Driving Enrollment in Utility Programs and Services

As energy and water demands grow, public power and water agencies are promoting conservation initiatives and programs. By adopting a four-stage approach to messaging, public utilities can drive awareness and encourage enrollment in programs that manage energy and water use.

This checklist can help fine-tune strategic approaches and guide customers through the program enrollment process.

STAGE 1:
Awareness and Opt-in

Awareness is the foundation of program participation. When individuals need to complete an action — whether enrolling in a water conservation initiative or selecting an energy assistance program — they look to public utilities for clear, trustworthy guidance. However, eligible residents are unlikely to take the next step if they aren't aware of available benefits or don't understand the value of enrolling. Ensuring that public utility agencies effectively communicate program benefits and the reasons to sign up is essential to driving participation.

- [ ] **Use Overlays:** Convert web traffic and significantly boost connections to relevant information on conservation initiatives and available programs.

- [ ] **Provide a text-to-subscribe option:** Give customers the option to sign up for program updates delivered through SMS messaging, increasing the chances to act on information.

- [ ] **Build a targeted sign-up process:** Use a sign-up builder to empower customers to easily subscribe to information on programs and initiatives most relevant to them.

Trust and Consideration

The trust and consideration stage is critical for power and water agencies to establish credibility with customers. Utilities must clearly explain how programs work to encourage customer participation and enrollment.

By simplifying the process and emphasizing the benefits of enrollment throughout, utilities can help customers feel confident that the programs they enroll in will benefit both them and the community.

- **Develop a question-and-answer process:** Encourage meaningful engagement through dialogue in responses.

- **Deliver welcome messages and campaigns:** Make a strong first impression by recognizing interest and establishing the organizational mission early in the relationship.

- **Implement a segmentation strategy:** Tailor outreach to customer interests based on what their indicated subjects of interest chosen during the sign-up process.

- **Clearly communicate account creation and login requirements:** Some organizations require accounts to access or enroll in programs. To reduce barriers in this stage, clearly state requirements and explain the value of account creation.

STAGE 3:

Decision and Action

For public utility agencies, converting awareness and trust into action is essential for getting people enrolled into programs. Whether signing up for a utility assistance program or applying for a water conservation rebate, customers must complete the full enrollment process to receive benefits. However, many start an application or create an account, but fail to follow through.

- **Leveraging advanced analytics:** Use advanced analytic tools and custom reporting to identify chokepoints in the enrollment process.

Analyze audience segmentation strategy: Taking a closer look at who is — and isn't — submitting applications for programs to optimize segmentation and messaging.

Write with plain language: Clear and concise language tailored to a customer's needs and interests will make the enrollment application process easier.

STAGE 4:
Management and Engagement

The submission of an application is not the final step in the process; it's the beginning of what will often be a long-term relationship. Even in the short-term, applicants might need to take additional actions, such as correcting errors, providing further documentation, or following up on their application status. Whether they are approved and must complete next steps or denied and require alternative solutions, clear and timely communication is essential to guide customers independently through the process.

Analyzing the application journey helps utilities identify process inefficiencies, enabling them to address issues proactively. This approach reduces administrative strain by minimizing inbound inquiries and enhancing self-service capabilities.

Send one-to-one messages: Communicate with customers based on event triggers with messaging via email, SMS, or voice calls to help manage post-process expectations.

Clarify next steps: Whether approved or rejected from a program, customers will want clear information on how to proceed further.

Provide timely and relevant information: Keep customers informed about application status after applying for a program to help influence whether they apply to programs in the future.

Ready to fine-tune your program enrollment process?

[Get in Touch]

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