Successful Prepay Implementation at Town of Wake Forest

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Andrew Brown Jr., Customer Service Manager, Town of Wake Forest
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Agenda

• Overview of “Smart” Prepayment
• Prepay is Trending
• Wake Forest and Prepay
• Keys to Success
• Customer “Success” Stories
• Q&A
# Prepay Solution Components

## Payment Processing
- Convenient payment options fully integrated via our payment gateway
- Retail POS
- Telephone (IVR)
- CSR
- Web Payment
- Mobile app
- Kiosk

## Billing & Operations
- Stand-alone billing platform or integrated with a legacy CIS system
- AMI Meter Control
- Usage Processing
- Service Orders
- Weather Moratoriums
- Complex Rating

## Messaging & Notifications
- Automated notification of events & proactive consumer messaging
- SMS Text
- Email
- Outbound Auto-Dialer
- Web
- IVR
- Mobile App

## Account & Debt Management
- Multiple methods for customers to manage their prepaid utility account
- CSR user interface
- Web Self Service
- Mobile App
- 2-way Texting
- Web Enrollment
- Arrears Recovery
The Prepay Account Lifecycle

- Enrollment
- De-Enrollment
- Payment and Remote Reconnect
- Remote Disconnect
- Remote Reading
- Balance Inquiry
How Does Prepay Work at Wake Forest Power?

Customer signs up for the prepay program via utility website

If customer ignores multiple low balance warnings, then GridLink CIS automatically sends disconnect request to smart meter

As balance gets lower, GridLink CIS sends multiple balance warnings to the customer's mobile phone

If customer ignores multiple low balance warnings, then GridLink CIS automatically sends disconnect request to smart meter via L+G Command Center

Smart meter shut down

Customer makes a payment via a walk-up cash payment location, or via mobile app, myAccount portal, inbound phone call, etc.

Payment is applied immediately as a credit to the energy balance

L+G Command Center processes meter read data and transmits to GridLink CIS

Customer signs up for the prepay program using GridLink CIS

GridLink CIS sends reconnect request to the smart meter via L+G Command Center

Smart meter turns on and payment process continues

...Wake Forest Customer Service Rep enrolls the customer in prepay program using GridLink CIS

Smart meter begins to transmit daily meter reads to Landis+Gyr (L+G) Command Center
Prepay is Trending
Adoption rates for prepaid electricity have risen. Utilities are moving from “pilot” to “launch.”

2014 Survey\(^8\) shows Prepay is now considered a “Mega-Trend” with a clear generational shift.

Mobile phone industry adopted prepaid plans long ago. They’ve made prepay “sexy.”
What is Causing the Generational Shift?

60%

Of “Millennials with Money” prefer using prepaid cards to credit cards and debit cards
Other Reasons for Prepay

43% see it as an option for bad debt
31% feel it is newer and more convenient
27% see it as a means to save money on energy bills
45% feel it would increase communication with their utility
Flexible Deployment Options

8 weeks to deploy

SmartGridCIS “Express”

Legacy CIS
Enrollment
Termination
Payment Processing
Adjustments
Service Orders

Prepay CIS
Alerts

Head End
Read Processing

Meter Control

Legacy CIS
Enrollment
Termination
Payment Processing
Adjustments
Service Orders

Prepay CIS
Alerts
Payment Processing
Monthly Reconciliation

Meter Control
HAN Device Communication

Head End

Meter

4 months to deploy

Integrated Adapter
Wake Forest and Prepay
What Problem Areas Did Wake Forest Address?

- Uncollected Revenue
- Cash Flow
- Customer Satisfaction
The Prepay Solution at Wake Forest

**GridLink CIS**
Full featured utility billing, operations and broker management in one configurable solution

**myAccount**
Web and mobile online account management extend the brand

**Web Portals**
Separate enrollment and payment portals provide additional capabilities for engaging customers
GridLink CIS – Dashboard View
Dashboard Widgets Showing Program Status

**Daily Program Status**

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<td>Active Prepay Accounts</td>
<td>332.00</td>
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<tr>
<td>Active PostPay Accounts</td>
<td>0.00</td>
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<tr>
<td>Yesterday's Payments</td>
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<tr>
<td>Yesterday's kWh Billed</td>
<td>2355.85</td>
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<tr>
<td>Yesterday's Disconnects</td>
<td>11.00</td>
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<tr>
<td>Yesterday's Reconnects</td>
<td>11.00</td>
</tr>
<tr>
<td>Yesterday's Alerts</td>
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**Period Averages**

From: 7/17/2018  
To: 1/17/2019

<table>
<thead>
<tr>
<th>Description</th>
<th>Value</th>
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</thead>
<tbody>
<tr>
<td>Avg. Payment Amount</td>
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<tr>
<td>Avg. Daily kWh Usage</td>
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<tr>
<td>Avg. Daily Disconnects</td>
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<tr>
<td>Avg. Daily Reconnects</td>
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<td>Avg. Email Sent</td>
<td>175.00</td>
</tr>
<tr>
<td>Avg. Outbound Dialer Calls</td>
<td>0.00</td>
</tr>
</tbody>
</table>
Customer (myAccount) Dashboard
Customer (myAccount) Showing Payment Center
Keys to Success
Critical Success Factor

- Pilot program
- Customer engagement
- Phases
- Customer Service
- Cash
Pay when you want, and pay how much you want. By paying for your electricity before you use it, you'll be able to decide how much you pay, and when you pay. You can pay as much or as little as you like each month, all year round.

View your usage and balance at any time. You can log in to your account and see how much electricity you are using on any given day. Adjust your thermostat a few degrees and see what happens to your costs. It's all in your hands.

No electric bills. Ever. Under the Pay-As-You-Go plan, you will not receive a monthly bill. Instead, the cost of the electricity you use will be deducted from your pre-paid account on a daily basis.

How do I know if my account is running low? If your balance is running low, you will receive periodic notifications reminding you to add funds to your account. You can select from these notifications by phone, email, text— or all of the above.

No connection fees or late fees. If the funds in your account run out, your electricity will be turned off. To turn your power back on, simply deposit more money into your account, any time of day or night, and your power will be automatically restored within one hour of processing your payment. There is no fee for reconnecting your power.

No deposit. The Pay-As-You-Go plan does not require a deposit and you will not be penalized for disconnects and reconnects. If you are on traditional billing service and you have an overdue balance, you can elect to participate in the debt management program that's available to Pay-As-You-Go customers.

Keep track of electricity usage and budget constraints. See how much you are using each month and how your budget is being affected.

Take charge of your electric costs.

Contact Information

Wake Forest Power
Keep it simple. Call (336) 756-3000.

Consumer Education

Wake Forest Pre-Pay Power Terms of Service

Applicability and Availability: Wake Forest Pre-Pay Power metering equipment is available to all single-phase non-rental residential customers in the Wake Forest service area, subject to availability. Wake Forest offers a variety of plans and rates for Pre-Pay Power service. Customers receiving energy assistance need to follow the setup and enrollment procedures for the Pre-Pay Power service.

For new customers, the Pre-Pay Power setup fee is $39, the Pre-Pay Power account balance is $15 and the standard edition meter is not available. Financial assistance may be required to help customers pay for the setup fees and costs of $15 or less to begin to stay on the program immediately following the Pre-Pay Power setup.

Deferral of Payment: Customers with account balances will be offered a payment plan, in order to stay on the program immediately following the Pre-Pay Power setup.

Customer service charges: Customers with account balances will receive regular payment reminders. Customers with account balances will be charged a $15 setup fee, in order to stay on the program immediately following the Pre-Pay Power setup.

Billing: Pre-Pay Power accounts do not receive paper statements. Pre-Pay Power customers will receive notifications by phone, email, text— or all of the above.

Enrollment and Minimum Payments for Reconnection: Pay-As-You-Go plans do not accept a credit card. To re-enroll service, customers must call their local utility company.

System Monitoring: During periods of extreme weather conditions, the utility may disconnect service to reduce the potential for electrical damage. Under such conditions, the utility may also adjust the set point for the thermostat to reduce the potential for electrical damage.

Payment Arrangements: The Pre-Pay Power accounts are eligible for payment by credit card, direct deposit, and/or bank draft. Payment arrangements can be changed at any time without notice, subject to the terms of this agreement. Customers paying by credit card, direct deposit, or bank draft will be required to provide the account information for the new payment method, which will be charged to the customer immediately following the Pre-Pay Power enrollment.

Change to Pre-Pay Service: You may elect to change your account from the standard edition to the Pre-Pay Power Account by notifying the utility of the change. A $15 change fee will be assessed when the customer account is transferred to the Pre-Pay Power service. The customer will be charged a $15 setup fee and any fees associated with the Pre-Pay Power enrollment.

Safety Watch: If account activity indicates an unsafe condition, the account will be disconnected and the customer will be advised to correct the unsafe condition before reconnecting.

Signature:

[Signature]

Connection Summary

On 11th Street SW, Wake Forest, NC 27587, 10010-0000

Customer: [Customer Name]
Address: [Customer Address]
Phone: [Customer Phone]

Account Balance:
[Account Balance]

Average Daily Usage:
[Average Daily Usage]

Notes:
[Notes]

Date:
[Date]

[Signature]

[Employer Name]
[Employer Address]
[Employer Phone]

[Note: This form is for customer use only and should not be submitted to the utility.]

Access Your Account Information

Wake Forest Power customers can access their account information by logging on at www.wakeforestpower.com or by calling 1-866-256-3070.

No Deposit

Wake Forest Pre-Pay Power customers are eligible to have their deposit refunded any time. This fund reserves your service if you ever need to change your account to a traditional billing service. You can change your account at any time without notice, subject to the terms of this agreement.

How do I know if my account is running low? If your balance is running low, you will receive periodic notifications reminding you to add funds to your account. You can select from these notifications by phone, email, text— or all of the above.

No connection fees or late fees. If the funds in your account run out, your electricity will be turned off. To turn your power back on, simply deposit more money into your account, any time of day or night, and your power will be automatically restored within one hour of processing your payment. There is no fee for reconnecting your power.

No deposit. The Pay-As-You-Go plan does not require a deposit and you will not be penalized for disconnects and reconnects. If you are on traditional billing service and you have an overdue balance, you can elect to participate in the debt management program that's available to Pay-As-You-Go customers.

Eligibility: To participate, you must be a Wake Forest residential customer with a $33 deposit or less, non-rental residential account. Life Support and Medical Alert accounts are not eligible for Pay-As-You-Go electricity service. Payment arrangements are not allowed on Pay-As-You-Go accounts. Energy payment assistance needs to follow the accepted payment methods for Pay-As-You-Go accounts.
Prepay – Challenges & Lessons Learned

- Vendor relationships
- Creative recruitment
- Customer mentality
- New
- Accuracy
Some Customer "Success" Stories
Customer Success Stories

- Pilot program
- 1st Customer
- Bad weekend
- Moratorium
- Deposits
Q&A