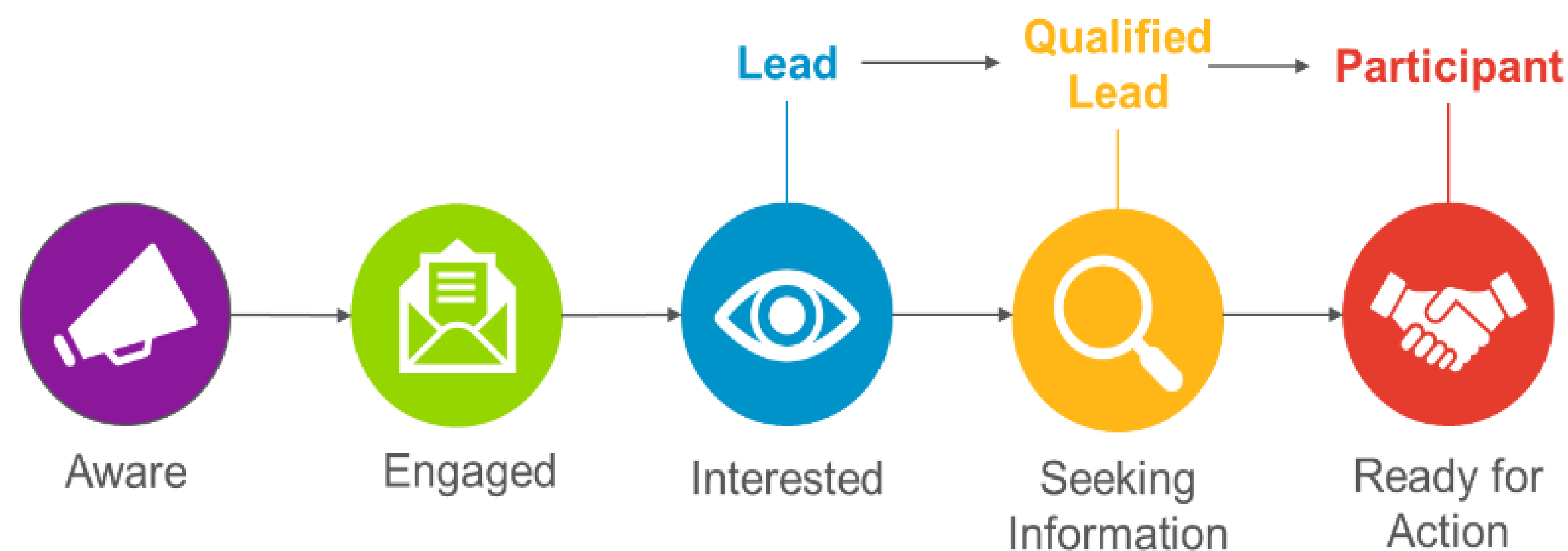


# Evaluation as a Key Element in Continuous Improvement

PECO aims to provide its customers with the right energy efficiency offer, in the right way, at the right time. How can we use customer-centric, timely evaluation to help ensure implementation is on track with this vision?

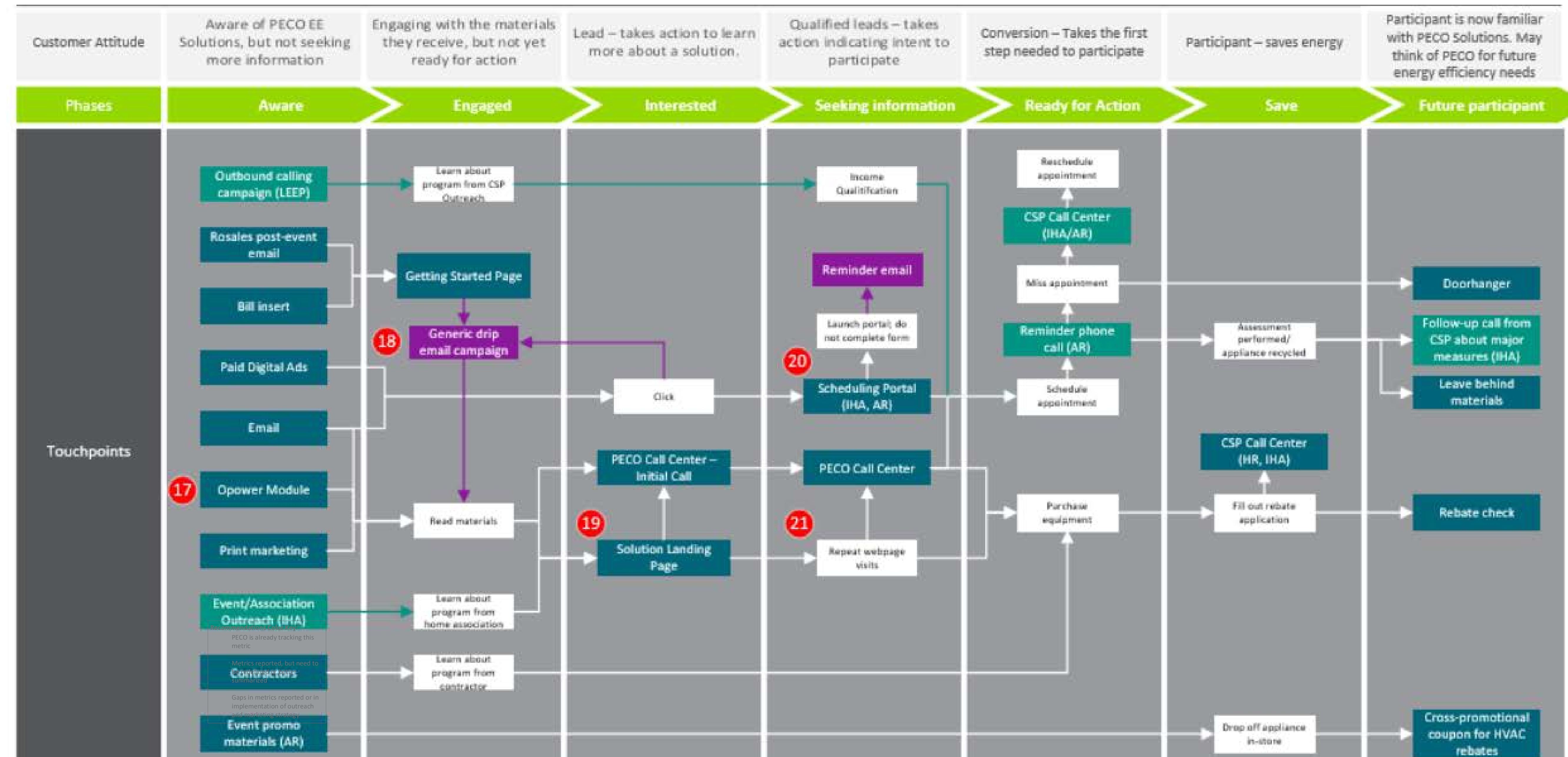
**1** We conducted a comprehensive customer journey assessment to understand the various customer touch points and experiences before they sign up for a program. This assessment was based on data collected through in-depth interviews, a web usability study, and data tracking system reviews.

**2** Customers journey through a series of phases before deciding whether to participate in a program. Programs need a clear strategy and a set of performance metrics for each of these phases.



STRANGER                      LEAD                      PARTICIPANT

**3** Programs risk losing the customer’s interest at each touchpoint. Implementation strategies should address this risk at each interval and track conversion metrics along the way.



**4** Marketing and outreach metrics should go beyond “hits and opens” so we know whether customers are converting from touchpoint to touchpoint. Our analysis revealed several critical knowledge gaps resulting from insufficient or unclear metrics tracking and a need to further explore other marketing channels to supplement this research.

Lead Lifecycle Stage	Metrics	Quantity
Aware	Total Number of Aware Customers	
	Number of Email Campaign Members	1
	Number of Digital Impressions	6
	Number of Print Materials Distributed	9
Engaged	Total Number of Engaged Customers	
	Number of Email Opens	2
	Number of Estimated Print Impressions	10
	Number of Drip Email Campaign Members	11
Interested	Total Number of Interested Customers (Leads)	12
	Number of Solution Landing Page New Users	3
	Number of Initial Call-Ins to PECO Call Center	4
Seeking Information	Total Number of Customers Seeking Information (Qualified Leads)	13
	Number of Portal Starts	5
	Number of Second Call-Ins to PECO Call Center	14
Ready for Action	Number of Repeat Visits to Solution Landing Page (within 2 weeks)	15
	Number of Appointments Scheduled (Conversions)	6
Save	Number of Assessments	7
Future Participant	Number of Repeat Customers	16

**Recommendations Color Key:**

- Green circle: PECO is already tracking this metric
- Yellow circle: Metrics reported, but need to be redefined or better summarized
- Red circle: Gaps in metrics reported or in implementation of outreach and marketing strategy