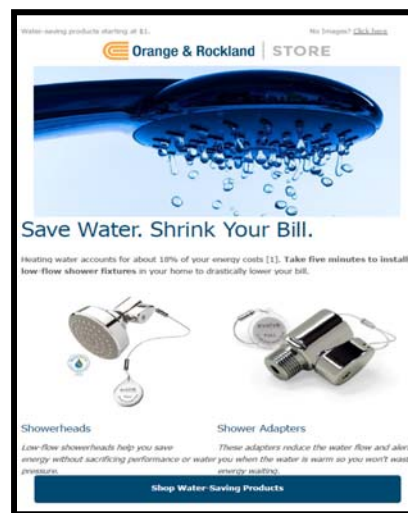
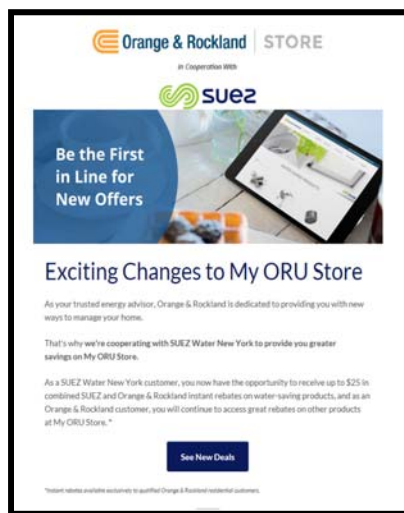
Appendix D: My ORU Store: Marketing Email – New Product and LTOs



Appendix E: My ORU Store: Personalized Emails



Appendix F: My ORU Store: Suez and Water Saving Emails



Appendix G: My ORU Store: Bill Inserts/Newsletters



Every home has unexpected expenses. Now there's a way to get unexpected savings.

O&R offers rebates and incentives for you to upgrade to more energy-efficient appliances, like refrigerators, pool pumps and central air units.

Did you know?
You can submit applications for rebates electronically through our Online Portal. Go to oru.com/save.

Go to myORUstore.com

Shop with us and save hundreds of dollars a year by using our certified energy-efficient products, such as:

- Smart thermostats
- Wireless lighting systems
- LED bulbs
- Advanced power strips and more!

Did you know?
The **myORUstore** offers instant rebates on our products and free shipping for orders over **\$49**.



Orange & Rockland EVERYTHING MATTERS

April 2017 

@home 

Your Guide to Energy Services and Information

Spring season savings

home. Follow these easy tips to use the changing weather to your advantage:

- Heat with the sun. Open blinds during the day to let the sun warm your home. Close blinds at night to keep out the chill.
- Embrace the breeze. On warm days, open your windows to naturally cool your home.
- Cook outside. When the weather's nice, cook outside on the grill. Using the oven and stove can make your home feel hot and stuffy.

Spring weather can be fickle – cool and rainy one day and sunny and warm the next. With these fluctuations, it can be hard to know how to heat and cool your

Do you know?

LED lighting has the greatest potential impact on energy savings in the United States. By 2027, widespread use of LEDs could potentially save the equivalent annual electrical output of 44 large electric power plants (1,000 megawatts each), and a total savings of more than \$30 billion at today's electricity prices.*

*Source: Department of Energy



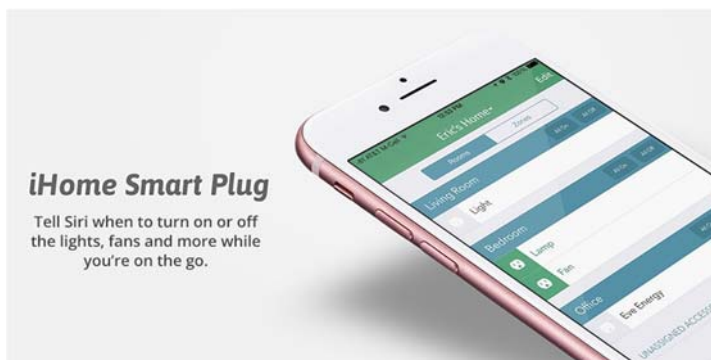

Appendix H: My ORU Store: Social Media Posts

Facebook



It takes a lot of energy to be Mom. Help her save on energy with #energyefficient products from #myORUstore.

Twitter



Plug #Siri into your home with an iHome #SmartPlug from #myORUstore

Appendix I: My ORU Store: Internal Communications

Employee Newsletter



Outreach Materials

Staying cool and saving money are no sweat with our suite of energy-efficient products and programs.

From our Bring Your Own Thermostat (BYOT) demand response incentive program and **ENERGY STAR®** air conditioner and dehumidifier rebates to free home energy assessments, there's a lot you can do to optimize your indoor climate while shrinking your energy bill.

To learn more about what we have to offer, go to oru.com and click on Save Energy & Money.

One of our latest summertime additions to myORUstore.com is a solar-powered, Bluetooth outdoor speaker.



Outreach Event with Suez



Appendix J: My ORU Advisor: Sample Email

