

CASE STUDY

Reducing Administrative Burden with Workflow Automation

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PSEG Long Island is an electric utility serving over 1.1 million customers on Long Island and the Rockaway Peninsula in New York City. Formerly a participating utility within NYSERDA's HPwES program, PSEG Long Island took ownership of the program in 2016 and had the goal of rebranding the experience and tailoring the processes to the local market to improve both contractor and customer satisfaction. PSEG Long Island wanted to use this tailored process to reduce the administrative burden for the 20 contractors in the PSEG Long Island territory to maximize their time in the field and with customers—without doing a major system overhaul or large IT project.

The utility wanted a solution that could handle both audit and contract programs, enable easy access to all data, restrict permissions appropriately on a per user basis, and most importantly, be able to get up and running as quickly as possible. They also wanted a flexible solution that enabled them to facilitate their own program. To address these challenges, PSEG Long Island launched Uplight's Workflow Automation Software (WFA), in January of 2017—in just **5 months from initial discussions to kick-off**. Uplight was able to easily and cost-effectively integrate WFA into the utility's systems without disrupting the program.

"Since implementing Uplight's Workflow Automation solution, PSEG Long Island reduced the administrative time required by contractors so that now 90% say they are more efficient—enabling our contractors to spend more time in the field completing high-quality projects and increasing customer satisfaction."

– STEVE WAGNER
HPWES PROGRAM MANAGER
PSEG LONG ISLAND

How WFA Delivers Business Benefits to PSEG Long Island:

Uplight's WFA optimizes programs by creating a single system of record for all project related information and makes that information available to contractors and program staff via a web-based portal. This results in less time spent tracking down information and more time spent completing projects. The system is designed to use data files from industry-leading modeling tools, allowing contractors to use the HPXML-compliant audit tool of their preference. This single source of information makes it easy to identify bottlenecks in the process and also provides PSEG Long Island easy access to measure project savings across all participating homes.

The result? Just six months after the launch, WFA reduced the total administrative time required by contractors substantially. With Uplight's approach, only 20% of PSEG Long Island's contractors now spend more than an hour on administrative work per project, compared to 67% before the implementation of WFA—resulting in 5,400 saved hours per year. And now 90% of contractors say the new software has made them more efficient.

5,400

hours saved on projects per year

90%

of contractors say they are more efficient with Workflow Automation

20%

Increase in the audit-to-retrofit conversion rate

How WFA Delivers Business Benefits to PSEG Long Island

Improved contractor satisfaction

Contractors are often viewed by the customer as an extension of their utility, and this is no exception at PSEG Long Island. By improving the experience for contractors, PSEG Long Island is also improving the experience for their customers. Because contractors typically submit, on average, 35 audit projects, leading to 11 contract projects per month to the utility, every reduction in administrative time adds up. 90% of the surveyed contractors say they are more efficient than before with WFA. 90% of contractors also report that they are either somewhat or very satisfied with the new loan process.

More time in the field and less time uploading documents

By reducing the amount of time spent on dissatisfying and arduous tasks, software like WFA frees up more time for contractors to do what they do best: complete projects and talk to customers. With WFA, 80% of contractors spend less than 1 hour on administrative tasks per project, compared to 33% prior to launch—saving 450 hours of contractor administrative time per month across the entirety of the program, or 5,400 hours per year. And now only 20% of PSEG Long Island's contractors spend more than an hour on administrative timer per project compared to 67% before.

Higher audit-to-retrofit conversion

At PSEG Long Island, many customers who complete an online home energy assessment, are recommended to take part in the HPwES program, complete an on-site audit, and then move forward with a retrofit after completing these steps. Using WFA, the utility was able to **increase their on-site audit-to-retrofit conversion by over 20% within a year.**

Increased number of LMI projects

To reach lower to middle income (LMI) customers, PSEG Long Island provides free home audits to those eligible. In doing so, the utility directly installs energy-saving measures such as LED lightbulbs, energy-efficient low flow water devices, duct sealing, and smart strips. Best of all, through WFA, the utility is able to approve, provide, and report on rebate opportunities for LMI customers to receive energy efficiency contract upgrades to their home. Through a tiered system of eligibility, these assisted home performance rebates can extend between 50-100% of funding toward eligible measures.



Top Challenges that WFA Solves:

- Improve contractor satisfaction
- Do more projects
- Convert more projects from audit
- Boost number of LMI projects

The WFA Difference for PSEG Long Island

WFA has enabled PSEG Long Island to create a more streamlined and efficient process for contractors—improving both contractor and in turn, customer satisfaction. Because contractors are spending less time manually processing their projects, they can spend more time in the field working on projects and talking to customers. And the good news is that several enhancements including streamlined loan processing integration and audit approval automation are planned and will continue to enhance and improve the trade ally experience.

About Uplight

Born from the merger of Tendril and Simple Energy, and the acquisitions of FirstFuel, EEme, EnergySavvy and Ecotagious, Uplight is the leading provider of end-to-end customer-centric technology solutions dedicated solely to serving the energy ecosystem. Uplight provides software and services to more than 75 of the world's leading electric and gas utilities, with the mission of motivating and enabling energy users and providers to accelerate the clean energy ecosystem.

Uplight is the leader in Demand Side Management, Energy Analytics, Utility Marketplaces, Utility Personalization, and Home Energy Management. Together, these solutions form a unified, end-to-end customer energy experience system that's proven at enterprise scale, yet nimble enough to deliver innovative solutions quickly. Utility leaders at all levels rely on Uplight and its customer-focused digital energy experiences to improve customer satisfaction, deliver energy and capacity outcomes, reduce service costs, increase revenue, and reduce carbon emissions.

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Interested in learning more about how Uplight can help you accelerate the clean energy ecosystem? Send us a note research@uplight.com or visit www.uplight.com

