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**BY DMM**

February 29, 2024

Honorable Michelle L. Phillips  
Secretary  
State of New York Public Service Commission  
Three Empire State Plaza  
Albany, NY 12223

**Re: Case 21-G-0073, Proceeding on Motion of the Commission as to the Rates, Charges, Rules and Regulations of Orange and Rockland Utilities, Inc. for Gas Service**

**Case 21-E-0074, Proceeding on Motion of the Commission as to the Rates, Charges, Rules and Regulations of Orange and Rockland Utilities Inc. for Electric Service**

**Case 22-E-0064, Proceeding Motion of the Commission as the Rate, Charges, Rules and Regulations of Consolidated Edison Company of New York, Inc. for Electric Service**

**Case 22-G-0065, Proceeding on Motion of the Commission as to the Rates, Charges, Rules and Regulations of Consolidated Edison Company of New York, Inc. for Gas Service**

Dear Secretary Phillips:

As required by Section M (1) of the Joint Proposal adopted by the New York State Public Service Commission in its July 20, 2023, *Order Adopting Terms of Joint Proposal and Establishing Electric and Gas Rate Plans with Additional Requirements* and Section H(6) of the Joint Proposal adopted by the Commission in its April 14, 2022, *Order Adopting Terms of Joint Proposal and Establishing Electric and Gas Rate Plans*, Consolidated Edison Company of New York, Inc., and Orange and Rockland Utilities, Inc., hereby submit their Strategic Customer Experience Report for the fourth quarter of 2023, which includes a description of their Digital Customer Experience program.

Please contact me if you have any questions about this filing.

Respectfully submitted,

Edward Sherwin

Enclosure



**Strategic Customer Experience Portfolio Report**

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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, and projected activities. The notable difference between the prior quarterly reports and this one is that this report has a new section that highlights key performance metrics at the portfolio level.

## 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 Q4 2023 Highlights

In Q4 2023, the Company's focus was on transitioning the customer analytic record and reports to use data from the Company's new Customer Care & Billing system (CC&B), enabling business insights from new data sources, and improving the program's governance practices. Below is an overview of the major initiatives completed in Q4 2023:

- Successfully completed the migration from Legacy CIS to Oracle CC&B. This included migrating 16 existing PowerBI Reports, and four reporting data models, and integrating 70+ data tables from CC&B.
- Established key metrics, processes, and data validations between Azure EDAP (the analytics platform supporting all Customer Analytics use cases) and CC&B to ensure the accuracy and reliability of the new customer service system.
- Operationalized use cases for the Call Center Staffing Modeler and Schedule Adherence Reporting.
- Introduced business insight reports focused on Back Office Exceptions, Payments made through DCX, Long Term Estimated and Delayed Billing, Disadvantaged Community (DAC) Customer Segmentation, First Call Resolution Reporting, and Customer Arrears.
- Implemented a centralized workflow for processing new incoming data requests and projects, improving operational efficiency.
- Upgraded our methodology to track usage of reports by internal customers to measure average monthly users for greater than 90 days. Monthly Report views increased from 1,812 in Q3 2023 to 2,543 in Q4 2023, reflecting a 40% growth in Q4.
- Initiated a comprehensive Data Governance Program to enhance management and quality of our data assets across issues management, data cataloging, and data quality management.
- Completed the design phase for the Unity Catalog architecture, setting the stage for improved functionality and user experience when querying data within Azure EDAP.

#### 2.1.2 Cost

Spend Category	December 31 YTD Spending	2023 Budget
O&M Labor (\$)	\$ 323,000.00	\$ 1,730,000.00
O&M Non-Labor (\$)	\$ 1,964,788.00	\$ 1,350,000.00
Capital Labor (\$)	\$ 1,179,106.32	\$ 1,301,020.40
Capital Non-Labor (\$)	\$ 9,392,271.07	\$ 9,198,979.60

### 2.1.3 Cost Savings & Avoidance

For Q4 2023, Con Edison has not accrued any measurable cost savings or cost avoidance, however the program has produced operational efficiencies in the form of 3-10x improvements in time spent on individual data queries, creating 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

- **Call Center Staffing Modeler:**

Implementing the Call Center Staffing Modeler has improved the call volume and staffing analyses, reducing what would typically take multiple days of an analyst's time to just one-hour. This was achieved by the automation of call volume forecasts using machine learning technology, the development of a robust tool to calculate staffing requirements based on the industry-standard Erlang Formula, and the automatic visualization of scenario planning outputs in PowerBI.

One of the benefits of this advancement is the ability to conduct scenario planning around how staffing levels may impact customer wait times. This enhanced capability allows for more agile decision-making, which could ultimately lead to improved operational efficiency within the call center.

- **Schedule Adherence Reporting:**

This reporting system has enhanced visibility into workforce dynamics over time at the call center, section, and supervisor levels, enabling informed decision-making on staffing management. The tool provides a more comprehensive view for employee evaluation and enabling schedulers to make informed decisions regarding training. By providing insights into what break times are or are not workable for individual representatives, the system will also improve the call center employee experiences.

- **Disadvantaged Community Outreach Report:**

The DAC-Outreach Report introduces a dynamic way to evaluate our customer base across all of the indicators the Climate Justice Working Group (CJWG) used to determine DAC designations, account specific information (e-bill enrollment, etc.), and customer contact details, in one comprehensive report. This report provides customer-centric data and automation that enables Customer Outreach to provide more targeted and personalized communications to our customers.

Prior to this report, an O&M funded resource would have had to query multiple systems to extract a list of accounts that met hardcoded parameters. This would have required system access, a knowledge of all the datasets, and a data analyst skillset to generate specific lists at the request of the Outreach Team. By contrast, the Customer Data and Analytics investments have enabled a self-service reporting tool that the Outreach team can utilize whenever they need, with negligible support costs.

- **Credit and Collections Dashboard**

Given the complexity of utility credit and collection practices it is difficult to frequently run analyses and investigate trends across all aspects of the process. The Central Credit dashboard has begun to enable employees to investigate drivers of customer arrears in a more holistic manner by offering topline business insights coupled with reporting on specific aspects of the Company's credit and collections processes. The Customer Data and Analytics program expects to improve visibility and offerings in these areas in Q1 2024

as the Company prepares to resume credit and collections processes after a multi-month pause during the transition to CC&B.

### 2.1.5 Q1 2024 Project Activities

The planned activities for Q1 2024 emphasize innovation, efficiency, and the continuous evolution of our data analytics capabilities. The team will begin development of targeted analytics use cases and ad-hoc reports to provide insights into customer billing and payments, call volume drivers, and back office activities. The program also aims to expand its data management efforts and build new technical features within Azure EDAP to deliver on its 2024 goals. Key project areas for Q1 2024 include:

- Tailor Back Office To-Do reporting (i.e., exception reporting) for the specific needs of various Customer Operations teams.
- Introduce an automated Unbilled Report to enhance visibility into outstanding billing.
- Upgrade the Credit and Collections Dashboard with CC&B data and enrich its functionality for a more comprehensive view.
- Implement measurement metrics for collections email campaigns, providing insights into campaign effectiveness and optimizing future outreach strategies.
- Perform customer arrears segmentation analyses to support targeted collections strategies and personalized communications.
- Create methodologies to bring together customer call details, customer satisfaction, and account data from CC&B to build a more comprehensive picture of drivers of customer satisfaction.
- Pursue pilots using generative artificial intelligence (AI) to identify trends in customer dissatisfaction reasons.

In the areas of Data Management and Governance, the team plans to:

- Develop a comprehensive customer data strategy and roadmap;
- Implement platform orchestration to streamline data workflows;
- Introduce the Unity Catalog to improve data discovery and accessibility;
- Implement Databricks workflows for enhanced data processing and analytics capabilities;
- Standardize documentation processes for use case development;
- Develop an interactive data catalog, and
- Establish an issues management process and train stakeholders in its use.

## 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](http://www.conedison.com), [www.coned.com](http://www.coned.com), and [www.oru.com](http://www.oru.com) external websites (with a new mobile-enabled design), the My Account portals, and mobile apps (iOS and Android). Quarterly reports filed by the Company in 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 Q4 2023 Highlights

The DCX team shifted its focus in Q2 and Q3 2023 to support system stability during the testing phase of the CC&B project. DCX played an important role in the success of the project by ensuring that all integrations and functionality were retained throughout the transition to the new billing system. In Q4, DCX was still in stabilization from the CC&B implementation and was not delivering work to production environments. However, the teams did complete development on items planned to be released in Q1 2024. The enhancements are applicable to both Con Edison and Orange and Rockland (O&R) unless specified:

- **Web/My Account**

In the Web/My Account environment within the Sitecore platform, enhancements have been fully developed for the user interface design to improve the ease of use on mobile devices. This is achieved by building more responsive tables and templates that are better suited for the user on various device aspect ratios. The team also completed the upgrade to a newer version of the Home Energy Analysis tool in the test environment. This provides customers the insights to better understand their energy consumption, including disaggregation of end uses (e.g., refrigeration, heating, cooling, etc.). Additionally, DCX completed development of a new address lookup functionality as part of outage reporting on the O&R website. This upgrade brings the O&R website closer to the Con Edison website experience.

- **Sitecore/Platform**

The team completed security enhancements for the Sitecore Mobile application program interfaces (APIs), protecting the assets from unauthorized access. Improvements to outage data handling policies will enhance the customer experience should the back-end systems come offline. Additionally, system health checks were developed to serve as a proactive early detection system, allowing the identification and mitigation of system issues before they cause significant disruptions to customers. The team also began work this quarter on migrating from the current Google Translate tool to a new translation partner called Weglot. The new tool is expected to make the site’s machine translations capabilities easier while also moving the technology to a supported platform. Finally, development is also continuing for both security and resiliency support, as well as improvements of webform builders in the Content Management System (CMS). Due to design freezes experienced in late 2023, some of these activities are expected to be released in the first half of 2024.

- **Native Mobile Applications**

Due to design freezes, the Mobile team was focused on CC&B implementation and stabilization until December 2023. During that time the team worked on code-base modernization, in which upgrades to the app code will allow new updates in the App Store and Google Play. Additionally, modernizing to iOS 17 and Android 14 is expected to be completed by late February 2024. This foundational work is essential to the reliability and availability of our native apps, and therefore is a priority as the team ramps up following design freezes in 2023.

### 2.2.2 Costs

<b>Con Edison</b>		
<b>Spend Category</b>	<b>December 31 YTD Spending</b>	<b>2023 Budget</b>
<b>O&amp;M Labor (\$)</b>	1,064,488	\$ 7,700,195.00
<b>O&amp;M Non-Labor (\$)</b>	6,287,738	
<b>Capital Labor (\$)</b>	586,723	\$ 9,047,847.00
<b>Capital Non-Labor (\$)</b>	3,483,759	
<i>Note: Capital underruns due to shift in focus on resources to CC&amp;B implementation</i>		
<b>O&amp;R</b>		
<b>Spend Category</b>	<b>December 31 YTD Spending</b>	<b>2023 Budget</b>
<b>O&amp;M Labor (\$)</b>	\$ 74,238.00	\$ 699,000.00
<b>O&amp;M Non-Labor (\$)</b>	\$ 420,084.00	
<b>Capital Labor (\$)</b>	\$ 113,792.00	\$ 1,000,000.00
<b>Capital Non-Labor (\$)</b>	\$ 244,104.00	

### 2.2.3 Cost Savings/Avoidance

For Q4 2023, 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 Q4 2023 improved 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	Q1 2023 Con Edison	Q2 2023 Con Edison	Q3 2023 Con Edison	Q4 2023 Con Edison	Q1 2023 O&R	Q2 2023 O&R	Q3 2023 O&R	Q4 2023 O&R
Sessions	7.3M	6.96M	7.83M	7.71M	744K	594K	755K	759K
Pageviews	27.6M	25.7M	29.38M	28.98M	2.71M	2.28M	2.72M	2.75M
Average Bounce Rate	32.20%	33.01%	34.27%	33.61%	34.27%	28.26%	31.28%	34.61%
Average Page Load Time (Sec)	4.81	5.33	5.99	5.72	4.29	4.23	4.08	4.23
Registration	96,406	99,158	119,748	108,680	7,316	6,203	7,395	7,317
NPS Score	46	50	49	43	50	54	51	44

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	Q1 2023 Con Edison	Q2 2023 Con Edison	Q3 2023 Con Edison	Q4 2023 Con Edison	Q1 2023 O&R	Q2 2023 O&R	Q3 2023 O&R	Q4 2023 O&R
IOS Downloads	38,039	32,972	43,237	37,339	2,101	1,862	2,276	2,505
IOS Uninstalls	5,944	4,871	4,411	7,468	411	252	236	417
Android Downloads	12,869	9,128	13,712	14,230	1,027	662	1,118	1,245
Android Uninstalls	5,864	4,406	6,114	7,486	339	322	409	627
iTunes Store Rating	4.83	4.83	4.83	4.83	4.78	4.78	4.79	4.78
Google Play Store Rating	4.84	4.82	4.8	4.72	4.77	4.75	4.67	4.64

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

Metric	Q1 2023 Con Edison	Q2 2023 Con Edison	Q3 2023 Con Edison	Q4 2023 Con Edison	Q1 2023 O&R	Q2 2023 O&R	Q3 2023 O&R	Q4 2023 O&R
Start	41%	42%	50%	49%	4%	6%	6%	11%
Stop	41%	44%	52%	56%	15%	16%	15%	19%
Transfer	40%	45%	54%	53%	N/A	N/A	N/A	N/A
Report Outage	54%	54%	62%	42%	54%	47%	50%	52%

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

Metric	Q1 2023 Con Edison	Q2 2023 Con Edison	Q3 2023 Con Edison	Q4 2023 Con Edison	Q1 2023 O&R	Q2 2023 O&R	Q3 2023 O&R	Q4 2023 O&R
Start	69.3K	84.6K	109.8K	42.2K	788	981	1.1K	778
Stop	36.9K	52.4K	61.8K	28.5K	897	1.2K	1.3K	557
Transfer	4.5K	6.8K	8.4K	9.6K	N/A	N/A	N/A	N/A
Report Outage	25.4K	23.6K	51.2K	27.6K	11.8K	10.5K	27.5K	7.9K

#### 2.2.5 Q1 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 make backend integration updates to the O&R credit card billing portal. This will provide a more seamless customer experience, eliminating the need for customers to input account numbers and other user data. New features are also being rolled out for first-time accounts, enabling customers to set notification preferences at account creation. Additionally, new functionality will allow free-form notifications to be disseminated via the website to targeted customer accounts. The Company will enhance the digital customer journey for Energy Affordability Program (EAP) customers, allowing them to check an account's EAP status before moving forward with an online EAP application. (This prevents customers who are already receiving a monthly discount from reapplying.) The O&R Start Service Deposit Transaction will be modified to allow customers to pay their deposit without an ID. Additionally, both Con Edison and O&R are upgrading sitewide forms for improved data collection and accuracy, through proper character handling.

- **Sitecore/Platform**

Currently, DCX architecture utilizes the .NET 6 developer platform, which comes to an end of life as of November 24, 2024. The team will be upgrading to .NET version 8, which offers significant improvements in performance, security, and efficiency. It enables DCX to leverage advanced features and enhance security. This update ensures that all new deployments will automatically integrate these security advancements, providing a safer and more secure environment. The "Check Outage" feature on the O&R website is also undergoing upgrades that will align the experience with Con Edison's recent design enhancements. Finally, the team will complete the design and integration for the new translation tool, Weglot.

- **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 for the customer. 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. 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 on the mobile outage experience. Lastly, a new design and implementation of mobile surveys are being developed.

## 2.3 Journey Mapping

The Journey Mapping program was launched in 2017 with the aim to not only get to the heart of what customers want 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 Q4 2023 Highlights

#### **Commercial Customers and Agents: Small and Medium Business Customers**

Today the Small and Medium Business (SMBs) 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. Next the team mapped out the full cycle journey and planned a workshop to take place in Q1 2024. While it is still early in the process the team has already identified pain points associated with the stop service journey and begun to explore potential collaborations with the Leave on for Landlord program (where landlords can request that an account be put in their name while the premises is between occupants). Additionally, a project kickoff was conducted with the Payment Marketing Team, and Con Edison became a member of Chartwell’s SMB Utility Council, where the team can connect with approximately 90 utility companies to share insights and design improvements for the SMB group.

#### **Customers Participating in Clean Energy Programs: Value Stack Billing Platform and Customer Portal**

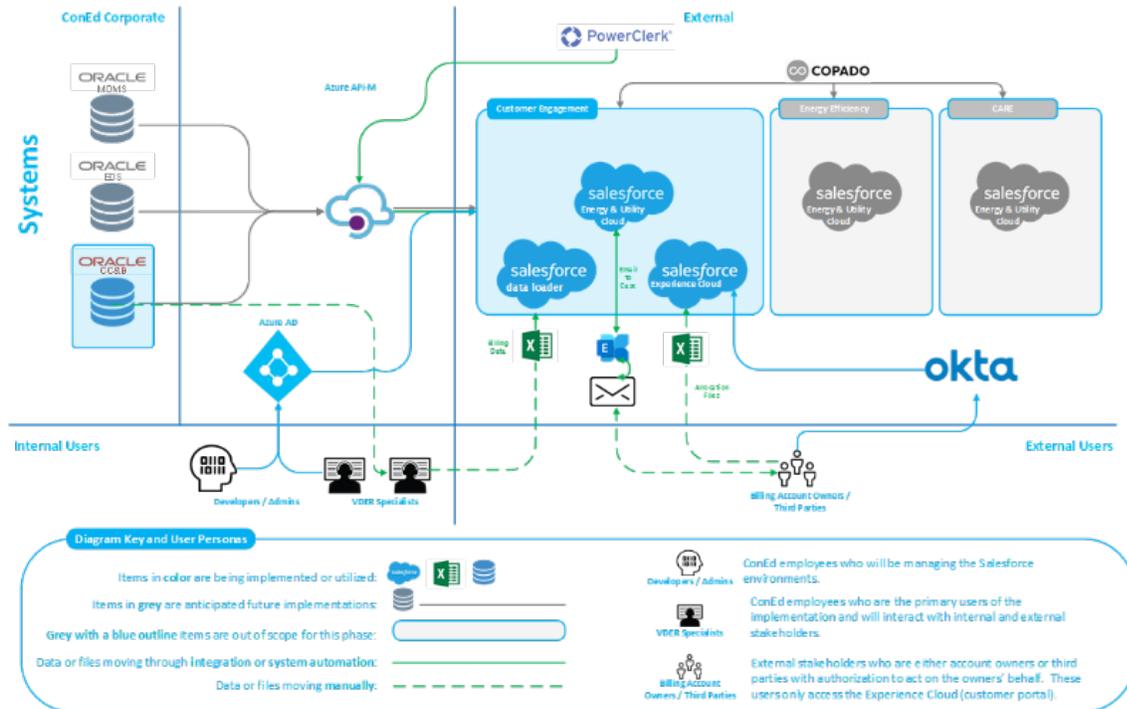
As part of its Clean Energy Commitment, Con Edison is actively engaged in enhancing the experience for distributed generation (DG) customers, where project hosts interconnect to the utility’s distribution system and are compensated for their net energy injections through the Commission’s Value of Distributed Energy Resources (VDER) pricing paradigm (also known as “the Value Stack”). Some DG hosts also choose to make theirs a Community DG (CDG) project and pass 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 Billing Platform and Customer Portal.

The Value Stack Billing Platform and 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 efficiencies of this platform solution, and Con Edison will be better positioned to enable further DG growth through scalable operations.

The initial focus of this work is on the CDG use case. In October 2023, the Journey Mapping team and internal business stakeholders completed the planning and requirements phase, which involved conducting 32 workshops across key stakeholder groups, documenting 110 user stories across 13 features, and proposing a solution architecture design. In November and December 2023, the team kicked off the implementation phase for the CDG use case. The team aligned on the minimum viable product (MVP) scope, refined technical design drawings to meet IT standards, drafted user experience/user interface (UX/UI) design requirements to align with branding and customer experience standards, and initiated user

acceptance testing (UAT). Priorities for the MVP include platform setup and configuration and workflows for customer case management. Additionally, there is an integration to an upstream project management system and a customer-facing portal.

Figure 1- High Level MVP Architecture



### 2.3.2 Costs

Spend Category	December 31 YTD Spending	2023 Budget
O&M Labor (\$)	\$ 428,200.00	\$ 1,300,000.00
O&M Non-Labor (\$)	\$ 845,544.00	
Capital Labor (\$)	\$ -	\$ -
Capital Non-Labor (\$)	\$ 1,671,268.54	\$ 1,100,000.00

### 2.3.3 Cost Savings & Avoidance

For Q4 2023, 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 Q1 2024 Projected Activities

The team's focus in Q1 2024 is on enhancing the following:

- **SMB Customer Journey:** Continued customer research and data analysis will drive informed improvements tailored to the unique needs of SMB customers. The initiative will culminate in a design thinking workshop, bringing together subject matter experts and frontline employees. Potential partnerships with the Leave on For Landlord program will also be further explored during this phase.
- **Residential Customer Start Service Journey:** An ongoing discovery process and industry research will help the Company identify opportunities for collaboration with real estate agents and management companies, all geared toward enhancing the overall customer experience.
- **Payment Journey Map:** The team plans to conduct customer research on customer payment preferences, focusing on their desire for bill invoice numbers and the feasibility of autopay via debit card.
- **Completion of Implementation Phase 0 for the Value Stack Billing Platform and Customer Portal MVP:** The team aims to finalize the technical design drawings and UX/UI design requirements for the core MVP features. These efforts will align with various IT, branding and customer experience standards. Additionally, the team is set to conclude User Acceptance Testing (UAT) for the MVP, update the product roadmap to include proposed future enhancements through 2024, and establish success metrics for baseline measurement mapped to desired business outcomes.

## 2.4 Virtual Assistant

The Virtual Assistant 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.

### 2.4.1 Q4 2023 Highlights

- **New Billing System**

In the fourth quarter of 2023, the VA team successfully deployed integrations with CC&B. To be ready for launch, thousands of test cases were completed to ensure all functionality would work as expected when CC&B went live. Any defect found during testing was prioritized and fixed prior to rollout. Thanks to this testing effort, the Virtual Assistant – referred to as “Watt” – was able to seamlessly continue serving customers immediately after the launch. Post-launch, the team diligently monitored Watt and its reporting metrics to confirm that it was functioning as anticipated.

- **Security Improvements**

Ensuring the safety of our customers is a top priority. In the fourth quarter of 2023, the VA team implemented stringent measures to safeguard against personally identifiable information being accessed within our system. This involved a comprehensive audit of all back-end systems to confirm the security and protection of our customers’ information.

- **Reporting Enhancements**

Reporting Enhancements have improved our internal and customer-facing VA operations. By reorganizing the report layout, we’ve achieved a clearer, more coherent presentation of data, tailored for both technical

and non-technical users. This restructuring has enhanced decision-making efficiency, particularly in understanding customer interactions with Watt.

Key achievements include the customization of the system dashboard for relevancy, improved data visualization for identifying customer needs, and aligning report aesthetics with our corporate branding. While we’ve successfully implemented reporting features like tracking conversations and escalations and discerning transaction success rates, future goals include integrating user feedback mechanisms and expanding user data analytics. These enhancements not only streamline our internal processes but also elevate customer experiences by enabling a deeper, more accurate understanding of their needs and behaviors.

2.4.2 Costs

Spend Category	December 31 YTD Spending*	2023 Budget
O&M Labor (\$)	\$ 124,219.00	\$ 189,147.00
O&M Non-Labor (\$)	\$ 340,058.00	\$ 725,853.00
Capital Labor (\$)	\$ 109,300.00	\$ 495,733.00
Capital Non-Labor (\$)	\$ 396,617.00	\$ 1,894,267.00

\*Due to teams shifting post-CORE, the Virtual Assistant actuals came in lower than forecasted.

2.4.3 Cost Savings & Avoidance

For Q4 2023, 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 Q1 2024 Projected Activities

In Q1 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. The goal is to complete all development work and necessary testing by early April 2024. 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 the website.
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, ensuring a seamless and user-friendly experience.

## 2.5 Billing and Payment Enhancements

Each year, the Company facilitates the delivery of over 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 over 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 on addressing priorities associated with billing, communications, and payments for the Company’s CC&B transition, to the exclusion of planned Billing and Payment Enhancements work. As CC&B stabilizes, the Company will resume its efforts to enhance the customer payment experience.

### 2.5.1 Q4 2023 Highlights

As noted in Q4 2023 the Company continued to commit its resources toward the implementation and stabilization phases of CC&B. However, in preparation for 2024 Billing and Payment Enhancement work, the team did conduct a payment kiosk survey via its Customer Advisory Community. The survey gauged customer interest in payment kiosks – potentially located indoors at local retailers or outdoors adjacent to Con Edison locations – as an additional payment option. This survey lays the foundation for one of the activities planned for Q1 2024.

### 2.5.2 Costs

Spend Category	December 31 YTD Spending *	2023 Budget
O&M Labor (\$)	\$ -	\$ 400,000.00
O&M Non-Labor (\$)	\$ -	
Capital Labor (\$)	\$ -	\$ 1,000,000.00
Capital Non-Labor (\$)	\$ -	

\* Because the Billing and Payment Enhancements team allocated most of its resources to support the implementation and stabilization of the CC&B, its plan activities for Q4 2023 only commenced in Q1 2024.

### 2.5.3 Cost Savings & Avoidance

For Q4 2023, 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 Q1 2024 Projected Activities

With CC&B now more stable, the Billing and Payment Enhancements team is realigning resources to prioritize planned initiatives in Q1 2024. The team will focus on three key project activities:

- **Neighborhood Kiosk Program**

To better serve unbanked, low-income, and small business customers, the Company aims to strategically place payment kiosks closer to where customers live and work. A one-question customer survey conducted in Q4 2023 revealed that 46% of the 1,221 residential and commercial customers who participated were interested in having Con Edison payment kiosks as an additional payment option, either indoors at a local retailer, such as a local pharmacy, or outdoors adjacent to a Con Edison locations. These modern customer payment kiosks will accept cash, check, credit/debit cards, and allow customers to create payment agreements. These transactions would update customer accounts in real time instead of the one- to three-day delay customers experienced before CC&B. As part of the rollout for this project, the Company will conduct a feasibility study to strategically place modern self-service payment kiosks near our customers' homes and businesses. The study will evaluate the latest vendor equipment for indoor and outdoor placement, functionality, and ease of integration to select the most advanced system available. The Company is on track to complete a feasibility study by the end of Q1 2024.

- **More Digital Payment Options**

Collaborating with payment vendors, the Company aims to integrate our customer-facing systems to offer customers additional payment options such as PayPal, Venmo, and other emerging apps. This initiative aligns with Con Edison's commitment to facilitate seamless payment interactions for customers. In Q1 2024, the focus will be on design and project planning, involving collaboration across Strategic CX program initiatives, including coordination with DCX. The company is on track to complete the design and project planning phase by the end of Q1 2024.

- **Video Communication**

Our video communication initiative aims to provide enhanced customer interaction and support through tailored video content. Video communication will visually guide customers through various beneficial programs such as budget billing, auto-pay, e-bill, and government assistance programs via personalized e-

mail communications containing clickable videos. The Company will conduct a survey to gauge how many customers would be interested in using personalized videos to understand and sign up for eligible programs and services quickly.

## 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, Knowledge Advanced (KA) project, 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 cost savings.

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, ultimately enhancing efficiency in responding to customer inquiries.

The Customer Experience (CXS) 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 \$3000, and Life Support Equipment (LSE) outage communications. In 2024, the Company plans to enhance the CXS 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 - 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 times (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 Q4 2023 Highlights

In Q4 2023, the Back Office Automation and Workforce Management program achieved two significant milestones, enhancing operational efficiency and augmenting user experiences.

#### **Robotic Process Automation**

The team developed and deployed additional 11 RPAs in Q4 – adding to the 30 completed earlier in 2023 – to streamline and simplify back-office processes. For example, robotic processes were implemented to replace a manual validation process for a series of recurring monthly rate changes. The team also further optimized RPAs in conjunction with the new CC&B system to support system integrations and enhance the success rate of transactions. The CC&B integration marks a crucial step toward aligning automation efforts with the latest technological advancements, promoting accuracy and reliability.

#### **Knowledge Advanced**

The team implemented improvements to the Reporting Dashboard, providing a more comprehensive insight into end-user performance. These enhancements empower decision-makers with actionable data to further refine processes and improve overall Knowledge Advance platform efficiency. The team upgraded the search algorithm within the Knowledge Advanced platform, enhancing search results for improved information retrieval. The refined algorithm contributes to a more user-friendly experience, enabling faster access to critical information. New job aid content was also created to support CSRs, which aligns with our commitment to providing the necessary tools and resources for the Company’s frontline staff.

### 2.6.2 Costs

<b>Spend Category</b>	<b>December 31 YTD Spending</b>	<b>2023 Budget</b>
<b>O&amp;M Labor (\$)</b>	\$ 533,456.00	\$ 459,680.00
<b>O&amp;M Non-Labor (\$)</b>	\$ 1,467,635.00	\$ 1,000,000.00
<b>Capital Labor (\$)</b>	\$ 231,521.00	\$ 2,335,000.00
<b>Capital Non-Labor (\$)</b>	\$ -	

### 2.6.3 Cost Savings & Avoidance

In Q4 2023, 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 which underscore the broad impact of the program for both the 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 CRSs 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 Q1 2024 Projected Activities

In the first quarter of 2024, the primary focus will be to advance our RPA capabilities, refine KA processes, and enhance customer experiences through the PEGA CXS platform. Planned activities for the program include:

#### **Robotic Process Automation**

- Develop and implement additional use cases for billing rate input and validation to enhance testing robustness and minimize human errors.
- Automate manual exception billing tasks (referred to as “To-Do’s”) generated from CC&B. The goal is to automate three additional tasks in Q1 2024, building on the 41 completed in 2023.

#### **Knowledge Advanced**

- Continue updating reports and dashboards for better insights.
- Start the development of a second KA interface for O&R CRSs.
- Update functional and technical designs for ongoing improvement.
- Start development of a governance strategy for managing and maintaining the platform.
- Commence a discovery phase to explore enhancing the platform with artificial intelligence technology.

#### **PEGA Customer Experience Platform**

- Start enhancements to the Meter Action Group (MAG) upload documents, enabling the Call Center 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.”
- Start development work for a case management workflow solution for customer complaints escalated to the PSC, further enabling prompt handling.
- Commence development work for a case management workflow solution to manage inactive gas meters that are registering usage without a responsible party on record in the billing system.
- Initiate development work for a case management workflow solution to track and create field appointments for exchanging or repairing non-communicating AMI meters. This will include imposing a no-access fee penalty on customers who do not provide access to the meter. The case life cycle may also include the replevin process (i.e., meter removal with a court order to provide meter access).

## 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. In response, 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 Q4 2023 Highlights

For Q4 2023, the Outage Communication team focused on three key initiatives.

- **Emergency Customer Messaging Center**

The team is partnering 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 Q4 the team expanded the scope of our multi-phase ECMC plan to include ad-hoc emergency messaging and upgrading the underlying technology for message delivery. Phase 1, slated for completion in Q1 2024, will deliver improvements such as the ability to initiate ad-hoc campaigns without cumbersome ticketing processes and to streamline our communications processes to allow faster message delivery.

- **Program Management and Expansion to O&R**

As the Company embraces new customer messaging technologies, the Outage Communications team has actively monitored and addressed the program’s growing complexity and maintenance requirements. In Q4 2023, the team gained a section manager overseeing the program within the Strategic CX Portfolio. The team also collaborated on transitioning to CC&B and achieved a seamless integration through comprehensive end-to-end and post-implementation testing. Additionally, the Outage Communications team played a pivotal role in developing an outage program for O&R, paving the way for an upcoming upgrade of the Outage Management System. As part of the AMI Restoration Validation package of enhancements, user acceptance testing was conducted for a new feature that leverages smart meter technology to allow operations to provide continued support to customers whose power is not restored after field crews have completed the restoration of other customers in the same area, a condition called “single outage.” Before this feature, customers experiencing single outages had to report that their services were still out so a new ticket could be created and a field crew dispatched. Now, this process has been automated, and customers are instead kept informed about their new estimated restoration time without having to contact the Company again.

- **Employee Event Task Tool**

The team introduced an internal operational and communications task management platform, which focuses on large-scale, no-notice outages. The tool aims to centralize coordination for customer-facing organizations during outage scenarios and facilitate the archiving of event activity for audits. For Q4 2023, the focus involved refining requirements, iterative design enhancements, and initiating user acceptance testing for the Beta version. This work will deliver a robust and user-friendly tool that will help mitigate operational seams.

### 2.7.2 Costs

Spend Category	December 31 YTD Spending	2023 Budget
O&M Labor (\$)	\$ 140,000.00	\$ 140,000.00
O&M Non-Labor (\$)	\$ 1,188,197.96	\$ 990,000.00
Capital Labor (\$)	\$ 205,806.00	\$ 200,000.00
Capital Non-Labor (\$)	\$ 833,482.00	\$ 810,000.00

### 2.7.3 Cost Savings & Avoidance

For Q4 2023, 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 Q4 2023 alone, Con Edison customers experienced around 30,000 outages. Customers with up-to-date contact information received proactive emails and text messages, preparing them for an upcoming snowstorm. 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 Q1 2024 Projected Activities

In Q1 2024, the Outage Communication team is set to achieve the following milestones across three key initiatives:

- **Emergency Customer Messaging Center**

The team will redesign customer contact files to enhance data accuracy and expand customer reach. We plan to execute user acceptance testing and release Phase 1 developments to production while conducting comprehensive training for employees handling ad-hoc messaging deployment. Furthermore, the team intends to finalize requirements for Phase 2 and initiate Phase 2 development work, which will deliver continuous improvements.

- **Employee Event Task Tool**

The Outage Communication team will complete user acceptance testing and release the Beta version. They plan to execute a roadshow to introduce the new tools to potential users.

- **Continued Improvements in Outage Messaging**

The team will conclude the hiring and onboarding process for two full-time employees for the new Outage Communications Section. Training with control center operators will be conducted to optimize the utilization of the new AMI Restoration Validation engine for handling “single outage” tickets. Additionally, the team plans to initiate a script audit to identify and implement any necessary content updates. Collaborative efforts with the DCX team will be undertaken to identify opportunities to enhance outage customers' digital experience.

#### 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 in a dozen other states, most recently New Jersey, with pending legislation in more than ten other states, including the New York Privacy Act. This legislation aims to provide New Yorkers more control over their personal data and privacy rights by requiring businesses to comply with many new requirements. Although this legislation has not been

passed by both houses of the legislature, the Company anticipates it will feel substantial operational implications soon after a final version passes and is signed by the Governor.

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 fulfilling consumer privacy rights and creating evidenced compliance for their organizations. The Company plans to invest in computer software and hardware that will provide a robust technology infrastructure to support compliance with these evolving policy 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. Mechanism for verification of the data subject right request to implement 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 for fulfilling customer data requests 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 Q4 2023 Highlights

In the fourth quarter of 2023, the Privacy Readiness Team worked on initiatives to strengthen our data management and privacy processes:

#### **Data Discovery**

- Conducted a thorough data mapping survey to pinpoint critical systems requiring prioritization.
- Completed a meticulous data scan for 25 databases in the test environment, ensuring comprehensive data accountability and security.
- Executed IT infrastructure enhancements for the test environment, optimizing it for efficient data scanning in the data discovery process.
- Successfully developed and deployed User Acceptance Testing (UAT) and production worker nodes, seamlessly integrated with OneTrust for a scan-ready environment. OneTrust is a comprehensive privacy management platform that was selected after a comprehensive review of

potential solutions because of its proven track record on the market and it can provide an end-to-end technology solution.

**Data Catalog**

- Updated and refined the program’s glossary/data dictionary, providing clarity on essential business terms.
- Documented target state design requirements, fostering a comprehensive understanding of data cataloging needs. Requirement includes ensuring transparent data access, visibility into data usage, and incorporation of data lineage and retention with remediation capabilities.
- Documented privacy use cases, enabling a practical and structured approach to data cataloging.

**Privacy Process Automation**

- Documented inventories for assets, processing activities, entities, and vendors, establishing a solid foundation for process automation.
- Designed mockup templates for in-scope privacy processes, including privacy impact assessments and consumer-facing webforms, within the OneTrust UAT environment.
- Initiated UAT, encompassing customer-facing webforms and workflows, aligning with the developed frameworks.

**Privacy Impact Assessment:**

Commenced building and unit testing for the Privacy Impact Assessment and data mapping, ensuring rigorous validation to meet the specific needs and requirements of the Company’s operational user before the official production deployment.

**Consent and Preference Management:**

- Initiated discovery work and requirements gathering for the Universal Consent and Preference Management module, a crucial step in safeguarding the privacy rights of our customers.
- Documented target state requirements and design documents, providing a clear roadmap for the development of consent and preference management functionalities.
- Developed an inventory of external touchpoints for the preference center, enhancing our understanding of customer touchpoints and preferences.

2.8.2 Costs

Spend Category	December 31 YTD Spending	2023 Budget
O&M Labor (\$)	\$ 18,100.00	\$ 500,000.00
O&M Non-Labor (\$)	\$ 79,105.00	\$ 1,500,000.00
Capital Labor (\$)	\$ 1,354,742.00	\$ 200,000.00
Capital Non-Labor (\$)	\$ 3,105,766.00	

2.8.3 Cost Savings & Avoidance

For Q4 2023, 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 Q1 2024 Projected Activities

In Q1 2024, the Privacy Readiness team will undertake the following activities. As in Q4 2023, these planned activities are designed to enhance and streamline data discovery, cataloging, privacy process automation, impact assessments, and consent management.

- **Data Discovery and Classification**

The team will launch a comprehensive data discovery solution to identify personal information data elements across structured, unstructured, and semi-structured assets. This initiative will support data classification, privacy rights fulfillment, and the systematic cataloging of data and assets.

- **Data Catalog**

The team will start the development of an advanced governance model that facilitates data cataloging, ensuring transparent data access, visibility into data usage, and incorporation of data lineage and retention with remediation capabilities.

- **Privacy Process Automation**

The team will start the development of a robust mechanism for the intake and management of individual privacy rights, such as Privacy Rights Assessment (PRA), and automate core processes within the Privacy Program, including data mapping, privacy impact assessment (PIA/DPIA), and data redaction capabilities.

- **Privacy Impact Assessment**

The team will initiate the building and unit testing phase for Privacy Impact Assessment and data mapping. This ensures a meticulous validation process to meet the specific needs and requirements of the Company's operational user before the official production deployment.

- **Consent and Preference Management**

The team will start the development of a user-friendly centralized consent and preference management platform for websites and mobile apps, featuring cookie scanning capabilities, efficient processing of opt-out and preference signals, and robust consent and preference management capabilities.

## 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.
- **Third Party Access to My Account:** This is an extension of the Company’s My Account web portal that allows third parties to request access to customers’ My Account experience to manage their accounts, retrieve data, and transact on behalf of customers.

### 2.9.1 Q4 2023 Highlights

In Q4 2023, the Customer Data Sharing team focused on the continuity of the Company’s data sharing services during and after the CC&B transition. The continuity of service was maintained through extensive internal testing, consisting of 1,389 test cases across the data-sharing platforms, resulting in 170 bugs being corrected in the test environment.

Also, to ensure a smooth transition from our legacy systems to the new platform, consistent, proactive communications about our system integration schedule were sent to participating third parties routinely; this also included the coordination of user testing to safeguard successful connections to our users and system functionality.

Lastly, in Q4 2023, the Customer Data Sharing program started an effort to align the Share My Data platform with the national standard through certification with the Green Button Alliance, which is expected to be completed by the second quarter of 2024.

### 2.9.2 Costs

Spend Category	December 31 YTD Spending*	2023 Budget
O&M Labor (\$)	\$ 64,908.00	\$ 109,620.00
O&M Non-Labor (\$)	\$ 447,880.00	\$ 756,401.00
Capital Labor (\$)	\$ 87,514.00	\$ 100,512.00
Capital Non-Labor (\$)	\$ 598,852.00	\$ 1,028,162.00

\*Due to the focus on prioritizing the integration and deploying the CC&B system in 2023, the commencement of this project was delayed, resulting in a later start than initially anticipated and underspending.

### 2.9.3 Cost Savings & Avoidance

The Data Sharing Program had no realized or measurable cost savings and avoidance in Q4 2023.

### 2.9.4 Non-Financial Benefits

The Customer Data Sharing Program’s efforts in Q4 2023 were centered on the continuity of service and an efficient cutover to the new CC&B system. This included the work management of two separate systems: (1) the CC&B-enabled platform and (2) its preceding legacy platform. To ensure issues were sufficiently resolved, bug fixes were carefully coordinated to maintain consistency across all data-sharing platforms. Currently, there are:

- 43 third parties enrolled with Share My Data with approximately 42K customer accounts authorized to share data.
- 1 large customer enrolled in Large Customer APIs
- 1 ESCO enrolled in ESCO APIs

#### 2.9.5 Q1 2024 Projected Activities

In Q1 and Q2 2024, the Customer Data Sharing Program will continue adjusting the Share My Data platform to conform to the Green Button Alliance's national standard. In addition, the team will focus on new data-sharing needs that have surfaced in the Share My Data platform. These additional needs include introducing new data elements to the platform, system performance improvements and enhancement of APIs, and web user interface/user experiences. The Company is pursuing these changes because they are consistent with feedback from Share My Data participants, conform with the Green Button Alliance national standard, and will support the Company's clean energy commitments.

### 3 Strategic CX Portfolio Cost Summary

#### 3.1 Capital Spending

Program	December 31 YTD Spending	2023 Budget
Customer Data & Analytics	\$ 10,571,377.39	\$ 10,500,000.00
DCX	\$ 4,428,378.00	\$ 10,047,847.00
Journey Mapping	\$ 1,671,268.54	\$ 1,100,000.00
Virtual Assistant	\$ 505,917.00	\$ 2,390,000.00
Billing & Payment Enhancement	\$ 0	\$ 1,000,000.00
Back Office Auto & Workforce Management	\$ 2,315,261.00	\$ 2,335,000.00
Outage Communications	\$ 1,039,288.00	\$ 1,010,000.00
Privacy Readiness	\$ 4,460,508.00	\$ 5,000,000.00
Customer Data Sharing	\$ 686,366.00	\$ 1,128,674.00
<b>Total</b>	<b>\$ 24,991,997.93</b>	<b>\$ 33,382,847.00</b>

#### 3.2 O&M Spending

Program	December 31 YTD Spending	2023 Budget
Customer Data & Analytics	\$ 2,287,788.00	\$ 3,080,000.00
DCX	\$ 7,846,548.00	\$ 8,399,195.00
Journey Mapping	\$ 1,273,744.00	\$ 1,300,000.00
Virtual Assistant	\$ 464,277.00	\$ 915,000.00
Billing & Payment Enhancement	\$ 0	\$ 400,000.00
Back Office Auto & Workforce Management	\$ 2,001,091.00	\$ 700,000.00
Outage Communications	\$ 1,328,197.96	\$ 1,130,000.00
Privacy Readiness	\$ 97,205.00	\$ 2,000,000.00
Customer Data Sharing	\$ 512,788.00	\$ 866,021.00
<b>Total</b>	<b>\$ 15,811,638.96</b>	<b>\$ 18,790,216.00</b>

## 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 Q4 2023, none of the Strategic CX initiatives have accrued any measurable cost avoidance or cost saving in program. However, the team has mechanisms in place to monitor efforts in this area to report in future quarters.

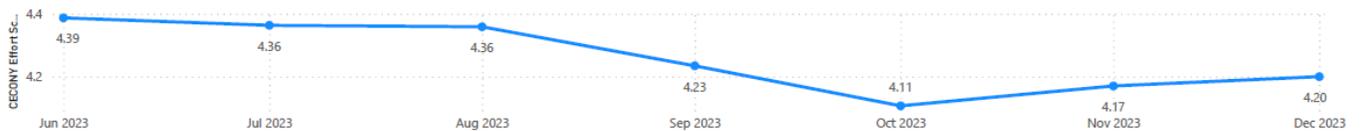
### 4.2 Customer Satisfaction (CSAT, NPS)



Q4 2023 Customer Satisfaction Metrics for Web and Mobile

<b>CSAT Score:</b> Q4 2023: <b>4.00</b>	<b>VA CSAT Score:</b> Q4 2023: <b>4.49</b>	<b>CECONY NPS Score:</b> Q4 2023: <b>43</b>	<b>O&amp;R NPS Score:</b> Q4 2023: <b>44</b>
<b>CECONY IOS Rating:</b> Q4 2023: <b>4.83</b>	<b>CECONY Android Rating:</b> Q4 2023: <b>4.79</b>	<b>O&amp;R IOS Rating:</b> Q4 2023: <b>4.79</b>	<b>O&amp;R Android Rating:</b> Q4 2023: <b>4.66</b>

CECONY Effort Score by Month



O&R Effort Score by Month



### 4.3 Digital Engagement

**conEdison** Strategic CX Report - CECONY/DCX  
**Digital Engagement Metrics**

Payment Agreements Completed Digitally by Month



• Payment Agreement data is missing from October 6-10 due to CC&B deployment. Data collection continued on October 10

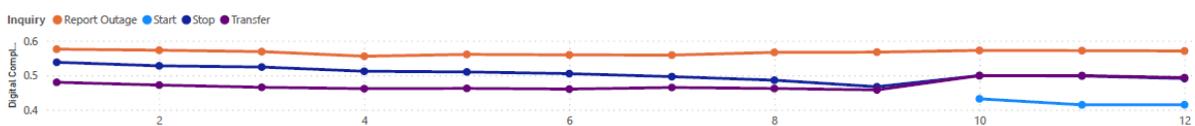
New E-Bill Enrollments by Month



Total MyAccount Profiles by Month

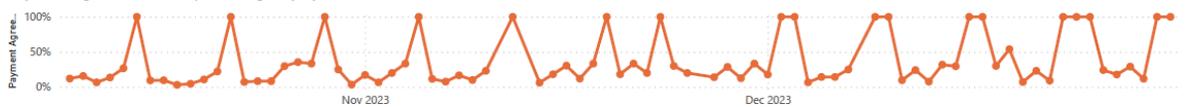


Digital Completion Rates by Month



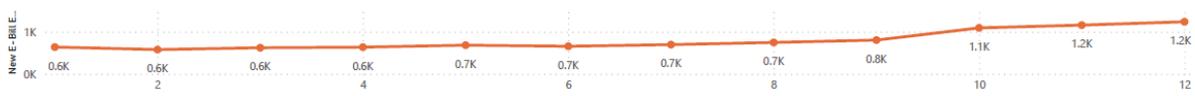
**Orange & Rockland** Strategic CX Report - O&R/DCX  
**Digital Engagement Metrics**

Payment Agreements Completed Digitally by Month



• Call centers are closed on weekends thus increasing digital transaction percentage enrollments

New E-Bill Enrollments by Month



Total MyAccount Profiles by Month



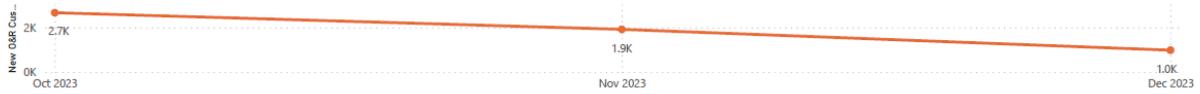
Digital Completion Rates by Month



New CECONY Customer Autopay by Month



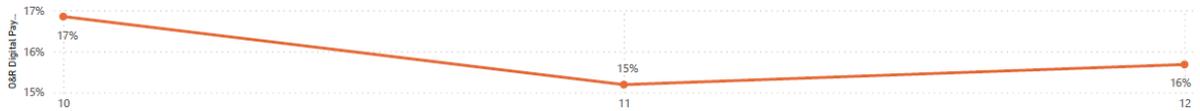
New O&R Customer Autopay by Year and Month



CECONY Digital Payments by Month



O&R Digital Payments by Month



## 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)