

# Exhibit to Agenda Item #2

Energy Resources & Customer Services Committee and  
Special SMUD Board of Directors Meeting

August 11, 2021, scheduled to begin at 5:30 p.m.

Virtual Meeting (online)

# Agenda

- Strategic Directive 5
- 2020 Results
  - Customer Satisfaction
  - Value for What you Pay (VFP)
  - Accomplishments
- Request the Board accept the 2020 monitoring report

# 2020 Customer Relations

## SD-5

### Policy:

*“Maintaining a high level of customer relations is a core value of SMUD. Therefore, the Board establishes an overall customer satisfaction target of 95 percent with no individual component measured falling below 85 percent.*

*In addition, the Board establishes an overall customer experience “value for what you pay” target of 70 percent by the end of 2025 and 80 percent by the end of 2030, with neither the average commercial customer score falling below 69 percent nor the average residential customer score falling below 65 percent in any year.*

### As part of this policy:

- (a) SMUD customers shall be treated in a respectful, dignified and civil manner.
- (b) SMUD shall communicate a procedure for customers who believe they have not received fair treatment from SMUD to be heard.

# Updates to SD-5

	SD-5 Measurement	Additions	Deletions
<b>2020</b>	New Connects, Tree Trimming, Bill Inquiry, Outage	Modification: VFP Target	N/A
<b>2018</b>	New Connects, Tree Trimming, Bill Inquiry, Outage	Interactive Voice Response (IVR) Payment Arrangements IVR Payment	N/A
<b>2016</b>	New Connects, Tree Trimming, Bill Inquiry, Outage	Customer Experience/VFP	N/A
<b>2015</b>	New Connects, Tree Trimming, Bill Inquiry, Outage	N/A	Meter Services
<b>2011</b>	New Connects, Tree Trimming, Bill Inquiry, Meter Services	Outage	N/A
<b>2010</b>	New Connects, Tree Trimming, Meter Services	Bill Inquiry	New Construction New Design
<b>2009</b>	New Connects, Tree Trimming, Meter Services, New Construction, New Design	N/A	Residential Audit
<b>2008</b>	New Connects, Tree Trimming, Meter Services, New Construction, New Design, Residential Audit	N/A	N/A

# Customer Satisfaction Scores

## Policy:

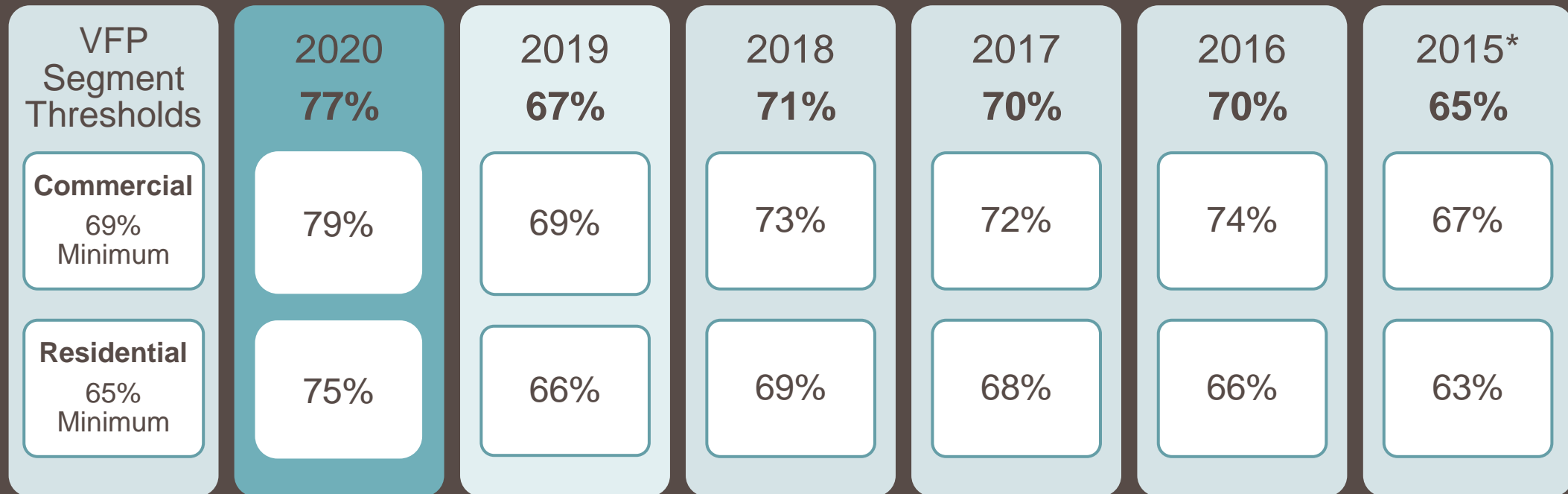
*“Therefore, the Board establishes an overall customer satisfaction target of 95 percent with no individual component measured falling below 85 percent.”*

Overall Satisfaction	2020 97%	2019 97%	2018 97%
Tree Trimming	95%	95%	95%
New Connects	99%	98%	98%
Bill Inquires	96%	96%	95%
Outage	95%	96%	96%
IVR Payment	97%	96%	96%
IVR Payment Arrangement	93%	98%	98%

# Value For What You Pay (VFP)

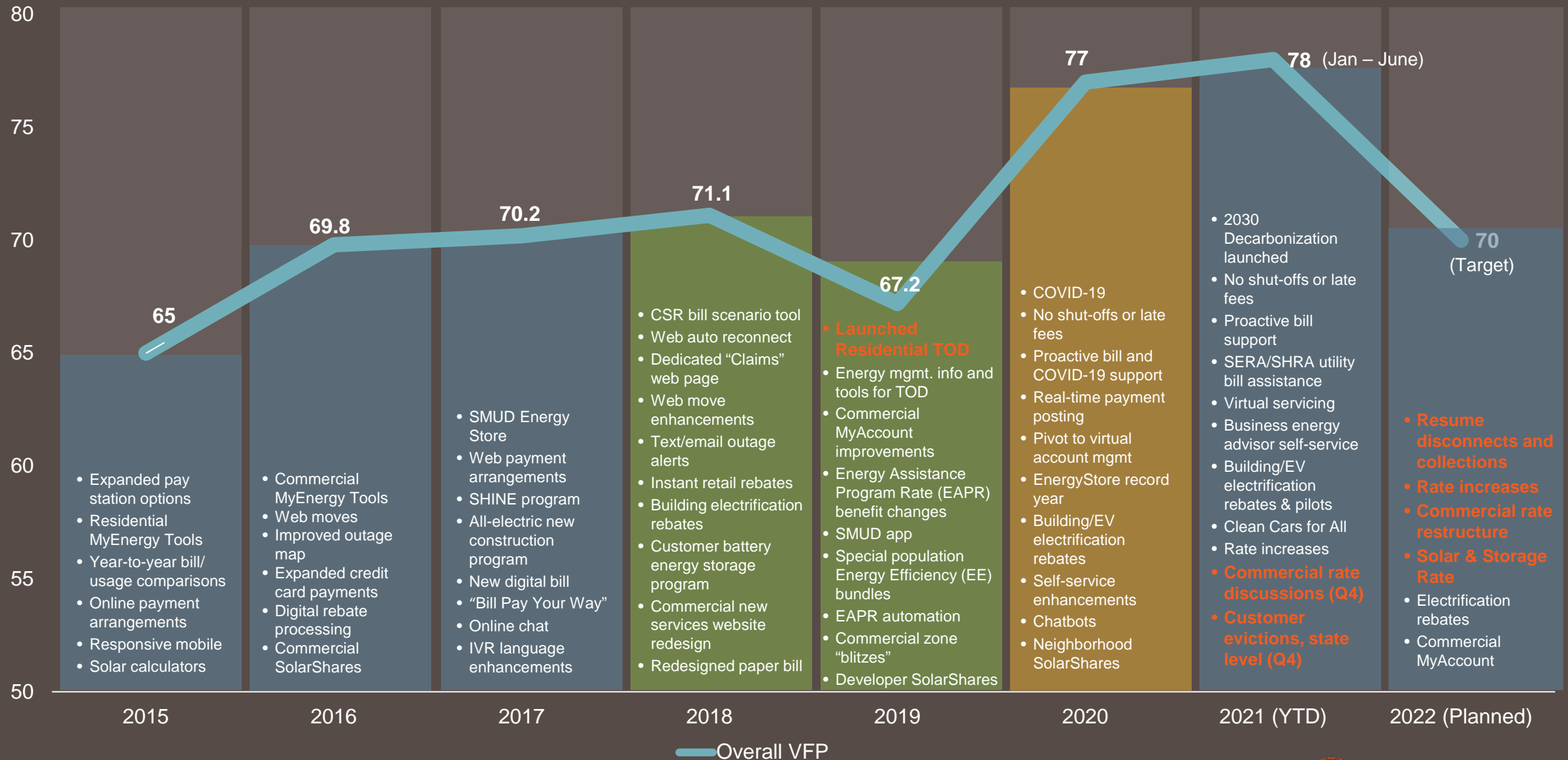
## Policy:

*“The Board establishes an overall customer experience “value for what you pay” target of 70 percent by the end of 2025 and 80 percent by 2030, with neither the average commercial customer score falling below 69 percent nor the average residential customer score falling below 65 percent in any year.”*



\*Start year

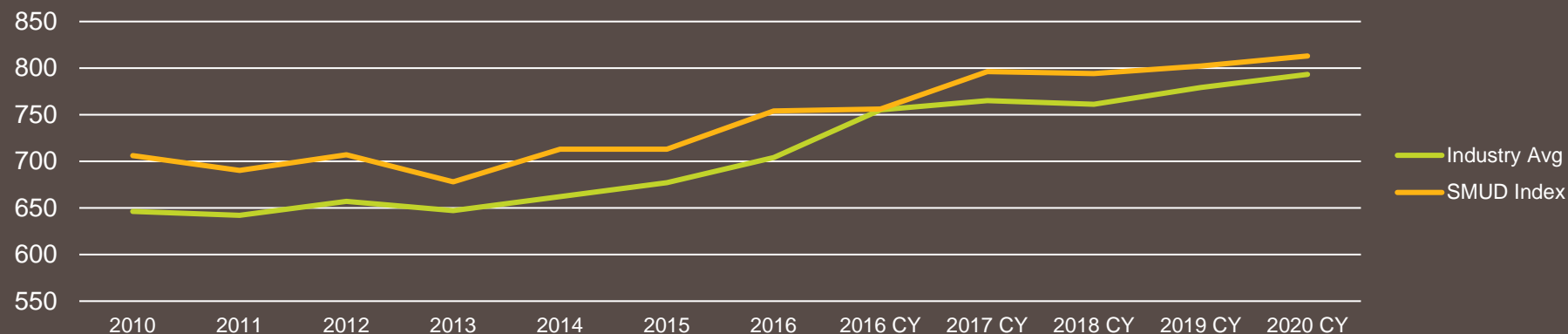
# Customer Experience Headwinds



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# J.D. Power & Associates

Commercial Overall Customer Satisfaction



## Commercial

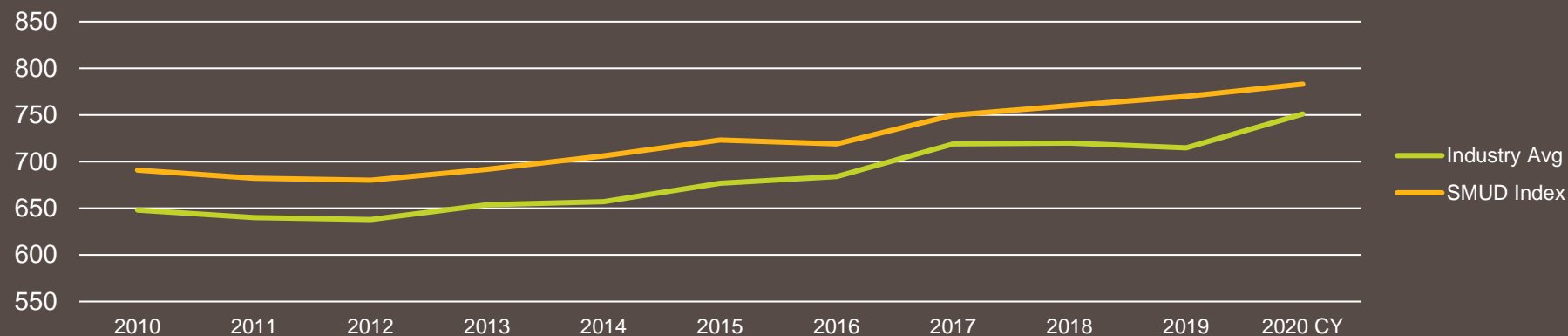
### California Ranking

- **2020CY: #1**
- 2019CY: #1
- 2018CY: #1

### West Midsize Ranking

- **2020CY: #2**
- 2019CY: #3
- 2018CY: #1

Residential Overall Customer Satisfaction



## Residential

### California Ranking

- **2020CY: #1**
- 2019: #1
- 2018: #1

### West Large Ranking

- **2020CY: #2**
- 2019: #2
- 2018: #2

CY = Calendar Year

# 2020 Environment: Quickly pivot and assist Residential



## Friendly reminder campaign

Over 240k residential & commercial customer touch points made via Customer Service Representative (CSR) & Strategic Account Advisor (SAA) calls, robocalls, emails, mailers.



## 1 ton+ food collected

Drive-thru, touchless canned food drive brought critical awareness and support to our community members.

## Financial assistance

### Increased Energy Assistance Program Rate (EAPR) Assistance

- 20k-30k customers kept their discount without reapplying, allowing ~12k customers to stay on EAPR who may have been dropped.
- Loosened eligibility requirements to increase eligibility.
- CSR personalized outreach to 2,976 customers around holidays.

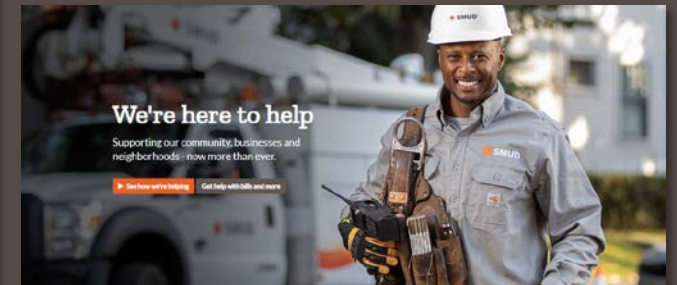
### EnergyHELP donations

- Multiple generous donations totaling \$14K applied to additional assistance and income eligible arrearages.



## We're here to help

3-phase campaign advertising our resources and efforts to support our community.





# SAA awareness campaign

Individualized, targeted messages highlighting help available from Strategic Account Advisors (SAAs) and SMUD.



## Friendly reminder campaign

## Commercial customer outreach



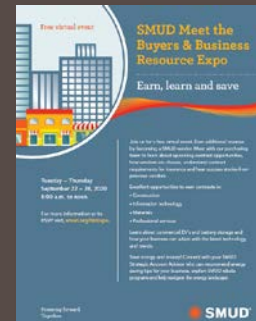
## Business reinvented

Social media campaign sharing local businesses' ingenuity coming to the aid of others.



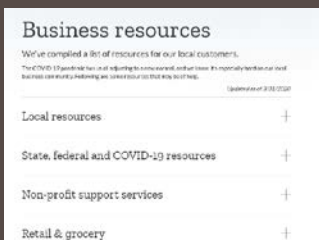
## Newsletter support for local business

Called upon our community to continue to support small business through both residential and commercial newsletters



## Virtual Meet the Buyers Expo

Annual event offered virtually for the first time.



## COVID-19 business resources

Online platform of community, state and federal resources available to business customers.



## Virtual assessments

A safe and convenient way to engage and thrive while resulting in operational efficiency and cost reduction for truck/car rolls.

# Value our residential customers & community



## Solar + weatherization

Provided installations for 34 single family homes

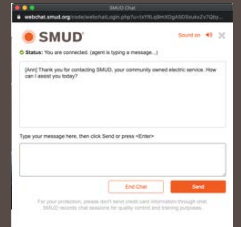


## 9.8k trees delivered

In partnership with Sac Tree Foundation

## Wattson live chatbot launched

Helps customers navigate smud.org, used by 9.2k customers and counting



## SMUD Energy Store record setting year

23k+ items sold, 53% customer awareness, \$72.5k+ donated to EnergyHELP, free holiday lights to 2,324 EAPR customers



## EV Concierge Service

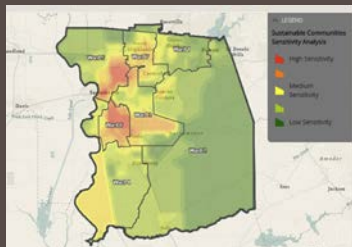
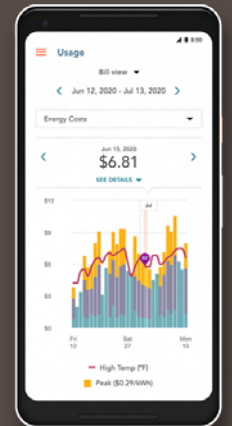
Offers live support, answering questions on all things about electric vehicles (EVs).



## Educational Outreach

10 residential + 2 K-12 educational videos produced with 150k+ views across all channels. Solar@Home summer camp for 287 local students.

**Enhanced SMUD App** Including robust charting features, real-time payment posting, mobile alerts and increased performance and speed



## Sustainable Communities resource priorities map

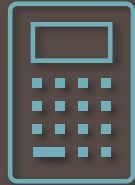
Drives community support to under-resourced neighborhoods – adopted by 10+ local jurisdictions.

## Digital self-service enhancements

Online automation of HomePower Repair request form, Energy Help Program and VIN Decoder for EV rate identification.

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# Value our commercial customers & community



## Commercial rate impact tool

Estimates bill impacts of 8-year rate restructure.



## Neighborhood SolarShares

Developers and builders to secure utility-scale solar from SMUD to meet the solar mandate.



## Solar support for our community

Provided solar installations for 5 local nonprofits



## Virtual Assessments

SAA's, Energy Specialists and Energy Advisors conducted onsite energy audits virtually giving customers a safe and convenient way to engage and thrive with SMUD during and after COVID-19.



## Commercial MyAccount

Expanded eligibility for commercial customers to make payment arrangements in digital channels.



## EE Incentives

850+ Commercial customers received energy efficiency incentives.



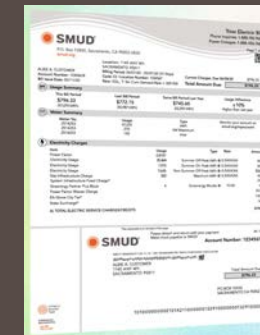
## 130 EVs + chargers

Incentivized through commercial charging, fleet and CALeVIP programs



## Business guide to beneficial electrification

Overview of benefits to go electric as a business, including reducing carbon, electrification costs, incentives, steps to electrify and equipment technology descriptions.



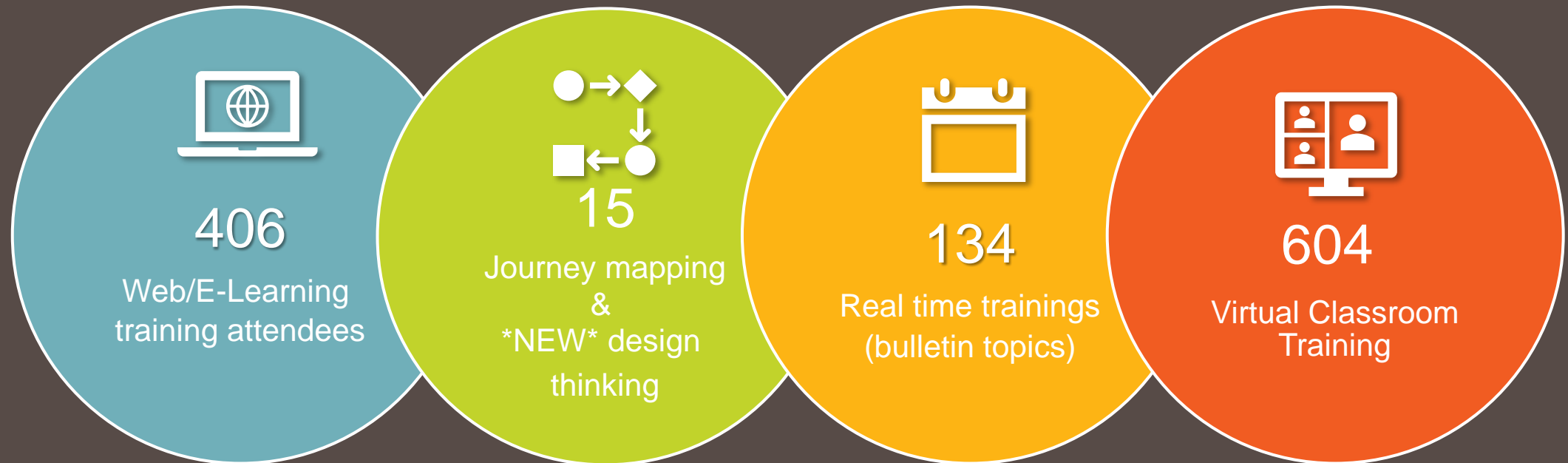
## SMUD business bill tips

Self-help video on [smud.org/MyAdvisor](https://smud.org/MyAdvisor) addressing the most-asked questions.

*Policy: "... (a) SMUD customers shall be treated in a respectful, dignified and civil manner."*

## 2020 Status:

Customer experience supported by internal training and customer-centric experience design



# Employees adapting to the 2020 environment



## Virtual CSRs

First-ever virtual onboarding (hiring and training).

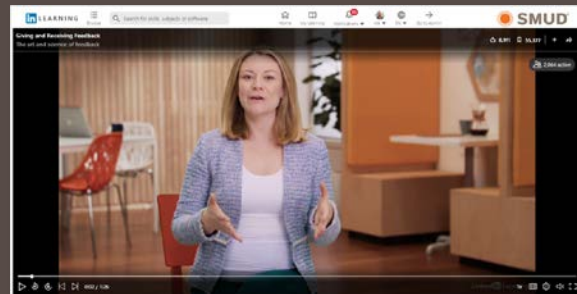


## Employees go remote

IT quickly transitioned to an at-home, remote set-up.

## LinkedIn Learning

Employee trainings quickly adapted to virtual environment.



## Info Technology drive-thru pick-up

Safe and efficient way for employees to get technical support and tools.



## Virtual resources

Resources adapted to virtual including HiLines



## Virtual team meetings

Online meeting tools quickly expanded to accommodate the sudden need.

# Customer Relations SD-5

## Policy:

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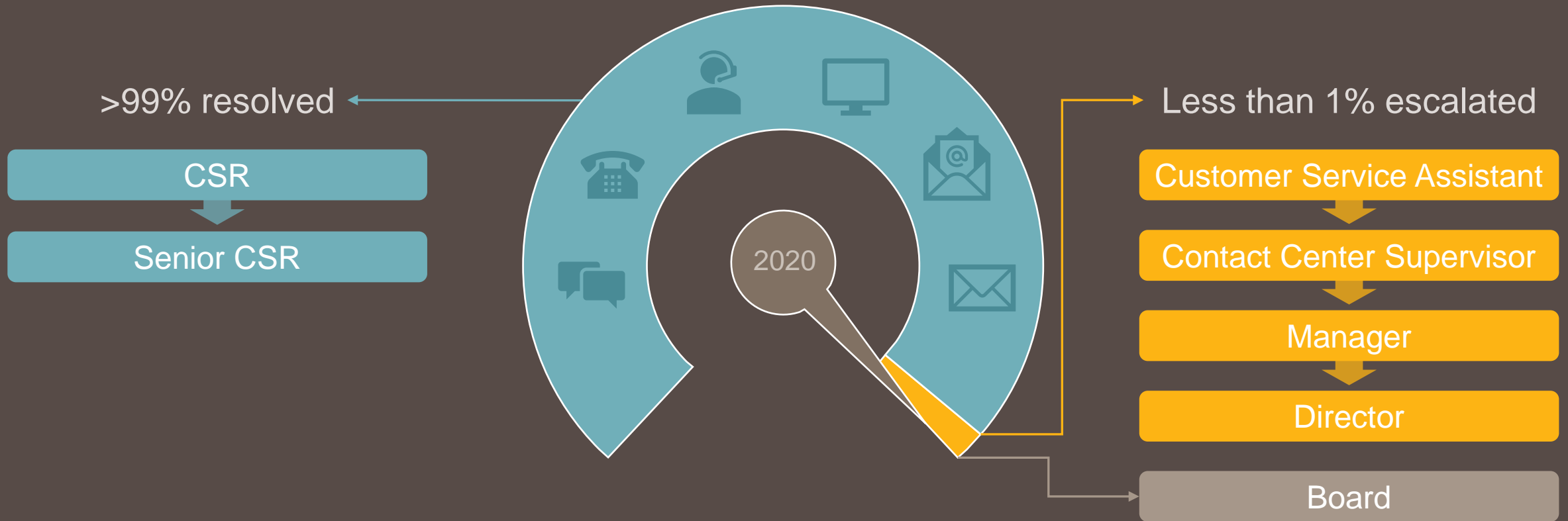
## Status:

Hearing and appeal process is found in detail on [smud.org](http://smud.org)

- [smud.org/assets/documents/pdf/Board-Meeting-Procedures.pdf](http://smud.org/assets/documents/pdf/Board-Meeting-Procedures.pdf) - Pg. 14 & 15
- The process is described on the back page of every bill

# Customer Communication Process

Over 650,000 contacts



# 2020 Awards & Recognitions



Excellence in Public Power Comms.  
(Print/Digital + Video)  
Alex Radin Distinguished Service



Bill McCrorie Distinguished Service  
Award - Arlen Orchard



Sacramento Rainbow Chamber  
Corporate Advocate Award Winner



Best Energy Program – Energy  
Storage Shares



Best Energy Efficiency & Demand  
Response Program - TOD



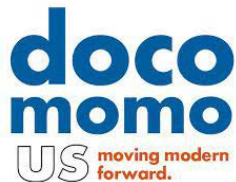
Best Practices Award – Program Marketing  
(Stay Well)



America's Best Mid-Size Employers of 2020  
(to be confirmed)



Climate A-List Company



Architectural Preservation Award –  
Wayne Thiebaud Mural



Drive Electric Award –  
Outstanding Utility



Non-Broadcast: Animated Energy Mix video  
Non-Broadcast: Student Careers Video  
Promo: TOD Customer Testimonial



State Leadership in Clean  
Energy – Energy  
StorageShares Program

Request the Board accept the SD-5  
monitoring report.