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BY DMM

August 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 Electric 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, 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 Q2 2024
Case No. 21-G-0073, 21-E-0074, 22-E-0064 & 22-G-0065

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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 detailed updates on the ten initiatives within the Strategic CX portfolio, now including the newly introduced CDG/Value Stack Customer Portal initiative. The report covers the status of each program within the portfolio, recent activities, costs (including budget versus actual spending and a breakdown of labor and non-labor expenses), cost savings and avoidance, non-financial benefits, upcoming activities, and 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 Q2 2024 Highlights

In Q2 2024, the program focused on deploying use cases in the Credit & Collections and Backoffice Product Oriented Delivery (POD) teams. The program also significantly improved its analytics platform capabilities and reorganized its development teams to support internal process improvement teams for the contact center, credit and collections, billing, and customer complaints. Below is an overview of the major initiatives completed in Q2 2024. The activities below exceeded what was reported as planned activities in Q1 reporting, speaking to the team's agility in addressing competing priorities while driving key initiatives across various domains.

- **Platform Enhancements:**
 - Enabled AI-powered code completion in Databricks which will increase productivity by providing intelligent code suggestions and reduce development time.
 - Designed Extract, Transform, and Load (ETL) orchestration improvements to use new Databricks capabilities that enhance data processing efficiency and accuracy by further automating data ingestion, improving troubleshooting of failed jobs, and contains a Databricks supported codebase.
 - Moved to standardized platform release schedule, improving system reliability and minimizing downtime.
 - Transitioned to Github for code repository management, leveraging its security features to identify vulnerabilities and enforce best practices.
 - Built Unity Catalog infrastructure to unify data governance solution, improving access control, data recovery, and collaboration across teams.
- **Process Improvement Teams:**
 - Conducted weekly analyses to improve call center operations and customer interaction efficiency.
 - Introduced new Call Center metrics reporting to further monitor and manage key drivers influencing the Call Answer Rate.
 - Created new methods to monitor and share statistics on CSR Occupancy, Average Handle Time (AHT), and Certain agent status codes.
 - Identified and initiated a Machine Learning (ML) use case to address PSC Complaints more effectively.
- **Credit and Collections Use Cases:**
 - Completed the first iteration of the field collections dashboard which is now used to optimize field collection processes, routing, and analyze failed customer visits.
 - Developed the baseline models, objection functions, and target variables for the machine learning based Payment Propensity analytics use case to predict customer payment behaviors.

- Deployed automated extract solution for the 60+ days in arrears Email Campaign. Analyzed potential cost and call volume impact associated with expanding email campaigns to a broader customer population. Key outcomes include:
 - 2.785 million emails sent to 1,260,000 customers with a 51.3% open rate
 - 126,000 payments totaling \$123.6 million (average \$44.30 per email sent)
 - 5,118,400 payment arrangements (PA) totaling \$18 million
- Multiple report pages were completed by the Central Credit dashboard and are now used by the Credit and Collections team to manage the Company's Credit portfolio more effectively.
- **Backoffice and Billing Use Cases**
 - Added the Unbilled Legislation page to the program's Operational Unbilled report to help track and prioritize Unbilled service agreements with potential write-offs.
 - Created the Executive Action Group report that displays cases and their relevant information to enable the team to work on customer complaints more quickly.
 - Created the Accounting Division report that provides the Accounting Division team with a customized view into their team's specific To Do's and their characteristics to increase efficiency in working down customer account backlogs.
 - Created the Premise Customer and Service Point report that consolidates customer, consumption, and premise information into one location to better serve customer investigations and improve premise, meter, and account updates.
- **Miscellaneous Use Cases**
 - Developed the Inbound Call Numbers (Speed Dials) report to assess CSR interaction details, including Interaction ID, timestamps, dates, and attempt counts linked to all speed dial codes. This report will help to identify the root causes of inbound calls to Con Edison numbers outside the usual 1-800-75-CONED.
 - Developed an additional First Call Resolution report, which offers insights into the performance of the Call Center, its individual sections, and employees in resolving customer issues or requests without a customer needing to call back.
- **Data Governance**
 - Established the Enterprise Data Governance Framework within the Customer Data Domain.
 - Created a Data Issues report to help track trends around data issues across sources, products, and teams.
 - Soft launched Microsoft Purview to catalog data to improve usability and searchability of the Customer Analytic Record.
 - Incorporated new Customer Domain level glossary into Microsoft Purview.
- **Generative Artificial Intelligence (AI) Call Listening Enablement**
 - Created a method to use notes placed on customer accounts to identify calls that would benefit from speech analytics (using generative artificial intelligence technologies) to better understand what happened on a customer phone call. These analyses have been used to assess collections activity linked to calls, PSC cases created shortly before or after calls, and identification of repeat callers.

2.1.2 Costs

Spend Category	June 30 YTD Spending	2024 Budget
O&M Labor (\$)	\$ 212,533.00	\$ 573,560.00
O&M Non-Labor (\$)	\$ 932,632.00	\$ 1,379,000.00
Capital Labor (\$)	\$ 677,229.00	\$ 2,877,904.23
Capital Non-Labor (\$)	\$ 6,955,911.00	\$ 12,752,092.90

2.1.3 Cost Savings & Avoidance

In Q2 2024, the Customer Analytics program began interviewing users of its newly delivered reports to assess the efficiencies gained and potential cost avoidance. These efficiencies are measured by comparing the use of these reports against the time-consuming manual processes previously used to investigate customer accounts or manage backoffice backlogs. The table below provides an example of how these efficiencies are being tracked. Please note that the hours saved are preliminary estimates, and are based on a small sample of users for each report.

Report	Anticipated Time saved per year (260 work days) <i>[preliminary, not representative of all users]</i>
Priority Customer Group	264 hours per year
Unbilled Legislation	240 hours per year
EAG Report	480 hours per year
Field Operations Efficiency V1	1,200 hours per year
Field Operations Efficiency V2	1,200 hours per year
Payment Propensity Model	600 hours per year

2.1.4 Non-Financial Benefits

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

In Q2 2024, the Company collected \$123.6 million in arrears through the arrears greater than 60 days email campaign, which was directly enabled by integrations, dashboards, and analytics produced by the Customer Data and Analytics program. The reporting associated with these analytics use case will also enable secondary analysis on the best days to communicate with customers, the campaign's impact on the call center, and how long it takes a customer to make a payment after receiving one of these emails.

2.1.5 Q3 2024 Project Activities

The focus for Q3 2024 will be on personalizing reports for various teams within the Company and advancing the Generative AI Proof of Concept (POC). Below are the key use cases and activities:

- **Use Cases:**
 - **Priority Customer Group Report:** Consolidates case and task information into a single dashboard, streamlining team collaboration and prioritization. This report saves time by centralizing information that was previously scattered across different areas in the Company's Customer Care & Billing system (CC&B).

- **Inactive Group Report:** A specialized To Do report displaying tasks associated with the Customer Operations Inactive Group, making it easier for teams to manage and prioritize work.
- **Premise EAG Report:** A customized version of the Premise Customer and Service Point Report, optimized for the Executive Action Group to better manage customer complaints.
- **Specialized Activities Report:** Provides a management summary by pulling data from existing reports, dashboards, SQL queries, and Oracle Utility Analytics, offering a comprehensive view of specialized activities.
- **Payment Propensity Models:** Ranks customers based on their likelihood to pay bills, allowing employees to use the model score along with other factors to effectively communicate and help prevent customers from falling further into arrears.
- **Operational Unbilled Report:** Enable automatic refreshes to streamline the process.
- **Generative AI Call Listening Enablement:** Continue development, with a focus on classifying and categorizing calls based on CSR notes, aiming to improve call comment classification.
- **Azure EDAP Platform Capabilities:**
 - Expand capabilities to enhance usability, enable generative AI, and increase the delivery of enterprise-grade analytics. Key initiatives include:
 - Developing data entity diagrams, conducting data quality analysis, implementing table usage analytics, improving Lakehouse monitoring, creating dynamic entity relationship diagrams, and enabling Databricks' new "AI/BI" functionality.
- **Data Governance Maturation:**
 - **CC&B Data Steward Onboarding:** Strengthen data governance by onboarding a dedicated steward.
 - **Metadata Parity:** Drive consistency between Microsoft Purview and Unity Catalog metadata.
 - **Data Issue Management:** Improve the process for managing data issues, enabling more efficient resolution and tracking.

2.2 DCX

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

DCX has aligned its vision, objectives, and themes to keep teams focused on 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 Q2 2024 Highlights

The program teams made significant strides in delivering enhancements and new functionality to the digital customer experience. The work completed in Q2 included the following updates to both Con Edison (CECONY) and Orange & Rockland (O&R) digital experiences, unless otherwise noted:

- **Web/My Account**

In the My Account experience within the Sitecore platform, new functionality was added to enable customers to authorize third-party data access for Share My Data (Green Button Connect) directly from the third-party sites, with confirmation on the utility side. This new experience will assist our efforts in the Green Button Alliance (GBA) certification for both CECONY and ORU. This aligns to the GBA specification and streamlines both third party and customer experiences. New functionality was also added to the Start Service flow for ORU customers, allowing them to pay deposit requirements when an account is established without a form of identification. This allows for more customers to serve digitally and aligns functionality already present for Con Edison. The Check Outage experience was also improved with new error messaging for specific periods when outage information is unavailable. In addition to the roll out of new functionalities, enhancements were made to several experiences for both CECONY and ORU, including:

- Share My Data page load times were significantly decreased and improvements were made to the overall user experience;
- Improvements were made to special character handling across the websites, allowing for better data collection and accuracy;
- Improved Error messaging for Start, Stop, and Transfer was improved, making these transactions clearer to prevent customer confusion; and
- Energy Affordability Program (EAP) eligibility logic was improved, preventing customers from completing an application if they are already enrolled in the EAP.

- **Sitecore/Platform**

The DCX program also continued to invest in upgrading its platform to an up-to-date, supported code base and versioning to maintain system reliability. The DCX architecture is currently powered by the .NET 6 platform and is due for an upgrade to the latest version, .NET 8; .NET 6 is scheduled for end of support by November 2024. This upgrade impacts 24 DCX services and will provide substantial improvements to performance, security, and available features; to date, 16 of the 24 impacted services have been upgraded. This upgrade is a strategic improvement to keep the DCX infrastructure competitive and secure at peak operating performance. The work involved with this upgrade is expected to be completed in Q3 2024.

Several other system improvements were made in Q2, including:

- Mitigated security vulnerabilities in the login experience by invalidating access codes after five unsuccessful attempts to log in;
- Implemented improved logic in the payment experience by preventing duplicate payments from being processed;

- Updated the Break Notice Agreement payment messaging to reflect same day payments and reduce duplicate payments from customers;
- Upgraded the Company’s outage management system to support a new version (2.6) that will replace the current system version of 2.3, which will reach end of life in 2024;
- Finalized the integration of Weglot, the Company's new translation tool, replacing Google Translate; and
- Made font updates to the website to accommodate new font styles and classes.

- **Native Mobile Applications**

In Q2, the mobile team added new functionality to the Pay My Bill user experience to better serve our different customer bases (residential/commercial) and introduced messaging to provide more transparency about fee waivers for credit card payments. An outage journey enhancement for Con Edison provides a more user-friendly experience around a wires-down condition, with backend logic improvements to reduce inaccurate downed wire reports. Additionally, the team implemented new designs of Mobile Surveys, utilizing a Qualtrics (survey tool) integration to improve customer feedback collection after bill pay. The new integration with Qualtrics will provide the Mobile team with enhanced metric collection, analyzation and trend identification to further improve our mobile experience. Lastly, new customer messaging was implemented that notifies customers when they cannot receive access codes for a given authenticated experience because there is no email address on file with the Company. This messaging is expected to improve the customer’s ability to self-serve and reduce related call center interactions.

2.2.2 Costs

Con Edison		
Spend Category	June 30 YTD Spending	2024 Budget
O&M Labor (\$)	\$ 392,729.00	\$ 10,484,570.00
O&M Non-Labor (\$)	\$ 3,777,572.00	
Capital Labor (\$)	\$ 545,235.53	\$ 14,056,000.00
Capital Non-Labor (\$)	\$ 5,038,217.31	
<i>Note: Capital underruns due to shift in focus on resources to CC&B implementation</i>		
O&R		
Spend Category	June 30 YTD Spending	2024 Budget
O&M Labor (\$)₂	\$ -	\$ 720,000.00
O&M Non-Labor (\$)	\$ 244,751.00	
Capital Labor (\$)	\$ 58,200.00	\$ 1,175,000.00
Capital Non-Labor (\$)	\$ 337,923.00	

1. In Q1, the DCX Con Edison budget inadvertently included the Virtual Assistant and Data Sharing initiative allocations. These allocations have since been corrected and are reflected in their respective program capital budgets.

2. In Q1, an error misclassified O&R's O&M non-labor cost as O&M labor cost. This mistake was identified and rectified during the Q2 spending verification process. Current O&R does not have O&M labor spending.

3. The overall budget for O&R capital includes both the DCX and Date Share capital, so the total capital budget has been revised accordingly. This adjustment pertains exclusively to O&R and not Con Edison.

2.2.3 Cost Savings/Avoidance

For Q2, 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 Q2 2024 improved the security, usability, and reliability of the Companies' digital platforms. The following metrics also provide perspective on customers' overall response to the DCX platforms.

2.2.4.1 Website Metrics Overview

Metric	Q3 2023 Con Edison	Q4 2023 Con Edison	Q1 2024 Con Edison	Q2 2024 Con Edison	Q3 2023 O&R	Q4 2023 O&R	Q1 2024 O&R	Q2 2024 O&R
Sessions	7.83M	7.71M	7.85 M	7.5M	755K	759K	684K	697K
Pageviews	29.38M	28.98M	28.72 M	30M	2.72M	2.75M	2.61M	2.4M
Average Bounce Rate	34.27%	33.61%	36.95%	30.89%	31.28%	34.61%	28.39%	31.60%
Average Page Load Time (Sec)	5.99	5.72	5.66	5.47	4.08	4.23	4	4.25
Registration	119,748	108,680	94,666	105,004	7,395	7,317	10,170	10,358
NPS Score	49	43	45	39.5	51	44	45	46

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	Q3 2023 Con Edison	Q4 2023 Con Edison	Q1 2024 Con Edison	Q2 2024 Con Edison	Q3 2023 O&R	Q4 2023 O&R	Q1 2024 O&R	Q2 2024 O&R
IOS Downloads	43,237	37,339	36,295	34,406	2,276	2,505	2,010	2,262
IOS Uninstalls	4,411	7,468	5,553	5,625	236	417	305	314
Android Downloads	13,712	14,230	12,517	9,982	1,118	1,245	1,168	874
Android Uninstalls	6,114	7,486	7,598	8,019	409	627	606	702
iTunes Store Rating	4.83	4.83	4.83	4.83	4.79	4.78	4.80	4.70
Google Play Store Rating	4.80	4.72	4.70	4.69	4.67	4.64	4.60	4.60

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

Metric	Q3 2023 Con Edison	Q4 2023 Con Edison	Q1 2024 Con Edison	Q2 2024 Con Edison	Q3 2023 O&R	Q4 2023 O&R	Q1 2024 O&R	Q2 2024 O&R
Start	50%	49%	66%	68%	6%	11%	47%	46%
Stop	52%	56%	62%	62%	15%	19%	45%	51%
Transfer	54%	53%	77%	78%	N/A	N/A	N/A	N/A
Report Outage	62%	42%	18%	34%	50%	52%	24%	43%

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

Metric	Q3 2023 Con Edison	Q4 2023 Con Edison	Q1 2024 Con Edison	Q2 2024 Con Edison	Q3 2023 O&R	Q4 2023 O&R	Q1 2024 O&R	Q2 2024 O&R
Start	109.8K	42.2K	34.1K	48.8K	1.1K	.78K	.80K	1.2K
Stop	61.8K	28.5K	18.8K	28.5K	1.3K	.56K	.45K	.70K
Transfer	8.4K	9.6K	4.6K	7.8K	N/A	N/A	N/A	N/A
Report Outage	51.2K	27.6K	15.8K	20.8K	27.5K	7.9K	11.1K	16.7K

2.2.5 Q3 2024 Projected Activities

The Q3 planned work below is applicable to both Con Edison and O&R, unless specifically identified otherwise.

- **Web/My Account**

DCX is working on a new Financial Advisor Tool that will allow customers to select an account to analyze and receive personalized results of eligibility on financial assistance programs. These include payment agreements, payment extensions, and budget billing. This new functionality will help customers self-serve these tools and should reduce call center interactions. The Payment Agreement experience will also be updated to allow customers to access signed Electronic Deferred Payment Agreement documents for up to two years on the web, providing a record of the agreement history they have. Budget Billing is receiving an update of billing detail visibility by providing access to the Budget Billing module directly from the My Account overview page, giving customers more transparency into this program. Further improvements to transparency will be realized by adding a personalized message to customer accounts enrolled in Autopay when those accounts make a post-dated payment; this will avoid any confusion about which bills are pending and which are paid. The Summary Billing customer journey will be enhanced by creating a pathway to a commonly used legacy portal for enrolled customers, which will allow streamlined access to historical billing data. Additionally, development of a new tool called the Rate Eligibility Screener is underway, allowing customers to self-serve and receive recommendations for eligible rates, based on their feedback in the tool. This is planned to be released in Q4 of 2024, with finalization of design and requirements throughout Q3. Lastly, for Web/My Account, an update to Single Sign-On messaging will be displayed for customers registering from an external application, reducing friction experienced by customers.

- **Sitecore/Platform**

With the end of support for .NET 6 approaching in November 2024, DCX will continue to upgrade to .NET 8 in Q3. As previously mentioned, this upgrade impacts 24 DCX services, promising substantial enhancements in performance, security, and efficiency. It also unlocks access to cutting-edge features, enabling the Company's systems to stay competitive, secure, and operative at peak performance. The upgrade process started in Q1 2024 and is expected to be completed by early Q3. Currently, 16 of the 24 services have been upgraded, with the remaining upgrades set to take place in Q3. DCX is also introducing improvements to our APIs for enhanced security. These updates better protect the Company from malicious actors, providing a safer and more secure environment. The current version of Android Firebase Cloud Messaging will be reaching the end of life and, therefore, DCX is migrating to the new version, FCM v1. This will enable uninterrupted service of the messaging system and will allow us to take advantage of new features and improvements. Similarly, we are updating Azure Cosmos DB .NET SDK from version 2 to version 3 due to discontinuing support from Microsoft on this service. The team is also working on new developments for a micro-service that will replace existing Single Sign-On endpoints. This will improve the system efficiency and eliminate relay dependencies, providing a simplified and scalable architecture. New endpoints will be introduced to help streamline the handling of customer privacy rights requests in preparation for integration with OneTrust's Privacy Rights Automation Module. Additionally, the team will deliver the Weglot integration, which is slated to replace the existing Google translate widget. Lastly for Q3, the team is designing and plans to deliver a webform to facilitate lead generation for ORU Energy Efficiency programs.

- **Native Mobile Applications**

The Mobile team is creating new functionality in Q3 that creates targeted customer messaging on individual pages within the Native Mobile experience. This will enable DCX to address issues across key areas of the app through targeted messaging on important issues such as data outages and energy usage. This aligns to similar functionality delivered on the My Account Experience for the Company websites. The team is also working on upgrading the customer experience for outage reporting that will enable predictive warnings for customers that already have an outage in their area. This enablement should increase customer confidence in the outage experience and reduce call center interactions. Enhancements are also being made to the Energy Affordability Program that enables the enrollment form on the native application. Customer messaging is being improved on the Electronic Deferred Payment Agreement (e-DPA) experience that more clearly communicates expected email confirmation timeframes for payment agreements upon signup. Lastly, the Mobile team is adding new functionality that enables automatic content changes on the app, rather than individual updates on a manual basis. This new functionality will also be used to develop a Spanish version of the app, allowing the mobile platform to reach more of our customer base in their native language.

2.3 Journey Mapping

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

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

2.3.1 Q2 2024 Highlights

Continuing the efforts from Q1, in Q2 2024, the program team shifted its focus to the payment journey for all customers, as this area presented significant pain points. The program included a comprehensive analysis of the current budget billing and payment arrangement services, where we identified and summarized customer pain points, examined underlying rules, and organized working sessions with relevant stakeholders to brainstorm and develop improvements.

One ongoing project involves mapping different budget billing thresholds for customers alongside data analysis, benefits, and risk assessment. These insights will enable well-informed, data-driven decisions to enhance the customer experience. The team also supported the DCX and CSR teams in actions related to revised bill design, aiming to reduce customer confusion during the 13th-month reconciliation period in the budget billing journey.

Additionally, the program team conducted a deep dive into the payment arrangement process to support efforts in improving arrears management. This included mapping out a holistic view of processes across

different channels (Website, VA, IVR, CSR) and summarizing pain points for potential improvements. The team also worked on the credit notice journey by mapping out all customer communications across channels for arrears collection. The program aimed to optimize the communication flow by analyzing call volume, payment data, and customer behavior patterns to refine each communication touchpoint.

Moreover, the team extended its expertise to support UI design work for the MS Purview data catalog. We partnered with the Customer Analytics team and Data Governance office to define various personas, conducting in-depth ethnographic interviews with customers to capture user expectations and identify practical features that can be integrated into the data catalog. The team also facilitated usability testing setups, ensuring existing features were optimized and aligned with user needs, enhancing the overall user experience.

2.3.2 Costs

Spend Category	June 30 YTD Spending	2024 Budget
O&M Labor (\$)	\$ 218,602.00	\$ 546,071.00
O&M Non-Labor (\$)	\$ 542,689.00	\$ 1,394,728.00
Capital Labor (\$)	\$ -	\$ -
Capital Non-Labor (\$)	\$ -	\$ -

2.3.3 Cost Savings & Avoidance

For Q2 2024, Con Edison has not accrued any measurable cost savings or cost avoidance.

2.3.4 Non-Financial Benefits

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

2.3.5 Q3 2024 Projected Activities

In Q3 2024, the team will focus on enhancing the following:

- **Small & Medium Business (SMB) Customer Journey:** Continuing customer research and data analysis will drive improvements tailored to the unique needs of SMB customers. This includes maintaining a partnership with the Call Center to review and update business rules for SMB service initiation. The initiative will culminate in design thinking sessions, bringing together subject matter experts and frontline employees to foster collaboration and innovation. Additionally, potential partnerships with the Leave on For Landlord program will be initiated during this phase.
- **Residential Customer Start Service Journey:** The team will partner with DCX to streamline the online sign-up process, addressing pain points such as long wait times and slow responses.
- **Payment Journey Map:** The team plans to conduct and analyze customer research to discern preferences, focusing on the desire for bill invoice numbers and the feasibility of autopay via debit card. They will map out the journey for the current budget billing plan and collection notice, working alongside the CORE team, Credit and Field Collection team, and Compliance team to address customer complaints and identify potential improvements.

2.4 CDG/Value Stack Customer Portal

As part of its Clean Energy Commitment, Con Edison is actively engaged in enhancing the experience for distributed generation (DG) customers, including customers that install solar photovoltaics and battery electric energy storage, where DG customers 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 customers also choose and are eligible to make their DG systems Community DG (CDG) projects, passing a portion of their VDER compensation on to other utility customers, referred to as subscribers. The annual growth in DG projects in Con Edison's service territory has been exponential in recent years, with continued market demand expected for the foreseeable future. To support this growth and meet customer expectations of accurate and timely VDER compensation, the Company is investing in a new platform for administration of VDER projects, called the Value Stack Customer Portal.

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

2.4.1 Q2 2024 Highlights

The project team planned and successfully deployed the CDG Value Stack Customer Portal in two phases. The April 2024 release made the internal-facing platform available to the VDER team. The June 2024 release made the external-facing portal available to VDER customers. The phased release approach enabled the project team to complete all planned development, internal approval, and change management activities. Internal communications, training, and office hours were provided to support platform adoption and engagement by the VDER team. External communications, public-facing webinars and a landing page on the website were provided to raise awareness and adoption of the portal by VDER customers. At the same time, the project team developed a prioritization framework and created a product roadmap to communicate immediate, near-term and long-term enhancement opportunities. Onboarding, billing and allocations are the opportunity areas targeted for the upcoming releases. In particular, planned platform enhancements will centralize onboarding and billing operations so the use of spreadsheets in these business processes can be eliminated. Moreover, additional automation around billing and allocation cases, including an integration with CC&B, are being explored.

2.4.2 Costs

Spend Category	June 20 YTD Spending	2024 Budget
O&M Labor (\$)	\$ -	\$ -
O&M Non-Labor (\$)	\$ -	\$ -
Capital Labor (\$)	\$ 2,459,644.00	\$ 4,500,000.00
Capital Non-Labor (\$)	\$ 134,420.00	

2.4.3 Cost Savings & Avoidance

For Q2 2024, Con Edison has not accrued any measurable cost savings or cost avoidance.

2.4.4 Non-Financial Benefits

The CDG/Value Stack Customer Portal successfully launched in late Q2 2024 for the benefit of both CDG host providers and third parties. Reports and dashboards provide visibility to VDER management on platform adoption and engagement trends. At the end of Q2 2024, there were about 70 registered portal users, and 35 cases managed by the VDER team with an average resolution time of less than one week. The Value Stack Customer Portal makes it easier for CDG hosts and authorized 3rd parties to do business with Con Edison.

2.4.5 Q3 2024 Projected Activities

The team's efforts in Q3 will remain on continuous CDG/Value Stack Customer Portal product development and quarterly roadmap re-prioritization. Current product development efforts are to further enhance the CDG project onboarding and billing processes. Moreover, a range of allocation file validations and related CX improvements are being incorporated into the platform, which are foundational for a later integration with CC&B. Roadmap re-prioritization efforts are hypothesizing what roadmap items and features would have the most immediate and largest impact on the bill credit accuracy and timeliness non-revenue adjustment (NRA) metrics. New roadmap items such as platform expansion to O&R and the introduction of a new case management process for Solar For All (SFA) are also being considered in re-prioritization efforts.

2.5 Virtual Assistant

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

2.5.1 Q2 2024 Highlights

- **System Upgrades and Performance Enhancements**

A major upgrade from .NET 6 to .NET 8 was successfully implemented, marking a significant step toward improved system stability and performance. This upgrade involved comprehensive testing and validation processes, including regression and smoke tests, to confirm the seamless operation of all features post-upgrade. These improvements are pivotal in maintaining a high-performance system capable of handling increasing demands. Such technology and code upgrades lead to better performance and efficiency, meaning faster, more reliable applications, which translates to improved user experience.

- **Bug Fixes and Issue Resolution**

In response to our increasingly diverse customer base, we enhanced the VA's language services to better serve non-English speaking customers. This included improvements and a particular focus on refining the bot's use of Spanish. These enhancements achieve a more inclusive service offering, making our services accessible to a broader audience.

The Virtual Assistant team also made significant strides in improving the authentication processes to guarantee a more secure and user-friendly experience. Key enhancements included handling invalid phone numbers, email addresses, and account numbers more consistently, with specific fixes to display different

error messages for various incorrect entries. This effort also included refining fallback mechanisms, such as providing accurate error messages in the correct language when users encountered issues with access codes. These updates help confirm that users receive clear guidance, and that the system can accurately handle diverse inputs.

Additionally, several improvements were made to the bot's conversation flow, addressing issues that could disrupt the user experience. Notable fixes included resolving errors that occurred when switching from the payment extension to the pay-as-guest option and handling invalid inputs at the login stage. These adjustments helped streamline the conversation flow, making it more intuitive and reducing errors for users.

Finally, to maintain a secure and efficient system, improvements were made to the logging and monitoring processes. The team addressed issues such as unnecessary logs in production environments and prevented sensitive information, like conversation IDs, from being improperly logged. These enhancements were crucial for maintaining data privacy and confirming that only relevant details were tracked and recorded.

- **Continued Utterance Development**

In the second quarter of 2024, our team continued to make substantial progress in expanding Watt's capabilities by including additional utterances. These additions are vital as they significantly improve the bot's ability to recognize and accurately respond to a broader range of customer queries. The expansion was particularly focused on the Start Service, Move Service, and Payment Agreement modules, confirming that common customer needs and inquiries are addressed more effectively.

- **Design Updates**

Replaced “Futura-Bold” font with “Lexend ExtraBold (800)” in two specific areas of the bot. The need for this change arose from an impending expiration of our license for the “Futura-Bold” font, necessitating the transition to be completed by the end of June 2024.

2.5.2 Costs

Spend Category	June 30 YTD Spending	2024 Budget
O&M Labor (\$)*	\$ -	\$ 32,831.00
O&M Non-Labor (\$)	306266.57	\$ 805,625.00
Capital Labor (\$)	\$194,374.98	\$ 718,218.00
Capital Non-Labor (\$)	\$796,299.16	\$ 3,111,781.00

* FTEs have been used on capital efforts and will transition to O&M at the closing of the year.

2.5.3 Cost Savings & Avoidance

For Q2 2024, Con Edison has not accrued any measurable cost savings or cost avoidance.

2.5.4 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.

2.5.5 Q3 2024 Projected Activities

In Q3, the VA team will focus on enhancing our customers' experience and improving the performance of the platform. Activities include:

- **Bug Fixes and Issue Resolution**

In Q3, the VA team will address several critical bugs impacting user experience and system functionality. Notable fixes will include resolving issues with the Chat transcript, which have caused deployment failures, and improving customer data handling within VA transcripts, particularly in scenarios involving live chat sessions. The team will also correct input validation and transaction processing errors in the Start Service module. These efforts will significantly improve the system's reliability and user experience, providing customers with consistent and accurate information.

- **User Authentication and Security Enhancements**

Improvements will be made to enhance user authentication processes and security. This includes refining the handling of invalid inputs during registration and login, such as issues with invalid email addresses and phone numbers. Additionally, measures will be taken to secure sensitive data, like user credentials and session information, and adequately protect this data so that it is not exposed in logs or error messages.

- **Improved Error Messaging and User Feedback**

Enhancements to error messaging and user feedback mechanisms will be implemented. The focus is on providing clearer messages when users encounter issues, such as invalid input errors or unavailable services. For example, updates will drive accurate system communication of errors in scenarios like submitting incorrect alternative billing addresses or dealing with invalid inputs in various forms.

- **Chit-Chat and Conversational Handling**

In September, we plan to further refine the system's handling of casual language and conversational nuances. These updates will certify that casual user interactions are correctly interpreted and routed to the appropriate responses, such as confirming actions, escalating issues, or providing information.

- **System Performance and Stability Enhancements**

Efforts to enhance system performance and stability, addressing issues like system exceptions, idle timeouts, and the robustness of the application during peak usage, will be performed in Q3. Planned updates for September will continue to improve load handling and maintain consistent response times, which are critical for maintaining a reliable user experience.

- **Bot Natural Language Upgrade**

The VA team is in the process of making an important transition due to the upcoming retirement of two key services currently in use: Azure LUIS and Azure QnA Maker. Azure LUIS (Language Understanding Intelligent Service) helps applications understand user commands, while Azure QnA Maker creates a

conversational layer over the chat data. LUIS will be retired on October 1, 2025, and QnA Maker will be deprecated on March 31, 2025.

To adapt to these changes, the team is moving to Azure Cognitive Service Language, a more advanced service that combines the functionalities of LUIS and QnA Maker, along with other language processing tools. This new platform will allow the Company to enhance its customer service operations with improved capabilities. The team has developed a strategy to support a smooth transition to this new service.

- **Advanced Conversational Capabilities**

The VA team plans to introduce more sophisticated conversational capabilities in Q3 2024. This includes development of features that enable Watt to handle freeform inquiries more effectively. The enhancements will allow the bot to direct customers to relevant web pages based on their queries, provide detailed, knowledge-based responses tailored to customer inquiries, and facilitate transactions within the bot. These improvements aim to offer a seamless and intuitive user experience, making interactions more engaging and informative.

The upcoming features will include handling high bill complaints by providing more detailed explanations and options, and assisting customers in ending their energy service contracts under specific circumstances, such as cases involving domestic violence. Additional enhancements will support the Energy Affordability Program and address gas inspection questions. These features aim to address specific customer needs, improving overall satisfaction and service efficiency.

This work was originally planned for Q2 but was shifted to Q3 to allow additional time for development and testing.

2.6 Billing and Payment Enhancements

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

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

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

2.6.1 Q2 2024 Highlights

In Q2, the Billing and Payment team continued focusing on delivering its three key initiatives. Below is the team achievement for the quarter:

- **Neighborhood Kiosk Program**

To enhance accessibility for unbanked, low-income, and small business customers, the Company aims to strategically place payment kiosks closer to their residences and workplaces. These modern payment kiosks will accept cash, checks, and credit/debit cards and will allow customers to create payment agreements. These transactions will be processed in real-time, eliminating the previous one to three-day delay experienced before CC&B implementation. In Q2, the team continued evaluating the latest vendor equipment for both indoor and outdoor placement, functionality, and ease of integration to select the most advanced system available. From the thorough evaluation, Dynatouch met the technology requirements by accepting cash, check, and debit card payments, offering customer-friendly features such as easy-to-navigate large display screens and the ability to video conference a Customer Service Representative if help is needed. Based on this, the Company is moving forward with the negotiation process with Dynatouch.

- **More Digital Payment Options**

To continue progress toward providing customers with additional payment options in our customer-facing systems, including PayPal, Venmo, and other emerging apps, the Billing and Payment team reviewed the Request for Proposal (RFP) for Billing & Payment Services, which was sent to several qualified vendors and should be awarded by the end of Q3 2024. In collaboration with Supply Chain, the team will evaluate and compare the services offered by these vendors. The team also coordinated with DCX for design and project planning and is on track to complete this phase of the initiative by the end of Q3 2024.

- **Video Communication**

The Company conducted an online community survey among Con Edison Community Members (both residential and commercial) to gauge customer interest in utilizing personalized videos to understand and enroll in eligible Billing & Payment programs and services. A total of 282 customers participated in the survey. There was overwhelming customer appreciation for the personalized videos, finding them clear, appealing, and informative. Based on this feedback, in Q2, the company enhanced the content of personalized videos for customers enrolling in the Paperless Billing, Budget Billing, and Auto-Pay programs. Additionally, targeted email notifications were designed to provide customers with easy-to-understand language about each program.

2.6.2 Costs

Spend Category	June 30 YTD Spending	2024 Budget
O&M Labor (\$)	\$ -	\$ 400,000.00
O&M Non-Labor (\$)	\$ 13,600.00	
Capital Labor (\$)	\$ -	\$ 300,000.00
Capital Non-Labor (\$)	\$ -	\$ 700,000.00

2.6.3 Cost Savings & Avoidance

For Q2 2024, Con Edison has not accrued any measurable cost savings or cost avoidance.

2.6.4 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.

2.6.5 Q3 2024 Projected Activities

During Q3 2024, the team will focus on the following activities:

- **Neighborhood Kiosk Program:**

Now that the Company has identified Dynatouch as a suitable vendor for its kiosk initiative, the team will conduct an in-depth evaluation of their equipment and software solutions for customer ease of use, reliability, and added features, such as support for multiple foreign languages and video conferencing capabilities. The objective of the in-depth evaluation is for the team to verify that Dynatouch's equipment complies with all our specifications.

- **More Digital Payment Options**

In Q3 and Q4 2024, the team will focus on completing the RFP review and will begin design and project planning. This will involve collaboration across Strategic CX program initiatives, including coordination with DCX. The Company aims to finalize the design and project planning phase by the end of Q4 2024.

- **Video Communication**

In Q3, the team will pilot low-volume email campaigns and monitor customer behavior. They will assess the effectiveness of these campaigns in encouraging enrollment in Billing and Payment programs and services and will make any necessary adjustments.

2.7 Back Office Automation & Agent Tools

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

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

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

The Customer Experience (CX) Platform is a PEGA software platform with robust case management and workflow management solutions. The platform was first deployed at Con Edison in 2017 to help manage customer field appointments and has grown to include gas service line safety inspections, digital field forms, meter inquiry request forms, the shared meter appliance usage calculator, PSC complaints and small claims totaling more than \$3,000, and Life Support Equipment (LSE) outage communications. In

2024, the Company plans to enhance the CX platform to support the Energy Assistance Program (EAP), case management for inactive gas accounts, case management for non-communicating AMI meters, and Personal Service automated workflow and case management tracking and reporting.

From 2020 to 2023, the Company developed, implemented, and refined an automated process to communicate with customers regarding gas service line inspections. As of Q4 2023, this process now incorporates a dashboard feature built using the PEGA software, facilitating rapid identification of target customers and enhancing reporting capabilities. This project significantly improved the Company's capacity to conduct on-site inspections, especially for customers who fail to grant access for inspection. Moreover, the automated process allows for swift action, including the possibility of service termination for customers who repeatedly refuse to cooperate. In 2024 and 2025, the Company plans to integrate this automated process with the new Gas Information System and explore further enhancements for the tool.

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

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

2.7.1 Q2 2024 Highlights

In Q2 2024, the Back Office Automation and Workforce Management team's primary focus was on advancing RPA capabilities, refining KA processes, and enhancing customer experiences through the PEGA CX platform. Key accomplishments include:

Robotic Process Automation

Successfully developed and implemented the following ten Robotic Process Automation (RPA) processes to validate billing rates, thereby eliminating manual steps and enhancing consistency and accuracy:

1. **Annual Rate Adjustments** for Electric, Gas, and Steam services.
2. **Trade and Customer Information System (TCIS)** process automation.
3. **Value Stack Interval** automation for both CECONY and O&R.
4. **Value Stack** process for CECONY.
5. **Gas Weather Normalization** automation.
6. **Market Supply Charge (MSC) Forecasted** rate validation.
7. **ESCO Price To Compare (PTC)** billing process.
8. **Power Authority of the State of NY (PASNY) Gross Receipt Tax (GRT)** rate automation.
9. **Purchase of Receivables (POR)** for Electric and Gas services in CECONY.
10. **Clean Energy Standard Delivery Surcharge (CESD)** billing.

The team also developed and implemented an RPA process for Meter Exchange (Field Activity Completion). This automation enables the completion of meter exchanges even when meter readings are unavailable at the time of exchange, allowing for timely billing. Additionally, the team has made significant progress in planning and developing two further automations: Start/Stop Service Field Activities and To-do's Work Exceptions processes.

Knowledge Advanced (KA)

Successfully developed or enhanced and deployed the below items:

- **Reporting Dashboard:** Expand the dashboard's capabilities to provide more real-time analytics.
- **Developed and deployed KA Interface for O&R CSRs** for ease of use and efficiency in training materials.
- **Functional and Technical Designs:** Continuously iterate on the designs based on user feedback and performance data. Emphasize the adaptability of the platform to meet evolving needs.
- **Search Function:** Enhance the search functionality with advanced filters to deliver more accurate and relevant results. This improvement reduces search times and decreases clicks.
- **Governance Strategy:** Develop a governance framework that outlines roles, responsibilities, and processes for content management. Include best practices for content creation and maintenance.

PEGA Customer Experience Platform

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

2.7.2 Costs

Spend Category	June 30 YTD Spending	2024 Budget
O&M Labor (\$)	\$ 325,920.00	\$ 612,000.00
O&M Non-Labor (\$)	\$ 1,208,764.00	\$ 3,888,000.00
Capital Labor (\$)	\$ 22,824.00	\$ 972,000.00
Capital Non-Labor (\$)	\$ 392,696.00	\$ 1,400,000.00

2.7.3 Cost Savings & Avoidance

In Q2 2024, Con Edison did not accrue any measurable cost savings or cost avoidance.

2.7.4 Non-Financial Benefits

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

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

2.7.5 Q3 2024 Projected Activities

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

Robotic Process Automation: Continue developing the eight RPA processes that were started in Q2 2024
Complete phase 2 of the Start/Stop Service Processes to allow for:

- SSFTL - Start - Phase 2 - Estimating the reads in cases with missing reads in Meter Data Management System (MDMS) for Move ins and Move outs
- SSFTL - Stop - Phase 2 - Estimating the reads in cases with missing reads in MDMS for Move ins and Move outs

Optimize RPAs for the below processes:

- ORU-Sales Tax
- ORU-DLM Standby
- ORU-EVMRS Standby
- ORU-ESS Standby
- ORU-VDER Standby
- ORU-Elec ECA Standby
- ORU-VDER Standby
- ORU-Mass Market Standby
- ORU-Base_Rates_Elect Standby
- ORU-GSC
- Gas Arrear management program (AMP)
- Electric Arrear management program (AMP)
- CECONY-DLM Standby
- CECONY-VDER Standby
- CECONY-DRS Standby
- CECONY-EVMRS Standby
- CECONY-ICAP Standby

Knowledge Advanced – Focus Areas:

- **Update the Reporting Dashboard:** Incorporate new metrics and visualizations that provide deeper insights into end-user performance. This could involve tracking user engagement with the content, identifying popular topics, and monitoring the effectiveness of search functionalities.
- **Develop New Content with Operating Groups:** Collaborate with different operating groups to identify gaps in the current content offerings. This could include creating specialized materials for unique user roles or industry-specific knowledge that supports user tasks and decision-making.
- **Refine Functional and Technical Designs:** Continuously refine the designs to meet the evolving needs of users. This could involve user feedback sessions, A/B testing of new features, and regular updates to the user interface for improved usability.

- **Enhanced Platform Support:** Strengthen the support framework for the platform by implementing a more robust helpdesk system, creating detailed user guides, and offering training sessions to help users fully leverage the platform's capabilities.

PEGA Customer Experience Platform – Focus Areas:

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

2.8 Outage Communications

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

2.8.1 Q2 2024 Highlights

For Q2 2024, the Outage Communication team focused on three key initiatives.

- **Emergency Customer Messaging Center**

Working with vendor Message Broadcast, the team released the second phase of development of the new Emergency Customer Messaging Center (ECMC) platform, which centralizes customer, asset, and system operations information and enables timely communication with customers. On June 28, 2024, the team released Phase 2, providing the Company with the ability to initiate ad-hoc messaging campaigns or pre-weather events preparation messages through the ECMC platform, with a user-friendly interface that reduces the number of steps required for campaign initiation, resulting in faster message delivery. One notable feature included in Phase 2 is the “Text-to-Speech” technology, through which written scripts are converted into very clear voice messages with the help of Artificial Intelligence expediting the preparation and delivery of urgent and important voice messages to customers.

As part of the release, the team held new feature training sessions for employees responsible for outage communications. Additionally, the team held workshops with Message Broadcast to define the scope of work in preparation for future development of Phase 3.

- **Program Management**

In Q2 of 2024, the new Outage Communications section continued the work to establish a solid foundation for the program. The section recruited, hired, and onboarded a second full-time employee, responsible for business and product analysis. This role will provide full support to the section manager and the product owner on all aspects of maintaining the program’s initiatives and managing projects’ development. The team also started the process of creating a comprehensive library of documents for knowledge management, developing new Standard Operations Procedures, User Guides, Playbooks and other training material.

- **Expansion to O&R**

The Outage Communications team continued to work with our internal partners and vendor Message Broadcast on the development of an Outage Communications Program for Orange & Rockland, which will modernize the way it provides information and updates to its almost 400,000 customers during outages and emergencies. The second quarter was dedicated to end-to-end user testing of the entire program, which is scheduled to launch by the end of September 2024.

- **Outage Communications Enhancements for Gas Customers**

The team continued the discovery work that will lead to an overhaul of outage and emergency communications for gas customers. During Q2, the team completed two workshops involving multiple internal organizations to ideate future improvements. As a result, a full deck of recommendations was provided to Gas Operations’ managers.

- **Storm Support**

The team also supported two different Class 2 Incident Command System (ICS) events – a windstorm in April 2024 and a heatwave in June 2024 – sending a total of 3.8 million text messages to customers in impacted areas to prepare them for the bad weather and remind them that they should report any service interruptions by replying “OUT” to the text from their phones.

2.8.2 Costs

Spend Category	June 30 YTD Spending	2024 Budget
O&M Labor (\$)	\$ 180,768.00	\$ 300,000.00
O&M Non-Labor (\$)	\$ 965,170.00	\$ 1,300,000.00
Capital Labor (\$)	\$ 164,698.00	\$ 200,000.00
Capital Non-Labor (\$)	\$ 390,374.00	\$ 1,400,000.00

2.8.3 Cost Savings & Avoidance

For Q2 2024, Con Edison has not accrued any measurable cost savings or cost avoidance.

2.8.4 Non-Financial Benefits

There are several non-financial benefits provided to customers by the Outage Communications Program. For Example: In Q2, Con Edison customers experienced two Class 2 weather-related events that resulted in more than 54,000 outages. Customers with up-to-date contact information received proactive emails and text messages, preparing them for the upcoming storms. Customers were encouraged to use digital channels for reporting outages, focusing on a “Mobile First” approach and prioritizing text messages based on customer preferences. Due to the Company’s continuous efforts to encourage customers to report outages, more than 17,000 customers reported interruption of services during Q2. The Outage Communications Program’s commitment to convenience has resulted in over 89% customer satisfaction in outage communication-focused surveys following service restoration.

2.8.5 Q3 2024 Projected Activities

In Q3 2024, the Outage Communications team is set to achieve the following milestones across two key initiatives:

- **Emergency Customer Messaging Center becomes Outage Communications Messaging Center**

The team will work on the next phase of our large capital project, beginning the work to expand the ECMC platform into a comprehensive Outage Communications Messaging Center. The plan, now that the team has a new user-friendly web platform that allows internal employees to manage the preparation and execution of Ad Hoc Messaging, is to continue building it to incorporate other portions of the Outage Communications Program. In this Phase 3, the team will deliver the development and integrations needed to introduce the Customer Contact Masterfile into the portal and start the work to include the pre-weather event text message campaigns into the new interface. Once this work is completed, these pre-storm campaigns will benefit from the new efficiencies of the platform, which eliminates steps and reduces the time needed to prepare and deliver messages. Following comprehensive User Acceptance Testing, the completion and release of this feature is scheduled for the end of Q3.

- **Large Survey with Outage Customers**

In Q3, the team will start preparing a large study with customers who experienced outages in the recent past. The goal is to survey close to 500 account holders to understand their experience and uncover any opportunities to improve the Outage Communications Program. This is part of the Company's continuous effort to listen to the voice of the customer and collect insights to deliver projects and services that meet customer needs. The study will be prepared in Q3, but its execution is planned for the beginning of Q4, following hurricane season.

2.9 Privacy Readiness

The Privacy Readiness Program is a comprehensive initiative designed to enhance the Company's privacy program in response to growing customer expectations, Company risk management priorities, and current and evolving legal obligations around the collection, storage, processing, and sharing of personal information (PI) and personally identifiable information (PII). These efforts increase customer trust, mitigate risk, enable privacy compliance, shift Company culture around how PI/PII is managed and protected, and strengthen the Company's ability to evolve through the clean energy transition as more data is shared.

The program drives the Company's ongoing compliance with current legislation and federal mandates, including the Federal Trade Commission's (FTC) Controlling the Assault of Non-Solicited Pornography and Marketing (CAN-SPAM) Act and the Federal Communication Commission's (FCC) Telephone Consumer Protection Act (TCPA). In addition to enforcing CAN-SPAM, the FTC also continues to take action against companies that have not demonstrated adequate protection of consumers' personal data, where penalties often carry significant reputational and financial fines.

Beyond meeting current requirements, comprehensive privacy laws have been enacted in more than a dozen states in recent years, including Connecticut and New Jersey, with pending legislation in more than ten other states, including New York. Further, a new federal privacy bill – the American Privacy Rights Act – was introduced in April 2024. The draft represents a significant bipartisan effort to establish a comprehensive federal privacy framework in the United States to unify the existing patchwork of state privacy laws. Once implemented at the state and/or federal levels, these bills will have wide-ranging implications for how the Company collects, uses, and protects personal data. Continuing and scaling the Privacy Readiness Program is central to the Company's strategy to proactively plan for this impending legislation while also mitigating and improving its privacy risk posture.

While the Company has made strides in enhancing its privacy practices over the last five years, the task ahead necessitates establishing a holistic framework and structure to efficiently grant customers the rights mandated by regulations, benchmarking against privacy programs implemented at other companies around the world who are now successfully addressing consumer privacy rights and are able to demonstrate their organizations' compliance. The Company is investing in computer software and hardware to provide a robust technology infrastructure to support compliance with these current and evolving laws. The envisioned technology ecosystem will monitor the types of personal data collected, providing individuals with comprehensive "data subject access rights (DSAR)," 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 allow for a systematic approach to managing data subject rights.
4. Secure mechanisms to verify the identity of data subject right requestors.
5. Customer-facing software and workflows to allow customers to make data fulfillment, modification, and deletion requests seamlessly.
6. Integration of consent management with data subject rights management to allow for seamless integration between consent management and data subject rights processes.
7. Mechanism to establish a streamlined process for collecting, managing, and fulfilling user requests.

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

2.9.1 Q2 2024 Highlights

In the second quarter of 2024, the Privacy Readiness Team continued its work to establish a successful, efficient, and mature privacy operations function that drives changes in Company culture around the handling of PI and PII.

This work is centered around the implementation of OneTrust as a comprehensive privacy management platform for the Company, advanced through the following workstreams. Across Q2 these workstream-specific activities occurred in parallel to broader program initiatives, such as conducting stakeholder "road shows" to build Company-wide privacy awareness.

Data Discovery and Classification

- Continued and scaled data scanning in the production environment to identify personal information data elements across enterprise-wide assets – making significant strides in establishing OneTrust as a privacy "source of truth" across the Company.

Data Catalog

- Began data terms reviews with application/asset owners, conducting "term review" meetings to review the results of completed data scans and validate PI/PII database fields.

- Continued to collaborate across the Enterprise Architecture and Microsoft Purview teams to develop an advanced governance model that allows for transparent data access, visibility into data usage, and incorporation of data lineage and retention with remediation capabilities.

Privacy Process Automation

- Continued to populate a comprehensive, Company-wide privacy application inventory in OneTrust – informed by EY Phase 0 audit scans and including results of a PI survey completed in Q1 2024 across over 800 system owners – to help define the scope of PI applications across the Company.
- Continued the development of a robust mechanism for the intake and management of individual privacy rights by initiating outreach to PI source system owners to define the scope of PI within their systems, and to build integration roadmaps that will enable future automated DSAR fulfillment.
- Completed testing and integration between OneTrust with ServiceNow (Company IT asset repository) to have an up-to-date record of all systems. This integration will support additional modules (Data Discovery, Data Catalog, etc.) and safeguard OneTrust’s positioning as the Company’s privacy management source of truth for the inventory of systems containing personal information and the mapping of what types of personal data each system contains.
- Completed designs to pilot automated data retrieval with two key customer information systems.
- Continued to test and plan for future legal and compliance DSAR requirements, such as by mapping out possible manual fulfillment workflows and refining privacy rights request webform fields and workflows.

Privacy Impact Assessment

- Launched a Privacy Threshold Assessment (PTA) pilot to incorporate this new assessment and revamped privacy review process into the Company’s existing end-to-end technical review process for all new IT requests. The addition of this new privacy assessment helps drive a “Privacy by Design” culture where privacy protections and controls are seamlessly integrated into all Company programs, systems, and processes from the earliest stages of project planning (pre-development), rather than later when privacy pitfalls can have greater dependencies and implications.
- Completed the drafting, design, and user acceptance testing process for the Privacy Impact Assessment (PIA), incorporating key considerations from evolving privacy legislation and broadening questions to encompass Company-wide data sharing and data governance priorities.

Consent and Preference Management

- Formalized business requirements for building a universal preference center that streamlines and centralizes customer opt-in/opt-out experiences and improves enterprise-wide risk management and compliance.
- Continued to develop a consent and preferences inventory, enhancing understanding of customer touchpoints and preferences across vendor and Company-owned consent collection points. This work requires close collaboration with internal and vendor stakeholders responsible for capturing communications consent.
- Aligned across legal and privacy compliance stakeholders on Company definitions of cookie categories (strictly necessary, functional, performance, social media, and targeting).
- Continued to advance the cookie categorization process with public-facing domain/site owners across the enterprise.

2.9.2 Costs

Spend Category	June 30 YTD Spending	2024 Budget
O&M Labor (\$)	\$ -	\$ 700,000.00
O&M Non-Labor (\$)	\$ 271,091.00	
Capital Labor (\$)	\$ 365,306.00	\$ 5,000,000.00
Capital Non-Labor (\$)	\$ 3,327,780.55	

2.9.3 Cost Savings & Avoidance

For Q2 2024, Con Edison has not accrued any measurable cost savings or cost avoidance.

2.9.4 Non-Financial Benefits

By developing key functionalities such as the Data Subject Access Rights (DSAR) Request 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.

2.9.5 Q3 2024 Projected Activities

In Q3 2024, the Privacy Readiness team plans to undertake the following activities. As in previous quarters, these activities are designed to enhance and streamline data discovery, cataloging, privacy process automation, privacy impact assessments, and consent and preference management.

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

- Migrate OneTrust to the production environment in alignment with the program’s environment management and usage strategy (development, UAT, and production).
- Refine vulnerability management workflows in collaboration with IT and cyber teams.
- Strategically establish governance processes and resource plans to sustain future “steady state” privacy operations following OneTrust go-live.

Data Discovery and Classification

- The team will continue and scale data scanning in the production environment to identify personal information data elements across structured, unstructured, and semi-structured assets enterprise wide. This initiative will support data classification, privacy rights fulfillment, and the systematic cataloging of data and assets.
- The team will develop a scan strategy to begin planning efforts for future privacy practices post OneTrust go-live.

Data Catalog

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

Privacy Process Automation

- The team will complete two key in-progress integrations, and advance roadmap planning to develop a robust process and prioritized integrations scope for the intake and management of individual privacy rights.

Privacy Impact Assessment

- The team will continue the pilot processes for the Privacy Threshold Assessment and scale this pilot to include a revised Privacy Impact Assessment – sunsetting the old assessment in favor of an improved privacy review process. This work includes migrating both assessments from a test to production environment in OneTrust.

Consent and Preference Management

- The team will continue roadmap development alongside internal and vendor stakeholders to inform the creation of a universal consent and preference management center.

2.10 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 APIs to retrieve the same billing and interval data available in Share My Data without the upfront consent process.
- **ESCO API:** Similar to Large Customer API, ESCO API allows energy services companies to retrieve customer billing and interval data via APIs for customers with presumed consent under the PSC's Uniform Business Practices.
- **My Account Data Presentment ETL:** The ETL (Extraction, Transformation, and Load) process supports the customer's usage, cost, and interval charts displayed in the My Account portal. This process, which includes several business rules, is responsible for extracting, cleaning, and reformatting data from its original state to the required format for integration with other systems and for the purpose of data analytics. This supports various platforms within the authenticated experience, such as My Account and Third Party My Account (TPMA).

2.10.1 Q2 2024 Highlights

During the second quarter of 2024, the Company remained dedicated to the goal of having an environment available and actively prepared for preliminary testing in collaboration with the Green Button Alliance. We have successfully connected the Green Button Connect My Data's Testing application to Con Edison's Green Button Connect platform. The Green Button Alliance has begun their internal testing and is actively sharing any discrepancies reported through their testing application. Additionally, as of this report, we have completed our first round of pre-certification testing with minimal issues identified. Concurrent with our testing efforts we have continued communications with third-party vendors to align on migration plans. We have reached out to gather information on their timelines to better gauge their availability for

migration. Additionally, we have received responses from several third parties committing to the migration in Q3 2024, while others have requested to start the migration at a later date, after the demand response period is over. In parallel, our internal front-end user experience team continues to address any issues cited by the Green Button Alliance that require modifications. The objective is that this new flow strictly adheres to the Green Button standard, thereby enhancing the overall user experience and compliance.

Our commitment to platform stability remains paramount. The team successfully addressed 20 bugs this quarter, thereby enhancing the robustness of the platform. Furthermore, we rolled out four new features aimed at refining the operational efficiency of the system and preparing for the release of the new platform:

- Replace Memory Cache with Redis Cache: Implemented for all GBC APIs to improve performance and reliability.
- Distinguish Between GBC Certification and Legacy GBC for Batch Webjobs: Enhanced the system to better manage batch processing jobs.
- Update SBLI Codes to Identify Solar Accounts: Improved identification and management of solar accounts.
- Create Configurable Setting to Enable/Disable Monthly Usage Reports: Added flexibility for report management.

These enhancements contribute to the stability and performance of the Share My Data platform while anticipating and responding to the evolving needs of users and stakeholders. Overall, the second quarter of 2024 has been marked by noteworthy progress in testing, vendor communication, and platform enhancements.

2.10.2 Costs

Spend Category	June 30 YTD Spending	2024 Budget
O&M Labor (\$)	\$ 25,175.00	\$139,291
O&M Non-Labor (\$)	\$ 418,433.00	\$853,483
Capital Labor (\$)	\$ 107,276.00	\$331,859
Capital Non-Labor (\$)	\$ 794,293.00	\$2,168,141

2.10.3 Cost Savings & Avoidance

The Data Sharing Program had no realized or measurable cost savings and avoidance in Q2 2024.

2.10.4 Non-Financial Benefits

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

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

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

2.10.5 Q3 2024 Projected Activities

During the first half of 2024, the Customer Data Sharing Program set out to enhance the Share My Data platform to align with the Green Button Alliance's national standards. The team will look to complete the certification process in Q3 2024 and begin the migration of the 40+ active third parties on the platform to the updated certified offering. Additionally, the team will begin planning the next phase of enhancements to align the large customer API offering to the GBC certified schema and other priority work. The next phase is planned to start in Q4 of 2024.

3 Strategic CX Portfolio Cost Summary

3.1 Capital Spending

Program	June 30 YTD Spending	2024 Budget
Customer Data & Analytics	\$ 7,633,140.00	\$ 15,629,997.13
DCX	\$ 5,583,452.84	\$ 14,056,000.00
Journey Mapping	\$ -	\$ -
CDG/Value Stack Customer Portal	\$ 2,594,064.00	\$ 4,500,000.00
Virtual Assistant	\$ 990,674.14	\$ 3,829,999.00
Billing & Payment Enhancement	\$ -	\$ 1,000,000.00
Back Office Auto & Workforce Management	\$ 415,520.00	\$ 2,372,000.00
Outage Communications	\$ 555,072.00	\$ 1,600,000.00
Privacy Readiness	\$ 3,693,086.55	\$ 5,000,000.00
Customer Data Sharing	\$ 901,569.00	\$ 2,500,000.00
Total	\$ 22,366,578.53	\$ 50,487,996.13

3.2 O&M Spending

Program	June 30 YTD Spending	2024 Budget
Customer Data & Analytics	\$ 1,145,165.00	\$ 1,952,560.00
DCX	\$ 4,170,301.00	\$ 10,484,570.00
Journey Mapping	\$ 761,291.00	\$ 1,940,799.00
CDG/Value Stack Customer Portal	\$ -	\$ -
Virtual Assistant	\$ 306,266.57	\$ 838,456.00
Billing & Payment Enhancement	\$ 13,600.00	\$ 400,000.00
Back Office Auto & Workforce Management	\$ 1,534,684.00	\$ 4,500,000.00
Outage Communications	\$ 1,145,938.00	\$ 1,600,000.00
Privacy Readiness	\$ 271,091.00	\$ 700,000.00
Customer Data Sharing	\$ 443,608.00	\$ 992,774.00
Total	\$ 9,791,944.57	\$ 23,409,159.00

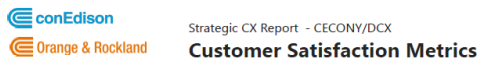
4 Portfolio Level Reporting

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

4.1 Cost Avoidance and Cost Saving

For Q2 2024, none of the Strategic CX initiatives have accrued any measurable cost avoidance or cost savings. However, the team has mechanisms in place to monitor efforts in this area to report in future quarters.

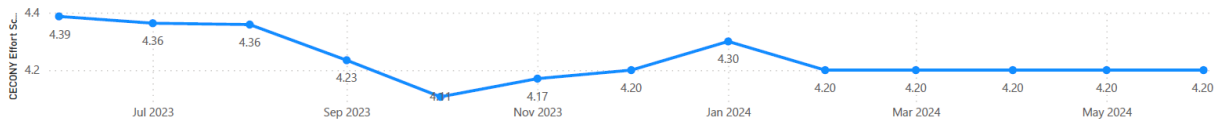
4.2 Customer Satisfaction (CSAT, NPS)



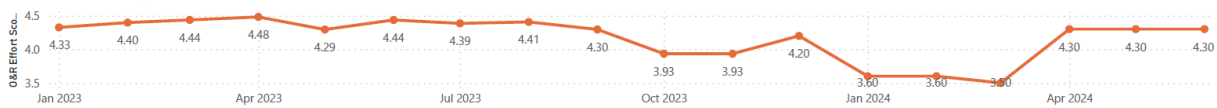
Q2 2024 Customer Satisfaction Metrics for Web and Mobile

CSAT Score: Q2 2024: 3.93	VA CSAT Score: Q2 2024: 4.53	CECONY NPS Score: Q2 2024: 39.5	O&R NPS Score: Q2 2024: 46
CECONY IOS Rating: Q2 2024: 4.83	CECONY Android Rating: Q2 2024: 4.69	O&R IOS Rating: Q2 2024: 4.79	O&R Android Rating: Q2 2024: 4.66

CECONY Effort Score by Month



O&R Effort Score by Month

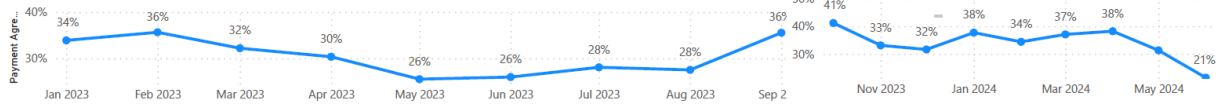




Strategic CX Report - CECONY/DCX

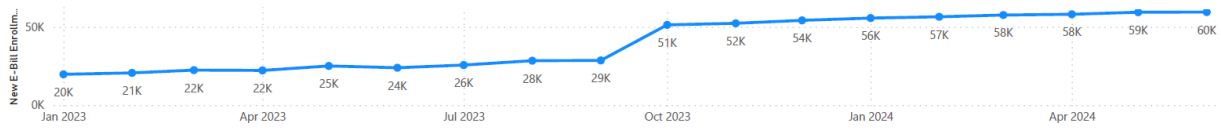
Digital Engagement Metrics

Payment Agreements Completed Digitally By Month

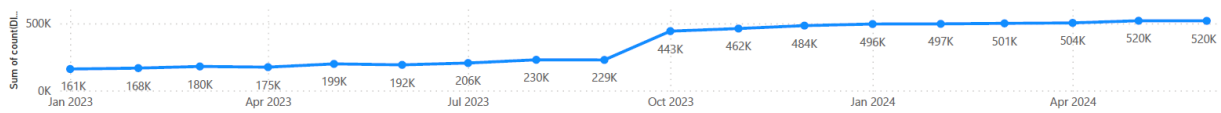


• Payment Agreement data is missing from October 6-10 due to CC&B deployment. Data collection continued on October 10

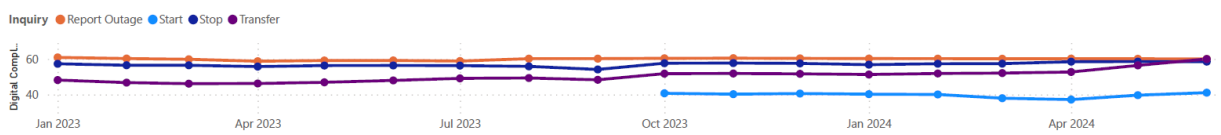
New E-Bill Enrollments by Month



Total MyAccount Profiles by Month



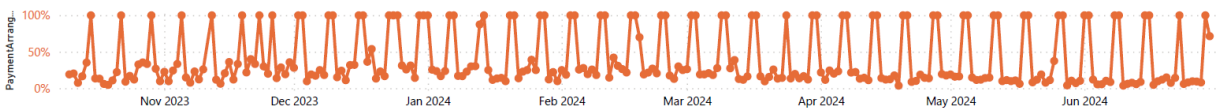
Digital Completion Rates by Month



Strategic CX Report - O&R/DCX

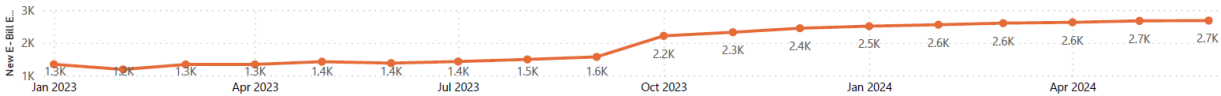
Digital Engagement Metrics

Payment Agreements Completed Digitally by Month

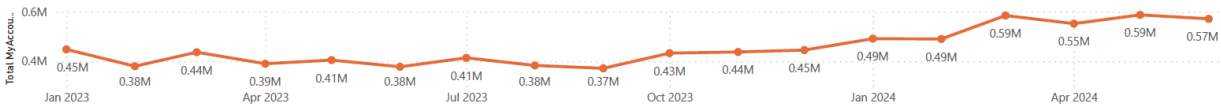


• Call centers are closed on weekends thus increasing digital transaction percentage enrollments

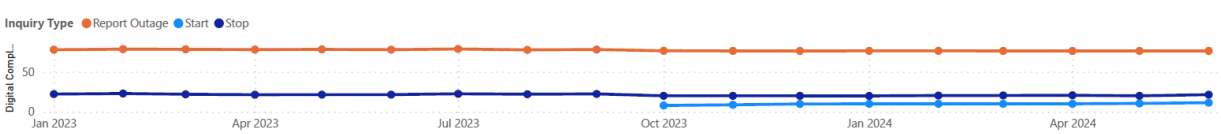
New E-Bill Enrollments by Year and Month

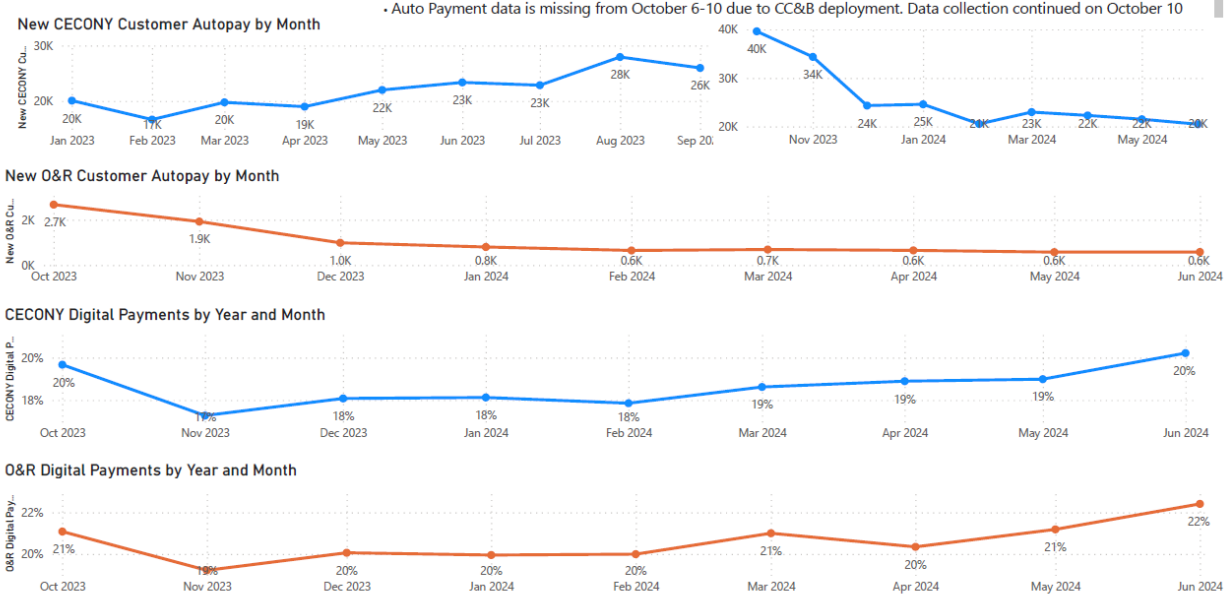


Total MyAccount Profiles by Year and Month



Digital Completion Rates 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)