



WattPlan® Advisor

Be your customer's
trusted energy advisor



- ✓ Automate Customer Education
- ✓ Personalize Customer Advice
- ✓ Provide Actionable Guidance
- ✓ Trust Proven Utility Solutions
- ✓ Rely on Secure Cloud Applications

Boost Customer Satisfaction

Be the go-to source for energy advice with digital tools that deliver objective information

Lower Customer Service Costs

Reduce call volumes by empowering self-service customer education

Reach Program Goals

Drive program awareness and enroll customers seamlessly using PowerClerk® workflow automation

Gain Customer Insight

Develop targeted marketing strategies and inform planning with insights into customer intentions

Demystify your customer's energy decisions using WattPlan® Advisor, the digital energy expert for utilities

Consumers are faced with a growing number of energy choices, from distributed energy resources (DERs) such as solar, batteries and electric vehicles (EVs), to utility offerings including time-of-use rates, community solar and green power programs. Utilities are challenged to increase program participation and drive off-peak usage, while protecting customers and boosting satisfaction by helping them make smart decisions.

WattPlan is the utility industry's only cloud-based software for automating customer education in EV, renewable and rate programs

WattPlan gives utility customers a uniquely personalized self-assessment for evaluating a wide range of DER scenarios. Based on actual utility rates and energy usage, WattPlan delivers trusted calculations leading to actionable next steps. With WattPlan, utilities have an efficient way to capitalize on key customer touchpoints by promoting programs and initiatives such as off-peak EV charging or community solar—all while collecting data to improve grid planning.



Personalized Experience

Focus on customer-specific information and preferences

Rate Optimization

Suggest the electric rate plan that will save your customers the most money and drive off-peak usage

Side-by-Side Comparisons

Inform customers by showing easy-to-understand rate, technology, program and financing options

Stepwise Experience

Empower customers to intuitively tailor assumptions to their lifestyle and preferences



Trusted Calculations

Depend on proven financial and energy models

Bills

Offer accurate bill calculations based on published tariffs and integrated interval meter data

Datasets

Rely on detailed rate, incentive, vehicle, solar and emissions data

Energy Calculations

Ensure reliable expectations with sophisticated energy simulations such as rooftop PV and total-cost-of-ownership calculations



Actionable Guidance & Insights

Guide your customers and gain an understanding of customer intent

Instant Enrollment

Enable one-click enrollment using PowerClerk® workflow automation

Marketplace Connect

Provide an actionable next step to connect with qualified contractors and dealerships

In-app Surveys

Measure customer satisfaction and inform marketing strategies with key customer insights





Comprehensive suite of customer education software

WattPlan supports the following core services: Renewables, EVs and Charging, and Rate Plans. Utilities can select services that meet today's needs and add more services over time.

Solar options available to you			
Next, you'll select an option to review detailed results, refine your assumptions, or change your selection.			
Rooftop solar		Community solar	
\$3,713	Not expected	\$0	7 years
Upfront cost	Break-even	Upfront cost	Break-even
Key assumptions		Key assumptions	
Payment type	20 year loan	Payment type	Electric bill
System price	\$14,280	System price	n/a
Interest rate	4.5%	Interest rate	n/a
Utility rate increase	2.5% per year	Utility rate increase	2.5% per year
Key results		Key results	
Carbon offset	78%	Carbon offset	84%
System size	4.2 kW	KW subscribed	3.0 kW
Annual production	6,306 kWh	Annual production	6,834 kWh
Average total energy & subscription cost	\$89/month	Average total energy & subscription cost	\$69/month
Key features		Key features	
<ul style="list-style-type: none"> Long term commitment Custom built and priced Installed on your roof 		<ul style="list-style-type: none"> Cancel anytime No upfront cost No installation or maintenance 	

Renewables: Distributed Solar, Community Solar & Battery Storage

- Educate customers and drive renewable energy program participation
- Show expected bill impacts and rate plan options, and set objective long-term savings expectations
- Right-size distributed PV and battery systems to meet customer needs

"Providing solutions directly from our website makes it easier for customers to explore their options, understand costs and make informed decisions."

- Patrick McCoy

SACRAMENTO MUNICIPAL UTILITY DISTRICT (SMUD)

"What really impressed us was our ability to get the tool deployed quickly—in just a few months—and with an interface that guides the customer in a friendly way."

- Ted Burhans

Dir. of Emerging Technologies & Innovation
TUCSON ELECTRIC POWER

Chevrolet 2020		Hyundai 2020		Tesla 2020	
Bolt EV LT		Kona Electric SEL		Model 3 Standard Range Plus	
\$35,820		\$28,890		\$37,190	
Price after incentives		Price after incentives		Price after incentives	
MSRP \$16,420		MSRP \$37,190		MSRP \$37,900	
Total range: 259 miles		Total range: 250 miles		Total range: 250 miles	
Electric range: 259 miles		Electric range: 250 miles		Electric range: 250 miles	
All electric		All electric		All electric	
Kia 2020		Nissan 2020		Hyundai 2020	
Niro Electric EX		Leaf S Plus		Ioniq Plug-In Hybrid	

Electric Vehicles & Charging

- Build EV awareness
- Encourage off-peak charging
- Promote incentive programs
- Show electric vehicle range, and charger options and locations

Demand Time-of-Use		Peak demand	
Low energy charges most of the day, but higher charges and a "demand" charge during on-peak hours.		Low energy charges around the clock, plus a "demand" charge during on-peak hours.	
\$98 Estimated average bill (Lowest)		\$102 Estimated average bill	
Learn more		Learn more	
Time-of-Use		Basic	
Low energy charges most of the day, but higher charges during on-peak hours.		You are currently on this rate plan. Energy charges are low around the clock, but demand is low on some days.	
\$104 Estimated average bill		\$108 Estimated average bill	
Learn more		Learn more	

Rate Plans

- Encourage off-peak usage with time-of-use rate plans
- Demonstrate rate switching savings potential with personalized rate comparisons
- Ensure informed customers with detailed calculations using recent energy usage data



Clean Power Research®

Software services from Clean Power Research help solve the energy industry's most challenging problems. Our mission is to power the worldwide energy transformation with trusted, adaptable and efficient solutions.

For more than 20 years, leading utility and energy enterprises have trusted Clean Power Research to deliver innovative solutions that inform, streamline and quantify energy-related decisions and processes. We are proud the top 10 Fortune 500 utilities, as well as many of the world's largest renewable energy companies, are our customers.



PowerClerk®

Energy program digitization, automation and management



WattPlan®

Customer engagement and enrollment, and DER planning



SolarAnywhere®

Solar assessment, forecasting and performance management