



Strategic Customer Experience Portfolio Report

May 30, 2024

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1 Strategic Customer Experience Portfolio Summary

Providing an optimal customer experience is at the core of Con Edison's business and is the driving force behind our Strategic Customer Experience (Strategic CX) portfolio of investments. Continued investments in the customer experience are more important than ever as societal trends, including technological advances and the clean energy transition, transform how our customers use energy and interact with the Company. Indeed, New York State expects that customers will play an important role in helping to achieve its clean energy goals, and supporting customers through this transition is accordingly part of the Company's clean energy commitment. The programs in the Strategic CX portfolio will meet both evolving customer and stakeholder expectations and enable the Company to lead the transition to a clean energy future.

The Strategic CX Portfolio will provide value for customers in several ways. It will increase customer satisfaction as the Company meets rising customer expectations for service and communications; drive cost efficiencies through improved service and resolution; support statewide clean energy goals by generating customer demand for and streamlining adoption of programs, as well as provide customer and system data that can facilitate investment and accelerate the deployment of clean energy solutions throughout the State; enhance understanding and adoption of optional rates, which help customers save money and support grid efficiency; support customer satisfaction through improved communication during outages; and provide education and access to payment assistance when customers experience financial difficulties that impact their ability to pay for service.

The Company's customer experience efforts began with programs approved in Cases 16-E-0060, 16-G-0061, 19-E-0065, and 19-G-0066. The Strategic CX portfolio included in Cases 22-E-0064 and 22-G-0065 continues many of the programs approved by the Commission in prior rate plans, and as such this quarterly Strategic CX Report is a continuation of the quarterly CX reports filed in earlier proceedings. It provides updates on the performance of the nine initiatives within the Strategic CX portfolio, including information on the status of each program in the initiative, recent activities, cost (including a comparison of budgeted and actual spending and a breakdown between labor and non-labor cost), cost savings/avoidance, non-financial benefits achieved, projected activities, and portfolio level key performance metrics.

2 Quarterly Update Reports

2.1 Customer Data & Analytics

Since 2020, Customer Data and Analytics has been bringing together information from customer interactions, account and billing data, and program enrollments into a single location to enable reporting and advanced analytics use cases. The team aims to continue connecting enterprise-wide data to build improved products that directly impact decision-making capabilities, strategic analysis, and customer interactions.

2.1.1 Q1 2024 Highlights

In Q1 2024, the program focused on enabling greater business insights associated with arrears mitigation, backlog management, and reporting updates based on continual learning by the Customer Care and Billing system's data model. The program also focused on improving its portfolio management processes. Below is an overview of the major initiatives completed in Q1 2024.

- Established a method for consolidating customer phone call details with data generated in the billing system to create more context on what happened during customer phone calls.
- Developed a comprehensive dashboard to monitor the health of the Company's credit and collections operations.
- Developed reporting to measure the return on investment of customer risk scoring.
- Enabled a new customer collections treatment for customers in arrears for greater than 60 days by automating customer identification, measuring campaign success, and onboarding a new email vendor specializing in utility collections communications.
- Removed technical debt within the platform and new Enterprise Data Analytics Platform (EDAP) workflows into production to reduce platform O&M costs.
- Finalized automated reporting for the Customer Operations section of the Company's Disadvantaged Communities report.
- Produced operational reporting associated with back-office work for billing issues and exceptions.
- Completed 23 ad hoc analyses related to customer experience drivers like details on customers calling about higher-than-usual bills, improved customer communications like identifying Energy Affordability Program (EAP) email campaign details for customers in disadvantaged communities and supporting operational needs like prioritizing customers for gas service line inspections.
- Continued to measure use case adoption through monthly communications, usage metrics, and stakeholder interviews. In Q1 2024, 37 Customer Analytics reports were viewed over 4,722 times by 158 employees. This represents an 85% growth in views from Q4 2023.

2.1.2 Costs

Spend Category	March 31 YTD Spending	2024 Budget
O&M Labor (\$)	\$ 97,442.00	\$ 573,560.00
O&M Non-Labor (\$)	\$ 584,472.00	\$1,379,000
Capital Labor (\$)	\$ 370,236.00	\$2,877,904.23
Capital Non-Labor (\$)	\$ 2,956,599.00	\$12,752,092.90

2.1.3 Cost Savings & Avoidance

For Q1 2024, Con Edison has not accrued any measurable cost savings or cost avoidance, but the program has produced operational efficiencies in the form of 3-10x improvements in time spent on individual data

queries, new data structures to look at customer accounts in new ways, and automated standard reports to provide more time for high value data analysis.

2.1.4 Non-Financial Benefits

- **Arrears Greater Than 60 Days Email Campaign:**

As of Q1 2024, the Company collected \$20 million in arrears through the arrears greater than 60 days email campaign, which was directly enabled by integrations, dashboards, and analytics produced by the Customer Data and Analytics program. The reporting associated with this analytics use case will also enable secondary analysis on the best days to communicate with customers, the campaign's impact on the call center, and how long it takes a customer to make a payment after receiving one of these emails.

- **Backoffice Reporting:**

In Q1 2024, the program produced generalized and personalized reporting associated with back-office billing and account exceptions. Without the program's reports, this information would need to be manually reviewed in the CC&B Graphical User Interface, making it difficult to obtain a comprehensive view of all the work assigned to a given team.

2.1.5 Q2 2024 Project Activities

The planned activities for Q2 2024 focus on personalizing reporting for various teams, increasing transparency into call volumes, and enabling new ways to evaluate the Company's collections treatment approaches. The program also aims to continue enhancing EDAP and support Proof of Concepts (POCs) that evaluate Generative AI's application to customers and back-office analytics. Key project areas for Q2 2024 include:

- Tailor Back Office To-Do reporting (i.e., exception reporting) for the Executive Action Group, Accounting Division, and Meter Action Group.
- Streamline the ability to identify all customer accounts and meters associated with a given premise while evaluating the outstanding cases and account exceptions present on these accounts.
- Begin propensity modeling associated with customer bill payment patterns.
- Create dashboards and views to manage unbilled populations greater than 90 days.
- Enhance long-term estimated and delayed billing datasets with recommended ways to bill the account.

2.2 DCX

The Digital Customer Experience (DCX) program was established in 2016 to improve the digital experience for customers through a redesign of the www.conedison.com, www.coned.com, and www.oru.com websites (with a new mobile-enabled design), the My Account portals, and mobile apps (iOS and Android). Quarterly reports filed by the Company since Cases 16-E-0060 and 16-G-0061 provide additional information on the earlier years of the program and its growing scope. For Con Edison's 2023-2025 rate plan, the DCX program will continue to optimize and expand the Company's digital platforms through integration with CC&B. The program will look to optimize and expand online self-service tools, enhance mobile app functionality, provide customers with more personalization and control, and iterate on transactional experiences as customer expectations and technology change. The Company's approach to digital transformation departs from traditional project management methods by using an Agile methodology.

DCX has aligned its vision, objectives, and themes to keep teams focused on the customer needs and priorities. The DCX vision remains true to the original intentions of the program: “Give customers their energy needs in a way that feels second nature.” To achieve this vision, the team prioritizes features and functionality that align to five themes:

- Make the digital experience so effortless that customers don’t feel the need to call customer service.
- Make it simple, clear and convenient to interact with us by streamlining the experience.
- Give customers the right tools to manage their energy usage more effectively.
- Deliver the basics, build trust, and understand customers’ circumstances.
- Anticipate customers’ needs by providing an experience that’s tailored to them.

2.2.1 Q1 2024 Highlights

The DCX teams continued to support CC&B stabilization, especially around testing and the resumption of credit and collection activities that increased over Q1 2024. The teams also made significant strides in delivering enhancements and new functionality to the digital customer experience. The work completed in Q1 2024 included the following updates to both the Con Edison (CECONY) and Orange & Rockland (O&R) digital experiences, unless otherwise noted:

- **Web/My Account**

In the My Account experience within the Sitecore platform, new functionality was added to the credit card flows for O&R, allowing customers to log directly into the third-party Fiserv BillMatrix billing portal without manually providing account numbers and other data. This enhancement brought the O&R experience up to parity with the CECONY credit card flows, providing customers a more seamless payment experience with fewer clicks. New functionality was also added for notification preferences when new accounts are added to a profile, providing customers effortless access to notification settings. This is expected to raise awareness of our robust billing and payment notifications for increased enrollment. Lastly, a new functionality for flexible messaging within the authenticated experience was added, allowing freeform messages to be delivered directly to customers. This new communication method could be used for rate updates, billing issues, or outage-related messages.

- **Sitecore/Platform**

The DCX program also invests in upgrading its platform to an up-to-date and supported code base and versioning to maintain system reliability. The DCX architecture is currently powered by the .NET 6 platform and is due for an upgrade to the current version, .NET 8; .NET 6 is scheduled for end of support by November 2024. This upgrade impacts 24 DCX services and will provide substantial improvements to performance, security, and available features. This upgrade is a strategic improvement to keep the DCX infrastructure competitive and secure at peak operating performance. The work involved with this upgrade will span multiple quarters with an expected completion of Q3 2024. In Q1 2024, the team upgraded four of the 24 services to the .NET 8 framework. The team also introduced security improvements to the deployment infrastructure, allowing new deployments to automatically integrate security advancements and providing a more secure environment. In addition, the team also completed enhancements to demand visualization graphs, implemented alternate multi-factor authentication (MFA) access codes, and began the transition of web translations to the new Weglot translation platform.

- **Native Mobile Applications**

In Q1 2024, the mobile team upgraded the native application code that enabled the release of iOS App Store and Google Play app updates. These updates provided additional security, privacy, and performance upgrades to each platform, aligning to iOS17 and Android 14. In conjunction with the native code updates, an enhanced set of frameworks for developing iOS and Android user interfaces were rolled out, improving developer efficiency. The improved frameworks also laid the foundation for new native app capabilities such as home screen widgets, live activities, and increased code efficiency for future implementations. Changes were also made to O&R credit card payment flows to mirror the website, allowing for a more seamless payment experience with fewer clicks. This is achieved through a new authentication process that removed the need for the customer to re-input account numbers when going from the Company website to the third-party payment provider. The team also improved the login experience through a more seamless design and flow, removing legacy modals for registration that no longer provider purpose to users. Finally, with the implementation of CC&B the Mobile Apps have also rebranded Level Payment plans to Budget Billing to align with the rebranding across all media platforms.

2.2.2 Costs

Con Edison		
Spend Category	March 31 YTD Spending	2024 Budget
O&M Labor (\$)	\$ 367,315.00	\$ 10,484,570.00
O&M Non-Labor (\$)	\$ 3,296,064.00	
Capital Labor (\$)	\$ 420,711.00	\$ 20,386,000.00
Capital Non-Labor (\$)	\$ 3,201,109.00	
Note: Capital underruns due to shift in focus on resources to CC&B implementation		
O&R		
Spend Category	March 31 YTD Spending	2024 Budget
O&M Labor (\$)	\$ 162,886.00	\$ 720,000.00
O&M Non-Labor (\$)	\$ 113,792.00	
Capital Labor (\$)	\$ 28,625.00	\$ 1,000,000.00
Capital Non-Labor (\$)	\$ 153,551.00	

2.2.3 Cost Savings/Avoidance

For Q1 2024, Con Edison and O&R have not accrued any measurable cost savings or cost avoidance.

2.2.4 Non-Financial Benefits

The work delivered in Q1 2024 improved the security, usability, and reliability of the Companies' digital platforms. The following metrics also provide perspective on customers' overall response to the DCX platforms.

2.2.4.1 Website Metrics Overview

Metric	Q2 2023 Con Edison	Q3 2023 Con Edison	Q4 2023 Con Edison	Q1 2024 Con Edison	Q2 2023 O&R	Q3 2023 O&R	Q4 2023 O&R	Q1 2024 O&R
Sessions	6.96M	7.83M	7.71M	7.85 M	594K	755K	759K	684K
Pageviews	25.7M	29.38M	28.98M	28.72 M	2.28M	2.72M	2.75M	2.61M
Average Bounce Rate	33.01%	34.27%	33.61%	36.95%	28.26%	31.28%	34.61%	28.39%
Average Page Load Time (Sec)	5.33	5.99	5.72	5.66	4.23	4.08	4.23	4
Registration	99,158	119,748	108,680	94,666	6,203	7,395	7,317	10,170
NPS Score	50	49	43	45	54	51	44	45

Metric	Metric Description
Sessions	A session is a group of user interactions with your website that take place within a given time frame.
Page views	A pageview (or pageview hit, page tracking hit) is an instance of a page being loaded (or reloaded) in a browser.
Average Bounce Rate	Bounce rate is single-page sessions divided by all sessions, or the percentage of all sessions on your site in which users viewed only a single page and triggered only a single request to the Analytics server.
Average Page Load Time (sec)	Total amount of load time on average across all pages.
Registrations	Total number of digital My Account registrations.
NPS Score	An index ranging from -100 to 100 that measures the willingness of customers to recommend a company's product or services to others.

2.2.4.2 Mobile Metrics Overview

Metric	Q2 2023 Con Edison	Q3 2023 Con Edison	Q4 2023 Con Edison	Q1 2024 Con Edison	Q2 2023 O&R	Q3 2023 O&R	Q4 2023 O&R	Q1 2024 O&R
IOS Downloads	32,972	43,237	37,339	36,295	1,862	2,276	2,505	2,010
IOS Uninstalls	4,871	4,411	7,468	5,553	252	236	417	305
Android Downloads	9,128	13,712	14,230	12,517	662	1,118	1,245	1,168
Android Uninstalls	4,406	6,114	7,486	7,598	322	409	627	606
ITunes Store Rating	4.83	4.83	4.83	4.83	4.78	4.79	4.78	4.8
Google Play Store Rating	4.82	4.8	4.72	4.7	4.75	4.67	4.64	4.6

2.2.4.3 Con Edison Digital Usage: Transactions Completed Digitally as a Percentage of Total Transactions

Metric	Q2 2023 Con Edison	Q3 2023 Con Edison	Q4 2023 Con Edison	Q1 2024 Con Edison	Q2 2023 O&R	Q3 2023 O&R	Q4 2023 O&R	Q1 2024 O&R
Start	42%	50%	49%	66%	6%	6%	11%	47%
Stop	44%	52%	56%	62%	16%	15%	19%	45%
Transfer	45%	54%	53%	77%	N/A	N/A	N/A	N/A
Report Outage	54%	62%	42%	18%	47%	50%	52%	24%

2.2.4.4 Con Edison Digital Volumes: Residential & Commercial Transactions Completed Digitally

Metric	Q2 2023 Con Edison	Q3 2023 Con Edison	Q4 2023 Con Edison	Q1 2024 Con Edison	Q2 2023 O&R	Q3 2023 O&R	Q4 2023 O&R	Q1 2024 O&R
Start	84.6K	109.8K	42.2K	34.1K	981	1.1K	778	796
Stop	52.4K	61.8K	28.5K	18.8K	1.2K	1.3K	557	454
Transfer	6.8K	8.4K	9.6K	4.6K	N/A	N/A	N/A	N/A
Report Outage	23.6K	51.2K	27.6K	15.8K	10.5K	27.5K	7.9K	11.1K

2.2.5 Q2 2024 Projected Activities

The planned work below is applicable to both Con Edison and O&R, unless specifically identified otherwise.

- **Web/My Account**

DCX plans to enable and support new functionality surrounding the Green Button Alliance Certification efforts described in the Data Sharing portion of this report. This will allow customers to authorize third-party data access directly from those sites. On the utility side, we will be able to confirm data sharing preferences and certify according to Green Button Alliance guidelines. The Share My Data webpage will also be getting enhancements to speed up page load times, improving the customer experience. The team will also be adding a module on the main My Account page for Budget Billing details to improve transparency and access to this information for enrolled customers. The Energy Affordability enrollment functionality will be undergoing development to enhance the customer journey through account checks prior to EAP application completion. This will reduce any duplicate requests if the account is already receiving a reduced rate, blocking application to the program a second time. Site-wide improvements are also being made on Forms, allowing for better data collection and accuracy to provide a foundation for better informed decisions in the future. Finally, an update for customers with broken agreement notices to reflect same-day payments will be implemented, helping customers reduce duplicate payments.

The program also focused on improving error messaging across the site. Error messaging for Start/Stop/Transfer will be improved to prevent confusion for customers and allow for better self-service. On the O&R side only, new functionality in the Start Service flow is being added to allow customers to pay deposits when they establish an account without an ID. On the Con Edison side only, new error messaging will be available during specific periods of isolation when outage information is not available.

- **Sitecore/Platform**

With the end of support for .NET 6 approaching in November 2024, DCX will continue to upgrade to .NET 8 in Q2. As previously mentioned, this upgrade impacts 24 DCX services, promising substantial enhancements in performance, security, and efficiency. This upgrade process will span multiple quarters, with completion by early Q3. In Q2, the team plans to upgrade additional services to .NET 8. We are also introducing improvements to APIs for enhanced security, as was done in Q1. Finally, the new translation tool, Weglot, will complete integration for both O&R and Con Edison, while new designs for lead generation intake on O&R Energy Efficiency programs will be delivered in Q2.

- **Native Mobile Applications**

New functionality is being added to the “Pay My Bill” user experience for both Con Edison and O&R native apps, personalizing them for different customer types. This will enable the apps to have flexible messaging regarding credit card payment fees. Like the Web experience, the mobile experience will also provide targeted messaging on items such as outage data and energy usage. Outage communications will receive an additional upgrade so that when a customer submits an outage ticket, we will be able to confirm to the customer that we were already aware of the outage and are working on restoration, aligning to existing website functionality. Also, upgrades to the outage map UX are planned, using graphical guided views to

make the apps more user-friendly. The UX optimization will be carried out in three phases throughout 2024 and is expected to reduce customer confusion when navigating the outage experience on the mobile app. Native App functionality enhancements are also planned for Q2, specifically on expanding and ensuring optimal user experience for the mobile app Turn Off for Non-Payment (TNOP) and increased functionality when adding or removing accounts. Lastly, a new design and implementation of mobile surveys are being developed to collect Voice of the Customer to help drive future enhancements from customer feedback.

2.3 Journey Mapping

The Journey Mapping program launched in 2017 to not only get to the heart of what customers want from their Con Edison experience but also to provide optimal customer touchpoints. Journey Mapping uses Agile project management and Design Thinking practices combined with customer research, data analytics, and employee input to design enhanced experiences and deliver quick-to-market improvements.

Journey mapping is a process improvement method that explores the full sum of customers' experience when interacting with a company, not just discrete interactions or transactions (referred to as customer touchpoints). A full customer experience, or "journey," is when a customer starts and finishes a transaction with no additional wants or needs. For example, beyond looking at the discrete action of a customer requesting utility service with a phone call, a journey mapping team would review what caused the customer to call in the first place, the actual call experience, and any additional steps up to the point where the customer receives and understands their first bill.

2.3.1 Q1 2024 Highlights

Commercial Customers and Agents: Small and Medium Business Customers

Today, Small and Medium Business (SMB) customers at Con Edison share the same customer journey as residential customers but have a unique set of needs. Recognizing an opportunity for enhancement and personalization, the Journey Mapping team initiated a discovery phase for the SMB start/stop service journey in Q4 2023.

The team began by collaborating with the Marketing Research team to gather customer feedback on the SMB experience at Con Edison. Following the initial discovery phase in Q4 2023, Journey Mapping planned and executed a cross-functional workshop with representatives from Marketing, Customer Service, the DCX team, and others during Q1 2024. The workshop highlighted pain points such as long wait times and a lack of awareness about online sign-up options to generate ideas to improve service for SMB customers. The workshop resulted in numerous brainstorming ideas and facilitated several initiatives with other stakeholders. Examples of these initiatives include collaboration with the Call Center team to examine and modify business rules associated with medium-sized customers signing up online and partnership with Energy Efficiency to gather more information from SMBs when they start service, such as their business type and expected equipment on site, to help tailor offers specifically for them.

A project kickoff was conducted with the Payment Marketing Team to facilitate the discovery phase. Notable features, such as adding invoice numbers on billing statements and promoting debit cards for autopay, were presented to stakeholders. Additionally, research on the payment agreement journey was conducted to investigate why customers, including SMBs, break their terms and to explore additional support options. Concurrently, the team supported Credit and Field Operations in gauging interest in a potential debt relief program. The Journey Mapping team also solidified its commitment to the customer

experience by joining Chartwell's SMB Utility Council at the Chartwell Business Customer Council Meeting, connecting with representatives from approximately 90 utility companies to share insights and design improvements for the SMB group.

Customers Participating in Clean Energy Programs: Value Stack Customer Portal

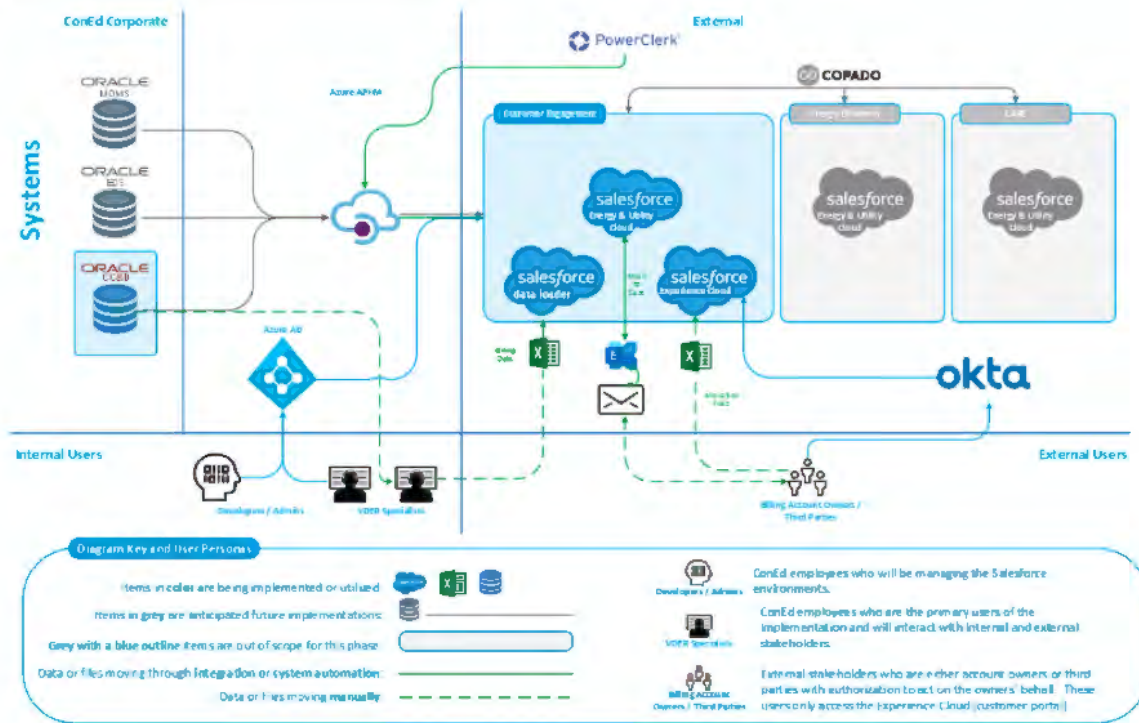
As part of its Clean Energy Commitment, Con Edison is actively engaged in enhancing the experience for distributed generation (DG) customers, where project hosts interconnect to the utility's distribution system and are compensated for their net energy injections through the Commission's Value of Distributed Energy Resources (VDER) pricing paradigm (also known as "the Value Stack"). Some DG hosts also choose to make their system Community DG (CDG) projects, passing a portion of their VDER compensation on to other utility customers, referred to as subscribers. The annual growth in DG projects in Con Edison's service territory has been exponential in recent years, with continued market demand expected for the foreseeable future. To support this growth and meet customer expectations of accurate and timely VDER compensation, the Company is investing in a new platform for administration of VDER projects, called the Value Stack Customer Portal.

The Value Stack Customer Portal will centralize operations for the CDG customer lifecycle: onboarding new projects, managing customer and contact info, and tracking and resolving customer requests. Both billing employees and VDER customers will benefit from the efficiency of this platform solution, and Con Edison will be better positioned to enable further DG growth through scalable operations.

In January 2024, business and IT stakeholders identified additional scope for the Value Stack Customer Portal minimal viable product (MVP) to align with internal standards and address upstream integration challenges, leading to a shift in the target deployment date to Q2 2024 and a revised two-phase deployment strategy. This shift allowed the team to address security risks, resolve integration issues, develop additional customer portal features, and plan comprehensive change management.

From February to March 2024, the project team focused on several Value Stack Customer Portal workstreams. These included completing core functionality development, addressing IT security concerns, and conducting upstream integration testing. The team also worked on additional customer portal features and developed a detailed change management plan, including communications, virtual trainings, and support structures. This approach enabled strong adoption and engagement by the VDER team and positioned Con Edison to effectively engage CDG asset owners and consultants.

Figure 1- High Level MVP Architecture



2.3.2 Costs

Spend Category	March 31 YTD Spending*	2024 Budget
O&M Labor (\$)	\$ 116,550.00	\$ 546,071.00
O&M Non-Labor (\$)	\$ 214,834.00	\$ 1,394,728.00
Capital Labor (\$)	\$ 24,016.00	\$ 200,000.00
Capital Non-Labor (\$)	\$ 262,688.00	\$ 2,000,000.00

* In future reports, we will have a new CDG section; Journey Mapping's Capital costs will be captured there.

2.3.3 Cost Savings & Avoidance

For Q1 2024, Con Edison has not accrued any measurable cost savings or cost avoidance.

2.3.4 Non-Financial Benefits

Journey Mapping plays a pivotal role in generating non-financial value by driving enhancements in Customer Satisfaction (CSAT). The increase in CSAT bolsters brand trust, fosters positive regulator and stakeholder relationships, and opens avenues to engage customers in the areas of rate design, energy efficiency, and other clean energy solutions.

2.3.5 Q2 2024 Projected Activities

The team's focus in Q2 2024 is on enhancing the following:

- SMB Customer Journey:** Continuing customer research and data analysis will drive improvements tailored to the unique needs of SMB customers. This includes maintaining a partnership with the Call Center to review and update business rules for the SMB service initiation. The initiative will

culminate in more design thinking sessions, bringing together subject matter experts and frontline employees to foster collaboration and innovation. Additionally, potential partnerships with the Leave on For Landlord program will be initiated during this phase.

- **Residential Customer Start Service Journey:** The team aims to elevate the start service journey by conducting industry research to identify initiatives for collaboration with real estate agents and management companies. The team will also partner with DCX to streamline the online sign-up process, addressing pain points such as long wait times and slow responses.
- **Payment Journey Map:** The team plans to conduct and analyze customer research to discern preferences, focusing on the desire for bill invoice numbers and the feasibility of autopay via debit card. They will map out the journey for the current budget billing plan and collection notice, working alongside the CORE team, Credit and Field Collection team, and Compliance team to address customer complaints and identify potential improvements.
- **CDG/Value Stack Customer Portal MVP:** The team continues to progress and complete all required development, approval, and change management activities needed to launch the Value Stack Customer Portal by the end of Q2 2024. In addition, a support team and process will be established for the ongoing operations and maintenance of the platform. Additionally, a cross-functional product team and process will be established for the planning, development, and launch of future enhancements of the platform. Due to the strategic nature and criticality of this project, the CDG/Value Stack initiative will be broken out into a standalone project and will be reported separately in future Strategic CX reports.

2.4 Virtual Assistant

The Virtual Assistant (VA) program is focused on leveraging AI to expand communication channels with customers. A virtual assistant, or “bot,” is a conversational virtual agent that provides a unique, interactive, and personal way for customers to obtain answers and assistance across multiple channels, 24 hours a day, 7 days a week, 365 days a year. Virtual assistant functionality provides the Company with frontline customer support that automates several simple transactions currently performed by CSRs over the phone. The bot, known as Watt, is only available at CECONY.

2.4.1 Q1 2024 Highlights

- **Utterance Development**

In the first quarter of 2024, the VA team added hundreds of utterances to the transactions available using Watt. Utterances are phrases that a customer may type while using the bot. This ensures that customers have a better chance of getting to the intended self-service skill they’re looking to interact with, creating a more satisfying experience.

- **Credit and Collections Testing and Remediation**

During Q1, following the CC&B deployment, credit and collections activities were reinitiated. The VA team went through an extensive testing process to validate that overdue balances and corresponding messages were accurately displayed to customers when using the VA. The team found two areas that were not consistent with the Con Edison website. A fix was made and deployed in an expeditious manner.

- **Resolution of Bugs and System Issues**

The VA team proactively addressed and resolved a series of critical bugs impacting the payment agreement modules and fixed specific bugs in the Start, Stop, Move module that were impacting user authentication and payment processing, bolstering system security and reliability.

- **Security and Performance Testing**

In Q1, the VA team conducted performance testing and a cybersecurity scan to evaluate the impact of new features and upgrades on the system's overall performance and ensure that these integrations were scalable while maintaining system integrity.

2.4.2 Costs

Spend Category	March 31 YTD Spending*	2024 Budget
O&M Labor (\$)	\$ -	\$ 32,831.00
O&M Non-Labor (\$)	\$ 145,960.00	\$ 805,625.00
Capital Labor (\$)	\$ 96,050.00	\$ 718,218.00
Capital Non-Labor (\$)	\$ 404,381.00	\$ 3,111,781.00

*All labor cost for Virtual Assistants is captured in the capital-labor.

2.4.3 Cost Savings & Avoidance

For Q1 2024, Con Edison has not accrued any measurable cost savings or cost avoidance.

2.4.4 Non-Financial Benefits

Watt enables the Company to elevate customer support and contribute to overall operational efficiency. Three critical advantages provided by Watt include:

1. **Seamless 24/7 Customer Support:** Watt extends continuous, reliable customer support, allowing our customers to carry out transactions independently, particularly during peak call center hours.
2. **Swift Response Times:** Watt's agility in swiftly addressing queries contributes to customer satisfaction, fostering a positive and responsive interaction model.
3. **Streamlined Automation of Repetitive Tasks:** By automating repetitive tasks, Watt frees up valuable human resources, allowing CSRs to dedicate their expertise to resolving more challenging customer concerns effectively.

2.4.5 Q2 2024 Projected Activities

In Q2 2024, the VA team will have a dual focus on technology modernization and conversational customer assistance.

Technology Modernization

The VA team is implementing crucial upgrades to Watt's system components to maintain cutting-edge functionality and further mitigate potential security risks. This initiative underscores the Company's commitment to staying current and proactively addressing emerging challenges.

Conversational Customer Assistance

In response to evolving customer needs, the VA team is enhancing Watt's capabilities to have more dynamic and personalized interactions. Specifically, new functionality is being developed to address freeform inquiries. These advance capabilities will empower Watt to respond in multiple ways:

1. Direct link to the web – Watt will guide customers to specific web pages if their inquiries align with the information available on www.coned.com.
2. Watt reply – Leveraging an integrated knowledge base, Watt will provide tailored responses based on the customers' inquiries.

3. Existing use case – For customers seeking to perform transactions within the VA, Watt will guide them through the necessary steps, creating a seamless and user-friendly experience.

One feature will reduce high bill complaints by giving customers more information and options. Another feature will allow customers to fill out a form to end their energy service contract if they declare that they are a domestic violence victim. Later uses will include the Energy Affordability Program, payment confirmation messages, and gas inspection questions.

2.5 Billing and Payment Enhancements

Each year, the Company facilitates the delivery of more than 55 million bills and pieces of correspondence to its 3.5 million customers through both paper and electronic channels. Additionally, the Company manages a substantial volume of more than 38 million customer payments each year. Con Edison's 2021 Bill Redesign Program introduced substantial changes to bills, letters, and electronic bill ("e-bill") delivery. This initiative resulted in a modern, customer-friendly bill format aligned with the My Account portal and mobile applications.

The Company is set to elevate the customer experience further by implementing a new Billing and Payment Enhancement program from 2023 to 2025. This initiative aims to continually refine billing and payment interactions, catering to customer needs and aligning with emerging technology trends and the Company's commitment to clean energy.

The team's primary focus in 2023 was addressing priorities associated with billing, communications, and payments for the Company's CC&B transition. With CC&B stabilization, the Company has resumed its efforts to enhance the customer payment experience.

2.5.1 Q1 2024 Highlights

- **Neighborhood Kiosk Program**

To enhance accessibility for unbanked, low-income, and small business customers, the Company aims to strategically place payment kiosks closer to their residences and workplaces. These modern payment kiosks will accept cash, checks, and credit/debit cards and will allow customers to create payment agreements. These transactions will be processed in real-time, eliminating the previous one to three-day delay experienced before CC&B. In Q1, the Billing & Payment team evaluated the latest vendor equipment for both indoor and outdoor placement, functionality, and ease of integration to select the most advanced system available. Three potential vendors were identified, and the selection process will begin in Q2.

- **More Digital Payment Options**

In collaboration with payment vendors, the Company has initiated the integration process for additional payment options into our customer-facing systems, including PayPal, Venmo, and other emerging apps. This initiative aligns with Con Edison's commitment to facilitating seamless payment interactions for customers. The Billing and Payment team has prepared an official Request for Proposal (RFP) for Billing & Payment Services, slated to be sent to qualified vendors by the end of Q3 2024. The team, in conjunction with Supply Chain, will evaluate and compare the services offered by these vendors.

- **Video Communication**

The Company conducted an online community survey among Con Edison Community Members (both residential and commercial) to gauge customer interest in utilizing personalized videos to understand and

enroll in eligible Billing & Payment programs and services. A total of 282 customers participated in the survey.

Customers overwhelmingly appreciate the personalized video, finding it clear, appealing, and informative. They particularly value the use of real-time data to explain the Budget Billing program. However, some desire more details on adjustments and final payments for Budget Billing and information on accepted payment methods for Autopay.

Key Findings:

- **Positive Feedback:** Customers praise the video's clarity, relevance, and personalization, with 72% expressing strong positive feelings about it.
- **Interest in Other Programs:** There is significant interest in personalized videos for other Con Edison programs, especially energy efficiency initiatives (54%).
- **Paperless Billing:** Virtually all respondents find the information clear and understand how the program works, with a majority (58%) expressing interest in learning more or enrolling.
- **Autopay:** Most customers find the information clear and understand the program, though fewer (45%) express interest in learning more or enrolling.
- **Budget Billing:** Almost all customers find the information clear and helpful, understanding how the program works. However, fewer (44%) express interest in learning more or enrolling, with some seeking additional details on payment adjustments and methods.

2.5.2 Costs

Spend Category	March 31 YTD Spending *	2024 Budget
O&M Labor (\$)	\$ -	\$ 400,000.00
O&M Non-Labor (\$)	\$ 13,600.00	
Capital Labor (\$)	\$ -	\$ 300,000.00
Capital Non-Labor (\$)	\$ -	\$ 700,000.00

* Capital expenditures pend a Property Records ruling.

2.5.3 Cost Savings & Avoidance

For Q1 2024, Con Edison has not accrued any measurable cost savings or cost avoidance.

2.5.4 Non-Financial Benefits

The Billing and Payment Enhancements program has produced several non-financial benefits, including improved customer satisfaction through a multi-channel, simple, and intuitive billing and payment experience.

2.5.5 Q2 2024 Projected Activities

During Q2 2024, the team will focus on three key project activities:

- **Neighborhood Kiosk Program**

In Q1, the Billing & Payment team evaluated the latest vendor equipment for indoor and outdoor placement, functionality, and ease of integration and identified three potential vendors. During Q2, the team will evaluate their equipment and software solutions to best serve our customers with ease of use, reliability, and added features such as support for multiple foreign languages and video conferencing capabilities.

- **More Digital Payment Options**

In Q2 and Q3 2024, the team will focus on design and project planning, involving collaboration across Strategic CX program initiatives, including coordination with DCX. The Company aims to complete the design and project planning phase by the end of Q3 2024.

- **Video Communication**

With customers overwhelmingly appreciating the personalized video, the team will refine the video further in Q2 to enhance its clarity, incorporating suggestions provided by customers. Additionally, based on observed customer enrollment behavior, the team will implement further adjustments to ensure the video maximizes its effectiveness in facilitating enrollment in Billing & Payment programs and services.

2.6 Back Office Automation & Workforce Management

The Back Office Automation and Workforce Management program is a strategic investment in software and systems that automate repetitive and manual back-office tasks, improve workflow and exception management processes, and centralize knowledge-sharing for more consistent customer and employee experiences. Key workstreams include implementation of Robotic Process Automation (RPA) technology, the Knowledge Advanced (KA) project, the PEGA Customer Experience Platform, Content Management, and the discovery phase of a Call Center Workforce Management Solution.

Improvements in RPA technology have enabled the Company to build processes that take several business rules into consideration and perform actions across several software programs. Notably, improvements in RPA technology have led to continued automation opportunities, which the team prioritizes based on development effort, customer satisfaction, and potential cost avoidance.

The Oracle Knowledge Advanced platform, deployed in the fourth quarter of 2023, serves as a centralized knowledge management solution. It allows employees to quickly access processes, procedures, and policy content needed to do their work. This platform played a pivotal role in improving representatives' productivity during the transition to the new CC&B system. However, the first iteration of the KA solution was limited to basic functionalities. The Company plans to enhance the platform by integrating it with CC&B and other essential internal knowledge repositories. The integration capabilities will facilitate CSR access to a broader pool of job procedures and help content, enhancing efficiency in responding to customer inquiries.

The Customer Experience (CX) Platform is a PEGA software platform with robust case management and workflow management solutions. The platform was first deployed at Con Edison in 2017 to help manage customer field appointments and has grown to include gas service line safety inspections, digital field forms, meter inquiry request forms, the shared meter appliance usage calculator, PSC complaints and small claims totaling more than \$3,000, and Life Support Equipment (LSE) outage communications. In 2024, the Company plans to enhance the CX platform to support the Energy Assistance Program (EAP), case management for inactive gas accounts, case management for non-communicating AMI meters, and Personal Service automated workflow and case management tracking/reporting.

From 2020 to 2023, the Company developed, implemented, and refined an automated process to communicate with customers regarding gas service line inspections. As of Q4 2023, this process now incorporates a dashboard feature built using the PEGA software, facilitating rapid identification of target customers and enhancing reporting capabilities. This project significantly improved the Company's

capacity to conduct on-site inspections, especially for customers who fail to grant access for inspection. Moreover, the automated process allows for swift action, including the possibility of service termination for customers who repeatedly refuse to cooperate. In 2024 and 2025, the Company plans to integrate this automated process with the new Gas Information System and explore further enhancements for the tool.

In conjunction with the Billing and Payment Enhancement program, the Company plans to explore software and tools to manage the lifecycle, distribution, and use of customer content/documents received by CSRs at the Customer Experience Centers, consistent with document retention regulations.

The Company also plans to procure a Workforce Management (WFM) solution that will enable it to monitor call center and back-office staffing levels, exception time (e.g., holidays, vacation, and sick and training time), scheduling accommodations, and intraday performance in one centralized platform. The WFM solution will improve the existing management processes used by our operating areas and support the Company's efforts to provide a high level of service to customers in the most efficient manner.

2.6.1 Q1 2024 Highlights

In Q1 2024, the Back Office Automation and Workforce Management team's primary focus was on advancing RPA capabilities, refining KA processes, and enhancing customer experiences through the PEGA CX platform. Key accomplishments include:

Robotic Process Automation

- Began developing eight new RPAs to streamline and simplify back-office processes associated with customer billing.
- Developed and implemented additional use cases for billing rate input and validation to enhance testing robustness and minimize human errors.
- Initiated discovery work to automate manual exception billing tasks (referred to as "To-Do's") generated from CC&B.

Knowledge Advanced

- Updated the reporting dashboard to achieve more comprehensive insight into end-user performance.
- Completed the development of a second KA interface for O&R CSRs, which is currently in the testing phase before going live.
- Updated functional and technical designs to support ongoing improvements.
- Initiated the development of a governance strategy for managing and maintaining the platform.
- Began a discovery phase to explore enhancing the platform with artificial intelligence technology. This work is currently on pause and is likely to resume in Q4 2024.

PEGA Customer Experience Platform

- Began enhancements to allow Customer Assistance or Field Operations to upload pictures of meters and create To-Do lists for the Meter Action Group (MAG) to ensure the correct meter is "on record."
- Started developing a case management workflow solution for customer complaints escalated to the PSC to enable prompt handling.
- Initiated the planning phase of a case management workflow solution to manage inactive gas meters that are registering usage without a responsible party on record in the billing system.

2.6.2 Costs

Spend Category	March 31 YTD Spending	2024 Budget
O&M Labor (\$)	\$ 213,000.00	\$ 612,000.00
O&M Non-Labor (\$)	\$ 324,184.00	\$ 3,888,000.00
Capital Labor (\$)	\$ 90,000.00	\$ 972,000.00
Capital Non-Labor (\$)	\$ 20,012.00	\$ 1,400,000.00

2.6.3 Cost Savings & Avoidance

In Q1 2024, Con Edison did not accrue any measurable cost savings or cost avoidance.

2.6.4 Non-Financial Benefits

There are several non-financial benefits associated with the Back Office Automation and Workforce Management program that underscore the broad impact of the program for both customers and employees:

- Increased customer satisfaction through faster resolution of inquiries handled by CSRs;
- Expedited processing from automated handling of back-office work;
- Increase in CSRs' speed to competency, minimizing the learning curve for new hires and simplifying knowledge transfer; and
- Easy access to point-of-performance information for new hires, reducing onboarding time.

2.6.5 Q2 2024 Projected Activities

In the second quarter of 2024, the primary focus will be to continue advancing our RPA capabilities, refining KA processes, and enhancing customer experiences through the PEGA CX platform. Planned activities for the program include:

Robotic Process Automation

- Continue developing the eight RPA processes that were started in Q1 2024 to automate manual exception billing tasks (referred to as "To-Do's") generated from CC&B.

Knowledge Advanced

- Continue updating the Reporting Dashboard to provide better insights into end-user performance.
- Test and deploy the second KA interface for O&R CSRs.
- Continue updating functional and technical designs for ongoing improvement.
- Continue developing a governance strategy for managing and maintaining the platform.

PEGA Customer Experience Platform

- Continue enhancing the MAG document upload feature, enabling Customer Assistance or Field Operations to upload pictures of the meter and create to-do lists for the MAG to ensure the correct meter is "on record."
- Continue developing a case management workflow solution for customer complaints escalated to the PSC to enable prompt handling.
- Continue developing a case management workflow solution to manage inactive gas meters that are registering usage without a responsible party on record in the billing system.

2.7 Outage Communications

Given the heightened frequency of climate events and associated outages – and the expectation that the frequency and intensity of events will only increase over time – the Company needs to be agile and coordinated in disseminating crucial messages to customers. For this reason, Con Edison has developed its Outage Communications program, which aims to proactively address and improve customer experiences surrounding outages and emergencies. This program leverages customer-centric design, rigorous data analytics, and an agile project approach to streamline the outage journey.

2.7.1 Q1 2024 Highlights

For Q1 2024, the Outage Communication team focused on three key initiatives.

- **Emergency Customer Messaging Center**

The team continued to work with Message Broadcast to fortify the Company’s Emergency Customer Messaging Center (ECMC) platform, which centralizes customer, asset, and system operations information and enables timely communication with customers. In Q1, the team released Phase 1 of the platform development, delivering improvements that will allow the initiation of ad hoc campaigns without cumbersome ticketing processes and streamline our communications processes, resulting in faster message delivery. The team also held training sessions for employees responsible for outage communications to use the new features of the ECMC platform. Lastly, the team refined the requirements and kicked off the development work for Phase 2 of the ECMC project.

- **Program Management**

Q1 2024 was dedicated to the foundational work needed to establish the new Outage Communications section. The section recruited, hired, and onboarded a full-time Product Owner to track the progress of large initiatives. The section also started the process to hire a Business Analyst.

- **Expansion to O&R**

The Outage Communications team continued to work with our internal partners and vendor Message Broadcast on the development of an Outage Communications Program for O&R, which will modernize the way it provides information and updates to its almost 400,000 customers during outages and emergencies. That project is undergoing User Acceptance Testing and is scheduled to launch in Q3.

- **Outage Communications Enhancements for Gas Customers**

The team also started the discovery work that will lead to an overhaul of outage and emergency communications for gas customers. The team identified the project sponsors, created a roadmap, and kicked off a discovery effort that included a large survey of gas customers, as well as one-to-one interviews with customers and employees to understand the current state and uncover pain points. The team is now planning two workshops involving multiple internal organizations to ideate future improvements.

- **AMI Restoration Validation Phase 3**

The team released a new feature that leverages the AMI Smart Meter technology to increase efficiency on the outage restoration flow. The AMI Restoration Validation Engine (ARVE) enhances the restoration process by validating the AMI meter is powered on before communicating with the customer. The meters that are not validated will not send a restoration message and instead will create a new ticket to be worked by operators and restoration crews. This provides increased support for those customers experiencing “single outages,” or outages that persist after an area is restored. Those customers no longer

need to report their outage a second time; they will receive a message from Con Edison informing them that crews will continue to work on their restoration.

- **Storm Support**

The team also supported three different Class 2 ICS events, sending a total of 6 million text messages to customers in impacted areas to prepare them for storms and remind them that they should report any service interruptions by replying “OUT” to the text from their phones.

2.7.2 Costs

Spend Category	March 31 YTD Spending	2024 Budget
O&M Labor (\$)	\$ 60,000.00	\$ 300,000.00
O&M Non-Labor (\$)	\$ 601,143.00	\$ 1,300,000.00
Capital Labor (\$)	\$ 36,457.00	\$ 200,000.00
Capital Non-Labor (\$)	\$ 97,985.00	\$ 1,400,000.00

2.7.3 Cost Savings & Avoidance

For Q1 2024, Con Edison has not accrued any measurable cost savings or cost avoidance.

2.7.4 Non-Financial Benefits

There are several non-financial benefits provided to customers by the Outage Communications Program. For example: In Q1 2024, Con Edison customers experienced five Class 2 weather-related events that resulted in more than 50,000 outages. Customers with up-to-date contact information received proactive emails and text messages, preparing them for an upcoming storm. Customers were encouraged to use digital channels for reporting outages, focusing on a “Mobile First” approach and prioritizing text messages based on customer preferences. As revealed by surveys, over 80% of customers prefer text messages for outage notifications. The Outage Communications Program’s commitment to convenience has resulted in over 80% customer satisfaction in surveys following service restoration.

2.7.5 Q2 2024 Projected Activities

In Q2 2024, the Outage Communication team is set to achieve the following milestones across three key initiatives:

- **Emergency Customer Messaging Center**

The team will work on Phase 2 of the ECMC platform development, which will deliver a new user-friendly web platform that will allow internal employees to manage the preparation and execution of Ad Hoc Messaging, eliminating steps that remained as part of the process in Phase 1. Following comprehensive User Acceptance Testing, the completion and release of this important phase is scheduled for July.

- **Outage Communications Enhancements for Gas Customers**

In Q2, the team will conduct two workshops with subject matter experts from cross-functional teams to identify priorities for outage and emergency communications for gas customers. As a result of this effort, the team will present a set of recommendations to the Gas Operations leadership.

2.8 Privacy Readiness

The Privacy Readiness Program is a comprehensive initiative designed to align the Company with forthcoming privacy laws in a way that caters to both regulatory requirements and the evolving needs of

our business and customers. Legislatures throughout the United States are enacting legislation that requires companies to provide state residents the ability to request the data that companies maintain on them, allow them to opt-out of sharing information, and permit them to request that the companies erase the data (with certain exceptions). California was the first state in the country to introduce comprehensive privacy legislation, the California's Consumer Privacy Act (CCPA), in 2018, based on the European Union's General Data Protection Requirement (GDPR), considered to be the gold standard for protecting individual privacy rights. The CCPA has been followed by comprehensive privacy laws enacted in more than a dozen other states, including New Jersey, with pending legislation in more than ten additional states. Pending legislation includes the New York Privacy Act, which aims to provide New Yorkers with more control over their personal data and privacy rights by requiring businesses to comply with many new requirements. If passed, the Company anticipates substantial operational implications.

Further, a new federal privacy bill – the American Privacy Rights Act – was introduced in April 2024. The draft represents a significant bipartisan effort to establish a comprehensive federal privacy framework in the United States, aiming to unify the existing patchwork of state privacy laws. Implementation of this bill could have wide-ranging implications for how U.S. companies collect, use, and protect personal data, influencing global data privacy practices.

While the Company has made strides in enhancing its privacy practices over the last five years, the task ahead necessitates establishing a holistic framework and structure to efficiently grant customers the rights mandated by regulations, benchmarking against privacy programs implemented at other companies around the world who are now successfully addressing consumer privacy rights and are able to demonstrate their organizations' compliance. The Company plans to invest in computer software and hardware that will provide a robust technology infrastructure to support compliance with these evolving laws. The envisioned technology ecosystem will monitor the types of personal data collected, providing individuals with comprehensive "data subject rights," including the ability to view, update, and erase stored data as applicable. Key components of the program include:

1. Standardized consent management solution to obtain, manage, and store consent across all data collection points (e.g., online, paper, or phone) and justify handling of personal information.
2. Enterprise customer preference portal to manage customer preferences, including opt-ins and opt-outs.
3. Framework and platform for data subject rights management to ensure a systematic approach to managing data subject rights.
4. Secure mechanisms to verify the identity of data subject right requestors.
5. Customer-facing software and workflows to allow customers to make data fulfillment, modification, and deletion requests seamlessly.
6. Integration of consent management with data subject rights management to ensure seamless integration between consent management and data subject rights processes.
7. Mechanism to establish a streamlined process for collecting, managing, and fulfilling user requests.

This program positions the Company to comply with anticipated legislation while staying attuned to evolving customer privacy needs and expectations. The successful execution of this program will underscore our commitment to safeguarding privacy and maintaining a leadership position in privacy compliance.

2.8.1 Q1 2024 Highlights

In the first quarter of 2024, the Privacy Readiness Team continued to work on initiatives to strengthen our data management and privacy processes. This work is centered around the implementation of OneTrust as a comprehensive privacy management platform for the Company – advanced through the following “modules,” or workstreams.

These workstream-specific activities are occurring in parallel with broader program initiatives, such as conducting stakeholder “road shows” to build Company-wide privacy awareness and understanding as well as expanding team capacity through the addition of dedicated IT project management/business analyst and change management resources.

Data Discovery and Classification

- After performing test scans of 25 databases to demonstrate the tool could successfully complete full scans and not impact the performance of the databases in the process, the module was approved to move into production. This included aligning on the scope and process for production scanning, completing set-up for the production worker node (the scanning infrastructure), and beginning to obtain approvals from database owners to scan in their production environments.

Data Catalog

- Finalized data catalog technical and business design, ensuring transparent data access, visibility into data usage, and incorporation of data lineage and retention with remediation capabilities.
- Hosted cross-functional meeting between the OneTrust and Microsoft Purview teams to ensure coordination between parallel Company data governance initiatives and identify areas of efficiency and collaboration.

Privacy Process Automation

- Completed enterprise-wide survey effort of all system owners to identify systems that collect or store personal information (PI).
- Completed user acceptance testing for manual data subject access request (DSAR) fulfillment scenarios, encompassing customer-facing webforms and workflows and establishing a manual ID verification plan.
- Continued the development of a robust mechanism for the intake and management of individual privacy rights by initiating outreach to PI source system owners to build integration roadmaps that will enable automated DSAR fulfillment.
- Continued cross-functional discussions with Law, Privacy Compliance, and Corporate Affairs to ensure a seamless data subject/consumer experience for DSAR fulfillment – including webform reviews and response template drafting.
- Initiated integration of OneTrust with ServiceNow (Company IT asset repository) to have an up-to-date record of all systems. This integration will support additional modules (Data Discovery, Data Catalog, etc.) and ensure OneTrust’s positioning as the Company’s privacy management source of truth for the inventory of systems containing personal information and the mapping of what types of personal data each system contains.

Privacy Impact Assessment

- Completed the Privacy Threshold Assessment (PTA) design and user acceptance testing and began preparing for piloting the PTA in the Company’s end-to-end technical review process for all new IT projects, processes, or systems.

- Continued building the Privacy Impact Assessment (PIA), incorporating key considerations from evolving privacy legislation and broadening questions to encompass data sharing and data protecting privacy considerations.

Consent and Preference Management

- Completed discovery work and requirements gathering for the Universal Consent and Preference Management (UCPM) module, a crucial step in safeguarding the privacy rights of our customers.
- Continued to develop a consent and preferences inventory, enhancing our understanding of customer touchpoints and preferences across vendor and Company-owned consent collection points.
- Hosted a cross-functional leadership summit on consent and preference management supported by the Chief Privacy Officer, serving as a catalyst for future cross-functional stakeholder engagements to inform UCPM design.
- Initiated the cookie categorization process with public-facing domain/site owners across the enterprise.

2.8.2 Costs

Spend Category	March 31 YTD Spending	2024 Budget
O&M Labor (\$)	\$ -	\$ 700,000.00
O&M Non-Labor (\$)	\$ 85,281.00	
Capital Labor (\$)	\$ 231,602.00	\$ 5,000,000.00
Capital Non-Labor (\$)	\$ 1,517,559.00	

2.8.3 Cost Savings & Avoidance

For Q1 2024, Con Edison has not accrued any measurable cost savings or cost avoidance.

2.8.4 Non-Financial Benefits

By developing key functionalities such as the Data Subject Right System and Consent Management System, the program aims to strengthen the corporate privacy program, enhance regulatory goodwill, and improve customer satisfaction through increased transparency and additional security measures for personal data. Moreover, it seeks to mitigate the risk of financial compliance penalties and reduce the potential for brand loss, positioning Con Edison as a proactive and compliant entity in the evolving landscape of privacy regulations.

2.8.5 Q2 2024 Projected Activities

In Q2 2024, the Privacy Readiness team will undertake the following activities. As in Q1 2024, these planned activities are designed to enhance and streamline data discovery, cataloging, privacy process automation, privacy impact assessments, and consent and preference management.

These activities will happen alongside holistic initiatives across all workstreams to:

- Build communications artifacts and launch an internal informational website.
- Migrate OneTrust to the production environment.
- Establish environment management and usage strategy (development, UAT, and production)
- Draft vulnerability management workflows.
- Begin building staffing and resourcing plans for maintaining future state privacy operations following OneTrust go-live.

Data Discovery and Classification

- The team will continue and scale data scanning in the production environment to identify personal information data elements across structured, unstructured, and semi-structured assets enterprise wide. This initiative will support data classification, privacy rights fulfillment, and the systematic cataloging of data and assets.

Data Catalog

- The team will begin data terms reviews with application/asset owners, as well as continue coordination across the Enterprise Architecture and Microsoft Purview teams to develop an advanced governance model that ensures transparent data access, visibility into data usage, and incorporation of data lineage and retention with remediation capabilities.

Privacy Process Automation

- The team will advance integrations roadmap to develop a robust mechanism for the intake and management of individual privacy rights. In parallel, the team will continue to test and plan for a near-term, manual DSAR fulfillment state to test the webform in preparation for future legal and compliance requirements.

Privacy Impact Assessment

- The team will finalize Privacy Impact Assessment questions and advance collaborative, data-informed pilot processes for both the Privacy Threshold Assessment and Privacy Impact Assessment.

Consent and Preference Management

- The team will finalize UCPM functional and technical requirements, providing a clear roadmap for the development of consent and preference management functionalities. This work includes continuing to closely collaborate with internal and vendor stakeholders responsible for capturing consumer communications consent, in addition to completing the cookie categorization process with website/domain owners.

2.9 Customer Data Sharing

Since 2018, the Company has built and maintained several data-sharing platforms that enable third parties – including distributed energy resource suppliers (DERS), energy services companies (ESCOs), demand response aggregators, rate consultants, and building management firms – as well as large customers to access an array of energy usage and account data. The primary platforms include:

- **Share My Data (Green Button Connect My Data):** This platform enables customers to consent to authorized third parties to retrieve customer billing and interval data via application program interface (API) technology aligned with Green Button specifications.
- **Large Customer API:** A platform allowing large customers to use application program interfaces (APIs) to retrieve the same billing and interval data available in Share My Data without the upfront consent process.
- **ESCO API:** Similar to Large Customer API, ESCO API allows energy services companies to retrieve customer billing and interval data via APIs for customers with presumed consent under the PSC's Uniform Business Practices.
- **My Account Data Presentment ETL:** The ETL (Extraction, Transformation, and Load) process supports the customer's usage, cost, and interval charts displayed in the My Account portal. This

process, which includes several business rules, is responsible for extracting, cleaning, and reformatting data from its original state to the required format for integration with other systems and for the purpose of data analytics. This supports various platforms within the authenticated experience, such as My Account and Third Party My Account (TPMA).

2.9.1 Q1 2024 Highlights

During the first quarter of 2024, our team maintained a commitment to the developmental goal of having an environment available and actively prepared for preliminary testing in collaboration with the Green Button Alliance. Concurrently, the team has initiated communications with third-party vendors, informing them of our certification trajectory. This outreach is intended to provide third parties, particularly those in the midst of the onboarding process, with insights to make informed decisions on whether to invest in the current legacy platform or to defer until the debut of the new, standardized offering.

In parallel to these efforts, our internal front-end user experience team was diligently working on designing a revamped authorization flow. The objective is to ensure that this new flow strictly adheres to the Green Button standard, thereby enhancing the overall user experience and compliance posture.

Moreover, our commitment to platform stability remains steady. The team successfully addressed 15 bugs, thereby strengthening the robustness of the platform. The team also rolled out three new features aimed at refining the operational efficiency of the system:

- A mechanism to prevent duplicate batch requests, which historically have been a source of undesirable latency.
- Equitable batch processing capabilities ensure a more balanced distribution of batch requests, particularly benefiting third-party vendors with fewer subscriptions.
- Updated code that more accurately identifies solar accounts, incorporating new identifiers to streamline this process.

These enhancements contribute to the stability and performance of the Share My Data platform while anticipating and responding to the evolving needs of our users and stakeholders.

2.9.2 Costs

Spend Category	March 31 YTD Spending*	2024 Budget
O&M Labor (\$)	\$ -	\$ 139,291.00
O&M Non-Labor (\$)	\$ 177,949.00	\$ 853,483.00
Capital Labor (\$)	\$ 54,056.00	\$ 331,859.00
Capital Non-Labor (\$)	\$ 353,031.00	\$ 2,168,141.00

2.9.3 Cost Savings & Avoidance

The Data Sharing Program had no realized or measurable cost savings and avoidance in Q1 2024.

2.9.4 Non-Financial Benefits

In the first quarter of 2024, the Customer Data Sharing Program team focused on stabilizing post-CC&B cutover while advancing the development of the Green Button Connect Share My Data initiative. This progression targets adherence to the Green Button Alliance's pre-certification testing criteria to ensure compliance with Green Button standards.

The Share My Data service has been utilized by 43 third parties, resulting in the authorization to share data across approximately 53,000 customer accounts.

Furthermore, the program has onboarded a significant enterprise client to the Large Customer APIs, which includes roughly 8,000 accounts. In parallel, one Energy Service Company (ESCO) has onboarded the ESCO APIs.

2.9.5 Q2 2024 Projected Activities

During the first half of 2024, the Customer Data Sharing Program is set to enhance the Share My Data platform to further align with the Green Button Alliance's national standards. The team will address emerging data-sharing requirements identified within the platform. This will involve integrating new data elements, optimizing system performance, improving APIs, and refining the web user interface and user experience. These modifications are driven by participant feedback from the Share My Data program, adherence to the Green Button Alliance's national standards and the Company's ongoing dedication to supporting third party clean energy initiatives.

3 Strategic CX Portfolio Cost Summary

3.1 Capital Spending

Program	March 31 YTD Spending	2024 Budget
Customer Data & Analytics	\$ 3,326,835.00	\$ 15,629,997.13
DCX	\$ 3,621,820.00	\$ 20,386,000.00
Journey Mapping	\$ 286,704.00	\$ 2,200,000.00
Virtual Assistant	\$ 500,431.00	\$ 3,829,999.00
Billing & Payment Enhancement	\$ -	\$ 1,000,000.00
Back Office Auto & Workforce Management	\$ 110,012.00	\$ 2,372,000.00
Outage Communications	\$ 134,442.00	\$ 1,600,000.00
Privacy Readiness	\$ 1,749,161.00	\$ 5,000,000.00
Customer Data Sharing	\$ 407,087.00	\$ 2,500,000.00
Total	\$ 10,136,492.00	\$ 54,517,996.13

3.2 O&M Spending

Program	March 31 YTD Spending	2024 Budget
Customer Data & Analytics	\$ 681,914.00	\$ 1,952,560.00
DCX	\$ 3,663,379.00	\$ 10,484,570.00
Journey Mapping	\$ 331,384.00	\$ 1,940,799.00
Virtual Assistant	\$ 145,960.00	\$ 838,456.00
Billing & Payment Enhancement	\$ 13,600.00	\$ 400,000.00
Back Office Auto & Workforce Management	\$ 537,184.00	\$ 4,500,000.00
Outage Communications	\$ 661,143.00	\$ 1,600,000.00
Privacy Readiness	\$ 85,281.00	\$ 700,000.00
Customer Data Sharing	\$ 177,949.00	\$ 992,774.00
Total	\$ 6,297,794.00	\$ 23,409,159.00

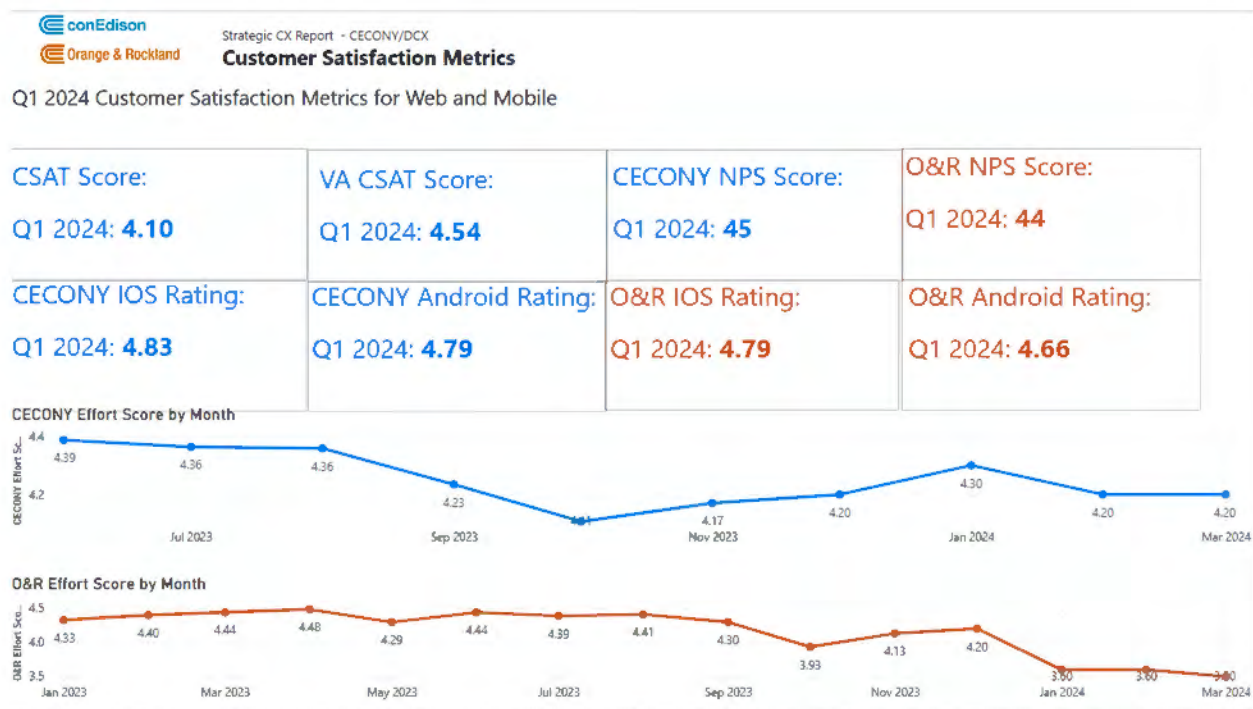
4 Portfolio Level Reporting

The Company has identified four metric categories to illustrate the value created by initiatives in the Strategic CX Portfolio: Cost Avoidance, Cost Savings, Customer Satisfaction, and Digital Engagement. Reporting on these at a portfolio level helps illustrate the overall value added by initiatives and provides a comprehensive understanding of the collective impact of the Strategic CX programs.

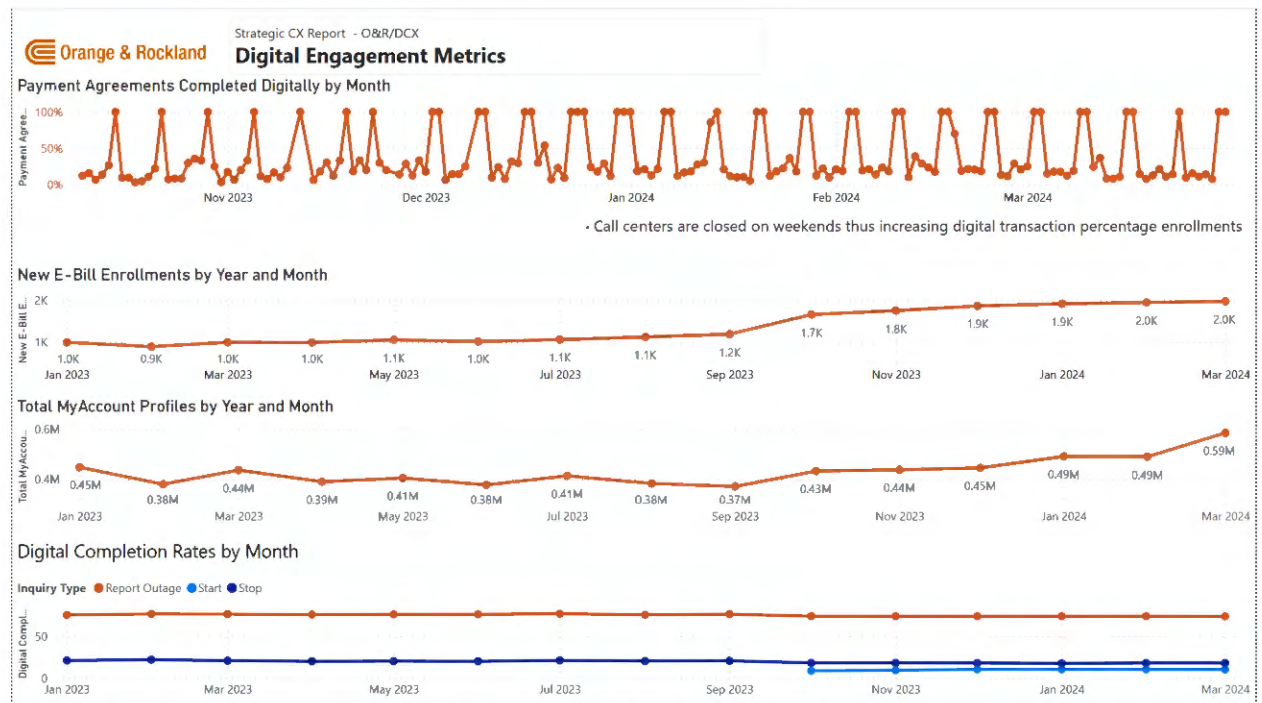
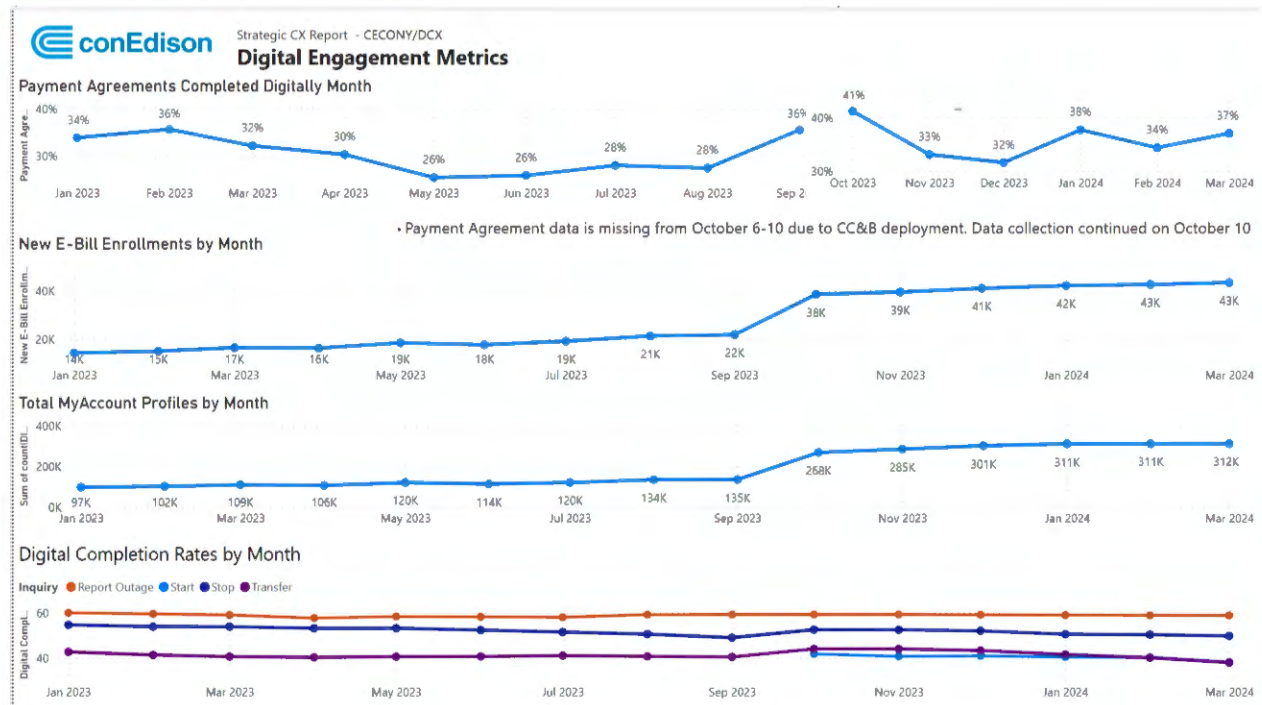
4.1 Cost Avoidance and Cost Savings

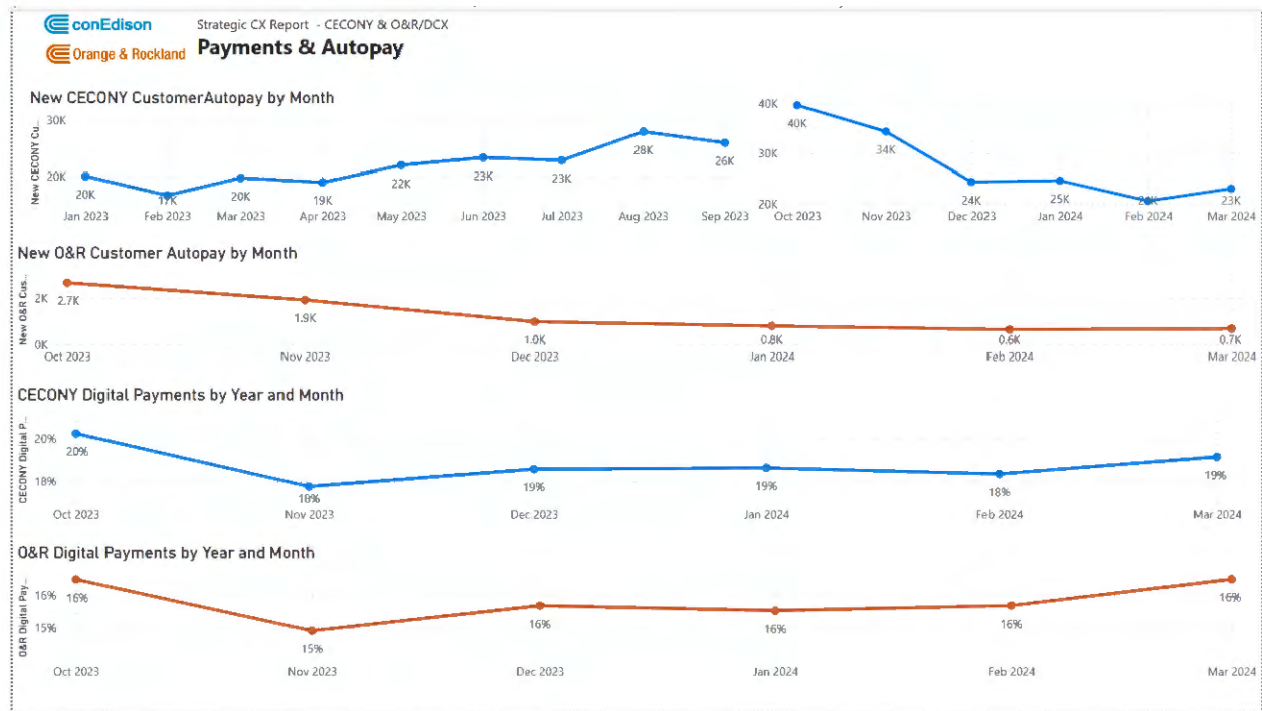
For Q1 2024, none of the Strategic CX initiatives have accrued any measurable cost avoidance or cost savings. However, the team has mechanisms in place to monitor efforts in this area to report in future quarters.

4.2 Customer Satisfaction (CSAT, NPS)



Digital Engagement





PSC Report - CECONY & O&R/DCX
Strategic CX Metrics

Glossary

CSAT Score: Metric indicating how satisfied customers are with a company's product or service

NPS Score: Measures customer loyalty by looking at their likelihood of recommending a given business. NPS Score is measured with a single question survey and reported with a number ranging from -100 to +100 where a higher score is desirable

Effort Score: Measures how easy it is to do business with us on a scale of 1 to 5

Digital Transaction Percentage of Start/Stop/Transfer/Report Outage: Digital enrollments of Start, Stop, Transfer and Report Outage that has been completed digitally (website, virtual assistant, and mobile application)

MyAccount Profiles: Active accounts that have logged into MyAccount within the last 6 months

Digital Payments: Payments received through digital channels including website, mobile applications, virtual assistant (VA) and interactive voice response system (IVR)