



fiveworx
a product of lirio

Show Me You Know Me

How customers engaged with Alliant Energy after receiving micro-targeted communications.

February 2018



Executive Summary

Highlights

Alliant Energy in Wisconsin selected Fiveworx in 2014 to implement the Alliant Energy Advisor program through email automation using a highly targeted, persona-based approach to engagement. Working with Fiveworx, the program expanded from a 3,000-customer proof-of-concept to a 15,000-customer pilot to a scaled program reaching 110,000 residential customers. Alliant Energy continues to use the Fiveworx platform to drive meaningful customer engagement and increase program participation.

Program Goals

- Increase Participation in *Focus on Energy* Programs
- Improve Customer Satisfaction
- Drive Customer Engagement

Common Energy Barriers

The Alliant Energy Advisor (AEA) program was designed to address common consumer barriers and misperceptions about energy. For example, most Americans:

- Think they use less energy than they actually do.

- Believe their homes are already energy efficient, with no need for further action.
- Know little about how to improve the energy efficiency of their homes (even if they want to try).

When AEA launched, only 2% of Alliant Energy's residential customers were participating in Wisconsin's statewide *Focus on Energy* programs. The participant percentage more than doubled in the first year of the AEA program.

The partnership between Alliant Energy and Fiveworx continues to address consumer barriers, increase customer engagement, cross market other programs, and help customers fully reap the benefits available through *Focus on Energy*.



Successful Pilot
Scaled to 110,000
Residential Customers



150% Increase in Program
Participation & Improved
Program Awareness



Increased Digital
Engagement Outperforming
Industry Benchmarks 120%



5% Higher
Customer Satisfaction



Supports Corporate
Marketing &
Communication Objectives

Program Fundamentals

About Alliant Energy

Alliant Energy Corporation (NYSE: LNT), headquartered in Madison, WI, provides regulated electric and natural gas service to 960,000 electric and 410,000 natural gas customers across Iowa and Wisconsin. Alliant Energy's mission is to deliver the energy solutions and exceptional service customers and communities count on—safely, efficiently, and responsibly. Interstate Power and Light Company and Wisconsin Power and Light Company are Alliant Energy's two public utility subsidiaries. Alliant Energy Corporation is a component of the S&P 500 and trades under the symbol LNT. For more information, visit alliantenergy.com.

About Fiveworx

Fiveworx is a turnkey communication solution that helps utilities become trusted and relevant in the eyes of their customers. The platform combines proprietary energy-specific psychographic personas with behavioral analysis, automated email marketing, and machine learning to go beyond meter data and tailor on-the-fly, personalized communications between utility providers and customers. At the metrics level, that means driving greater program participation and energy savings along with improved customer satisfaction. In the big picture, Fiveworx can deliver the customer engagement and program results of an experienced CMO.

Design

- Everything we do is research-driven, designed, and validated.
- Our personas go beyond demographics to include individually validated, energy-specific psychographics.
- We use machine learning and predictive analytics to go beyond propensities and deliver individually selected messages.

Software

- We keep our solution simple, functional, and scalable.
- Our software is capable and flexible, so it can adapt as needed.
- We integrate with the best technologies rather than trying to reinvent the wheel.

Design
Fundamentals + Software
Fundamentals = Advantages

Fiveworx Foundation of Success: We Believe in Personas

Energy-Specific, Psychographic Personas

Fiveworx applies our four proprietary energy personas to communicate energy efficiency content in a relevant way to individual customers. Each persona has its own propensities, motivations, and behavioral cues. So, while some emails share a similar look and feel, the content varies by persona and is specifically tailored to motivate each customer into action.




Thousands took back the power by using less power.

Alliant Energy Advisor customers have taken control over their energy bills. Approximately 6,400 energy-saving actions were taken to reduce energy use and energy costs. Stay ahead of your bill by updating your personalized energy-savings plan.

[Check Out Plan](#)

It's now even easier to outwit your energy bill.

You're a smart cookie. So why are you using more energy than necessary? Take steps toward becoming more energy efficient to outsmart your bill and keep more money for yourself.

Alliant Energy and Focus on Energy have just launched a host of new energy efficiency rebate programs for 2017, including incentives for:

- Recycling your old, inefficient refrigerator
- Purchasing a smart thermostat
- Installing a heat pump water heater

Now's a great time to review your personalized energy-savings plan and make sure you have the right actions on this year's to-do list. Your bill will never see it coming.

[Save Plan](#)

Alliant Energy Advisor is an optional tool that gives you customized advice on how to save energy and money.

©2017 Alliant Energy | Privacy and Legal | [Click here to Login](#)

Unsubscribe



Cautious Conservatives




Thousands of you took important steps toward energy savings.

Alliant Energy Advisor customers have made progress as part of the environmental solution—not just of the problem. Our customers took approximately 6,400 energy-saving actions to cut down on carbon emissions! Keep protecting Planet Earth by updating your personalized energy-savings plan.

[Check Out Plan](#)

Don't miss this chance to shrink your home's environmental impact.

The opportunity to make a difference doesn't come along every day. But here it is: a simple action to save energy and minimize your carbon footprint...

Alliant Energy and Focus on Energy have just launched a host of new energy efficiency rebate programs for 2017, including incentives for:

- Recycling your old, inefficient refrigerator
- Purchasing a smart thermostat
- Installing a heat pump water heater

As you know, saving energy is vital to protecting the planet. Now's a great time to review your personalized energy-savings plan and make sure you have the right actions on this year's to-do list. Planet Earth will be glad you did.

[Save Plan](#)

Alliant Energy Advisor is an optional tool that gives you customized advice on how to save energy and money.

©2017 Alliant Energy | Privacy and Legal | [Click here to Login](#)

Unsubscribe



Concerned Parents




Thousands took steps toward a cleaner, healthier planet.

Alliant Energy Advisor customers have made important choices that impact your family's quality of life now—and years from now. Approximately 6,400 energy-saving actions were taken to help protect our air, water, and climate. Continue using energy wisely by updating your personalized energy-savings plan.

[Check Out Plan](#)

Energy efficiency benefits the whole household.

Think you don't have time for energy efficiency? Think again. Just a small investment of time can pay you back in energy savings and make your home a better place for your family to live.

Alliant Energy and Focus on Energy have just launched a host of new energy efficiency rebate programs for 2017, including incentives for:

- Recycling your old, inefficient refrigerator
- Purchasing a smart thermostat
- Installing a heat pump water heater

Now's a great time to review your personalized energy-savings plan and make sure you have the right actions on this year's to-do list. Your household budget will be glad you did.

[Save Plan](#)

Alliant Energy Advisor is an optional tool that gives you customized advice on how to save energy and money.

©2017 Alliant Energy | Privacy and Legal | [Click here to Login](#)

Unsubscribe



True Believers




Thousands of you gave your household budget that little something extra.

Alliant Energy Advisor customers have officially reduced the amount of energy used! Collectively, our customers took approximately 6,400 energy-saving actions along the path to lower energy bills. Keep the momentum by updating your personalized energy-savings plan.

[Check Out Plan](#)

Every penny in your budget counts. Don't spend a single one on wasted energy.

If you have a limited budget, you're probably really careful with your dollars. Did you know that taking just a little time for energy efficiency can lead to big rewards?

Alliant Energy and Focus on Energy have just launched a host of new energy efficiency rebate programs for 2017, including incentives for:

- Recycling your old, inefficient refrigerator
- Purchasing a smart thermostat

Now's a great time to review your personalized energy-savings plan and make sure you have the right actions on this year's to-do list. Your wallet will be glad you did.

[Save Plan](#)

Alliant Energy Advisor is an optional tool that gives you customized advice on how to save energy and money.

©2017 Alliant Energy | Privacy and Legal | [Click here to Login](#)

Unsubscribe



Working Class Realists

Story of Program Evolution

From Proof-of-Concept to Full-Scale Program

Alliant Energy and Fiveworx began our journey together in 2014 to address existing energy efficiency program participation barriers. The first program, Alliant Energy Advisor, was a proof-of-concept, web-based, behavioral economics marketing approach to inform and motivate roughly 3,000 residential customers to adopt energy-efficient measures and direct them to sign up on the Alliant Energy Advisor (AEA) portal website. Alliant Energy used the Fiveworx platform to deliver customized, persona-based content to customers via automated email on a biweekly basis.

Due to changing program objectives, different segmentation techniques were used throughout the program. Fiveworx currently segments customers into their respective personas by using a proprietary algorithm and third-party data.

Once Alliant Energy customers were segmented into the right persona, emails are delivered to personally motivate them to take energy-saving actions and encourage them to visit the Alliant Energy Advisor portal website or *Focus on Energy* to access personalized energy savings plans. Initially the AEA website pre-populated with the top five highest

persona-based propensity recommendations, each plan was tailored by the customer to fit individual preferences. Customers were encouraged to visit the portal to document, review, and verify any recommended actions they have completed.

Fiveworx tracks each customer interaction with emails and portal visits through a feedback loop, continuously analyzing the data. Through machine learning, the system analyzes the data and surfaces insights to update and customize all content to deliver the best next communication for each customer.

Since the pilot launch, Fiveworx and Alliant Energy have taken the proof-of-concept program to pilot and now to full-scale program. Fiveworx continues to enhance its software platform to enable larger and faster email deliveries with more robust reporting capabilities. Email sends for Alliant Energy now reach 110,000 residential customers on a biweekly basis. The next steps of the program move beyond energy efficiency to start engaging Alliant Energy's customers with corporate initiatives beyond energy efficiency.



Program Timeline

Alliant Energy and Fiveworx began their journey in 2014.

The overarching goal was to increase the residential customers' participation in the state of Wisconsin's *Focus on Energy* program.

Year 1

Treatment Includes Web Portal & Email

In year one, Alliant Energy Advisor was a proof-of-concept, web-based, behavioral economics driven marketing approach to inform and motivate roughly 3,000 residential customers to adopt energy-efficient measures. Emails were sent directing customers to fill out an intake survey and sign up on the Alliant Energy Advisor portal.

Year 2

Treatment Includes Email Directing to *Focus on Energy Site*

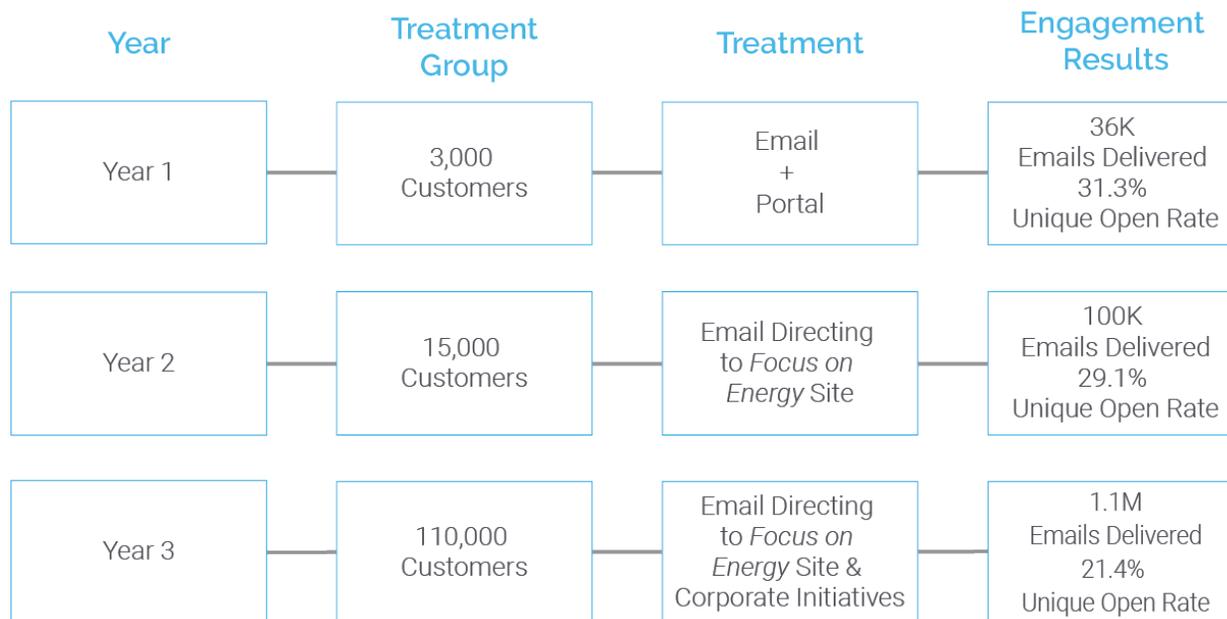
In year two, we expanded the proof-of-concept, to a pilot program which included a customer pool of 15,000 residential customers. During the pilot, customers were sent personalized behavioral emails motivating them to adopt energy-efficiency measures while directing them toward the *Focus on Energy* site.

Year 3

Treatment Includes Email Directing to *Focus on Energy Site* & Corporate Initiatives

In year three, the pilot evolved into a full-scale program with 110,000 residential customers receiving biweekly behavioral emails. The Fiveworx platform was enhanced to send highly customized emails from a library of content that offers each measure written for each unique persona. Since Fiveworx uses behavioral data, machine learning, and persona-based measure propensities to tailor messaging, each email send grew to include between 2,000 and 10,000 different email variations for a total send to 110,000 customers.

The program is currently evolving to include other corporate products and objectives, such as green power participation and electrification, in addition to traditional energy efficiency programs.



Tying Goals to Performance

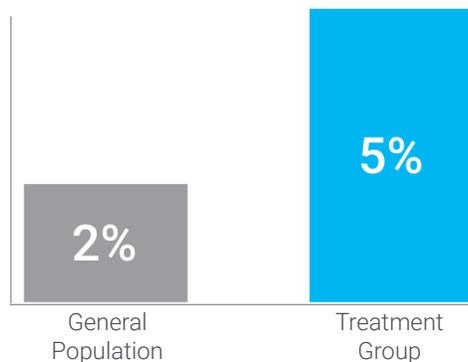
Key Findings

Goal #1 Increase Participation in *Focus on Energy* Programs

Finding: 150% Increase in Participation

Based on Alliant Energy's data, year one resulted in 5% of the customers in the treatment group participating in *Focus on Energy*, compared to the 2% participation rate among Alliant Energy's general residential customer base.

When evaluators asked participants how important they found Alliant Energy Advisor in helping them practice common energy-saving behaviors, 8% said very important and 48% said important.



Finding: Greater Awareness & Website Visits to *Focus on Energy*

By increasing exposure, Alliant Energy Advisor raised customer awareness of *Focus on Energy*. Customers who first participated in the Alliant Energy Advisor pilot in 2014 reported significantly greater awareness of *Focus on Energy* programs and rebates than those customers who had just stated participating in year two of the pilot. Of the treatment group, 34% reported visits to the *Focus on Energy* website, compared to the 17% in the control group who reported visiting the site.

Goal #2 Improve Customer Satisfaction

Finding: Higher Satisfaction Among Customers Who Receive Regular Communication From Utility

Alliant Energy Advisor increased customer satisfaction with Alliant Energy. Treatment group customers reported a 5% higher satisfaction rating than those in the control group.

Goal #3 Drive Customer Engagement

Finding: Lift in Energy Savings From Program Participants

The Alliant Energy Advisor pilot provided a lift in savings from participation in *Focus on Energy* programs. Customers in the treatment group saved 71% more energy from participation than customers in the control group.

Finding: Outperforming Industry Benchmarks in Email Opens & Clicks

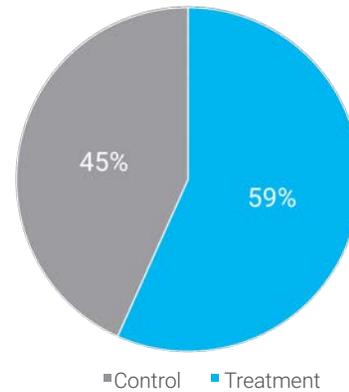
Over the span of the program, email open, click-through, and click-to-open rates outperformed industry benchmarks and exceeded targets by at least 120% on average.

Alliant Energy's own data analysis revealed a 150% increase in program participation.

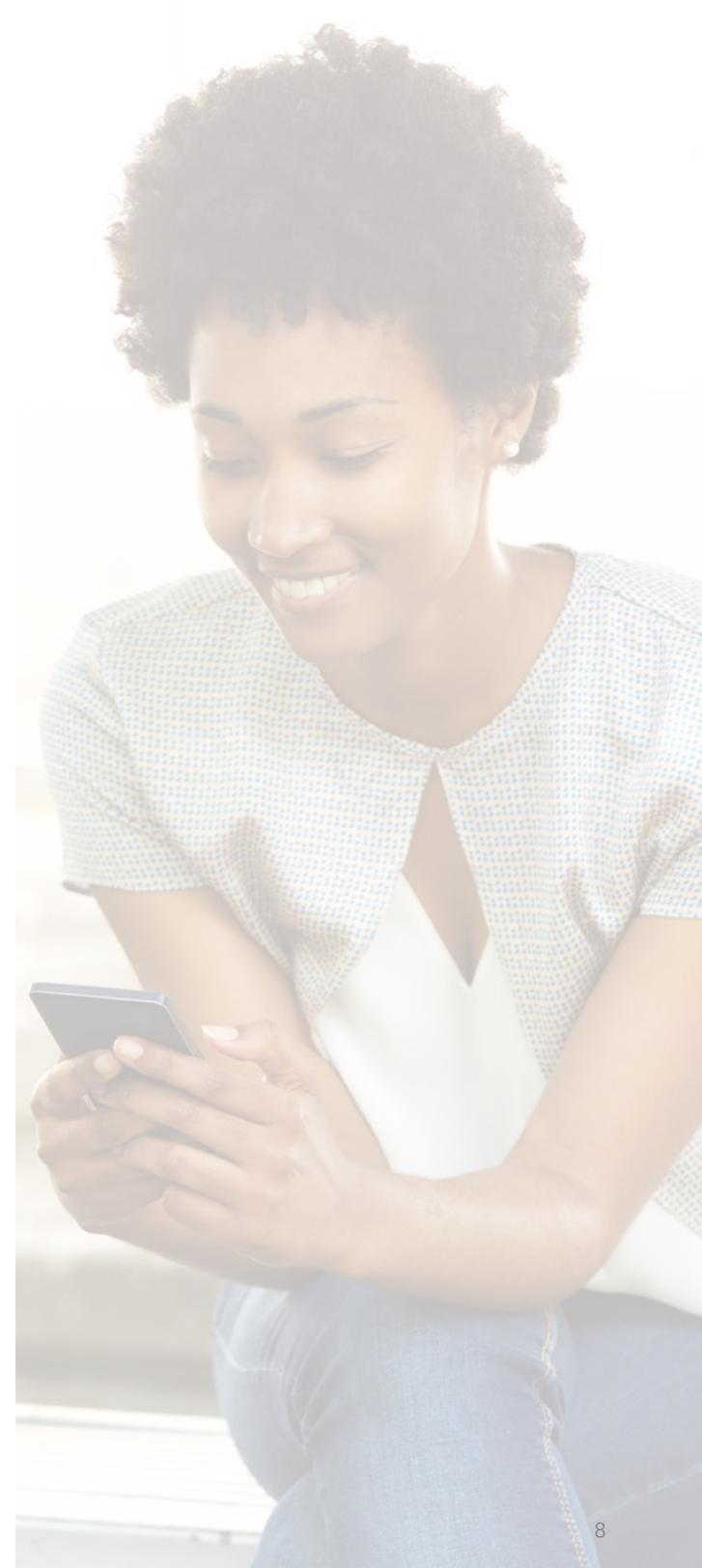
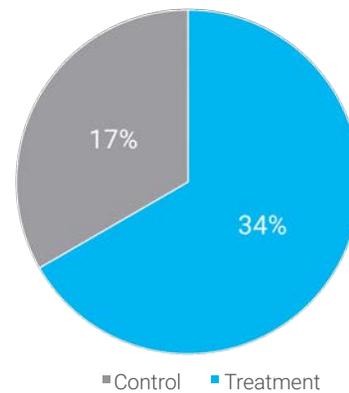
Greater Awareness & Website Visits to *Focus on Energy*

Alliant Energy raised customer awareness of *Focus on Energy* programs by leveraging digital communications under the Alliant Energy brand. Customers who first participated in the Alliant Energy Advisor pilot in 2014 reported significantly greater awareness of *Focus on Energy* programs and rebates and more *Focus on Energy* website visits than customers who had just started participating in year two of the pilot.

Familiarity With *Focus on Energy* Rebates and Programs During Year 1

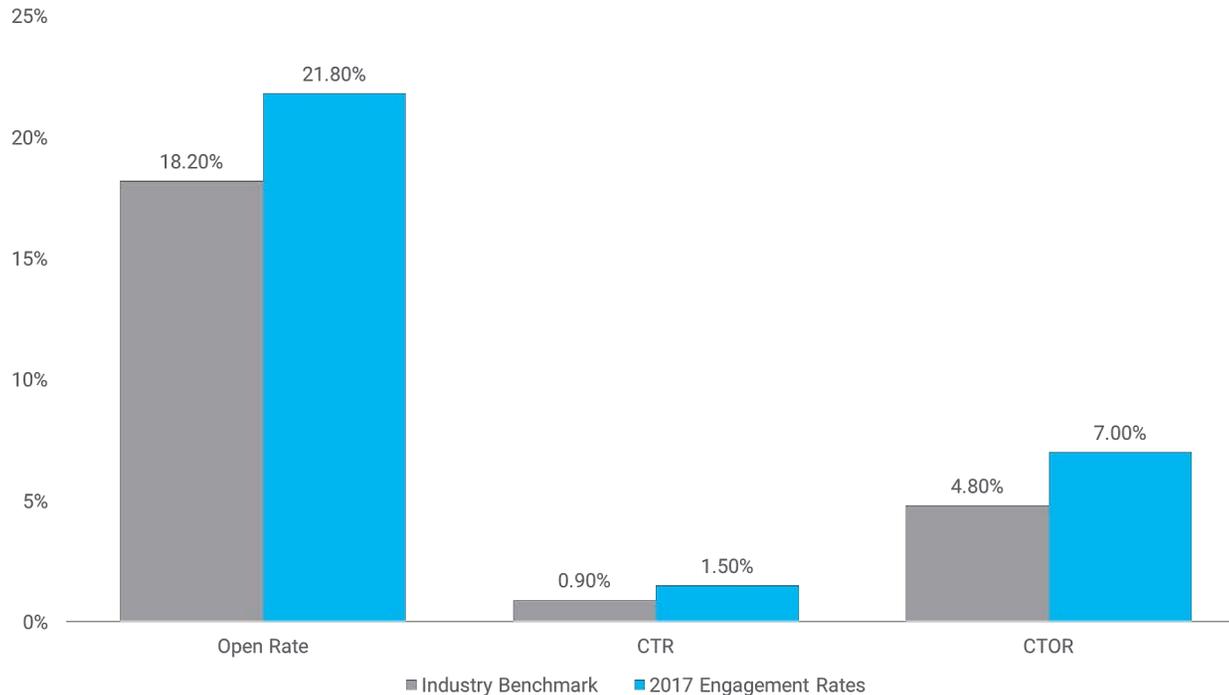


Self-Reported Visits to the *Focus on Energy* Website During Year 1



Beating Industry Benchmarks: A Look at Digital Engagement Metrics

The Alliant Energy Advisor and *Focus on Energy* program pilot achieved substantial email engagement results compared to industry benchmarks. Here are a few key metrics in 2017 comparing Fiveworx email engagement results to industry benchmarks:



Email Open Rates*



20%

above industry average

Click-Through Rates**



66%

above industry average

Click-to-Open Rates***



46%

above industry average

Email Open Rates: A percentage measuring the number of successfully delivered emails that were opened by subscribers.

**Click-Through Rates (CTR): A percentage measuring the number of subscribers who have clicked on a link in an email divided by the total number of emails delivered.

***Click-to-Open Rates (CTOR): A percentage measuring the number of subscribers who have clicked on a link in an email divided by the total number of subscribers who opened the email. CTR is an important metric to track overall email engagement. CTOR is an important metric for tracking how email content is performing by measuring only subscribers who actually opened the email.

Conclusion

Onward & Upward

Alliant Energy continues its partnership with Fiveworx, not only to increase its energy efficiency program participation rate, but also to truly understand its customers as individuals. Fiveworx personas, based on behavioral cues and motivations, allow utilities to move beyond meter data to engage their customers in ways that drive them to take action and build trust in the relationship. Alliant Energy continues to utilize the Fiveworx platform to expand its engagement to 110,000 residential customers. Alliant Energy and Fiveworx continue to collaborate and grow their partnership to examine new areas of opportunity, such as specific targeting and segmentation of certain residential customers (i.e. low income), messaging on new corporate initiatives, and enhancing personalization through machine learning.

To learn more about Fiveworx and how persona-based messaging can help your utility build trusted relationships with customers, visit fiveworx.com or contact Fiveworx to schedule a demo.





Contact Us:

865.243.8000 Local

877.819.2188 Toll Free

9202 S. Northshore Dr. Suite 300

Knoxville, TN 37922

fiveworx.com

a product of **lirio**

Copyright © 2017 by Lirio, LLC.

All rights reserved.