

Elevating the New Customer Experience: A Strategic Approach

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Retail Customer Survey

The purpose: each year we ask Public Power customers what drives their satisfaction — from reliability and value to the programs and channels they rely on — so we can see where service is strong and where to improve.

9

YEARS OF TRACKING

For nine years, this survey has tracked customer satisfaction — giving us a consistent benchmark of sentiment and trends across our member communities.

What the survey aims to achieve

Improve satisfaction

Track and identify focus areas to raise overall customer satisfaction across our member utilities.

Guide programs & communications

Turn customer input into better program design, rate options and education, and communications.

Benchmark performance

Compare Public Power against competitors and prior years to see what is working.

New Segmentation

Introduced in 2025 — SECC Consumer Pulse Wave 9, available to ElectriCities as an SECC member

- Four personas defined by attitudes toward environmental issues, energy efficiency, and technology

Informed and Engaged

Knowledgeable about their provider and do everything they can to be energy efficient.

Curious and Capable

Want to save money on electricity but do not have affordability challenges and are open to technology.

Tech-Cautious Savers

Focus on saving money and maintaining low electricity rates without sacrificing comfort or relying on complex technology.

Turnkey Comfort

Reliability and resiliency focused but want their electricity provider to do the work.

MORE FAVORABLE

LESS FAVORABLE

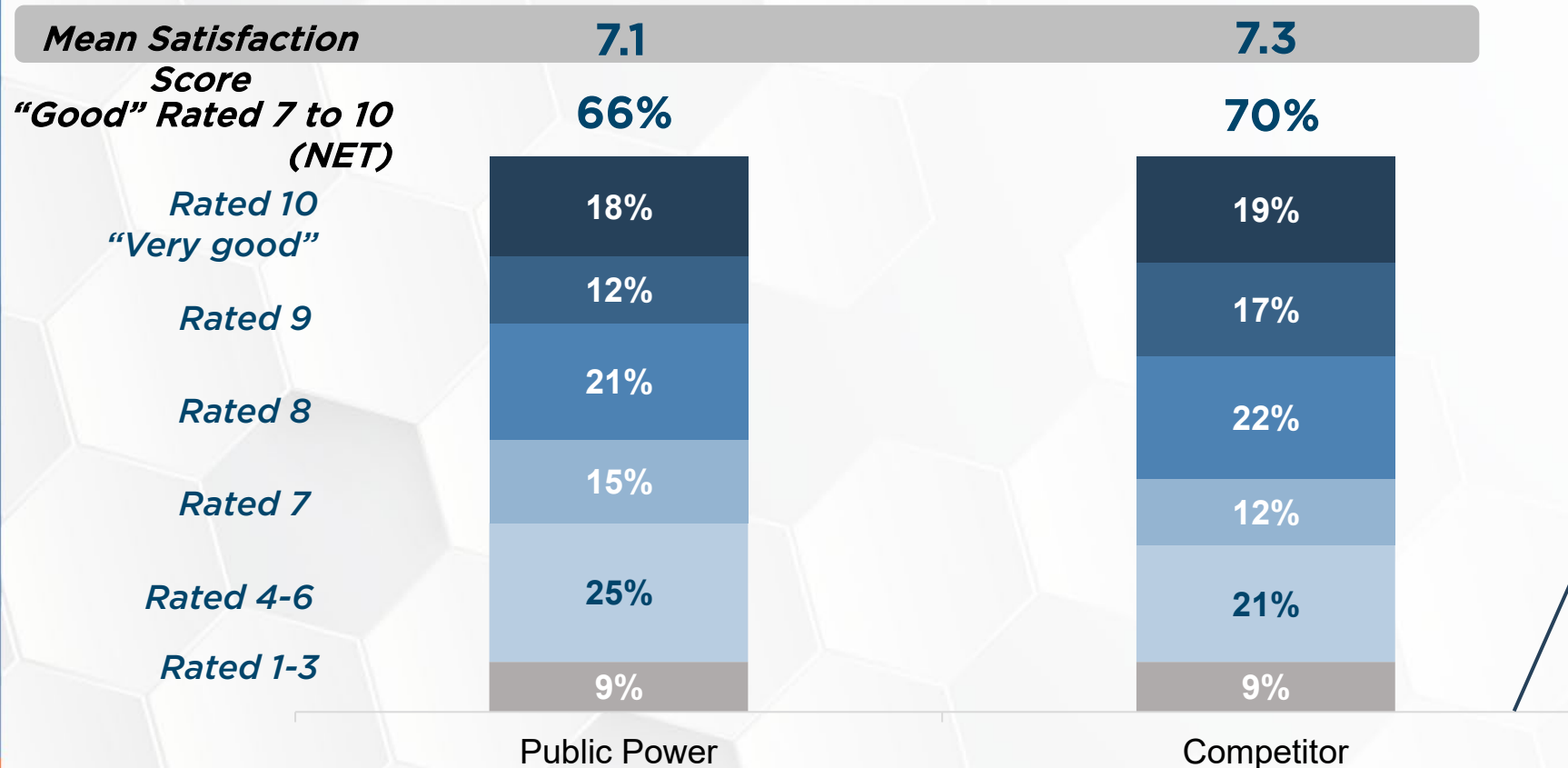
How much interest customers have in taking action to save energy

Key Findings

- The research is showing that the key drivers of satisfaction have shifted: customers now view reliability as a given, and good value has become the leading driver.
 - This is not limited to Public Power, but Competitor residential customers are highlighting the same shift.
- Reliability continues to be a strength for Public Power, but awareness gaps exist, and when it comes to providing good value, there is room for improvement.
- Affordability is increasingly front of mind for Public Power customers. These customers are also expecting more from their utility for the increased costs that they are seeing.
 - Bill unpredictability continues to be a challenge for residential customers and reinforces that some customer education needs have not changed.

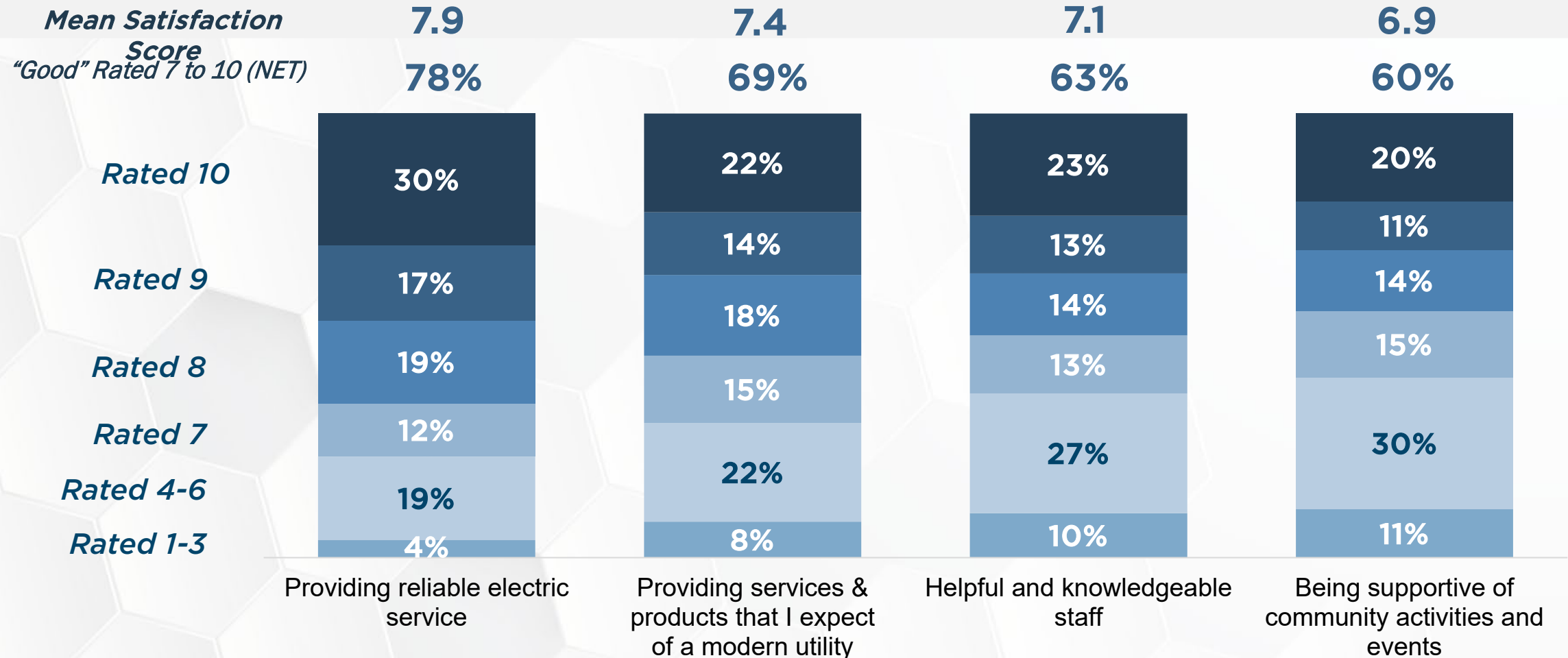
Customer Satisfaction Benchmarks

Q. How would you rate your overall satisfaction with your utility?

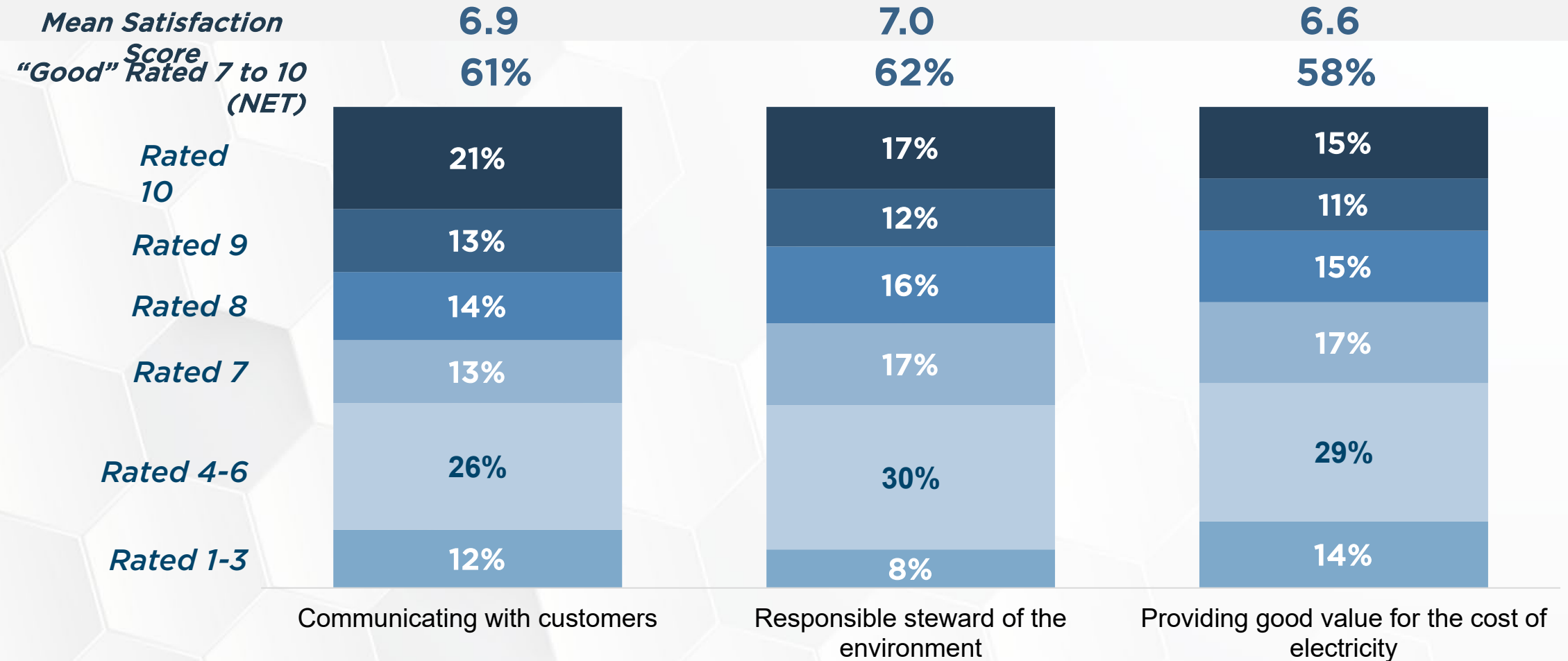


Competitor Residential	Type	
	Co-op	IOU
Mean Satisfaction Score	8.0	7.0
"Good" Rated 7 to 10 (NET)	79%	66%

Utility Organizational Characteristics

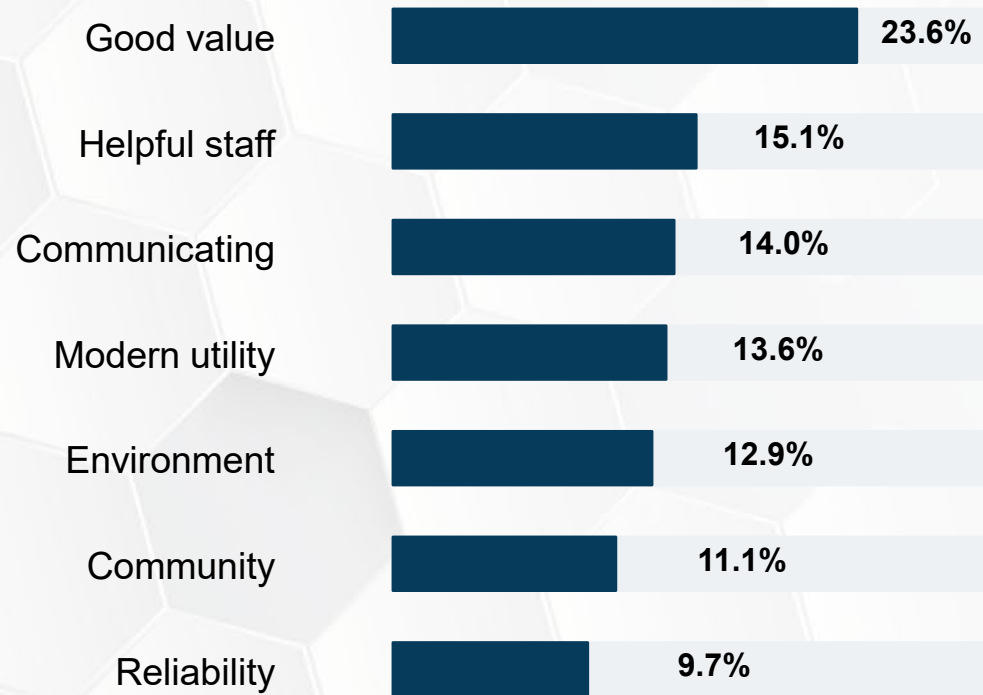


Utility Organizational Characteristics

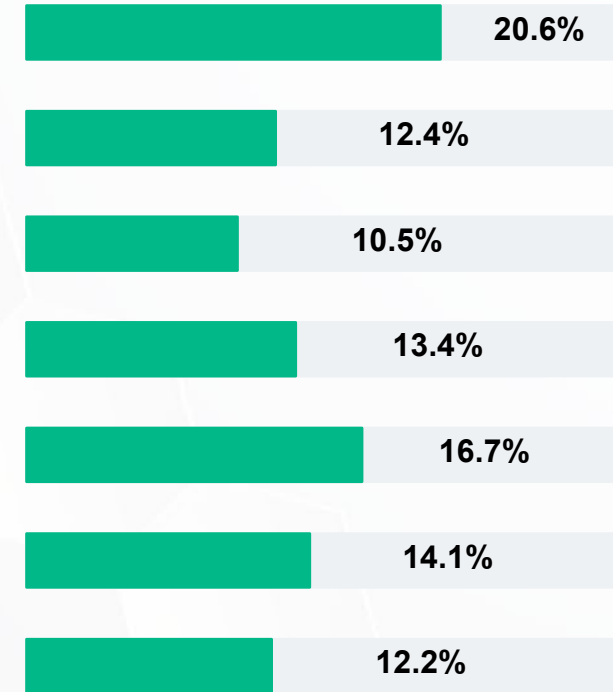


Satisfaction Drivers

Public Power

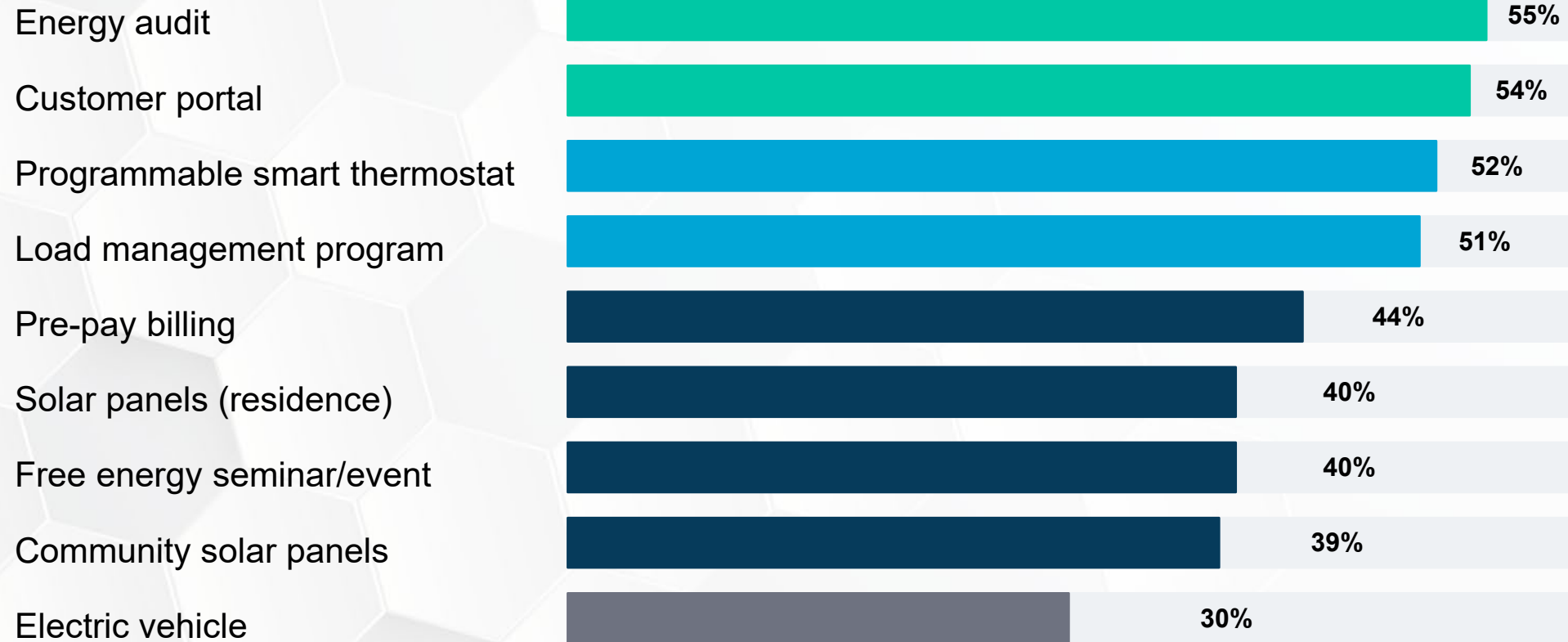


Competitor Residential

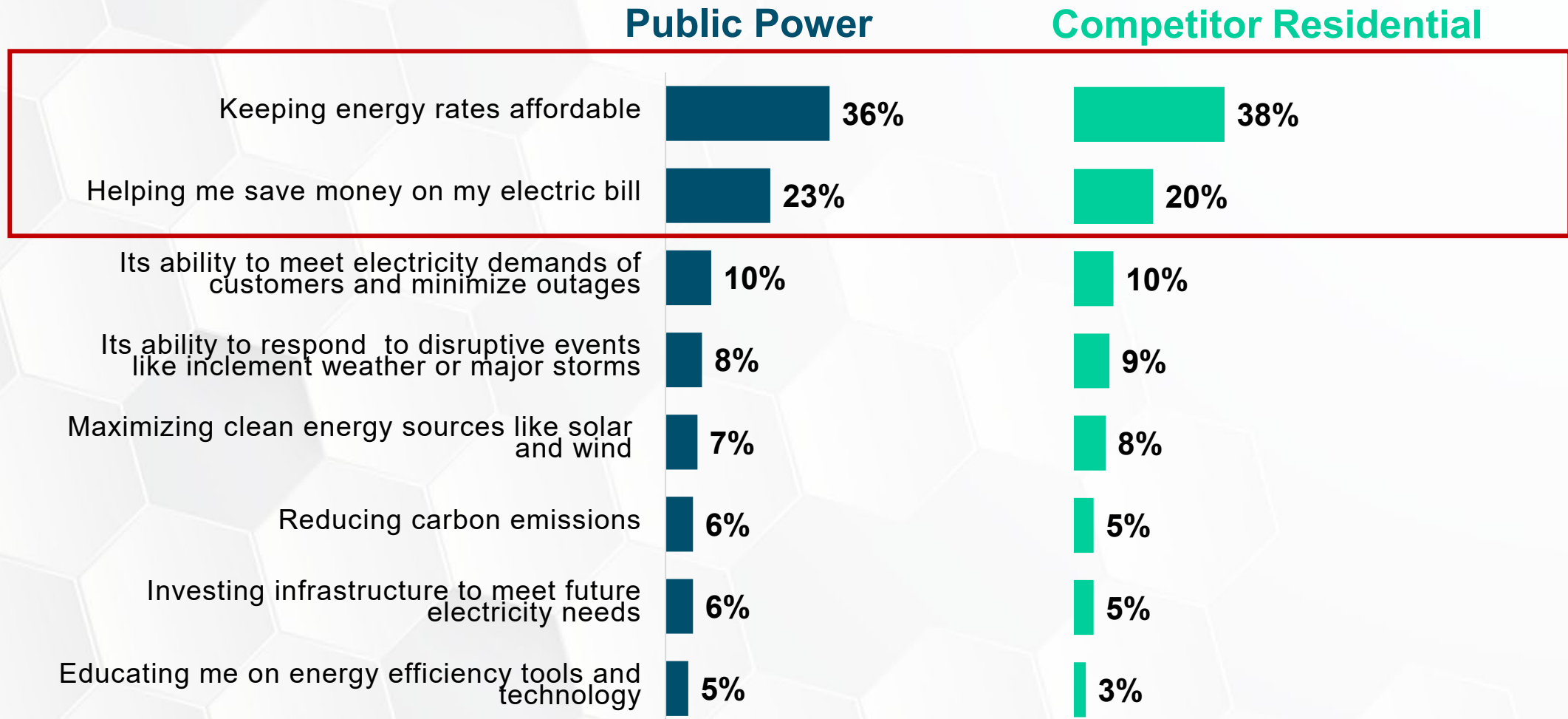


Good value carries the most weight for satisfaction across all three sample groups; reliability remains important but is less differentiating in the derived analysis.

Programs customers are most interested in

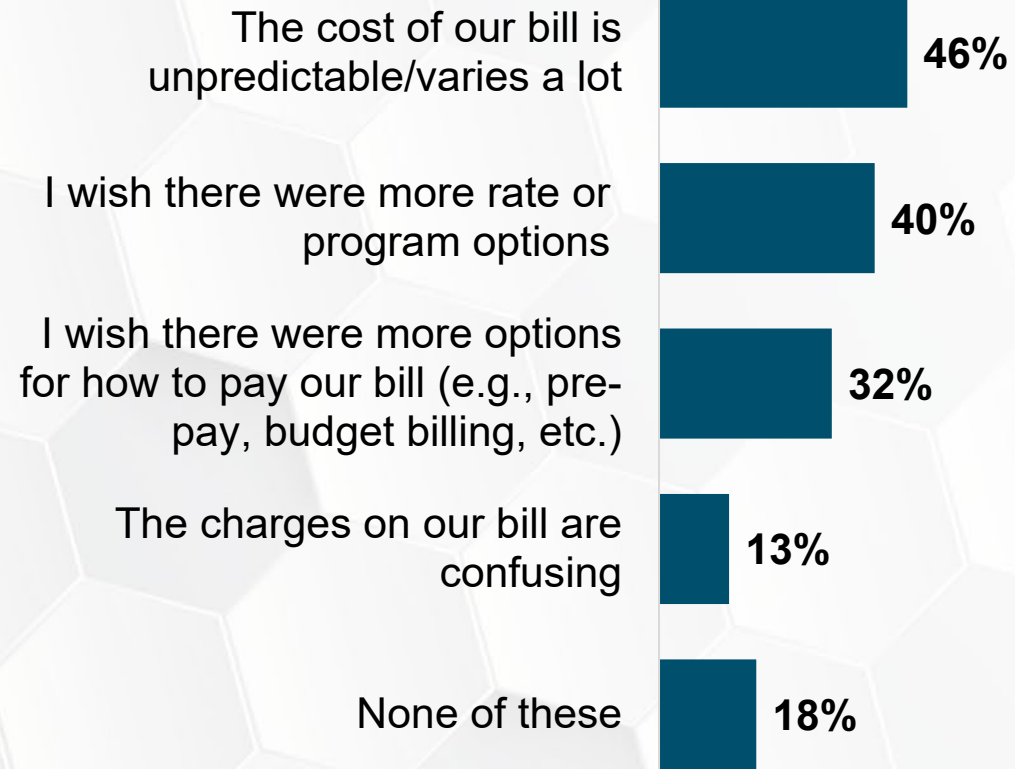


What customers want providers to prioritize

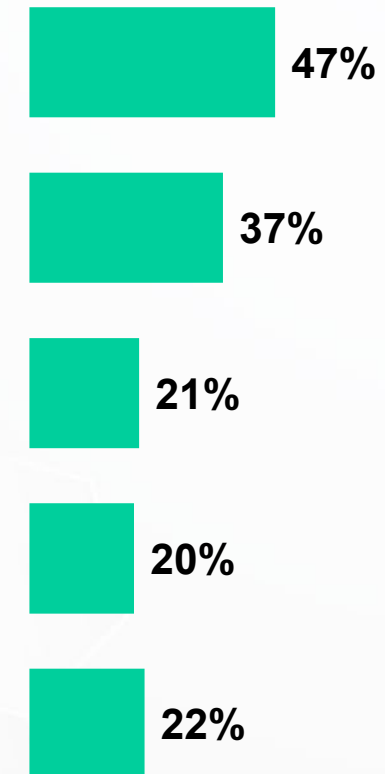


Electricity Bill Attributes

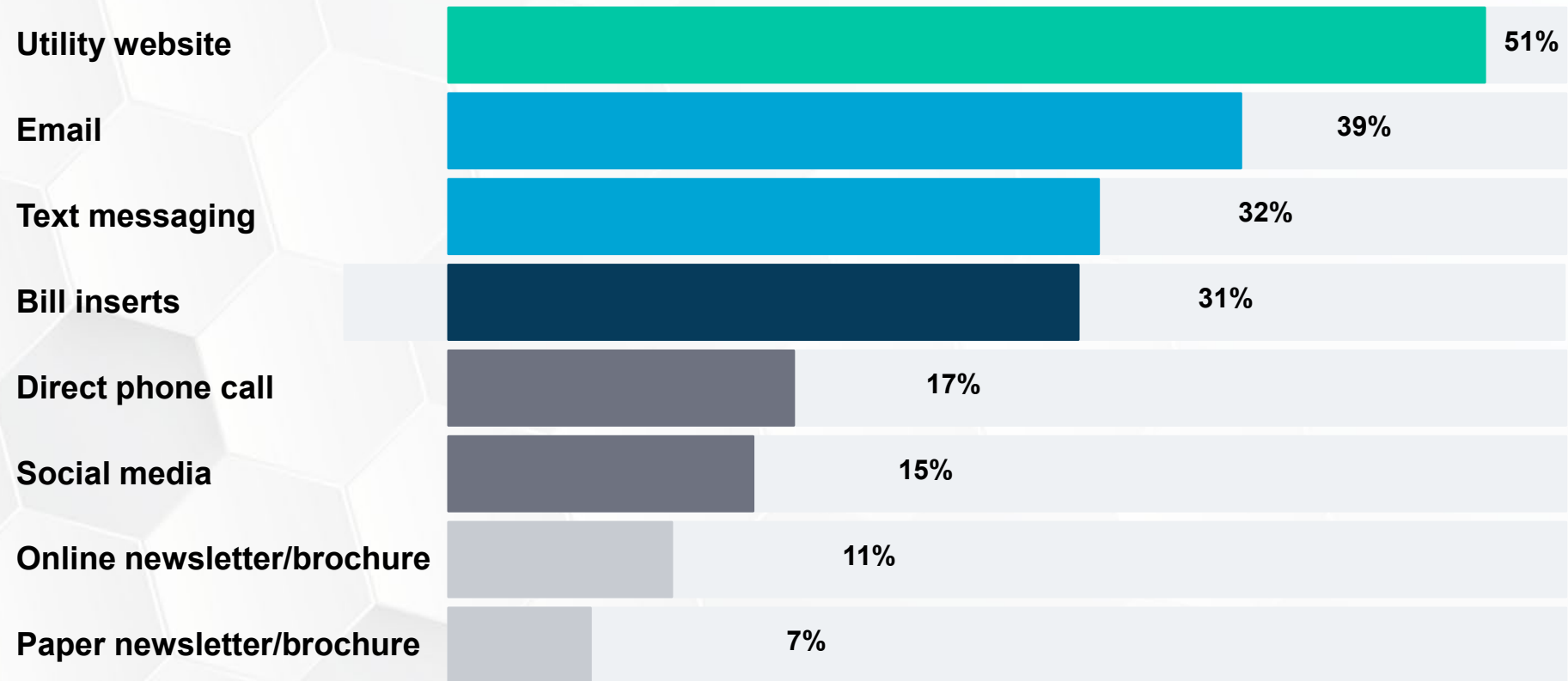
Public Power



Competitor Residential



Where customers prefer to get information



When it comes to communications & program design

Lead with value

Translate reliability, service quality, and public power benefits into tangible customer value and affordability messages.

Package programs as bill-control tools

Position audits, portals, thermostats, and load management as practical ways to understand usage and manage costs.

Use a tiered channel strategy

Meet your customers where they are! Anchor information on the utility website, push reminders through email/text, and use bill inserts for adjacent education.

Segment the message

Connect high-engagement customers to technology/program options; keep cost-conscious customers focused on stability, savings, and control.

What customers are signaling in 2026

#1

Good value is the dominant derived satisfaction driver across sample groups.

66%

Public Power rate reliability “very good,” the strongest characteristic tested.

55%

Energy audits are the highest-interest Public Power program.

41%

Public Power rate good value “very good,” making it the clearest improvement opportunity.

51%

Utility websites remain the top preferred information source among Residential 2026 customers.

Bottom line: Reliability still matters, but customers are telling utilities to make **VALUE** more tangible and easier to act on.

Building a Program

Innovate to Better Serve Customers

Serving customers is core to Public Power's Vision & Purpose

We also know...

- Customer expectations are changing
- Our member staff are changing
- New and emerging technologies are presenting new opportunities
- Electrification will present new opportunities and challenges

Bridge the Gap with Customers

Customer

- *I want personalized* choices and cleaner energy solutions.
- I want to save energy & money but maintain comfort.
- Smart devices make my life easier.
- Clean energy is important to me.
- It is important that I can use as much energy as I want.

Utility

- Increasingly complex technologies & new competitors
- Environmental & regulatory impacts
- Supply chain challenges
- Staffing limitations
- Reliability & affordability are as important as ever

Where to start

Start here

What do your customers want?

Value
Proposition

GOAL

Achievable

Affordable

Can the solution be built?

Do the numbers work?

What does the process look like?

Research and learn about target audience and their challenges



Understand



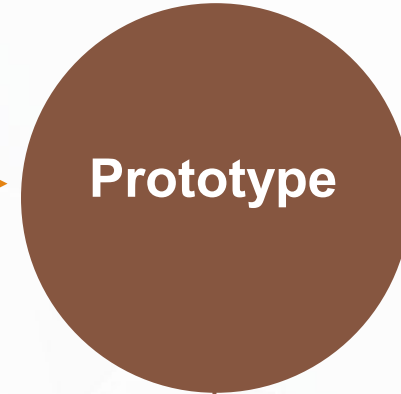
Define



Brainstorm, explore new approaches, identify creative solutions then evaluate and refine.



Ideate



Prototype



Test

Asses the prototype performance, get feedback, and refine

Identify & clearly summarize the problem you want to solve

Choose a path to develop one of those ideas into a solution / program

DIVERGE

(YESTERDAY)



Create choices

“Yes, and...”



CONVERGE

(TODAY)



Make choices

“Yes, but...”



Yesterday's Activity

Defined

- Identified the problem to be solved
- Collaborated to review research, evaluated problem statements, and developed clear understanding of customers' needs
- Defined criteria for a program (the "how might we" statements)
 - **Problem:** Customers aren't aware of program offering
 - **HMW:** How might we increase awareness of program offering?

Ideated

- Brainstormed solutions!
 - **Went wide:** Expanded the solution space rather than settle on the first obvious idea.
 - **Quantity over quality:** Focused on generating a high volume of concepts first. Bad ideas often spark good ones.
 - **No judgment:** Criticism was banned so people felt safe sharing wild, unconventional thoughts!

Today's Activity

Ideate Refinement

- Review ideas and refine the strongest concepts into workable solutions.
- Set aside ideas that are not feasible based on priorities, resources, or cost considerations.
- Build on the best ideas by combining complementary concepts into a stronger overall solution.

Prototyping

- Assess each solution for feasibility, impact, and alignment with your goals.
- Keep the customer at the center of the design process while considering your utility's capabilities and resources.
- Define clear success metrics and the outcomes you want to achieve.
- Identify potential risks, red flags, and criteria for modifying or retiring the program.
- Evaluate implementation requirements, including vendor support, internal resources, and costs to the utility.

Testing

- Develop a plan to test and validate the solution.
 - Pilot with a small customer group? Gather internal feedback and iterate? Stress test with a focus group?

Our goal...

Today we will fine-tune and **build a program prototype** based on yesterday's challenges and brainstorming!

We'll compile results and share what each table has come up with



At your table you will see...

...an index card at your seat and two worksheets at your “table”

On the back of the index card, you will find a “persona”

On your worksheets you’ll find a roadmap, your problem, and ideas which you can follow as you discuss amongst your group

Get ready to build your own program



At your table you will also see...

A worksheet in the middle of your table.

1 minute to change tables (negotiate)

On the worksheet you will find the problem you are solutioning for and the ideas generated yesterday.

No net gain for any table

Get ready to build out potential programs that meet your customers' needs.

Build and Report out (each table)

What was your challenge?

Important realizations from the “personas” and narrowing down from brainstorming to prototyping?

What does your program look like?

Thank You