

KEY ACCOUNT MANAGEMENT

As utilities focus on delivering premium services and a superior digital experience to their largest customers, Key Account Managers need a tool to deliver value-added data and analytics. The GridX Key Account Management Tool combines Salesforce's best-in-class customer relationship management capabilities with utility usage, cost, rate and bill analytics to transform Key Account Managers into trusted energy advisors.

THE GRIDX KEY ACCOUNT MANAGEMENT (KAM) TOOL

The GridX KAM Tool enables Key Account Managers to efficiently and effectively serve the largest and most important customers.



Hypothetical Usage



What if Rate

KEY FEATURES

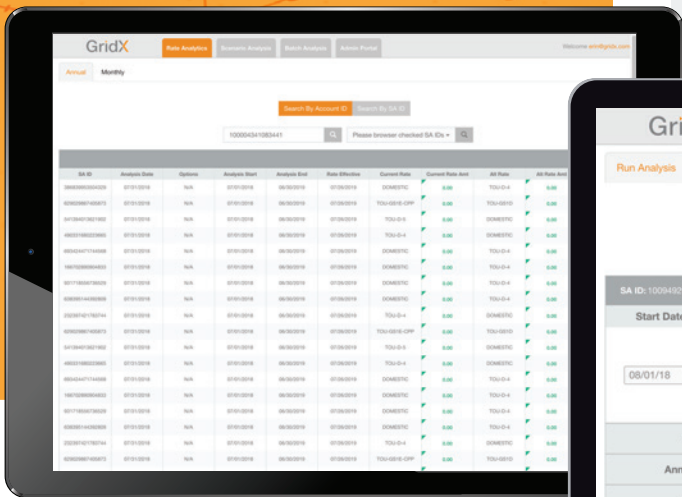
- ▶ **NATIVE SALESFORCE APP** that puts usage, rate, bill and cost analyses at Key Account Managers' fingertips instantly.
- ▶ **INTEGRATED WITH SALESFORCE SERVICE CLOUD** to incorporate usage, rate, bill and cost analyses into on-going customer interactions.
- ▶ **ACCOUNT HIERARCHY BROWSER** to navigate complex account hierarchy, access aggregated usage and rate analyses, and identify the best rates across the hierarchy.
- ▶ **BILLING QUALITY RATE AND COST ANALYSES** with validated accuracy through calibration against the utility CIS.
- ▶ **COMPLETE ENERGY USE SCENARIOS** to enable real-time what-if analyses for rate enrollment, program participation and load changes due to EE, load shift and DER.
- ▶ **BUILT-IN INTELLIGENCE** to manage rate and program eligibility and compatibility rules.

GridX

THE GRIDX KEY ACCOUNT MANAGEMENT TOOL PROVIDES USAGE, RATE AND COST ANALYSES FOR LARGE CUSTOMERS ACROSS THEIR COMPLEX ACCOUNT HIERARCHIES.

BENEFITS

- ▶ **MOST UP-TO-DATE ANALYSES:** Through integration with CIS and other IT systems, the KAM Tool maintains the current customer and rate information and delivers the most up-to-date analyses.
- ▶ **INTEGRATED WITH SALESFORCE:** Enables 360° customer engagement and care.
- ▶ **INCREASED CUSTOMER TRUST:** The KAM Tool continuously monitors customers' energy use and identifies the best rates for proactive customer engagement.
- ▶ **HIGH QUALITY ANALYSES:** Highly accurate analysis results, enabling Key Account Managers to advise their clients with confidence.
- ▶ **INTUITIVE:** Easy-to-use interface enables Key Account Managers to perform analyses across complex account hierarchies.



GridX Scenario Analysis interface showing a detailed analysis for SA ID: 100040296956389. The interface includes a search bar, a table of scenarios, and a summary table.

Start Date	End Date	DE	DE-FERA	D-FERA-SDP	D-CARE	Rate
08/01/18	07/31/19	NEM	NEM	NEM	NEM	
		Default Option	Options	Options	Options	
		NEM	NEM	NEM	NEM	
		Load Modifiers	Load Modifiers	Load Modifiers	Load Modifiers	
		N/A	N/A	N/A	N/A	
Total Cost (\$)		818.04	657.97	792.84	728.21	
Annual Difference (\$)		0.00	-160.07	-25.20	-89.83	
Total Cost (\$)		818.04	657.97	792.84	728.21	
Annual Difference (\$)		0.00	-160.07	-25.20	-89.83	
Total Cost (\$)		818.04	657.97	792.84	728.21	
Annual Difference (\$)		0.00	-160.07	-25.20	-89.83	
Total Cost (\$)		818.04	657.97	792.84	728.21	
Annual Difference (\$)		0.00	-160.07	-25.20	-89.83	

ABOUT GRIDX

GridX is a provider of Business Operation Support (BOS) Cloud for utilities, a turnkey suite of cloud services that enable utilities to develop better products and services, more efficiently operationalize them, more effectively engage and serve customers and, ultimately, optimize their performance. For more information, contact us at Info@GridX.com.