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

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

<table>
<thead>
<tr>
<th>Overall Satisfaction</th>
<th>2020</th>
<th>2019</th>
<th>2018</th>
</tr>
</thead>
<tbody>
<tr>
<td>Tree Trimming</td>
<td>95%</td>
<td>95%</td>
<td>95%</td>
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<tr>
<td>New Connects</td>
<td>99%</td>
<td>98%</td>
<td>98%</td>
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<tr>
<td>Bill Inquires</td>
<td>96%</td>
<td>96%</td>
<td>95%</td>
</tr>
<tr>
<td>Outage</td>
<td>95%</td>
<td>96%</td>
<td>96%</td>
</tr>
<tr>
<td>IVR Payment</td>
<td>97%</td>
<td>96%</td>
<td>96%</td>
</tr>
<tr>
<td>IVR Payment Arrangement</td>
<td>93%</td>
<td>98%</td>
<td>98%</td>
</tr>
</tbody>
</table>

Aug. 11, 2021
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.”

<table>
<thead>
<tr>
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<tbody>
<tr>
<td>Commercial</td>
<td>77%</td>
<td>67%</td>
<td>71%</td>
<td>70%</td>
<td>70%</td>
<td>65%</td>
</tr>
<tr>
<td>69% Minimum</td>
<td>79%</td>
<td>69%</td>
<td>73%</td>
<td>72%</td>
<td>74%</td>
<td>67%</td>
</tr>
<tr>
<td>Residential</td>
<td>75%</td>
<td>66%</td>
<td>69%</td>
<td>68%</td>
<td>66%</td>
<td>63%</td>
</tr>
<tr>
<td>65% Minimum</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

*Start year
Customer Experience Headwinds

- 2015 Year-over-year bill/usage comparisons
- 2016 Year-over-year bill/usage comparisons
- 2017 Year-over-year bill/usage comparisons
- 2018 Year-over-year bill/usage comparisons
- 2019 Year-over-year bill/usage comparisons
- 2020 Year-over-year bill/usage comparisons
- 2021 (YTD) Year-over-year bill/usage comparisons
- 2022 (Planned) Year-over-year bill/usage comparisons

- 2030 Decarbonization launched
- 2021 (Target) Year-over-year bill/usage comparisons

- Aug. 11, 2021

- Overall VFP

- Expanded pay station options
- Residential MyEnergy Tools
- Year-to-year bill/usage comparisons
- Online payment arrangements
- Responsive mobile
- Solar calculators
- Commercial MyEnergy Tools
- Web moves
- Improved outage map
- Expanded credit card payments
- Digital rebate processing
- Commercial SolarShares
- SMUD Energy Store
- Web payment arrangements
- SHINE program
- All-electric new construction program
- New digital bill
- "Bill Pay Your Way"
- Online chat
- IVR language enhancements
- CSR bill scenario tool
- Web auto reconnect
- Dedicated "Claims" web page
- Web move enhancements
- Text/email outage alerts
- Instant retail rebates
- Building electrification rebates
- Customer battery energy storage program
- Commercial new services website redesign
- "Bill Pay Your Way"
- Redesigned paper bill
- Launched Residential TOD
- Energy mgmt. info and tools for TOD
- Commercial MyAccount improvements
- Energy Assistance Program Rate (EAPR) benefit changes
- SMUD app
- Special population Energy Efficiency (EE) bundles
- EAPR automation
- Commercial zone "blitzes"
- Developer SolarShares
- COVID-19
- No shut-offs or late fees
- Proactive bill and COVID-19 support
- Real-time payment posting
- Pivot to virtual account mgmt
- Energy Assistance Program Rate (EAPR) benefit changes
- SMUD app
- Special population Energy Efficiency (EE) bundles
- EAPR automation
- Commercial zone "blitzes"
- Developer SolarShares
- Resume disconnects and collections
- Rate increases
- Commercial rate restructure
- Solar & Storage Rate
- Electrification rebates
- Commercial MyAccount
Commercial Overall Customer Satisfaction

- Industry Avg
- SMUD Index

Residential Overall Customer Satisfaction

- Industry Avg
- SMUD Index

Commercial California Ranking
- 2020CY: #1
- 2019CY: #1
- 2018CY: #1

West Midsize Ranking
- 2020CY: #2
- 2019CY: #3
- 2018CY: #1

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.

Aug. 11, 2021
2020 Environment: Quickly pivot and assist Commercial

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

COVID-19 business resources
Online platform of community, state and federal resources available to business customers.

Virtual Meet the Buyers Expo
Annual event offered virtually for the first time.

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

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

9.8k trees delivered
In partnership with Sac Tree Foundation

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

Sustainable Communities resource priorities map
Drives community support to under-resourced neighborhoods – adopted by 10+ local jurisdictions.

Wattson live chatbot launched
Helps customers navigate smud.org, used by 9.2k customers and counting

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

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

Digital self-service enhancements
Online automation of HomePower Repair request form, Energy Help Program and VIN Decoder for EV rate identification.

Aug. 11, 2021
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**
SAAs, 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.

**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 addressing the most-asked questions.

Aug. 11, 2021
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

- **Web/E-Learning training attendees**: 406
- **Journey mapping & *NEW* design thinking**: 15
- **Real time trainings (bulletin topics)**: 134
- **Virtual Classroom Training**: 604
Employees adapting to the 2020 environment

Virtual CSRs
First-ever virtual onboarding (hiring and training).

LinkedIn Learning
Employee trainings quickly adapted to virtual environment.

Virtual resources
Resources adapted to virtual including HiLines

Info Technology drive-thru pick-up
Safe and efficient way for employees to get technical support and tools.

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

Virtual team meetings
Online meeting tools quickly expanded to accommodate the sudden need.
Policy:

“(b) SMUD shall communicate a procedure for customers who believe they have not received fair treatment from SMUD to be heard.”

Status:

Hearing and appeal process is found in detail on smud.org

- 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

>99% resolved

CSR
Senior CSR

Less than 1% escalated

Customer Service Assistant
Contact Center Supervisor
Manager
Director
Board

Aug. 11, 2021
2020 Awards & Recognitions

- Excellence in Public Power Comms. (Print/Digital + Video)
  Alex Radin Distinguished Service Award
- Bill McCrorie Distinguished Service Award - Arlen Orchard
- Sacramento Rainbow Chamber Corporate Advocate Award Winner
- Best Energy Program – Energy Storage Shares

- Source
- Chartwell
- Forbes / Statista
- CDP
- 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

Aug. 11, 2021
Request the Board accept the SD-5 monitoring report.