



By the end of program year one, the program team had completed 2,913 home energy assessments, delivered 8,287 home energy kits, processed 7,354 rebate projects, and completed 8,416 multifamily units.

**114%**  
ANNUAL SAVINGS GOAL

**8,600**  
WEBSITE LEADS WITHIN  
THE FIRST NINE MONTHS

**91%**  
CUSTOMER SATISFACTION

# Portfolio-Level Collaboration Delivers Customer Savings

**Franklin Energy implements the full residential portfolio for a large electric and gas municipal utility, significantly boosting participation through collaborative and innovative digital marketing.**

## THE STORY

A large municipal utility that provides combined natural gas to more than 800,000 customers, and electric services to more than 340,000 customers, prides themselves on being innovative and involved in their tight-knit community. Through a broad portfolio of energy efficiency, demand response and solar programs, the utility helped their customers save a total 522 MW of energy between 2009-2017.

## THE GOAL

Franklin Energy's main goal was to design a portfolio that would engage more residential customers in energy efficiency and demand response measures. In the first year, the portfolio needed to achieve 31,000 kWh in savings.

## THE SOLUTION AND RESULTS

As the portfolio implementor, Franklin Energy developed a customer-centric portfolio design that provided several pathways for customer participation based on the customers' unique needs and opportunities. Rather than launching each program individually, all programs were bundled together under one new brand to streamline delivery and eliminate customer confusion. To provide a single home for all the customers' energy efficiency needs, a website was created, a quarterly newsletter was launched, marketing materials were built, and a social media presence was established. One cohesive portfolio offering ensured a more seamless customer experience.

Before the portfolio launched, the utility had been offering home energy assessments but did not have an effective way to engage customers who didn't qualify for full services. This gap was addressed by adding water- and energy-saving kit programs to the portfolio. These kits put conservation products where they have the greatest impact: in customers' hands.

The easy pathways to participation resulted in exceeding the goal before year-end. In the first year, the portfolio realized 114% of its annual savings goal and achieved a 91% customer satisfaction score—all with a marketing budget of less than \$60,000. By implementing the unique marketing strategy of bringing together all programs under one brand, the program was able to collect 8,600 leads through the website within the first nine months, resulting in 3,048 leads for the home energy assessments, 3,387 kit requests and 960 requests for rebate information. Each of these leads was closed into a program participant.

