

Charting the Future: How to Use Customer Engagement Strategies to Ensure Energy Savings and Persistence

Laura Orfanedes, Fiveworx
Linda Dethman, Research into Action
Jamie Lalos, Fiveworx

ABSTRACT

Many highly successful companies – such as Apple and Amazon – use customer engagement strategies that involve customers in making a long-term cognitive, emotional and behavioral investment in their brand. We believe program administrators in the energy efficiency industry can benefit from these strategies as they scramble to reach new markets, meet higher energy savings and customer satisfaction goals with smaller budgets, and ensure that savings persist over time.

Drawing from our experience as customer engagement practitioners and evaluators, this paper will define customer engagement, illustrate how engagement platforms can be used in energy efficiency programs, and present guidelines to help program administrators plan, design, implement, and evaluate a modern, integrated, and efficient customer engagement platform. We will show how advances in big data and tracking systems can support platforms that are technology-enabled, center on customer needs, leverage psychosocial drivers and data analytics, and employ mechanisms to foster long-term trust and loyalty. This can also lead to higher satisfaction levels, greater energy savings, and more persistence of savings.

Introduction

Great customer experiences produce great business results. Examples of this dynamic are found in legendary brands like Apple, American Express, Amazon, Starbucks, Southwest Air, Tesla, and Virgin. These companies each represent different industries and business models. However, one thing they have in common is that they have worked hard to deliver a customer experience their competitors cannot match, and in the process have built large and growing groups of passionate advocates. For example, American Express has shifted emphasis from transactions to a deeper customer focus, thus earning a rank of 22nd as the most valuable brand in the world by BusinessWeek (KPMG Nunwood 2015). Starbucks, on the other hand, has invested in technology to enhance the comfort of customers such as wireless phone chargers installed at stores, an app that makes it easier to interact with them in one place, or high-tech cloud-based coffee machines that track both the performance of the machines and customer preferences (KPMG Nunwood 2015). The creation of an engaged and loyal customer base is key to the growth and profitability of these companies. While most energy utilities are new to the pursuit of customer engagement, many are exploring how to achieve it with their customers.

There are many reasons why utilities are feeling compelled to improve their engagement with their customers. One key reason is the change in customer expectations brought on by the digital revolution of the last ten years and its influence on utility customers' preferences for engagement and communication (Accenture 2015). Also, the engagement and personalization of social media and the Internet is profoundly influencing and shaping the expectations of a rising

purchasing market and a demographic segment: the Millennials (KSV 2015). Another significant reason is the changing utility business model spurred by the rise of distributed generation and the emergence of technology giants like Google as viable competitors (Caperton and Hernandez 2013; Huffington Post 2015). Amidst these consumer, media, and industry changes is the push by regulators and legislators for continued growth of energy efficiency at unprecedented levels and the aggressive energy savings that come with it (ACEEE 2016). As the achievement of those goals and the persistence of those savings continue to be a critical part of administrators' jobs, so too will be the engagement of their customers.

This paper explores what it means to meaningfully engage utility customers in a way that leverages the full potential of technology, as well as customer lifecycle and loyalty, to drive sustained energy savings and behavior change. It explores the following topics: understanding and defining customer engagement; using consumer research and data analytics tools to build customer insights; planning and designing customer engagement for evaluability and continuous improvement; defining Key Performance Indicators (KPIs) and metrics and how they will be tracked; tracking performance with analytics to optimize campaign performance; and implementing digital marketing strategies to engage customers and drive energy efficient actions.

The Importance of Customer Engagement

Energy efficiency program administrators have to meet energy savings goals and they need the interest, engagement, and participation of their customers in order to do that. However, indications are that consumer adoption of energy measures may be flattening or reversing.

One contributor to this trend may be the apparent deep-seated consumer skepticism of the energy efficiency value proposition. Shelton Group's longitudinal EnergyPulse™ study of American energy consumers shows that consumers are increasingly reporting that they believe the benefits and return on energy efficiency investments are not worth their financial investment (Shelton 2015). Their study reports that customers are undertaking about one-to-three energy-efficient actions and then not continuing on to implement further measures. A key reason cited in the study is that customers say they are not realizing the benefits expected from their actions (such as bill reduction) and, as a result, are becoming disillusioned and disengaged with energy efficiency. Therefore, for a third year in a row, Shelton's research shows that consumers' likelihood of taking energy efficient actions is down across every measure their study tracks.

Historically, many utilities have used traditional marketing strategies, such as direct marketing, mass media advertising, and event outreach to try to engage customers and increase program participation. While these strategies can be effective at raising program awareness, they often fail at driving sustained customer behavior change. A big reason for this is that the one-way flow of communications inherent in traditional marketing tactics (i.e., direct mail, radio advertising) does not provide the marketer with a deep understanding of the psychological and emotional factors, such as the type cited in Shelton's research, that might motivate or hinder a customer's participation in programs. Without that type of customer insight, it can be difficult, if not impossible, for a utility to deeply engage a customer, communicate a value proposition for energy efficiency that is personally meaningful to that particular customer, and drive long-term, sustained behavior change. This is where customer engagement – as opposed to traditional marketing – can be a key strategy to accomplish these objectives.

The fragmented, digital world of smart technologies and product innovation, game-changing partnerships and converging markets that was detailed in Accenture's recent study, *The New Energy Consumer*, is revolutionizing the 100-year old utility-customer relationship by

changing how customers interact with their utility and what they expect from the relationship (Accenture 2015). It is also bringing with it increasingly robust data analytics, faster computing power, and more sophisticated software algorithms that are opening up the possibility for utilities to have a more personalized, meaningful, and engaged relationship with their customers, a relationship that they are counting on more than ever in order to meet their business objectives.

Defining Customer Engagement

Customer engagement is inextricably linked with the notion of a great and emotional customer experience. As the author of an article in *Chief Marketing Officer* magazine stated, “as we improve our understanding of how consumers and B2B customers make choices, it is clear that emotional elements of the brand experience are just as important as the rational and functional elements in driving preference, loyalty and advocacy” (CMO 2014).

As seen in Figure 1, our preferred definition of customer engagement by Hollebeck (2011) shows that the level of a customer’s engagement with a specific brand can be measured by their “cognitive, emotional, and behavioral investment in specific brand interactions.” In this definition, engagement has three dimensions: 1) immersion, representative of cognitive engagement, 2) passion, representative of emotional engagement, and 3) activation, which is representative of behavioral engagement. The benefit of this definition is that it frames customer engagement more holistically than the energy efficiency industry currently does, which is typically a set of metrics that show customer activity, such as visits to a website, document downloads, or email open rates.

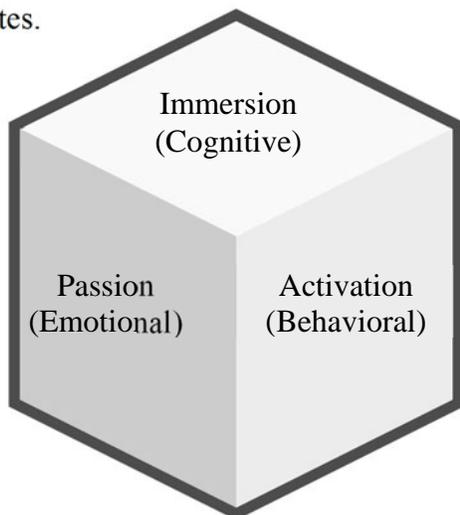


Figure 1. Hollebeck’s definition of customer engagement. *Source*: JSM 2011

Customer Engagement as an Ongoing Dialogue

Relationship marketing offers an ideal construct for putting customer engagement in practice. In this type of marketing discipline, the buyer-seller encounters accumulate over time with opportunities to transform discrete transactions into relational partnerships (Singh 2011).

Critical in relationship marketing is the concept of ongoing dialogue. In this self-generating dynamic the brand engages the customer to build their trust and commitment, which allows for ongoing dialogue. This, in turn, creates the customer’s perception of value and quality from the brand. Both the brand (or utility) and customer mutually benefit from the interaction.

For example, many utilities use their large commercial customer account representatives to do this with their customers as a way of garnering good brand value and trust—which, in turn, can result in gaining more commitment from the customer. This approach is a significant departure from traditional marketing, which is designed to drive one-off transactions.

This model has profound implications for program administrators trying to achieve deep and broad energy savings. Emotionally engaged customers are more likely to be satisfied with their utility, undertake more energy-efficient actions, and recommend utility energy-efficiency programs to their friends and family (Head and Hunt 2014).

Designing and Implementing an Effective Customer Engagement Program

Now that we have defined customer engagement and discussed its importance as a strategy for program administrators, this section will explore the key components needed in designing and implementing an effective customer engagement program. Once goals have been established, developing a customer engagement program will typically follow these three overarching phases: 1) Gaining an understanding of the customer; 2) Designing the program for continuous improvement; 3) Implementing program and monitoring program performance.

Understanding the Customer

A deep understanding of customers, and knowing how to use those insights to hit their “sweet spot” (Fortini-Campbell 1992), is at the heart of any successful customer engagement program. Organizations need to walk in their customer’s shoes, even if those shoes are unfamiliar and uncomfortable, and to develop empathy for them, before effective engagement can happen. Historically, most utility-customer exchanges have been transactional, not relational, where utilities sell, and customers buy, reliable power. Since the advent of energy-efficiency programs and other services that demand more involvement from customers, utilities have begun to appreciate how varied their customers are and what it takes to establish a trusted, loyal, and ongoing relationship with their customers. The next sections discuss how to create customer insights and translate them into an effective customer engagement program.

Creating Customer Insights

A good customer insight embodies the spirit of what is real in a consumer’s life and what consciously (or subconsciously) drives their behavior. It engages the full spectrum of cognitive, emotional, and behavioral dimensions. A good insight requires having an accurate and deeply intuitive understanding about your target audience, not just the “what,” but the “why.” Finally, it should serve up a slice of genuine reality so succinctly, and so accurately, that it will leave the customer nodding their head in violent agreement. Good examples of insights from commercial brands that are translated into brand copy and slogans include:

- “Teeth are only 25% of your mouth.” (Listerine)
- “See, the thing about dreams is, they don’t retire.” (Ameriprise)
- “Depression hurts.” (Cymbalta)

It can be challenging to coax insights out of consumers. When conducting focus groups or eliciting insights from consumers, certain conditions can help foster the emergence of insights

from customers. Brain research confirms this. The brain is actually more likely to share insights when a person is quiet, inward looking, slightly happy, and not effortful (Rock 2010).

Figure 2 shows an example, based upon what bank facility engineers said about how energy efficiency fits into their jobs; the process uses facts and observations to coax out insights.

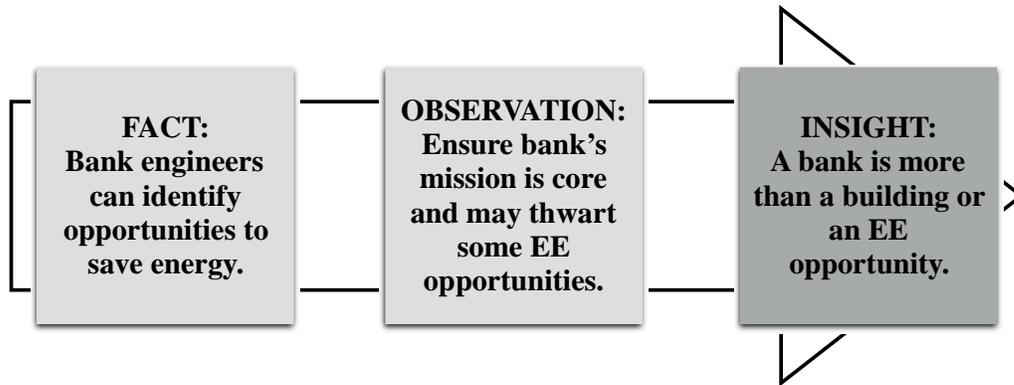


Figure 2. Bank example of a process for coaxing insight from facts and observations

When developing customer insights, keep in mind that insights are not facts, but they need to be based on truth and supported by evidence. While energy efficiency programs may target buildings for energy savings, they cannot forget about the mission, hopes, and needs of the people occupying them. People rarely look at buildings or equipment through an energy lens. Thus, technologies and services need to work with those needs, not against them. If efficiency results in parking lights that are too dim, temperatures that are too hot or cold, or gaming devices that turn off in the middle of a game, the fact that those technologies are efficient will not be enough for most people to use them.

Gaining Insights from Target Audiences

To provide real value to customers when engaging them in an ongoing dialogue means understanding the emotional, cognitive and behavioral dimensions of what makes them tick. Customer attitudes, perceptions, motivations, and worldviews, are very important in understanding what drives customers to do what they do. Quantitative and qualitative data can provide those types of insights, including survey results, focus group research, ethnographic research, interviews, demographic profiles, household information, energy consumption patterns, geographic locations, housing information, political views, and others.

Insights allow program administrators and their marketers to be consistent with the tenets of customer engagement and relationship marketing, which is to know your customers and put your customers' needs and preferences first. In the section below, we discuss how all of this data arising from customer insights come together to paint the fullest picture of a customer resulting in psychographic segmentation that covers the spectrum of a customer's dimensions.¹

Customer Segments and Personas

The importance of defining customer personas and segments cannot be overstated. Aside from defining program objectives and determining what customer behavior the program is

¹ Psychographic segmentation refers to the study and classification of people according to their attitudes, aspirations, and other psychological criteria, especially in market research.

designed to influence, developing customer segments and personas is the most critical step in the development of a customer engagement program.

Market segmentation has been shown to be a powerful tool in speeding customer adoption of products, services, or desired behaviors, from computers and software to beverages and restaurants to reducing tobacco use. (Moss and Cubed 2008; McDonald and Dunbar 2008; Lutzenhiser 2008). Segmentation divides markets into distinct customer groups based on shared characteristics, needs, and preferences and allows programs and marketing to be tailored to key segments. However, many sources suggest that successful segmentation schemes require experience, judgment, science, flexibility, patience, and the organizational commitment to ensure it is used, tested, and refined over time. (McDonald and Dunbar 2008; Horn and Huang 2009; Dethman, Degens, and Castor 2010) Thus, on its own, segmentation is not a panacea for better customer understanding.

The words “persona” and “segment” tend to be used interchangeably, but they have very different meanings. While both words involve the grouping and definition of the characteristics and profiles of customers, they have important distinctions. Segments help to project and estimate market interest for a product or service, while personas help to understand the emotional and behavioral triggers behind individual customers within that market (Collins 2015). Combined, segments and personas offer a powerful, complementary set of psychographic segmentation tools for deeply understanding the customer, which is a critical component of successful customer engagement, as seen in Table 1. Further, there are some indications that the energy efficiency industry is beginning to understand and leverage the distinctive benefits of segments and personas in program marketing (Smith, Wong, and Rajagopal 2012; De Bois 2014).

Table 1 below shows the difference between data used for segmentation versus personas

Energy Customer Segmentation	Energy Customer Personas
Geographic	<i>Attitudes</i>
Demographic	<i>Perceptions</i>
Building Data	<i>Behaviors</i>
Energy Usage	<i>Worldviews</i>
Past Participation	<i>Opinions</i>
Media Consumption	

In terms of operationalizing segments and personas, traditional segmentation is used to identify and target audiences and personas are used for framing messaging that taps customers’ deeper emotional, cognitive, and behavioral drivers.

The Customer Journey

Inherent in customer engagement is the notion of a customer engaging with a brand throughout a lifecycle (as seen in Figure 3). In this model, the lifecycle is potentially infinite, as the customer purchases new products and services, propelling them on another journey through the lifecycle. Within this lifecycle are countless touch points where the customer can receive messaging that is timely, relevant, meaningful, and personalized and that engages them to take the next action on the journey.

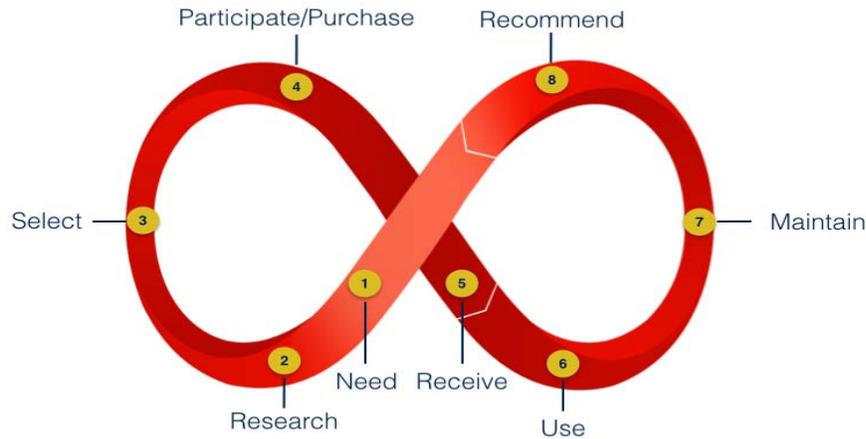


Figure 3. Customer lifecycle

There are a few methods for mapping the customer journey. First, managers can conduct traditional customer journey mapping exercises whereby all customer touch points, pain points, interactions, and actions are meticulously mapped for a particular program, set of programs, or at the utility level. There are a number of journey mapping programs and services available to administrators from a variety of vendors and agencies. Second, administrators can define a journey based on propensity models built from segmentation and personas that allow program managers the opportunity to build sequence-based customer journeys for energy efficiency.

Designing for Continuous Improvement

The key to designing a successful engagement strategy centers on data – both what data needs to be collected and how that data will be used. Data can have several key uses within a customer engagement platform:

- Establishing a baseline (typically used to measure savings, track changes in actions, measure satisfaction increases, or track general interaction)
- Determining key messages within specific customer communications (this could be related to programs that customers have completed)
- Developing segment-specific propensities and messaging
- Determining frequency of customer communications (i.e., customer preferences for frequency and channel, under what conditions can customers be contacted, etc.)

Once it has been determined what the action is that customers need to take – and the mechanisms that will be used to get them to take that action – the next step is to determine data needs. It is important to conduct a data audit during the design phase of a customer engagement program and not at the end. This involves identifying the data needed and how that data will be used.

Typically, data is stored across multiple divisions and departments within a utility. Wrangling this data and consolidating it into a comprehensive, searchable, relational database is out of reach budget-wise for most utilities. However, as many utilities seek to replace aging, legacy customer information systems (CIS), there are increasing opportunities to combine data into a warehouse from which administrators can implement a customer engagement platform.

Therefore, as part of the planning and design phase of the project, administrators are advised to outline a plan for coordinating the transfer and use of data within their organizations to ensure that planning is integrated and coordinated. Typically, this effort will involve IT and security from within the utility. Key issues for discussion should include deciding upon the variable data pieces needed based on reporting requirements; developing a data format; determining how data will be cleaned to ensure alignment with multiple systems; and testing and implementing data transfer protocols prior to launch.

Establishing Metrics

It is important to plan upfront for how a customer engagement program will be monitored. A program’s goals and objectives will drive what metrics a program administrator needs to measure, not the other way around. Therefore, metrics serve as a reflection of the product or program strategy that is being implemented. Further, metrics help inform strategic decisions that are part of the planning, design, and evaluation of a customer engagement program.

How different metrics are characterized depends on the marketing discipline, agency, or other factors. One preferred approach is to define metrics as two separate types: vanity and actionable (Ries 2009). Vanity metrics include measurements such as registered users, downloads, and raw pageviews. Vanity metrics mostly serve the purpose of being directional in that they might indicate whether a program is performing well or poorly. However, they don’t provide enough clear guidance to make sound course corrections in an engagement program, partially because they are influenced by external factors like search engine optimization, search engine marketing, seasonal website traffic patterns, media coverage, etc.

For example, consider the most basic of reports that a customer engagement project manager might receive: a Google Analytics report of the total number of “hits” to a program website that shows the website received 10,000 visitors. While this figure may seem impressive, it does not provide clarity into what marketing and messaging the customer might have been exposed to and if those tactics are responsible for the visitors to the website. Additionally, this metric does not indicate the additional steps the customer took after visiting the website. In order to engage that customer in ongoing dialogue by providing them with something of value, it might be important to know what they are seeking.

Actionable metrics offer greater clarity and might include measurements such as, active users, engagement statistics such as email open and click-through-rates, data derived from website “cookies,” the acquisition costs for new program participants, etc. Table 2 provides examples of actionable metrics for a digital customer engagement program.

Table 2. Examples of Actionable Metrics

Visitor repeat usage and “recency” (how recently the customer took the desired action)
Time between sessions
Meaningful value gained by session
Quantity/frequency of reviews, comments, discussions, etc.
Content sharing frequency
Site affinity/likelihood to influence other friends
Actions taken/usage reduced

In the example above, a project manager can enhance the use of a vanity metric like website visitors with additional data. For example, a utility might add a feature to its website. If traffic is driven to the website using email A/B split test emails in which Group A customers see the new feature and Group B customers do not, results may show that group B had 20% more document downloads-per-customer. Actionable metrics allow managers to learn what is valuable to customers so that they can, in turn, continue to offer more of that type of valuable content to customers to spur additional future engagement. When defining metrics, an important rule of thumb for program managers to keep in mind is that they should plan to track and measure any type of metric that can contribute to a greater understanding of a customer’s behavior. A helpful tool for identifying where and when within the customer journey program managers will need to collect and track data is by developing a customer engagement process flow that illustrates the details of a broader customer journey. An illustration of one section of an engagement flow can be seen in Figure 4 for a multi-drip email campaign.²

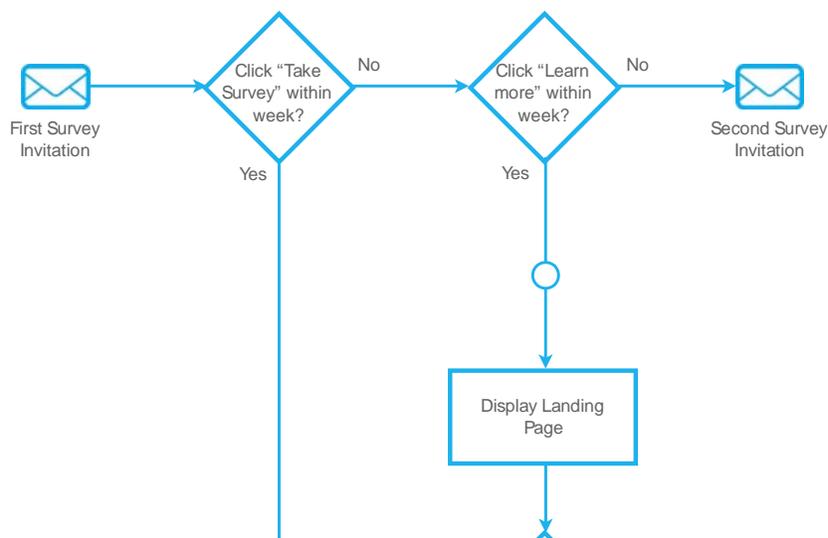


Figure 4. Example of customer engagement process flow

Implementing Customer Engagement Strategies

Like traditional marketing, customer engagement strategies can serve a variety of objectives, from acquiring new customers, to increasing conversions, to building awareness. However, a key distinction lays in customer engagement being a two-way – as opposed to one-way – conversation with the customer. All efforts are designed to leverage that ongoing dialogue to influence and change the target customer’s behavior. Engagement objectives could include:

- Getting customers to download a home energy management app, complete recommendations within an online energy savings plan, or change energy use behavior.
- Getting customers to follow through on a set of specific energy efficiency recommendations coming from an energy assessment or online audit tool.
- Driving repeat purchases and installation of energy-saving products, such as lighting, weather stripping, and advanced power strips.

² “Multi-drip” refers to the term “drip campaign”: a method used in direct marketing to acquire customers through repetitive marketing actions. It involves sending marketing information to prospects repeatedly over longer periods of time in order to nurture prospects or leads.

Technology Solutions

The digital revolution that has changed customer expectations has also given rise to the wide availability of technologies offering utilities unprecedented access to customer information. These technologies offer a feedback loop to customers that are allowing utilities to provide an ever-greater degree of customization and personalization (Goldman 2016). They can include:

- Mobile applications (mobile apps) like Powerley, Smappe, Ecotagious, etc. that are accessible on smart phones or tablets and offer customers information about their home energy use through their utility account.
- Connected products (Wi-Fi enabled thermostats, smart plugs, etc.), like Google’s Nest, Honeywell, Bidgely, Tendril, My Meter, etc. that have Internet connectivity and can be monitored and controlled remotely.
- Segmentation, customer relationship management, customer engagement email marketing, marketing automation, and content marketing solutions like Salesforce, Microsoft Dynamics, Fiveworx, Oracle, Adobe, and Hubspot to identify, track and manage engagement with customers through enterprise software platforms.

As shown in Table 3, within the utility customer experience, there are dozens of channels whereby these solutions can be deployed as part of a customer engagement program (Russolo 2012).

Table 3. Examples of Utility Channels to Deploy Customer Engagement Program

Chat	Mobile
Collateral	Social Media
Digital advertising	Text
Direct mail	Utility bill
Email	Walk-in office
Interactive voice response (IVR)	Web
Live agents	

Evaluating Results

How a customer engagement program’s effectiveness is measured will depend on program goals and what the program is trying to achieve. Since the idea of customer engagement as a separate initiative is relatively new to the energy efficiency industry, the evaluation, measurement and verification (EM&V) approach is likely to be similar to that of what would be used to measure energy savings from a behavior energy savings program. Therefore, if a program outcome for a customer engagement program is to deliver energy savings, a billing analysis as part of a Randomized Encouragement Design may be the preferred methodology for EM&V. In this method, the billing analysis would compare the average energy usage from a treatment group to that of a control group, while accounting for weather patterns and other external variables.

One significant challenge for customer engagement programs inherent in using this methodology is that program savings cannot be double counted. Therefore, the evaluator will typically deduct from the energy savings attributable to the customer engagement program any savings resulting from customer adoption of measures from other programs. This is a challenge for customer engagement programs whose sole purpose is often to drive customer participation in programs. The industry will continue to wrestle with this challenge as it continues to work on

developing a reliable and accepted methodology that accurately measures the influence of customer engagement programs on energy savings.

In addition to energy savings, there are a host of other benefits of customer engagement that can be tracked and measured, including the program's influence on customer satisfaction as well as changes in brand loyalty and program awareness. Another interesting benefit of customer engagement programs that the authors have observed is the ability of these types of initiatives to reveal patterns in the data that help to refine program design and marketing. For example, tracking customer engagement through an online savings plan can reveal the amount of time between when a customer first researches a program measure to when that customer participates in that program, resulting in the adoption of that measure.

As these types of initiatives become more prevalent in the energy industry, evaluators will continue to look for new approaches to accurately measure and assign results. In the interim, the authors propose a list of questions program administrators can use as a guide in developing an effective evaluation plan.

- What percent of participants participated in other utility programs and how does this compare to general population participation?
- Does the initiative effectively serve as a feeder program for some programs but not others? Similarly, do specific programs serve as feeder programs for additional measures?
- Are there segmentation or other demographic indicators that would help identify those that are early adopters versus those that are laggards to participate?
- Do the current analytics offer sufficient resolution to capture these nuances, or are other data points available that may help explain these differences?
- How has satisfaction changed during the course of the effort? Are there specific nudges or behavioral principles that are more effective?

Conclusion

The dramatic changes in customer expectations swept in by the digital and demographic changes of the last 20 years are shaping the energy market in ways unforeseen a generation ago. The power has now shifted to the consumer. Or, as a president at Kellogg Company recently remarked, the consumer has now become the CEO (CLEAResult 2016).

Getting customer engagement right will not be easy. It will take a cultural and organizational shift within utilities. To be effective, they will have to evolve a set of process and structures to manage customer engagement across the entire organization. As McKinsey noted (2010), the critical moments of interaction, or touch points, between companies and customers are increasingly spread across different parts of the organization, so customer engagement is now everyone's responsibility, not just marketing, sales, IT, customer service, or communications. As part of this shift, organizations will have to ask themselves questions such as: *Is the whole organization aligned on the engagement vision? Are traditional marketing budgets extracting the most value from the customer lifecycle? Are we really listening to how our customers talk about us? Do we know our customer's wants and needs? Is our customer data set up for success?*

Marketing energy efficiency will never again be as seemingly simple as tossing out clever marketing copy in a radio spot or punchy graphics in a print advertisement. Utilities that design and execute effective customer-centric engagement strategies will have the advantage in this new world order; the others will lose ground.

References

- ACEEE. *Energy Efficiency Programs for Utility Customers*. Accessed March 14, 2016. <http://aceee.org/topics/energy-efficiency-programs-utility-customers>
- Accenture. 2015. *The New Energy Consumer: Unleashing Business Value in a Digital World*. Accenture Consulting. Accessed March 15, 2015. https://www.accenture.com/_acnmedia/Accenture/next-gen/insight-unlocking-value-of-digital-consumer/PDF/Accenture-New-Energy-Consumer-Final.pdf#zoom=50
- ARF (The Advertising Research Foundation). 2006. “Advertising Industry ‘Turned On’ by New Measurement Model.” March 21. New York. Archived April 1, 2007. <https://web.archive.org/web/20070401045631/http://www.thearf.org/about/pr/2006-03-21.html>
- Bell, L. 2015. “Two Things Utilities Should Know about Millennial Customers.” *KSV Energy Wire* (blog). December 9, 2015. <http://energywire.ksvc.com/2015/12/09/millennials-want-more-from-their-utility/>
- Caperton, R. and M. Hernandez. 2013. “The Electrical Divide: New Energy Technologies and Avoiding an Electric Service Gap.” *Center for American Progress*, July 15, 2013. <https://www.americanprogress.org/issues/green/report/2013/07/15/69249/the-electrical-divide-new-energy-technologies-and-avoiding-an-electric-service-gap/>
- CLEARResult. 2016. *Innovation Outlook: The 2016 State of Energy Efficiency*. Austin, TX: CLEARResult.
- Collins, T. “Creating Personas vs. Customer Segments: What’s The Difference?” *Acquia: Think Ahead*, April 14, 2015. <https://www.acquia.com/blog/creating-personas-vs-customer-segments-whats-difference>
- Crawford-Browne, S. “Balancing Customer Effort and Engagement.” *CMO.com*, February 15, 2016. <http://www.cmo.com/articles/2016/2/12/balancing-customer-effort-and-engagement.html>
- Dethman, L., P. Degens, and S. Castor. 2009. *Comparison of Segmentation Plans for Residential Energy Consumers*. Prepared for Energy Trust of Oregon. http://energytrust.org/library/reports/091231_Segmentation.pdf
- Du Bois, D. “How Efficiency Is Learning About Market Segmentation From Internet Giants and Political Campaigns.” *Greentech Media*. October 30, 2014. <http://www.greentechmedia.com/articles/read/how-energy-efficiency-marketers-are-learning-about-market-segmentation-from>
- Fabode, S. 2015. “How Google Is Cleverly Becoming Your Power Utility.” *The Blog, Huffington Business*, December 4, 2015. <http://www.huffingtonpost.com/seyi-fabode/how-google-is-cleverly-be b 8721164.html>
- Ferriss, T and E. Ries. “Vanity Metrics vs. Actionable Metrics.” Accessed October 28, 2015. <http://fourhourworkweek.com/2009/05/19/vanity-metrics-vs-actionable-metrics/>
- French, T., L. LaBerge, and P. Magill. 2012. “Five ‘no regrets’ moves for superior customer engagement.” July, 2012. In *McKinsey Quarterly*. <http://www.mckinsey.com/business-functions/marketing-and-sales/our-insights/five-no-regrets-moves-for-superior-customer-engagement>
- Goldman, M. 2016. “The Story of You: How Utility Customization is Driving Increased Energy Efficiency Participation.” Presented at the *AESP 26th Annual National Conference and Expo*.
- Head, L. and P. Hunt. 2014. “Motivating Utility Customers to Adopt Multiple Energy-Efficient Measures.” In *Proceedings of the ACEEE 2014 Summer Study on Energy Efficient Buildings*. <http://aceee.org/files/proceedings/2014/data/papers/5-857.pdf>

- Hollebeek, L.D. 2011. "Exploring Customer Brand Engagement: Definition & Themes." *Journal of Strategic Marketing*, 19 (7): 555-573.
- Horn, B. and W. Huang. 2009. "Comparison of Segmentation Approaches," *Decision Analyst*. Accessed March 18, 2016. http://www.decisionanalyst.com/publ_art/CompareSegmentation.dai
- Kotler, P. and G. Zaltman. 1971. "Social Marketing: An Approach to Planned Social Change." *Journal of Marketing* 35: 3-12. http://www.jstor.org/stable/1249783?origin=crossref&seq=1#page_scan_tab_contents
- Lutzenhiser, L. 2008. "Behavioral Assumptions Underlying California Residential Energy Efficiency Programs." In *Proceedings of the 2008 Behavior Energy & Climate Change Conference*. http://www1.eere.energy.gov/buildings/betterbuildings/neighborhoods/pdfs/ba_ee_res_wp.pdf
- McDonald, M. and I. Dunbar 2008. *Market Segmentation: How to Do It, How to Profit From it*. Chichester, West Sussex, United Kingdom: John Wiley & Sons, Ltd.
- Moss, S. and M. Cubed. 2008. *Market Segmentation and Energy Efficiency Program Design*. Prepared for CIEE Behavior and Energy Program, 6. http://energy.gov/sites/prod/files/2014/01/f6/market_seg.pdf
- Rock, D. "How to Have More Insights." *Psychology Today*, September 6, 2010, <https://www.psychologytoday.com/blog/your-brain-work/201009/how-have-more-insights>
- Russolo, M. 2012. "Delivering Improved Customer Experiences and Operational Savings through Your Website Self-Service and Social Media." March 26, 2012. Boulder, CO: E-Source. http://www.slideshare.net/E_Source/delivering-improved-customer-experiences-and-operational-savings-through-your-website-selfservice-and-social-media
- Singh, S. 2011. "Influencing Behavior Change by Customer Engagement Amongst Youth." *Adolescent Health Medical Therapy* 2: 123–132. <https://www.dovepress.com/influencing-behavioral-change-by-customer-engagement-amongst-youth-peer-reviewed-article-AHMT>
- Shelton Group. 2015. *Energy Pulse™ 2015 Study*. Knoxville, TN: Shelton Group.
- Smith, B., J. Wong, and R. Rajagopal. 2012. "A Simple Way to Use Interval Data to Segment Residential Customers for Energy Efficiency and Demand Response Targeting." In *Proceedings of the ACEEE 2012 Summer Study on Energy Efficient Buildings*. <http://aceee.org/files/proceedings/2012/data/papers/0193-000182.pdf>
- The Excellence Centre Team. 2015. "Road To Excellence: How American Express leads the way for customer experience transformation." May 27, 2015. KPMG Nunwood. London. <http://www.nunwood.com/road-excellence-american-express-leads-way-customer-experience-transformation/>
- The Excellence Centre Team. 2015. "Road to Excellence: Why is Starbucks' US customer experience strategy so strong?" April 8, 2015. KPMG Nunwood. London. <http://www.nunwood.com/road-to-excellence-why-is-starbucks-us-customer-experience-strategy-so-strong/>