



REV Demonstration Project:
Connected Homes Platform

2016 3Q Quarterly Progress Report

Dated: October 31, 2016

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1.0 EXECUTIVE SUMMARY

Consolidated Edison Company of New York, Inc. (“Con Edison” or the “Company”) submits this quarterly report on the progress of the Connected Homes Platform REV demonstration project (“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 (“Commission”) on February 26, 2015.

1.1 PROGRAM ACHIEVEMENTS

On July 1, 2015, Con Edison submitted the Project for approval by Department of Public Service Staff (“DPS Staff”); on January 8, 2016, DPS Staff approved the Project. Con Edison filed an implementation plan for the Project with the Commission on January 29, 2016. In the first quarter of 2016, the Company focused on clearly defining the scope of the Project and initiating development. In the second quarter of 2016, the Project was launched to approximately 275,000 customers in Con Edison’s Brooklyn and Westchester territories. During the third quarter, eligible customers began receiving solar panel targeted offerings, High Usage Alerts (“HUAs”) (email alerts informing customers when they are on track for a high bill) were sent to customers for the first time, direct small product purchases (light bulbs, power strips and thermostats) were enabled on the Marketplace¹, and the program acquired its first product sales. The project team also initiated significant marketing efforts to promote the demonstration project and the Marketplace through social advertising, digital advertising, and a video campaign.

1.2 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 Project includes specific protections related to cybersecurity and PII. Assurance of this protection is critical in encouraging customers to sign up with new and innovative services offered by utilities.

1.3 ACCOUNTING PROCEDURE ESTABLISHED

On February 16, 2016, in Case 15-E-0229, Con Edison filed an accounting procedure for the accounting and recovery of all REV demonstration project costs. This accounting procedure establishes a standardized framework that will govern

¹ The Marketplace is an online portal that allows customers to browse energy efficient products and services across a variety of categories (e.g., energy score or price) to drive energy efficiency outcomes in their home. The Marketplace provides an automated recommendation engine for product searches, product-specific energy information, including efficiency and incentive details for specific products, as well as local store and referrals to online and offline retailers for purchasing products. The Marketplace Storefront is a feature enhancement enabled in July 2016 that allows customers to purchase specified small efficiency products (e.g., light bulbs, thermostats, power strips) directly on the Marketplace.

how the Company categorizes and allocates the costs of the REV demonstration projects, and will facilitate analyzing each project to determine the overall financial benefits of the program to customers.

1.4 COSTS, BENEFITS, AND OPERATIONAL SAVINGS

Budget information for all of the Company's REV demonstration projects is being filed confidentially with the Commission, concurrently with the filing of this document. All costs filed are incremental costs needed to implement the projects. To date, no tax credits or grants have been available to reduce the net costs of the projects, but Con Edison will take advantage of such offsetting benefits when they are available. Due to the early stage of implementation for the Project, there are no operational savings to report at this time.

1.5 CONNECTED HOMES PLATFORM

The Project seeks to provide targeted residential customers in selected areas of Con Edison's service territory with a set of tools designed to proactively connect them with cost-effective energy efficiency products and services and distributed generation offerings that will be most relevant to them. The Project is designed to remove barriers to residential adoption of distributed energy resources ("DERs") and animate the DER market by using customer usage data and advanced data analytics to match customer needs with vetted DER products. A set of pre-qualified vendors will be promoted to participating customers through targeted marketing campaigns to demonstrate and evaluate the proof of concept. The targeted marketing campaigns will utilize various channels to communicate with customers, including direct, digital, the online Marketplace, and a contact center, and will be administered by Con Edison's partner in the Project, Opower.

In Q3 2016, the Project successfully launched the storefront configuration of the online Marketplace Storefront (direct purchases), the first DER targeted offering campaign (solar), and HUAs. A marketing campaign was initiated to educate customers on the demonstration project and the Marketplace through social advertising, digital advertising, and a video campaign.

2.0 CONNECTED HOMES – QUARTERLY PROGRESS

2.1 DEMONSTRATION HIGHLIGHTS

2.1.1 Since Previous Quarter – Major Tasks Completion

- Launched the storefront functionality of the Marketplace and processed initial direct purchase transactions for LED light bulbs, advanced power strips and Wi-Fi thermostats
- Added an additional product category (dehumidifiers) to the Marketplace
- Added Bring Your Own Thermostat (“BYOT”) program promotional text on relevant Wi-Fi thermostats sold on the Marketplace
- Launched email HUAs
- Launched the solar panel targeted offering campaign (print and digital)
- Finalized the Marketplace and Wi-Fi thermostat campaign creative materials (print and digital)
- Developed a marketing module to promote Con Edison web account creation (print and digital)
- Successfully transferred initial purchase and lead data files from DERs to Con Edison
- Con Edison customers can now view rebate information for eligible products while they shop online at selected publisher and retailer websites
- Launched Marketplace and Connected Homes promotional effort and outreach:
 - Social Advertising: Facebook advertisements (general, split-testing creative, people vs. product)
 - Digital Advertising: General banner advertising and Con Edison’s energy education campaign to encourage customers to visit the Marketplace
 - Homepage Banner/Slider: Con Edison’s website promotes the Marketplace through a slider and a banner
 - Video Campaign: 30-second Marketplace video and 1-minute Connected Homes video created, which highlights the demonstration project as a whole. An additional 15-second video was created by Con Edison to also raise awareness of the Marketplace.
 - Video posted on Con Edison’s website, Con Edison’s Facebook page, Con Edison’s Twitter page, in NY subway stations and in Con Edison’s September edition of Customer News.

2.1.2 Activities Overview

In this quarter, the Project team configured the storefront functionality on the Marketplace, launched HUAs and sent the first targeted offering campaign (solar panels) out to customers.

The storefront configuration on the Marketplace went live in July 2016 and allows customers to purchase smaller energy products (LED light bulbs, advanced power strips and programmable thermostats) directly on Con Edison’s Marketplace. This

functionality was built on the existing Marketplace, which was launched last quarter. The dehumidifier product category was also added in Q3 2016. The product categories currently on the Marketplace are: smart thermostats, lighting, advanced power strips, refrigerators, clothes washers, dishwashers, electric water heaters, gas water heaters, dehumidifiers and air conditioners. Products with Con Edison-associated rebates are also noted on the Marketplace. For example, there are instant rebates available to customers on smart thermostats (\$25) and light bulbs (\$4).

Linked to the Marketplace, Opower-Enervue activated paid search on Google and Bing, targeting thousands of niche brand, appliance, and model number keywords; implemented air conditioner display campaigns targeted to in-market shoppers; and launched dynamic display ads, which pull daily updated data such as energy score, current price, and reviews into the ad.

The team also sent out the first HUAs to eligible customers within the Home Energy Report program in August 2016. Customers are sent HUAs in the middle of a billing period if their historical usage and current weather patterns indicate they are on track for higher usage. The alert compares their current bill period to their last bill period. In the coming months, these HUAs will also include targeted offerings from selected DERs. For an example of a HUA, see Appendix A: High Usage Alert.

Another significant milestone in Q3 2016 was the launch of the solar targeted offering campaign. In August 2016, roughly 80,000 customers within the Home Energy Report program began receiving digital and printed promotions for solar panels. Half of these customers received one particular messaging strategy (e.g., solar is trending in my neighborhood), and the other half of these customers received another messaging strategy (e.g., solar can help me save). The team will be evaluating the effectiveness of each of these messaging strategies to inform future solar communication campaigns. The creative promotions were developed in partnership with SunPower, Con Edison's solar vendor for this project. Unique landing pages and phone numbers were created by SunPower for customers to submit their contact information and request further details about solar. For examples of the solar targeted offering reports, see Appendix B: Solar Targeted Offering Home Energy Reports. The Con Edison call center team was prepared and fully trained on the targeted offerings prior to customers receiving them.

In support of Con Edison's various Corporate Marketing initiatives, a series of new ads was launched into market this quarter in print, digital and transit media. The ads have been featured in major daily, weekly and local ethnic publications, as well as on subway branded cars through October. These ads will drive customers to the Our Energy Future page on the website on which there's a prominent link to the Con Edison Marketplace.

FINALLY, A BETTER WAY TO SHOP FOR APPLIANCES View online



Attention Shoppers!

Make marketplace.conEd.com your first stop for energy-efficient products and appliances. Con Edison's new shopping website makes it easy to:

- Browse A/C units, refrigerators, washers, water heaters, and more.
- Compare features, energy ratings, and prices, and read customer reviews.
- Take advantage of rebates and special offers.
- Find stores near you.



You can even easily buy **energy-saving lightbulbs, power strips, and smart thermostats** at great prices.

Forward to a friend


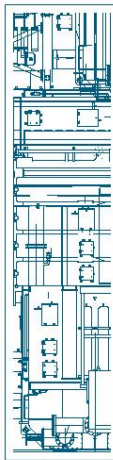
IN THE AGE OF SMART EVERYTHING, TAP INTO SMART ENERGY.

At Con Edison, we've made it our mission to give customers cleaner, more efficient energy choices. So we're investing in new technologies, such as smart meters, to deliver the benefits of a smart grid. Also, to help customers make more informed energy-saving decisions, we're giving them personalized usage reports. It's this spirit of innovation that guides everything we do. Not only today, but as we look toward the future. For more on how we're preparing for tomorrow, visit us today at conEd.com/EnergyFuture.






Additionally, Con Edison's Energy Tips ads have been revised to drive customers to the new demo Marketplace site. These have been featured in print and digital.


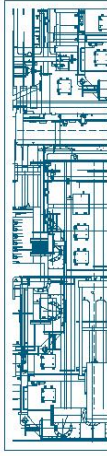
YOUR CLOTHES WON'T KNOW IF THEY'RE WASHED IN COLD WATER. BUT YOUR ENERGY BILL WILL.


Energy is important. And to help you use it wisely, Con Edison offers a variety of energy-saving solutions. Everything from rebates on high-efficiency appliances to no-cost tips on how to lower your energy bill. Visit marketplace.conEd.com for details.



FULL DISHWASHERS MAKE FOR HAPPIER ENERGY BILLS.

Energy is important. And to help you use it wisely, Con Edison offers a variety of energy-saving solutions. Everything from rebates on high-efficiency appliances to no-cost tips on how to lower your energy bill. Visit marketplace.conEd.com for details.



The team developed 15-second, 30-second and 60-second videos highlighting the Project and the features of the Marketplace. Con Edison has posted these videos on a variety of channels to spread awareness: the Con Edison website, the Con Edison Facebook page, the Con Edison Twitter page, in NY subway stations and in an issue of the Con Edison Customer News. The 15-second video is running in September and October on 80 Vistar subway platform screens in 17 stations throughout the city.

Included are stations in ethnic communities that will feature the video in Spanish, Chinese, Russian, and Korean.

These efforts will garner 120 million impressions across all media (14 million from the Vistar effort).

To view the 15-second video, see here:

http://players.brightcove.net/954168402001/default_default/index.html?videoid=5080135780001

To view the 30-second video, see here:

<http://bcove.me/0lftbja5>

To view the 60-second video, see here:

<http://bcove.me/ozeag5zb>

Con Edison is also using various creative advertisements on its Facebook page. The team has also implemented general banner advertising to encourage customers to visit the Marketplace. Lastly, the Con Edison homepage now has a slider and banner promoting the Marketplace.

To further promote Con Edison's Marketplace and increase customer awareness, Opower-Enervue implemented a digital widget at selected publisher and retailer websites that allows Con Edison's customers to view rebate information when they shop for eligible products. This functionality allows customers to provide their email address and receive a link to related rebate applications.

2.1.3 Key Metrics

In Q3, the project began to see tangible results described below from the targeted offerings in the Home Energy Reports and other marketing efforts. For additional details on program results to date, see Appendix D: Full list of metrics and results.

Customer Communications:

The following communications were sent to customers in Q3:

- Over 972,000 Home Energy Reports: 412,275 print and 560,687 digital
- 7,488 digital High Usage Alerts
- Over 300,000 reports included targeted offerings for SunPower: 163,576 print and 140,949 digital

- On average, customers opened eHERs, the digital version of HER, with targeted offerings at a rate of 50%
- Digital Home Energy Reports without targeted offerings had a 49% open rate
- High Usage Alerts had a 38% open rate

Purchases and Leads:

- Solar Panels:
 - In Q3, the project team recorded 230 qualified solar leads, and 4 solar installations. Out of the 1,612 customers who have visited the landing pages, 200 of them have completed the solar interest form online (12% conversion rate).
- Marketplace Storefront Sales:
 - In Q3, the team recorded 24 sales transactions for 65 light bulbs, 10 thermostats and 2 power strips. All purchases were made directly on the Marketplace Storefront.

Digital Customer Engagement:

The Con Edison Marketplace has seen 41,099 total unique visitors since launch in Q3 2016. The Marketplace has a total of 108,416 page views and customers are spending on average 1:46 on the website. Once customers log into the web insights portal, they are highly engaged; over 70% of customers who log into the website take an action (e.g., check off a tip or make a savings commitment). 28% of customers who log in check off a tip, and 55% of customers who log in take the “What Uses Most” online audit.

DER Market Activation:

Con Edison’s Marketplace has broad and growing market coverage; by the end of Q3, Marketplace featured 4,050 individual product models from 154 different brands, spanning nine product categories with utility incentives and one without. Retailers, publishers and manufacturers are receiving traffic from the Marketplace, and visitors also clicked through to Con Edison’s BYOT program from Marketplace thermostat offerings.

Energy Savings:

Since the launch of the behavioral Home Energy Report program, customers have saved over 6,958 MWh of electricity (July, August, September). Customers began the program saving at a rate of 0.28% in June and have slowly increased the percent savings to 1.09% as of September 2016. Once customers have reached their savings ramp, generally 12 months after program initiation, the anticipated savings rate is between 1.5% and 3.0% for the remainder of the demonstration project.

Estimated indirect energy savings associated with Marketplace Storefront sales in Q3 are 39.58 MWh and 9,064 Therms on a lifetime basis.



















Greenhouse Gas Emissions Reductions:

The behavioral and indirect energy savings through the Marketplace Storefront are estimated to have avoided 7,671,097 pounds of carbon dioxide, 157.45 pounds of methane and 16.23 pounds of nitrous oxide emissions in Q3.

2.1.4 Next Quarter Forecast




In Q4 2016, the Project will send out targeted offering campaigns to promote the Marketplace, the Wi-Fi Thermostats (Nest, ecoBee, Honeywell) sold on the Marketplace Storefront, and Sealed Home Improvements. These targeted offerings consist of paper inserts, paper marketing modules included in the paper HERs, and digital marketing modules included in the digital HERs. A mockup of each of these communications can be found in Appendix C: Printed Home Energy Report with Targeted Offerings. Also in Q4, HUAs will begin to include targeted offerings for relevant DER promotions. Enervue is developing promotional materials (email, Facebook post, and bill insert text) for use in Black Friday campaigns.

2.1.5 Checkpoints/Milestone Progress

| Checkpoint/Milestone | Timing* | Status |
|---|--------------------------|---|
| DER Sales | Phase 2 Midpoint / End |    |
| Channel and Messaging Effectiveness: <i>Customer Motivation</i> | Phase 2 Midpoint / End |    |
| Digital Engagement: <i>Integrated Online Experience</i> | Phase 3 start + 6 months |    |
| Revenue Realization: <i>New Business Models</i> | Phase 2 Midpoint / End |    |
| Demand Side Management: <i>Customer Co-Benefits</i> | Phase 2 Midpoint / End |    |
| Referrals to Energy Efficiency Rebate Programs | Phase 2 Midpoint / End |    |

*Detailed descriptions of the Phases can be found in the Appendix E: Description of Phases.

Legend

| | | |
|---|--|---|
|  On Schedule |  Delayed w/out Major Impact |  Delayed or Stopped – Project Goals Impacted |
|---|--|---|

2.1.6 Planned Activities

2.1.6.1 DER Sales

Status: Green

Expected Target by Phase 2 Midpoint: 18,500 purchases (revised since the Q2 2016 report of 31,000 purchases; see section 2.1.7 Changes to Program Design for justification)

Solutions/strategies in case of results below expectations: First, review overall DER sales by channel and product category to identify over- or under-performing products and services. Examine the possibility of changing the mix of DERs offered through each channel based on this review. Second, review “Channel and Messaging” effectiveness (below) to identify strategies for engaging customers at a higher rate. If the expected target is missed, the Project team will evaluate the larger impact to the overarching goals of the Project.

2.1.6.2 Channel and Messaging Effectiveness: Customer Motivation

Status: Green

Expected Target by Phase 2 Midpoint: 50% recall rates; 16% open rates; 2.5% click through rates

Solutions/strategies in case of results below expectations: Evaluate results of the content and messaging effectiveness. First, evaluate potential changes in content or layout informed by A/B, or split testing. A/B testing compares two versions of a communication to see which one performs better. Second, evaluate responses by customer segment and assess possibility of customizing content by unique customer segment. Third, evaluate channel effectiveness and assess resource allocation between channels. If the expected target is missed, the Project team will evaluate the larger impact to the overarching goals of the Project.

2.1.6.3 Digital Engagement - Integrated Online Experience

Status: Green

Expected Target by Phase 2 Midpoint: 70,000 unique visitors each 6-month period

Solutions/strategies in case of results below expectations: Evaluate strategies for generating traffic to online tools. Shift investment between strategies if optimization is needed, add incremental investment to the most effective strategies or develop additional strategies for lead generation if needed. If the expected target is missed, the Project team will evaluate the larger impact to the overarching goals of the Project.

2.1.6.4 Revenue Realization: New Business Models

Status: Green

Expected Target by Phase 2 Midpoint: \$484,000 (revised since the Q2 2016 report of \$627,000; see section 2.1.7 Changes to Program Design for justification)

Solutions/strategies in case of results below expectations: Evaluate the effectiveness of all messaging strategies (A/B tests, digital and paper channels) and shift communications towards the most effective means to maximize DER sales. Establish a mechanism for competition between DER vendors who wish to feature their products through the Connected Homes Platform in order to identify vendors who can benefit the most from participation in the Project and who are willing to offer the most competitive terms. If the expected target is missed, the Project team will evaluate the larger impact to the overarching goals of the Project.

2.1.6.5 Demand Side Management: Customer Co-Benefits

Status: Green

Expected Target by Phase 2 Midpoint: 500 MWh (Marketplace Storefront); 10,300 MWh (behavioral energy efficiency); 2.74 MW (behavioral energy efficiency); 5% lift in program participation (revised since the Q2 2016 report, see section 2.1.7 Changes to Program Design for justification)

Solutions/strategies in case of results below expectations: Review balance of energy insights vs. promotional content included in outbound content and optimize as needed. If the expected target is missed, the Project team will evaluate the larger impact to the overarching goals of the Project.

2.1.6.6 Referrals to Energy Efficiency Rebate Programs

Status: Green

Expected Target by Phase 2 Midpoint: 10,300 click-throughs from Marketplace to large appliance rebate applications (new target since the Q2 2016 report, see section 2.1.7 Changes to Program Design for justification)

Solutions/strategies in case of results below expectations: Evaluate the mix of marketing channels and shift strategies if optimization is needed. Add additional resources to the most effective channels or develop new marketing strategies.

2.1.7 Changes to Project Design

Following discussions with potential showerhead vendors, the project team concluded that these devices would not have significant revenue generation potential and decided not to include them under the Storefront offering at this time. Meanwhile, the dehumidifier category was added to the Marketplace.

The project team also originally intended to outsource call center services to promote product sales and services to customers moving into their homes. Since products are now sold on Marketplace Storefront, the team decided to use the internal Con Edison call center resources to promote it to its customers.

At the outset of the project, revenue targets were forecast separately from - and did not include the cost of - order fulfillment. It was also assumed that Con Edison would manage fees for each order fulfilled separately. These fulfillment costs were included in the project costs outlined in Section 3) B of the Implementation Plan. However, after close review, it became apparent that having Enervee, Con Edison's Marketplace vendor, manage this fulfillment process would enable overall cost efficiencies for Con Edison. As a result, the team has revised the revenue targets to reflect the *net* revenue to Con Edison. These net revenues represent the final revenues to be earned *after* the handling and fulfillment costs of products sold on the Marketplace Storefront managed by Enervee. Because of the efficiencies introduced in the fulfillment process, this change results in greater net revenues to Con Edison.

Lastly, it was foreseen at the outset of the project that online rebates would be processed - and could therefore be tracked - through the Marketplace; instead, Marketplace visitors can download the PDF rebate application form (electric and gas water heaters, refrigerators, room AC, dehumidifier, cloth washer, and dish washer) or are directed to Con Edison's online rebate application process. As a result, the Marketplace platform is unable to track the number of actual participants, sales, energy savings and greenhouse gas emissions reductions associated with rebates offered by Con Edison and promoted through the Marketplace. For this reason, the energy savings targets have been adjusted to include only those savings associated with Marketplace Storefront sales. Nonetheless, Con Edison tracks rebate applications, energy savings, and gas emissions as part of its Energy Efficiency Programs and will work on streamlining the customer purchase experience via the

Marketplace and rebate process. The team will report on the outcome of the effort in a future report.

For these reasons, several Phase 2 Midpoint targets have been adjusted in the previous sections:

| Target Reference | Original Targets | Units | Adjusted Targets | Justification of Change |
|----------------------|---|---------|---|--|
| 2.1.6.1 DER Sales | Phase 2 Midpoint: 31,000 Phase 2 End: 77,700 | # units | Phase 2 Midpoint: 18,500 Phase 2 End: 46,200 | <ul style="list-style-type: none"> Original DER sales targets included large appliance purchases influenced by the Marketplace, assuming rebate processing through the platform was in scope. Since rebate processing is being managed outside of the Marketplace platform, 10,300 projected large appliances were removed from the Phase 2 Midpoint target (26,000 from the Phase 2 End target), and are being tracked under Con Edison's energy efficiency rebate programs. Instead, a new Checkpoint/Milestone (2.1.6.6) was added to account for referrals to energy efficiency rebate programs through the number of click-throughs to large appliance rebate applications. 2,200 showerheads were also removed from the DER sales projections (5,500 from the Phase 2 End target), since they are not offered on the Storefront. The adjusted target includes 1,000 high value DER sales through Opower outreach by Phase 2 Midpoint (2,700 by Phase 2 End) and 17,500 Storefront sales by Phase 2 Midpoint (43,500 by Phase 2 End). |

| | | | | |
|---|---|---------------------|---|---|
| 2.1.6.4 | Phase 2 Midpoint: \$627,000 Phase 2 End: \$1,570,000 | \$ | Phase 2 Midpoint: \$484,000 Phase 2 End: \$1,210,200 | <ul style="list-style-type: none"> Revenue targets were originally forecast separately from - and did not include the cost of – order fulfillment². It was also assumed that Con Edison would manage these fees. However, it became apparent that having Enervee, Con Edison's Marketplace vendor, manage this fulfillment process was more efficient for Con Edison. Revenue targets have therefore been revised to reflect the net revenue to Con Edison, taking into account the handling and fulfillment costs of products sold on the Marketplace Storefront managed by Enervee. This change results in greater net revenues to Con Edison. |
| 2.1.6.5 Marketplace electricity savings sub-target | Phase 2 Midpoint: 19,000 Phase 2 End: 47,300 | MWh | Phase 2 Midpoint: 500 Phase 2 End: 8,700 | <ul style="list-style-type: none"> Participation in rebates cannot be tracked through the platform; larger appliance rebates are accounted for under Con Edison's energy efficiency programs. The Marketplace-generated energy saving targets have since been adjusted to reflect this change. The newly proposed target is calculated based on 17,500 Storefront sales of LED bulbs, thermostats and power strips by the Phase 2 Midpoint (43,500 by Phase 2 End). |
| 2.1.6.6 Referrals to Energy Efficiency Programs: Click-throughs to | Phase 2 Midpoint: N/A Phase 2 End: N/A | # of click-throughs | Phase 2 Midpoint: 10,300 Phase 2 End: 26,000 | <ul style="list-style-type: none"> New metric was added to track referrals to energy efficiency programs through click-throughs to large appliance rebate applications. Since rebate processing through the platform is no longer in scope, projected large appliances |

² Order fulfillment costs include the shipping and fulfillment fees charged by Amazon or other fulfillment providers per transaction.

| | | | | |
|--|--|--|--|--|
| large appliance rebate applications | | | | influenced are being tracked through Con Edison's energy efficiency rebate programs and removed from the DER Sales Checkpoint/Milestone. |
|--|--|--|--|--|

2.2 WORK PLAN & BUDGET REVIEW

2.2.1 Phase Progress

The team successfully worked through Phase 0 (Project Development) and Phase 1 (Project Launch), and is now working through Phase 2 (Demonstration Implementation). Phase 0 consisted of submitting the Implementation Plan and completing partner negotiations. Phase 1 consisted of all the activities required to launch the Project: data acquisition, program design and configuration, implementation of the web/Marketplace and call center tools, quality assurance testing and go-live, as well as initial customer community outreach efforts. Phase 2 (Demonstration Implementation) tasks focus on overall maintenance and reporting for the Project. A full description of the major Project phases is set forth in Appendix E: Description of Phases.

2.2.1.1 Updated Work Plan

Demonstration Project - Connected Homes Platform

| Activity No. | Activity Description | Status | Lead | 2016 | | 2017 | | | | 2018 | |
|--------------|---|-------------|---------------------|------|----|------|----|----|----|------|----|
| | | | | Q3 | Q4 | Q1 | Q2 | Q3 | Q4 | Q1 | Q2 |
| 1.0 | Phase 0 - Project Development | | | | | | | | | | |
| 1.1 | Project Management | COMPLETE | Con Edison | | | | | | | | |
| 1.1.1 | Complete Implementation Plan | COMPLETE | Con Edison | | | | | | | | |
| 1.1.2 | DPS review | COMPLETE | DPS | | | | | | | | |
| 1.2 | Complete partner negotiations | COMPLETE | Con Edison | | | | | | | | |
| 1.2.1 | Complete MSA with platform partner | COMPLETE | Con Edison/Opower | | | | | | | | |
| 1.2.1.1 | Complete SQW with platform partner | COMPLETE | Con Edison/Opower | | | | | | | | |
| 1.2.1.2 | Contract negotiations w/ DER partners | COMPLETE | Con Edison | | | | | | | | |
| 1.2.1.3 | Define contact center solutions | COMPLETE | Con Edison | | | | | | | | |
| 2.0 | Phase 1 - Project Launch | | | | | | | | | | |
| 2.1 | Platform Configuration | COMPLETE | Con Edison/Opower | | | | | | | | |
| 2.1.1 | Data acquisition | COMPLETE | Con Edison/Opower | | | | | | | | |
| 2.1.1.1 | Complete historical data transfer | COMPLETE | Opower | | | | | | | | |
| 2.1.1.2 | Configure and load historical and parcel data and prepare | COMPLETE | Opower | | | | | | | | |
| 2.1.1.3 | Incorporate third party and DER data | COMPLETE | Opower | | | | | | | | |
| 2.1.2 | Program design and configuration | COMPLETE | Con Edison/Opower | | | | | | | | |
| 2.1.2.1 | Finalize marketing, branding, and content materials | COMPLETE | Con Edison/Opower | | | | | | | | |
| 2.1.2.2 | Define customer segmentation strategy and configure application | COMPLETE | Opower | | | | | | | | |
| 2.1.3 | Implement Web, Marketplace, and Call Center tools | COMPLETE | Con Edison/Partners | | | | | | | | |
| 2.1.3.1 | Configure Marketplace | COMPLETE | Enervee | | | | | | | | |
| 2.1.3.2 | Configure Web Portal | COMPLETE | Opower | | | | | | | | |
| 2.1.3.3 | Contact Center Integration | COMPLETE | Con Edison | | | | | | | | |
| 2.1.4 | Quality assurance testing and go live | COMPLETE | Con Edison/Opower | | | | | | | | |
| 2.1.4.1 | Conduct QA testing and receive final sign off | COMPLETE | Opower | | | | | | | | |
| 2.1.4.2 | Customer service training | COMPLETE | Con Edison/Opower | | | | | | | | |
| 2.1.4.3 | Deploy Web, Marketplace, print and mail Home Energy Reports | COMPLETE | Opower | | | | | | | | |
| 2.2 | Ongoing Customer & Community Outreach | COMPLETE | Con Edison | | | | | | | | |
| 3.0 | Phase 2 - Demonstration Implementation | | | | | | | | | | |
| 3.1 | Project Management | IN PROGRESS | Con Edison | | | | | | | | |
| 3.1.1 | Track program metrics | IN PROGRESS | Con Edison/partners | | | | | | | | |
| 3.1.1.1 | Track digital and outbound engagement metrics | IN PROGRESS | Opower/Enervee | | | | | | | | |
| 3.1.1.2 | Track energy efficiency savings | IN PROGRESS | Opower | | | | | | | | |
| 3.1.1.3 | Report on DER sales | IN PROGRESS | DER Partners | | | | | | | | |
| 3.1.1.4 | Conduct customer survey | NOT STARTED | Opower | | | | | | | | |
| 3.1.2 | Reporting and Evaluation | IN PROGRESS | Con Edison | | | | | | | | |
| 3.1.2.1 | Deliver Quarterly Reports | IN PROGRESS | All | | | | | | | | |
| 3.1.2.2 | Annual workshop with stakeholders | IN PROGRESS | All | | | | | | | | |
| 3.2 | Delivery | IN PROGRESS | Con Edison/Partners | | | | | | | | |
| 3.2.1 | Deliver core content to customers | IN PROGRESS | Con Edison/Partners | | | | | | | | |
| 3.2.1.1 | Maintain Marketplace and Web Portal | IN PROGRESS | Opower/Enervee | | | | | | | | |
| 3.2.1.2 | Maintain contact center solutions | IN PROGRESS | Con Edison | | | | | | | | |
| 3.2.1.3 | Deliver outbound content | IN PROGRESS | Opower | | | | | | | | |
| 3.2.2 | Phase in additional web functionality | IN PROGRESS | Con Edison/partners | | | | | | | | |
| 3.2.2.1 | Additional appliance categories integration for Marketplace | COMPLETE | Enervee | | | | | | | | |
| 3.2.2.2 | Marketplace launch Storefront and retailer API functionalities | COMPLETE | Enervee | | | | | | | | |
| 3.2.2.3 | Implement Single-Sign-On | COMPLETE | Opower | | | | | | | | |
| 3.2.3 | Launch DER targeted promotional messaging | COMPLETE | Con Edison/Partners | | | | | | | | |
| 3.2.3.1 | DER program design and configuration | COMPLETE | DER Partners/Opower | | | | | | | | |
| 3.2.3.2 | Deploy web, print and email-based promotions | COMPLETE | Opower | | | | | | | | |
| 3.2.3.3 | Maintain contact center solutions for new customers | IN PROGRESS | Con Edison/Partner | | | | | | | | |
| 3.3 | Ongoing Customer & Community Outreach | IN PROGRESS | Con Edison | | | | | | | | |
| 4.0 | Phase 3 - Project Optimization | | | | | | | | | | |
| 4.1 | Project Management | NOT STARTED | Con Edison | | | | | | | | |
| 4.1.1 | Evaluate project rollout | NOT STARTED | Con Edison | | | | | | | | |
| 4.2 | Implement competitive bidding | NOT STARTED | Con Edison | | | | | | | | |
| 4.2.1 | Conduct RFI for additional DER partners | NOT STARTED | Con Edison | | | | | | | | |
| 4.2.1.1 | Establish qualification criteria for DER partners | NOT STARTED | Con Edison | | | | | | | | |
| 4.2.1.2 | Prepare RFI for additional DER partners | NOT STARTED | Con Edison | | | | | | | | |
| 4.2.1.3 | Qualify potential additional DER partners | NOT STARTED | Con Edison | | | | | | | | |
| 4.2.1.4 | Complete contract negotiations with additional DER partners | NOT STARTED | Con Edison | | | | | | | | |
| 4.3 | Optimize Program | NOT STARTED | Con Edison/Partners | | | | | | | | |
| 4.3.1 | Refine Program Design | NOT STARTED | Con Edison/Partners | | | | | | | | |
| 4.3.1.1 | Refine DER Categories and Pricing | NOT STARTED | All | | | | | | | | |
| 4.3.1.2 | Optimize Revenue/Benefit Opportunity | NOT STARTED | All | | | | | | | | |

= Completed Task
 = In Progress Task
 = Not Started Task
 = New/Modified Task

2.2.1.2 Updated Budget

Budget information is being filed confidentially with the Commission.

2.3 CONCLUSION

2.3.1 Lessons Learned

Moving forward, the team will include DER partner's phone numbers as part of the campaign, in addition to their specific websites, when applicable. This will allow customers the option to call the DER partners directly and get more detailed information about each of the targeted offerings. The solar campaign included just a website for customers to visit, and while this was manageable, the customer experience may have been better and the call center process facilitated had we included SunPower phone numbers on the communications.

The team had also planned to report on the number of leads and acquisitions among recipient customers and control customers as part of the quarterly report. Matching customers to specific purchases has been more difficult than anticipated due to privacy concerns around sharing account numbers with multiple vendors as well as requesting account numbers from customers too early in the sales process. The project team is working through a robust matching process and will report out on this metric in 2017.

2.3.2 Recommendations

The team recommends close coordination between the Company and the DER partners throughout the process to ensure a smooth, timely and effective delivery of campaigns. In addition to having DER partners involved in the customer targeting process to leverage industry expertise (e.g. historically effective zip codes), project teams should involve the DER partners in the creative development process early and often for a successful campaign implementation.

2.4 INCLUDED APPENDICES

Included in the Appendices are mock-ups of the HUA, DER targeted offering campaign communications, a full list of detailed metrics and results, as well as a description of all project Phases.

Appendix A: High Usage Alert

Appendix B: Solar Targeted Offering Home Energy Reports (print)


Appendix C: Marketplace and Thermostat Targeted Offering Home Energy Report (print)

Appendix D: Full list of metrics and results


Appendix E: Description of Phases

Appendix A: High Usage Alert (email)


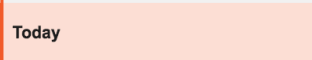

From: Con Edison <noreply@energyreports.coned.com>
Date: Mon, Aug 8, 2016 at 1:15 PM
Subject: Alert - Warmer weather is impacting your energy use
To: opowertest.iqa@opower.com


Reference number: 001100000243131

Due to warmer weather, you're trending toward higher energy usage

 This month was an average 1°F warmer than last month

This month's projected electricity use


| | | | |
|------------|--|---------|--|
| This month |  | Today |  |
| Last month |  | 264 kWh | |

For billing period beginning July 24, 2016

This alert is designed to help you take control of your energy use and save on your energy bill. We use your past year of electric use and weather data to determine if you may be on track for a high bill. If you would prefer not to receive these alerts, you can [unsubscribe here](#).

If you are a Level Payment customer, your costs may increase in the future if you use more energy than usual.

Appendix B: Solar Targeted Offering Home Energy Reports (print, front page only)



Con Edison – Home Energy Report
4 Irving Place
New York, NY 10003

Your Home Energy Report

Account number: XX-XXXX-XX45-0000-2
Reference number: 001-100-000-945-506
Report period: 07/23/16–09/21/16

We are pleased to provide you periodic, personalized Home Energy Reports to help you make smart energy saving decisions.




If you have any questions about these reports, you can contact us at 1-212-460-4738 or energyreports@conEd.com.

For a full list of energy programs, services, and products for purchase, including rebates from Con Edison, visit energyreports.conEd.com.

FIRST NAME LAST NAME

Last 2 Months Neighbor Comparison

You used **38% more** electricity than your efficient neighbors.

| | | |
|---------------------|---|------------|
| Efficient Neighbors |  | 1,253 kWh* |
| YOU |  | 1,723 |
| All Neighbors |  | 1,977 |

* kWh: A 100-Watt bulb burning for 10 hours uses 1 kilowatt-hour.

How you're doing:

Great 😊 😊

▶ **GOOD** 😊

More than average

Who are your Neighbors?


■ **All Neighbors:** Approximately 100 occupied, nearby homes that are similar in size to yours (avg 1,399 sq ft) and have both electricity and natural gas service

■ **Efficient Neighbors:** The most efficient 20 percent from the "All Neighbors" group

Be the next to go solar.

Many of your neighbors are reaping the benefits of solar. You can join them! Solar panels from our partner, SunPower, are the most efficient panels you can own—and can give your home even more curb appeal.

Explore more about solar on our exclusive website at SunPower.com/ConEdison-Solar.



Turn over for savings →



Con Edison – Home Energy Report
4 Irving Place
New York, NY 10003

Your Home Energy Report

Account number: XX-XXXX-XX85-0003-0
Reference number: 001-100-000-953-852
Report period: 07/23/16–09/21/16

We are pleased to provide you periodic, personalized Home Energy Reports to help you make smart energy saving decisions.

If you have any questions about these reports, you can contact us at 1-212-460-4738 or energyreports@conEd.com.

For a full list of energy programs, services, and products for purchase, including rebates from Con Edison, visit energyreports.conEd.com.

FIRST NAME LAST NAME

Last 2 Months Neighbor Comparison

You used **35% more** electricity than your efficient neighbors.



* kWh: A 100-Watt bulb burning for 10 hours uses 1 kilowatt-hour.

How you're doing:

Great 😊 😊

► **GOOD** 😊

More than average

Who are your Neighbors?

■ **All Neighbors:** Approximately 95 occupied, nearby homes that are similar in size to yours (avg 2,460 sq ft) and have electric heat

■ **Efficient Neighbors:** The most efficient 20 percent from the "All Neighbors" group

Solar fits your budget.

With high-performance solar panels from our partner, SunPower®, you may enjoy lower energy bills for decades. SunPower can:



Create a free, custom solar proposal for you.



Discuss financing options and estimated savings.




Help you find a certified local installer.

Visit SunPower.com/ConEdison for a custom quote and to schedule a free consultation.

Turn over for savings →

Appendix C: Marketplace & Thermostat Targeted Offering Home Energy Report (print, front page only)





conEdison
Con Edison – Home Energy Report
4 Irving Place
New York, NY 10003

Your Home Energy Report
Account number: XX-XXXX-XX60-0003-9
Reference number: 001-100-000-320-148
Report period: 07/26/16–09/22/16

First Name Last Name

We are pleased to provide you periodic, personalized Home Energy Reports to help you make smart energy saving decisions.
If you have any questions about these reports, you can contact us at 1-212-460-4738 or energyreports@conEd.com.
For a full list of energy programs, services, and products for purchase, including rebates from Con Edison, visit energyreports.conEd.com.

Last 2 Months Neighbor Comparison | You used **34% more** electricity than your efficient neighbors.

| | | |
|---------------------|---|----------|
| Efficient Neighbors |  | 739 kWh* |
| YOU |  | 990 |
| All Neighbors |  | 1,576 |

How you're doing:

Great 😊 😐 😞

► **GOOD** 😊

More than average


* kWh: A 100-Watt bulb burning for 10 hours uses 1 kilowatt-hour.

Who are your Neighbors?


- **All Neighbors:** Approximately 100 occupied apartments or condos that have electric heat and are either in the same building or nearby (avg 0.34 mi away)
- **Efficient Neighbors:** The most efficient 20 percent from the "All Neighbors" group

Get ideal room temperatures anytime.


Have you considered a smart thermostat?
It can make being at home even more enjoyable. Here's how.



Programs itself
after learning about your energy use.



Adjusts temperatures
automatically within days.



Can be **controlled with WiFi** using your computer or phone.

Discover more about smart thermostats online at marketplace.conEd.com/mytemp.

Turn over for savings →

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Con Edison – Home Energy Report
4 Irving Place
New York, NY 10003

Your Home Energy Report

Account number: XX-XXXX-XX43-0000-4
Reference number: 001-100-001-014-585
Report period: 07/23/16–09/21/16

We are pleased to provide you periodic, personalized Home Energy Reports to help you make smart energy saving decisions.

If you have any questions about these reports, you can contact us at 1-212-460-4738 or energyreports@conEd.com.

For a full list of energy programs, services, and products for purchase, including rebates from Con Edison, visit energyreports.conEd.com.

FIRST NAME LAST NAME

Last 2 Months Neighbor Comparison

You used **47% more** electricity than your efficient neighbors.



* kWh: A 100-Watt bulb burning for 10 hours uses 1 kilowatt-hour.

How you're doing:

Great 😊😊

► **GOOD** 😊

More than average

Who are your Neighbors?

■ **All Neighbors:** Approximately 100 occupied apartments or condos that are either in the same building or nearby (avg 0.05 mi away)

■ **Efficient Neighbors:** The most efficient 20 percent from the "All Neighbors" group

Manage your energy use easily with a smart thermostat.

A smart thermostat puts you in control of your home's temperature. It learns your daily patterns so it can program itself within days—and it can even self-adjust when you're away.

Find the smart thermostat that's right for you. Visit marketplace.conEd.com/mythermostat.



A smart thermostat adjusts your temperatures effortlessly

Turn over for savings →



Con Edison – Home Energy Report
4 Irving Place
New York, NY 10003

Your Home Energy Report

Account number: XX-XXXX-XX07-0005-4
Reference number: 001-100-000-945-651
Report period: 07/26/16–09/22/16

We are pleased to provide you periodic, personalized Home Energy Reports to help you make smart energy saving decisions.

If you have any questions about these reports, you can contact us at 1-212-460-4738 or energyreports@conEd.com.

For a full list of energy programs, services, and products for purchase, including rebates from Con Edison, visit energyreports.conEd.com.

FIRST NAME LAST NAME

Last 2 Months Neighbor Comparison

You used **17% more** electricity than your efficient neighbors.



* kWh: A 100-Watt bulb burning for 10 hours uses 1 kilowatt-hour.

How you're doing:

Great 😊 😊

► **GOOD** 😊

More than average

Who are your Neighbors?

■ **All Neighbors:** Approximately 100 occupied apartments or condos that have gas heat and are either in the same building or nearby (avg 0.08 mi away)

■ **Efficient Neighbors:** The most efficient 20 percent from the "All Neighbors" group

The smart energy products you need—all in one place.

Shop online at Con Edison's Marketplace to easily compare and buy the high-efficiency products you use every day.



Find essentials
such as LED bulbs and smart power strips.



Browse Energy Scores to compare efficiency ratings.



Purchase directly from Con Edison and receive rebates.

Energy savings are waiting for you online. Visit marketplace.conEd.com/onestop today.

Turn over for savings →

Appendix D: List of Metrics and Results

| Checkpoint | Category | Metric | Definition | Reporting Cadence | Results for Q3 2016 (not cumulative) |
|--|-----------|---------------------------------|--|-------------------|--|
| DER Sales: Market Animation and Customer Choice & Digital Engagement: Integrated Online Experience | Awareness | Customers aware of DER partners | Response to customer survey questions about awareness of DER offerings in Con Edison's territory | Annually | To be reported in Q3 2017. |
| | | Total number of impressions | Total number of paper and digital communications sent to customers, cut by DER | Quarterly | 982,962 total print and digital communications were sent to customers in Q3 2016. 412,275 of those communications were printed, and 568,175 were emailed. 304,525 total communications included targeted offerings for SunPower, Con Edison's solar partner. 140,949 of these were digital and 163,576 were print. |
| | | Open rates (eHERs) | Percent of customers who open eHERs with targeted offerings, cut by DER | Quarterly | On average, customers opened eHERs with targeted offerings at a rate of 50%. Across all eHERs, the open rate for Q3 was 49%. |
| | | Open rates (HUAs) | Percent of customers who open HUAs with targeted offerings, cut by DER | Quarterly | HUAs are not scheduled to include targeted offerings until Q4 2016. Across all HUAs, the open rate for Q3 was 38%. |
| | | Click through rates (eHERs) | Percent of customers who click on the link/s included in eHERs with targeted offerings, cut by DER | Quarterly | On average, customers clicked-through from eHERs with targeted offerings at a rate of 3.4%. Across all eHERs, the click-through rate in Q3 was 3.02%. |
| | | Click through rates (HUAs) | Percent of customers who click on the link/s included in HUAs | Quarterly | HUAs are not scheduled to include targeted offerings until Q4 2016. Across all HUAs, the |

| Checkpoint | Category | Metric | Definition | Reporting Cadence | Results for Q3 2016 (not cumulative) |
|--|------------------------|---------------------------------|---|-------------------|---|
| | | | | | click-through rate in Q3 was 0.73%. |
| | | Unique web visits | Number of unique customers who visit the web portal | Quarterly | 371 authenticated, first time users visited the web portal in Q3. The Marketplace had 41,099 unique visits. |
| | Leads and Acquisitions | Qualified solar leads generated | Number of qualified leads from the targeted offerings | Quarterly | 230 qualified solar leads. |
| | | Solar installations reported | Number of installations | Quarterly | 4 solar installations. |
| | | Thermostats sold | Number of thermostats sold through the targeted offerings | Quarterly | 10 thermostats sold. |
| | | Recipients and controls | Number of leads and acquisitions among recipient customers and control customers | Quarterly | Recipient and control purchase and lead comparisons will occur in 2017 once the team has refined the customer matching process. |
| Channel and Messaging Effectiveness: Customer Motivation | Partners | DER partners retained | Percent of DER partners who choose to continue with the targeted offerings | Annually | To be reported in Q3 2017. |
| | Customers | Positive customer experience | Percent of customers who respond positively to survey questions on their satisfaction with targeted offerings | Annually | To be reported in Q3 2017. |
| Revenue Realization | Total Revenue | Total revenue to Con Edison | Revenue gained through targeted offerings | Annually | To be reported in Q3 2017. |

| Checkpoint | Category | Metric | Definition | Reporting Cadence | Results for Q3 2016 (not cumulative) |
|--|----------------------------|--|--|-------------------|--|
| Demand Side Management: Customer Co-Benefits | Energy / Demand / Benefits | Energy efficiency savings | Energy savings generated by customers as a result of participating in the program | Monthly | 6,958 MWh total in Q3: 1,938 MWh in July, 2,561 MWh in August, 2,459 MWh in September. |
| | | Demand savings (MW) | Demand savings generated by customers as a result of participating in the program | Monthly | 9.46 total MW in Q3: 2.60 MW in July, 3.44 MW in August, and 3.42 MW in September. |
| | | Indirect energy savings (Marketplace Storefront sales) | Total kWh savings from product sales from the Marketplace Storefront | Quarterly | Electric savings: 39,577 kWh, Gas savings: 9,064 therms. |
| | | Reduction in greenhouse gas emissions | Greenhouse gas emissions reduction from product sales from Marketplace Storefront and the Behavioral Program | Quarterly | <p>7,671,097 lbs total CO₂, 157.45 lbs total CH₄, 16.23 lbs total N₂O from both the Marketplace Storefront and Behavioral Program:</p> <p>Marketplace Storefront: 148,734 lbs CO₂; 0.89 lbs CH₄; 0.09 lbs N₂O.</p> <p>Behavioral: 7,522,363 lbs CO₂; 157.45 lbs CH₄; 16.23 lbs N₂O.</p> |

Appendix E: Description of Phases

| Phase | 0. Product Management | 1. Project Launch | 2. Demonstration Implementation | 3. Project Optimization |
|--------------------------------------|---|--|--|---|
| Milestone (Stage Gate to Next Phase) | <i>Negotiations Complete</i> <ul style="list-style-type: none"> • Partner contracts signed • DPS approval | <i>Successful Platform Build</i> <ul style="list-style-type: none"> • Attract vendors in key categories • Successful data transfer | <i>Platform Utilization</i> <ul style="list-style-type: none"> • Click through rates • Qualified leads • Contact center volume • Vendor retention • Customer satisfaction | <i>Revenue Realization</i> <ul style="list-style-type: none"> • Revenue per source • Customer satisfaction • Vendor retention |
| Key Elements | <ul style="list-style-type: none"> • Platform provider contracted • DER providers signed-on | <ul style="list-style-type: none"> • Develop platform • End-to-end testing • Contact center training • Program go-live | Evaluate response of specific audiences to <ul style="list-style-type: none"> • DER combinations • Channels • Messages | <ul style="list-style-type: none"> • Learn how to leverage more granular customer data • Optimize profit by refining categories and pricing • Optimize for energy efficiency gains |
| DER Categories | N/A | N/A | <ul style="list-style-type: none"> • Rooftop solar • Home energy efficiency audits • Smart thermostats | <ul style="list-style-type: none"> • Further expansion of DER products and providers • Expand to ESCOs |