



EnergyTrac Advisor is a robust new behavioral-based tool from Questline that enables a utility’s residential customers to set energy conservation goals and track their progress in completing those goals.

With EnergyTrac Advisor, users create a customized track of actions that can be used to make their homes and their behaviors more energy efficient. EnergyTrac Advisor is based solely on what the users would like to do to save energy—everything from switching to CFL bulbs; to caulking and weather-stripping doors and windows, and upgrading to more energy-efficient furnaces. Users can view the estimated energy and dollar savings associated with their plans and track their progress as they complete their plans.

For the utility, the EnergyTrac Advisor product consists of five components; each critical to the customer’s successful energy savings:

The Online Portal

The online EnergyTrac Advisor portal, which can be linked to from your utility’s Web site, collects attributes from your utility customers on their home and basic energy behaviors. Based on these attributes, simple action-oriented recommendations are made that will help users reduce energy consumption. Users then pledge to reduce energy use by committing to the recommendations and tracking their progress in completing them. Along the way, users can view the estimated energy and dollar savings associated with individual actions and their overall plan. Utility energy-use data can be integrated in to the tool to provide

accurate energy-savings estimates. Benchmark estimates based on home profiles are used for those without energy-use data.

Program Engagement Campaign

This multi-part email marketing campaign is delivered to your utility’s residential customers monthly. These communications are designed to call customers to action; encouraging them to commit to energy conservation. Communications can be targeted and sent to up to four segmented groups with varied messages based on predefined attributes or personas identified by the utility.

Proactive Triggered Emails

Engaging customers in the tool is a start, but Proactive Triggered Emails are the key to keeping them involved. Six transactional sends are built into the tool to keep customers engaged and coming back. Messages are sent when a new track is created, modified, or deleted; or when a track has been inactive for 30, 45, or 60 days. All of the triggered emails will be designed to draw customers back into the EnergyTrac Advisor portal to complete their plan and allow for brand reinforcement and cross-marketing of other energy-efficiency programs from your utility.

ENERGYTRAC ADVISOR

Program Evaluation Services

Underlying components of the EnergyTrac Advisor product are the ability to evaluate the success of the program in terms of energy savings and the capacity to report this success to your utility's internal stakeholders, partners, and the regulatory community. The reporting features of EnergyTrac Advisor combined with utility-provided data on energy consumption of specific customers will enable Questline to explain and quantify the program benefits. At the end of an annual evaluation period, Questline will provide the utility client, corresponding utility partners, and potentially regulatory agencies with comprehensive evaluations of the energy savings of the program participants. Questline will also compare the attributed energy savings of program participant's against non-participants. These non-participants—selected at the beginning of the program—will serve as a random control group.

Bringing It All Together!

To use the EnergyTrac Advisor product to its fullest potential, your utility will complete a custom implementation project with Questline. During this project, Questline will step you through branding and customization of the online EnergyTrac Advisor portal, as well as:

- Design of the EnergyTrac Advisor program, including a random control group, data requirements, and so on
- Setup of a secure FTP site
- Data integration work
- Marketing campaign consultation
- Engagement campaign design and coding
- Transactional message design, coding, and integration

Contact Questline today to learn more about how you can help your residential customers save energy and money with a few simple behavioral changes! You should also keep an eye on www.questline.com for the product release date and more sneak peeks at this exciting new product.

Data Collection for Marketing Purposes

Customer data that is collected during their interactions with the online portal and proactive email components will enable utilities to target specific customers with personalized marketing messages. For example, home profile information and data on what actions a customer has pledged or completed can drive targeted cross-promotion of rebate programs. Customers who showed an interest in the program engagement email but did not use the online portal could be offered other energy-efficiency programs or content. Dynamic content based on behaviors within the tool could be used to deliver highly targeted messaging—the possibilities are endless.