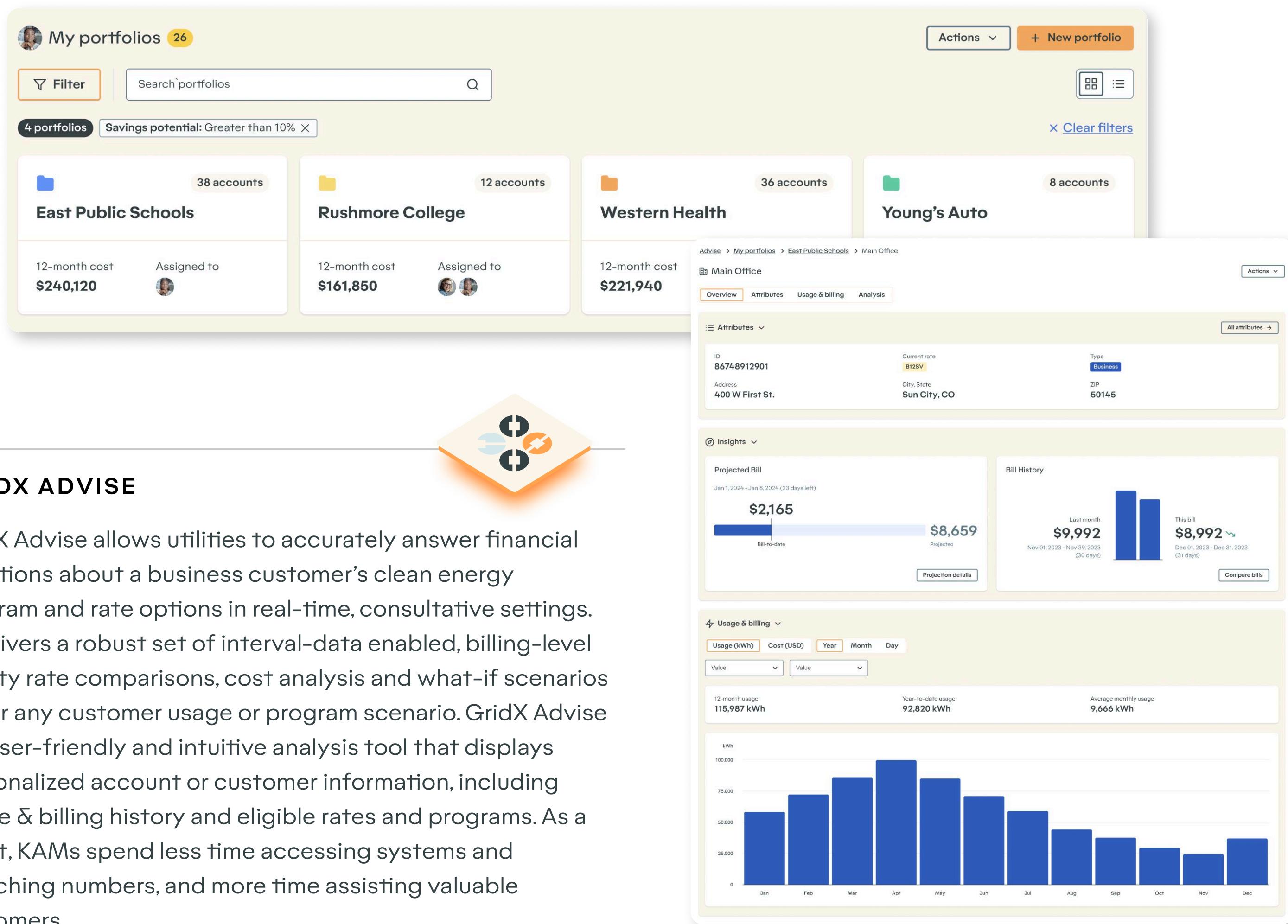


Rate and Program Analytics for Strategic Accounts

As utility rates and programs become more complex and business customer interest in clean energy technologies increases, the role of Key Account Managers (KAMs) becomes more critical than ever. From how rate options to program participation to behind-the-meter resources and behavioral changes impact energy bills, there is a growing need for KAMs to serve as strategic energy advisors to their largest customers.

Current methods utilities use, like spreadsheet-based tools, make answering difficult questions about rates and high-bills quite slow and error prone. Without tools designed to streamline complex calculations to serve customers, utilities risk missing opportunities to steer their large business customers to better solutions and earn their place as the trusted energy advisor. Purpose-built software from GridX allows KAMs to stop worrying about getting the calculation right and focus on how to use the analysis to effectively guide their key accounts on how to maximize energy spend.

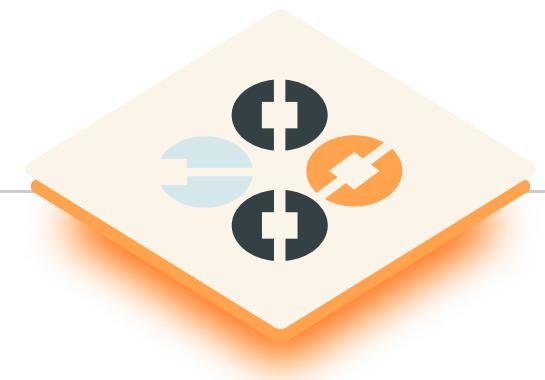


The screenshot displays the GridX Advise software interface. At the top, there is a navigation bar with a user profile icon, 'My portfolios' (26), a 'Filter' button, a search bar ('Search portfolios'), and a 'New portfolio' button. Below this, a filter bar shows '4 portfolios' and 'Savings potential: Greater than 10%' with a 'Clear filters' link. The main area is divided into four portfolio cards: 'East Public Schools' (38 accounts, 12-month cost \$240,120), 'Rushmore College' (12 accounts, 12-month cost \$161,850), 'Western Health' (36 accounts, 12-month cost \$221,940), and 'Young's Auto' (8 accounts). To the right, a detailed view for the 'Main Office' of 'Western Health' is shown. This view includes sections for 'Attributes' (ID: 86748912901, Address: 400 W First St., Current rate: B12SV, City, State: Sun City, CO, Type: Business, ZIP: 50145), 'Insights' (Projected Bill: \$2,165, Bill History: Last month \$9,992, This bill \$8,992), 'Usage & billing' (12-month usage: 115,987 kWh, Year-to-date usage: 92,820 kWh, Average monthly usage: 9,666 kWh), and a bar chart of monthly usage from January to December.

GRIDX ADVISE

GridX Advise allows utilities to accurately answer financial questions about a business customer's clean energy program and rate options in real-time, consultative settings. It delivers a robust set of interval-data enabled, billing-level quality rate comparisons, cost analysis and what-if scenarios under any customer usage or program scenario. GridX Advise is a user-friendly and intuitive analysis tool that displays personalized account or customer information, including usage & billing history and eligible rates and programs. As a result, KAMs spend less time accessing systems and crunching numbers, and more time assisting valuable customers.





Benefits of GridX Advise

GridX Advise offers complete solutions for teams who serve the most complex utility customers. Discover why GridX Advise is best for your business.

◆ CUSTOM ACCOUNT VIEWS

Evaluate cost impacts of customer account changes including participation in rates and programs, voltage and phase changes and changes to usage behavior. Group accounts into Portfolios based on customer hierarchy or by grouping accounts using a set of supported attributes.

◆ ANALYTIC INSIGHTS

See cost implications of upcoming rate or tariff changes for key accounts, including new rates. Generate What-If analyses for new and hypothetical customers using load profiles to quickly respond to inquiries from economic development teams.

◆ GAIN CUSTOMER TRUST

Calculate the bill impact of DER adoption like solar generation, EV fleets and battery storage. Become the “trusted energy advisor” role by objectively counseling customers on the impact of DER adoption, behavior changes, and program choices.

◆ INCREASE EFFICIENCY

Improve 1st call resolution and minimize average handling time (AHT) by providing KAMs and CSRs with “one-click” answers that customers are looking for. Reduced AHT results in reduced average speed of answer (ASA), a key customer service metric indicating operational efficiency.

◆ IMPROVED COMMUNICATION

Effectively address high bill calls by communicating the cause of changes to customer bills over time and offer rate, program and behavior changes to mitigate high costs. Increase customer satisfaction by offering rate change solutions and the cost impact of a new rate or program.

2,000+ Hours

Operational savings that happened when large midwestern IOU in 1st year after implementing GridX Advise. Savings represent reduced time and increased output realized by changing from spreadsheets to Advise for assessing “best rate” questions.

For those customers considering more complex solutions, such as rooftop solar, EVs, energy efficiency or changing their usage behavior, **GridX Advise enables “what-if analysis” to calculate the modified loads, identify the best rates and programs, and give customers the answers they need to make informed decision.**



The One True Rates Platform

GridX is the leading Enterprise Rate Platform provider to modern utilities and energy technology companies. Our software enables utilities to better design, promote, operationalize, and drive adoption of emerging energy products and programs.

For more information, please visit gridx.com.

