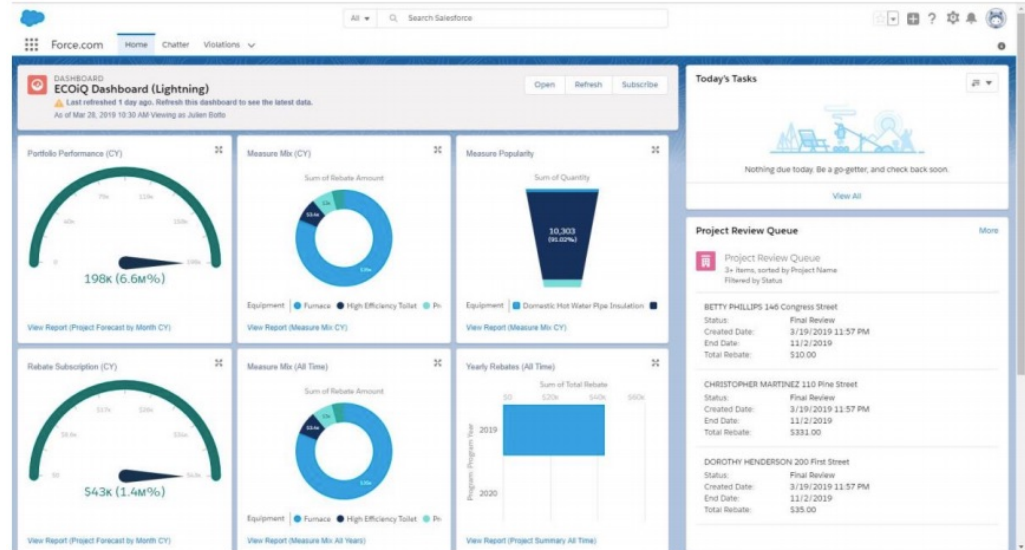# SALESFORCE CRM FOR PROGRAM TRACKING

PRESENTED BY: JP Ross
DATE: DECEMBER 14 , 2020

SALESFORCE CRM

- EBCE has selected Salesforce (SF) CRM
  - + AIQUEOUS - a Program Management and reporting application
  - + Pardot – a Marketing Automation tool to facilitate customer outreach, communication and enrollment
- SF with AIQUEOUS and Pardot were selected as tools to help manage customer interactions as well as program enrollment and tracking
  - – AIQUEOUS is used by MCE for EE program management and reporting and by PCE for incentive program management
- EBCE customer records are being moved into SF environment and will be launched by EoY. Full deployment will continue through 2021

DASHBOARDS AND REPORTS

- Allow single view of program enrollments and tracking to budgets
- Customizable for program specific metrics
  - DAC/LI/CARE enrollment
  - Installations to date
  - Projected/Measured Energy savings

INITIAL SALESFORCE METRICS

Programs	Measures	Customer Attributes
Resilient Home	kW Solar	CARE/Medical Baseline
Critical Facility S+S	kW/kWh Storage	DAC/LI Census tract
Heat Pump Water Heaters	#/type of Appliances	Single Family / Multi-Family / Commercial / Municipal
Low-Income P4P	EE measures	
Commercial P4P	Expected kWh savings	Owner/Renter
Residential P4P	Measured savings	Customer Satisfaction
Connected Communities Solar Program & DAC-GT / CS-GT	Customer bill savings	
	Enrollment / Installation date	

SALESFORCE TIMELINE

Salesforce CRM

Finalize Data Model → Load Customer Data → Build Dashboards/Reports

Salesforce Reporting

Draft Reports → Launch AIQUEOUS and gather reporting requirements → Build templates for Implementers to report → Gather program data from implementors

Q4 2020 – Q1 2021

Q2 -2021

EAST BAY COMMUNITY ENERGY