



REV Demonstration Project:
Connected Homes Platform

2017 2Q Quarterly Progress Report

Dated: July 28, 2017

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1.0 EXECUTIVE SUMMARY

Consolidated Edison Company of New York, Inc. (“Con Edison” or the “Company”) submits this quarterly report on the progress of the Connected Homes Platform REV demonstration project (“Project”) it is implementing as part of the Reforming the Energy Vision (“REV”) proceeding, as required by the *Order Adopting Regulatory Policy Framework and Implementation Plan*, issued by the New York State Public Service Commission (“Commission”) on February 26, 2015.

1.1 PROGRAM ACHIEVEMENTS

On July 1, 2015, Con Edison submitted the Project for approval by Department of Public Service Staff (“DPS Staff”); on January 8, 2016, DPS Staff approved the Project. Con Edison filed an implementation plan for the Project with the Commission on January 29, 2016. The Project launched in Q2 2016 to approximately 275,000 customers in Con Edison’s Brooklyn and Westchester territories. Customers have access to detailed energy insights online and have received targeted offers in their Home Energy Reports and High Usage Alerts for solar panels, Wi-Fi thermostats, Sealed home services, and the Con Edison Marketplace, as eligible. In early 2017, the Project successfully upgraded to the second version of the Con Edison Marketplace (Marketplace 2.0), the second version of the printed Home Energy Reports (HER 2.0), and launched the second round of targeted offerings for Sealed home services, Wi-Fi thermostats, and Marketplace. In Q2 2017, the Project team developed new modules for the SunPower and Sealed campaigns creatives, expanded marketing efforts and added two new revenue streams on the Marketplace: third-party advertising and cost-per-click referrals.

1.2 CYBERSECURITY AND PERSONALLY-IDENTIFIABLE INFORMATION PROTECTION

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

1.3 ACCOUNTING PROCEDURE ESTABLISHED

On February 16, 2016, in Case 15-E-0229, Con Edison filed an accounting procedure for the accounting and recovery of all REV demonstration project costs. This accounting procedure establishes a standardized framework that governs how the Company categorizes and allocates the costs of the REV demonstration projects, and facilitates analyzing each project to determine the overall financial benefits of the program to customers.

1.4 COSTS, BENEFITS, AND OPERATIONAL SAVINGS

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

1.5 CONNECTED HOMES PLATFORM

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

2.0 CONNECTED HOMES – QUARTERLY PROGRESS

2.1 DEMONSTRATION HIGHLIGHTS

2.1.1 Since Previous Quarter – Major Tasks Completion

- Launched the second round of SunPower solar targeted offers with new creatives modules.
- Made significant negotiation progress with Mitsubishi, a new DER partner.
- Finalized selection criteria for adding an estimated 20,000 new customers to the program to account for customer attrition (move outs, customers going inactive, customers opting out).
- Conducted first customer satisfaction and engagement survey.
- Successfully implemented expanded marketing and email e-commerce campaigns responsible for increases in Marketplace site traffic and Storefront products sold.
- Enabled two new revenue generation channels on the Marketplace: third-party advertising and cost-per-click referrals with third-party retailer Appliances Connection.

2.1.2 Activities Overview

In Q2 2017, the Project team continued to send out targeted offer reports to customers across all four product groups: Sealed home services, SunPower solar, Marketplace products and Wi-Fi thermostats. Notably, the team updated the SunPower creative campaign to include photography in the paper reports to better catch the attention of readers (see Appendix A for full sample report).



Go Solar

Modernize your home with solar

Solar is trending in your area. It may be right for you. SunPower® panels feature sleek designs that complement your roof—and produce 60% more clean energy over 25 years in the same space than conventional panels.

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



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The team also conducted the first customer engagement survey to gauge customer satisfaction and interaction with the REV Demo reports and web resources. Nine hundred seventeen Con Edison customers responded to the online survey, 617 recipients of the REV Demo communications and 300 control customers (non-recipients on the REV Demo communications to isolate for report effects). The survey was fielded from June 5 through June 26, 2017. The results of the survey will be analyzed in July and presented in the Q3 report.

In Q2 2017, the Con Edison Marketplace added the following product categories: Monitors, Projectors, Tablets, Televisions, Video Game Consoles, EV Chargers, Freezers, and Dryers. With these additional product categories, Con Edison end users now have over 2,900 products to research and compare.

The Enervee team also established the framework for the Small Business DIY Lighting Pilot program, with a targeted early Q3 launch.

Marketing Initiatives:

The team delivered weekly and bi-weekly e-commerce focused emails promoting Storefront products on the Marketplace. Primarily driven by email, units sold in Q2 increased 7x compared to the previous eight-month period from launch through Q1 2017. Total sales topped 9,154 units sold. These results represent a material improvement compared to the 1,280 units sold prior to the implementation of the email campaign and expanded marketing. Email campaigns were also responsible for 117,586 Marketplace visits in Q2.

conEdison MARKETPLACE

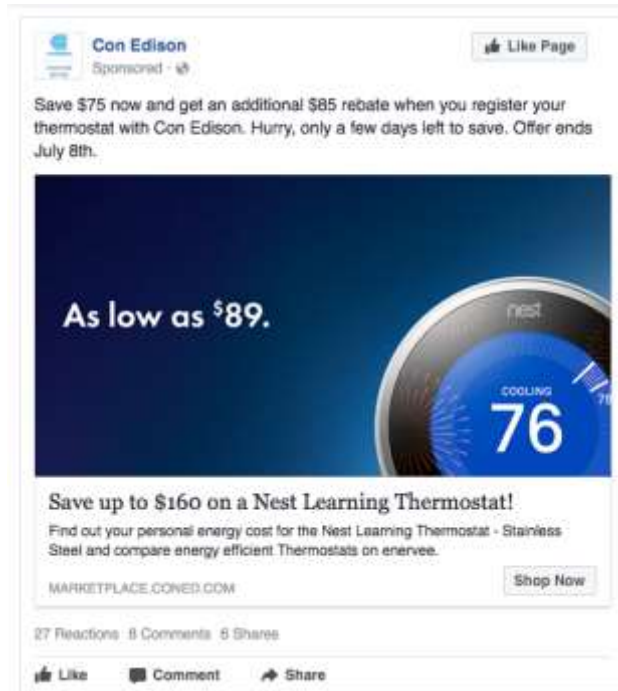
nest
Save up to \$160
 With discounts and rebates from Con Edison and Nest
 (Cue Fireworks)
 BUY NOW

This 4th of July, save \$75 on the Nest Learning Thermostat now, plus get an additional \$85 energy rebate when you register it with Con Edison. Hurry, offer good June 29 - July 8, 2017

nest
~~\$249~~
 -\$75 Instant Savings
 -\$85 Con Edison Rebate
\$89*
 BUY NOW
 Offer ends July 8, 2017

***Get the Lowest Price**
 Get an additional \$85 rebate when you register your new Nest Thermostat with Con Edison and bring your cost down to only \$89. [Find out how](#)

The Project team implemented improved Facebook advertising; customers are targeted on Facebook through 1) their email address with imagery and offers complementing the email campaigns, and 2) remarketing that displays products Marketplace customers have previously viewed on Marketplace in advertising.



The Project team also introduced new display advertising methods, including delivering display ads to customers who have viewed Enverve's Charge widget on third-party sites such as Digital Trends and Appliance Connections,¹ and targeting in-market shoppers. Optimization and improvement of the display creatives was completed.

2.1.3 Key Metrics

In Q2, the Project continued to see increasing product leads and purchases as a result of the DER marketing campaigns. For additional details on program results to date, see Appendix B: Full list of metrics and results.

Targeted Offering Communications:

The following communications were sent to customers in Q2:

- Over 754,524 Home Energy Reports: 341,776 print and 412,692 digital
- Over 103,692 digital High Usage Alerts
- Over 79,000 customers received targeted offerings for Sealed home services
- Over 75,000 customers received targeted offerings for Wi-Fi thermostats

¹ Through Enverve Charge, customers who are "in-market shoppers" and have reviewed an appliance on one of our third-party partner sites (Digital Trends, TopTenReviews, Goedeker's), are then displayed Marketplace-oriented ads on other sites they may be browsing.

- Over 145,000 customers received targeted offerings for the Marketplace
- The open rate for eHERs (the digital version of Home Energy Reports) averaged 46 percent
The open rate for High Usage Alerts averaged 32 percent

Purchases and Leads:






- Solar Panels:
 - In Q2, the project team recorded 15 qualified solar leads and 5 solar appointments held.
- Sealed Home Services:
 - In Q2, the project team recorded 130 qualified Sealed leads, 63 assessments, 8 project sales.
- Marketplace Storefront Sales:
 - In Q2, the team recorded 1,719 orders for 8,554 light bulbs, 759 thermostats and 63 power strips. All purchases were made directly on the Marketplace Storefront. The Marketplace also generated 2,743 leads to Con Edison's Smart Thermostat program.

Digital Customer Engagement:

The online Marketplace has had 501,463 total visits and 1,109,737 page views since launch last June. This quarter, the number of visitors and page views on Con Edison's Marketplace increased significantly due to the expanded marketing activities, from 45,186 visitors last quarter to 278,010 in Q2; and total page views increased from 106,359 last quarter to 675,400. Marketing channels continue to be optimized and traffic levels are expected to exceed the target of 450,000 visits every six months.

Con Edison's Marketplace also raises awareness of other Con Edison programs and tracks actions taken by visitors. Since inception through Q2 2017, 2,743 smart thermostat shoppers on Con Edison's Marketplace Storefront sought out information on the Smart Thermostat program, and 5,174 Marketplace visitors have clicked through to Con Edison's large appliance rebate offers.

Today's Online Offers

Seller	Delivery	Full Price tax + shipping	Visit Store
SPONSORED			
	Free Delivery	\$716	Buy
	See store for shipping	\$720	Buy
	See store for shipping	\$720	Buy
	\$99	\$724	Buy
	\$59	\$756	Buy

Over 78 percent of customers who log into the Home Energy Report website take an action (e.g., check off a tip or make a savings commitment). Thirty-three percent of customers who log in check off a tip, and 59 percent of customers who log in start the online audit. This user-friendly audit helps customers understand what's using the most energy in their home so that they can focus their actions on behavior changes that will have the greatest impact.

DER Market Activation:

During Q2, Con Edison's Marketplace channeled customers to third-party retail websites nearly 2,602 times. The most popular Marketplace categories were air conditioners and refrigerators.

Energy Savings:

Since the launch of the behavioral Home Energy Report program, customers have saved over 25,753 MWh of electricity (June 2016 through June 2017). In Q2 alone, customers saved over 7,935 MWh with a 1.47 percent average savings rate.

Estimated indirect energy savings associated with Marketplace Storefront sales in Q2 are 4,683 MWh and 730,785 Therms on a lifetime basis.

Greenhouse Gas Emissions Reductions:

The behavioral and indirect energy savings through the Marketplace Storefront are estimated to have avoided 23,504,027 pounds of carbon dioxide, 301.39 pounds of methane and 33.12 pounds of nitrous oxide emissions in Q2. The behavioral program saved an estimated 9,917,163 pounds of carbon dioxide, 195.99 pounds of methane and 22.22 pounds of nitrous oxide emissions. The Marketplace Storefront contributed savings of an estimated 13,586,864 pounds of carbon dioxide, 105.4 pounds of methane and 10.9 pounds of nitrous oxide emissions.

2.1.4 Next Quarter Forecast

In Q3 2017, the Project will continue to distribute targeted offers to customers. In late August, the Project plans to add an estimated 20,000 customers to the program to account for customer attrition (move outs, customers going inactive, customers opting out). These customers will begin receiving targeted offers after their first report.

In September, a new DER partner campaign will begin promoting Mitsubishi electric heat pumps. Customers across the four different customer tracks will receive paper and digital, as applicable, communications. The team will continue to develop the creative campaign over this upcoming quarter.

The Sealed targeting offering creatives are being updated based on learnings from the field; the new designs are simplified to help customers understand how Sealed can specifically help solve home comfort problems.

Planned Q3 2017 activities for the Marketplace/Storefront include:




Launching the Solar experience on Marketplace (with partner PickMySolar), which will provide a guided, seamless experience to empower Con Edison customers to identify the most cost effective and well qualified local contractors, walk them through the vendor selection and contracting process, and provide a concierge-type service until installation is complete.










Focusing weekly / bi-weekly email campaigns on promoting specific products and deals sold on Storefront.

Expanding third-party marketing on the Marketplace beyond the initial partner (Appliances Connection) to other retailers and manufacturers.

Expanding the Smart Thermostat product offerings to include Nest, Ecobee, Sensi, Radio, Honeywell, LUX, and Lyric products.




Checkpoints/Milestone Progress

Checkpoint/Milestone	Timing*	Status
DER Sales	Phase 2 Midpoint / End	
Channel and Messaging Effectiveness: <i>Customer Motivation</i>	Phase 2 Midpoint / End	
Digital Engagement: <i>Integrated Online Experience</i>	Phase 3 start + 6 months	

Checkpoint/Milestone	Timing*	Status
Revenue Realization: <i>New Business Models</i>	Phase 2 Midpoint / End	  
Demand Side Management: <i>Customer Co-Benefits</i>	Phase 2 Midpoint / End	  
Referrals to Energy Efficiency Rebate Programs	Phase 2 Midpoint / End	  

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

Legend

 On Schedule	 Delayed w/out Major Impact	 Delayed or Stopped – Project Goals Impacted
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2.1.5 Planned Activities

2.1.5.1 DER Sales

Status: Green

Expected Target by Phase 2 Midpoint: 18,500 purchases

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

2.1.5.2 Channel and Messaging Effectiveness: Customer Motivation

Status: Green

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

Solutions/strategies in case of results below expectations: Evaluate results of the content and messaging effectiveness. First, evaluate potential changes in content or layout informed by A/B, or split, testing. A/B testing compares two

versions of a communication to see which one performs better. Second, evaluate responses by customer segment and assess possibility of customizing content by unique customer segment. Third, evaluate channel effectiveness and assess resource allocation between channels. If the expected target is missed, the Project team will evaluate the larger impact to the overarching goals of the Project.

2.1.5.3 *Digital Engagement - Integrated Online Experience*

Status: Green

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

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

2.1.5.4 *Revenue Realization: New Business Models*

Status: Green

Expected Target by Phase 2 Midpoint: \$484,000

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

2.1.5.5 *Demand Side Management: Customer Co-Benefits*

Status: Green

Expected Target by Phase 2 Midpoint: 500 MWh (Marketplace Storefront); 10,300 MWh (behavioral energy efficiency); 2.74 MW (behavioral energy efficiency); 5 percent lift in program participation

Solutions/strategies in case of results below expectations: Review balance of energy insights versus promotional content included in outbound content and

optimize as needed. If the expected target is missed, the Project team will evaluate the larger impact to the overarching goals of the Project.

2.1.5.6 Referrals to Energy Efficiency Rebate Programs

Status: Green

Expected Target by Phase 2 Midpoint: 10,300 click-throughs from Marketplace to large appliance rebate applications

Solutions/strategies in case of results below expectations: Evaluate the mix of marketing channels and shift strategies if optimization is needed. Add additional resources to the most effective channels or develop new marketing strategies. If the expected target is missed, the Project team will evaluate the larger impact to the overarching goals of the Project.

2.1.6 Changes to Project Design

Upgrades to the Marketplace will be made to integrate rebate processing capabilities to improve the end-to-end customer experience throughout the research, shopping and rebate process.

2.2 WORK PLAN & BUDGET REVIEW

2.2.1 Phase Progress

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

2.2.1.1 Updated Work Plan

Demonstration Project - Connected Homes Platform				2015		2016				2017				2018	
Activity No.	Activity Description	Status	Lead	Q3	Q4	Q1	Q2	Q3	Q4	Q1	Q2	Q3	Q4	Q1	Q2
1.0	Phase 0 - Project Development														
1.1	Project Management	COMPLETE	Con Edison												
1.1.1	Complete Implementation Plan	COMPLETE	Con Edison												
1.1.2	DPS review	COMPLETE	DPS												
1.2	Complete partner negotiations	COMPLETE	Con Edison												
1.2.1	Complete MSA with platform partner	COMPLETE	Con Edison/Opower												
1.2.1.1	Complete SOW with platform partner	COMPLETE	Con Edison/Opower												
1.2.1.2	Contract negotiations w/ DER partners	COMPLETE	Con Edison												
1.2.1.3	Define contact center solutions	COMPLETE	Con Edison												
2.0	Phase 1 - Project Launch														
2.1	Platform Configuration	COMPLETE	Con Edison/Opower												
2.1.1	Data acquisition	COMPLETE	Con Edison/Opower												
2.1.1.1	Complete historical data transfer	COMPLETE	Opower												
2.1.1.2	Configure and load historical and parcel data and prepare automatic	COMPLETE	Opower												
2.1.1.3	Incorporate third party and DER data	COMPLETE	Opower												
2.1.2	Program design and configuration	COMPLETE	Con Edison/Opower												
2.1.2.1	Finalize marketing, branding, and content materials	COMPLETE	Con Edison/Opower												
2.1.2.2	Define customer segmentation strategy and configure application	COMPLETE	Opower												
2.1.3	Implement Web, Marketplace, and Call Center tools	COMPLETE	Con Edison/Partners												
2.1.3.1	Configure Marketplace	COMPLETE	Enervee												
2.1.3.2	Configure Web Portal	COMPLETE	Opower												
2.1.3.3	Contact Center Integration	COMPLETE	Con Edison												
2.1.4	Quality assurance testing and go live	COMPLETE	Con Edison/Opower												
2.1.4.1	Conduct QA testing and receive final sign off	COMPLETE	Opower												
2.1.4.2	Customer service training	COMPLETE	Con Edison/Opower												
2.1.4.3	Deploy Web, Marketplace, print and mail Home Energy Reports	COMPLETE	Opower												
2.2	Ongoing Customer & Community Outreach	COMPLETE	Con Edison												
3.0	Phase 2 - Demonstration Implementation														

3.1	Project Management	IN PROGRESS	Con Edison												
3.1.1	Track program metrics	IN PROGRESS	Con Edison/partners												
3.1.1.1	Track digital and outbound engagement metrics	IN PROGRESS	Opower/Enervee												
3.1.1.2	Track energy efficiency savings	IN PROGRESS	Opower												
3.1.1.3	Report on DER sales	IN PROGRESS	DER Partners												
3.1.1.4	Conduct customer survey	IN PROGRESS	Opower												
3.1.2	Reporting and Evaluation	IN PROGRESS	Con Edison												
3.1.2.1	Deliver Quarterly Reports	IN PROGRESS	All												
3.1.2.2	Annual workshop with stakeholders	IN PROGRESS	All												
3.2	Delivery	IN PROGRESS	Con Edison/Partners												
3.2.1	Deliver core content to customers	IN PROGRESS	Con Edison/Partners												
3.2.1.1	Maintain Marketplace and Web Portal	IN PROGRESS	Opower/Enervee												
3.2.1.2	Maintain contact center solutions	IN PROGRESS	Con Edison												
3.2.1.3	Deliver outbound content	IN PROGRESS	Opower												
3.2.2	Phase in additional web functionality	IN PROGRESS	Con Edison/partners												
3.2.2.1	Additional appliance categories integration for Marketplace	COMPLETE	Enervee												
3.2.2.2	Marketplace launch Storefront and retailer API functionalities	COMPLETE	Enervee												
3.2.2.3	Implement Single-Sign-On	COMPLETE	Opower												
3.2.3	Launch DER targeted promotional messaging	COMPLETE	Con Edison/Partners												
3.2.3.1	DER program design and configuration	COMPLETE	DER Partners/Opower												
3.2.3.2	Deploy web, print and email-based promotions	COMPLETE	Opower												
3.2.3.3	Maintain contact center solutions for new customers	COMPLETE	Con Edison												
3.3	Ongoing Customer & Community Outreach	IN PROGRESS	Con Edison												
4.0	Phase 3 - Project Optimization														
4.1	Project Management	NOT STARTED	Con Edison												
4.1.1	Evaluate project rollout	NOT STARTED	Con Edison												
4.2	Implement competitive bidding	NOT STARTED	Con Edison												
4.2.1	Conduct RFI for additional DER partners	NOT STARTED	Con Edison												
4.2.1.1	Establish qualification criteria for DER partners	NOT STARTED	Con Edison												
4.2.1.2	Prepare RFI for additional DER partners	NOT STARTED	Con Edison												
4.2.1.3	Qualify potential additional DER partners	NOT STARTED	Con Edison												
4.2.1.4	Complete contract negotiations with additional DER partners	NOT STARTED	Con Edison												
4.3	Optimize Program	NOT STARTED	Con Edison/Partners												
4.3.1	Refine Program Design	NOT STARTED	Con Edison/Partners												
4.3.1.1	Refine DER Categories and Pricing	NOT STARTED	All												
4.3.1.2	Optimize Revenue/Benefit Opportunity	NOT STARTED	All												

■ = Completed Task
 ■ = In Progress Task
 ■ = Not Started Task

2.2.1.2 Updated Budget

Budget information is being filed confidentially with the Commission.

2.3 CONCLUSION

2.3.1 Lessons Learned

Through close DER observation of weekly email campaign metrics, the Marketing team has determined the optimal frequency of e-commerce oriented emails should alternate between weekly and bi-weekly, depending on special offers, in order to minimize end user email fatigue.

The team has also observed that campaigns for non-rebated products (e.g., power strips) performed significantly lower than campaigns for rebated products.

The additional traffic being driven to Marketplace and Storefront via the e-commerce campaigns is expected to be a significant and ongoing contributor towards meeting the Marketplace traffic objectives.

2.3.2 Recommendations

Moving forward, the team will be adjusting the Sealed marketing creatives to be more concrete and project centric, as well as shifting the targeted customer group more towards customers using more gas.

To ensure achievement of revenue objectives, the team will continue its focus on email campaigns for products scheduled to align with manufacturer promotions.

2.4 INCLUDED APPENDICES

Appendix A: Sample Revised Targeted Offering Paper Report for SunPower



Home Energy Report

We've put together this report to help you understand your energy use and what you can do to save. To view more of your energy insights, visit energyreports.conEd.com. If you have any questions about these reports you can contact us at 1-212-460-4738 or energyreports@conEd.com.

Find a list of rebates and energy-saving products and services you can buy.
➔ marketplace.conEd.com

Here's how you compare to neighbors



May 21, 2013 - Jun 21, 2013

This is based on 100 similar homes within approximately 6 miles. Efficient neighbors are the 20% who use the least amount of energy. See back for details.

😊 Great
☹️ Good
😞 Using more than average

30% less energy than efficient neighbors

Go Solar

Modernize your home with solar

Solar is trending in your area. It may be right for you. SunPower® panels feature sleek designs that complement your roof—and produce 60% more clean energy over 25 years in the same space than conventional panels.

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

SUNPOWER



Tips from efficient neighbors

📄 Check your air filters every month
Save up to \$105 per year

🌞 Raise your thermostat a few degrees in the summer
Save up to \$145 per year

Turn over ➔

Appendix C: List of Metrics and Results

Checkpoint	Category	Metric	Definition	Reporting Cadence	Results for Q2 2017 (not cumulative)
DER Sales: Market Animation and Customer Choice & Digital Engagement: Integrated Online Experience	Awareness	Customers aware of DER partners	Response to customer survey questions about awareness of DER offerings in Con Edison's territory	Annually	To be reported in Q3 2017.
		Total number of impressions	Total number of paper and digital communications sent to customers	Quarterly	858,216 total print and digital communications were sent to customers in Q2 2017. 341,776 of those communications were printed, and 516,440 were emailed.
		Open rates (Email Home Energy Reports)	Percent of customers who open email Home Energy Reports (eHERs)	Quarterly	On average, customers opened eHERs at a rate of 46 percent.
		Open rates (High Usage Alerts)	Percent of customers who open High Usage Alerts (HUAs)	Quarterly	On average, customers opened HUAs at a rate of 32 percent.
		Click through rates (eHERs)	Percent of customers who click on the link/s included in eHERs	Quarterly	On average, customers clicked-through from eHERs at a rate of 0.96 percent.
		Click through rates (HUAs)	Percent of customers who click on the link/s included in HUAs	Quarterly	On average, the click-through rate was 0.68 percent.
		Unique web visits	Number of unique customers who visit the web portal	Quarterly	The Marketplace had 278,010 unique visits.
	Leads and Acquisitions	Qualified solar leads generated	Number of qualified leads from the targeted offerings	Quarterly	15 qualified solar lead.

Checkpoint	Category	Metric	Definition	Reporting Cadence	Results for Q2 2017 (not cumulative)
		Solar installations reported	Number of installations	Quarterly	0 solar installations.
		Thermostats sold	Number of thermostats sold through the targeted offerings	Quarterly	759 thermostats sold.
		Recipients and controls	Number of leads and acquisitions among recipient customers and control customers	Quarterly	To be reported in Q4 2017.
Channel and Messaging Effectiveness: Customer Motivation	Partners	DER partners retained	Percent of DER partners who choose to continue with the targeted offerings	Annually	To be reported in Q3 2017.
	Customers	Positive customer experience	Percent of customers who respond positively to survey questions on their satisfaction with targeted offerings	Annually	To be reported in Q3 2017.
Revenue Realization	Total Revenue	Total revenue to Con Edison	Revenue gained through targeted offerings	Annually	To be reported in Q3 2017.
Demand Side Management: Customer Co-Benefits	Energy / Demand / Benefits	Energy efficiency savings	Energy savings generated by customers as a result of participating in the behavioral program	Monthly	7,935 MWh total in Q2: 1,951 MWh in April, 2,706 MWh in May, 3,278 MWh in June.
		Demand savings (MW)	Demand savings generated by customers as a result of participating in the program	Monthly	10.05 total MW in Q2: 3.9 MW in April, 3.4 MW in May, and 2.7 MW in June.

Checkpoint	Category	Metric	Definition	Reporting Cadence	Results for Q2 2017 (not cumulative)
		Indirect energy savings (Marketplace Storefront sales)	Total kWh savings from product sales from the Marketplace Storefront	Quarterly	Electric savings: 4,683 MWh, Gas savings: 730,785 Therms
		Reduction in greenhouse gas emissions	Greenhouse gas emissions reduction from product sales from Marketplace Storefront and the Behavioral Program	Quarterly	<p>23,504,027 lbs total CO2, 301.39 lbs total CH4, 33.12 lbs total N2O from both the Marketplace Storefront and Behavioral Program:</p> <p>Behavioral: 9,917,163 lbs CO2; 195.99 lbs CH4; 22.22 lbs N2O.</p> <p>Marketplace Storefront: 13,586,864 lbs CO2; 105.4 lbs CH4; 10.9 lbs N2O.</p>

Appendix C: Description of Phases

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