

Exhibit to Agenda Item #1

Accept the monitoring report for **Strategic Direction SD-5, Customer Relations.**

Board Policy Committee and Special SMUD Board of Directors Meeting
Wednesday, August 9, 2023, scheduled to begin at 6:00 p.m.
Auditorium, SMUD Headquarters Building

Agenda

- Strategic Direction SD-5
- 2022 Results
 - Customer Satisfaction
 - Value for What you Pay (VFP)
 - Accomplishment highlights
- Request the Board accept the 2022 monitoring report

2022 Customer Relations SD-5

Policy:

“Maintaining a high level of customer relations is a core value of SMUD. Therefore, the Board establishes an overall customer satisfaction target of 95 percent with no individual component measured falling below 85 percent.

In addition, the Board establishes an overall customer experience “value for what you pay” target of 70 percent by the end of 2025 and 80 percent by the end of 2030, with neither the average commercial customer score falling below 69 percent nor the average residential customer score falling below 65 percent in any year.

As part of this policy:

- (a) SMUD customers shall be treated in a respectful, dignified and civil manner.
- (b) SMUD shall communicate a procedure for customers who believe they have not received fair treatment from SMUD to be heard.

Customer Satisfaction Scores

Policy:

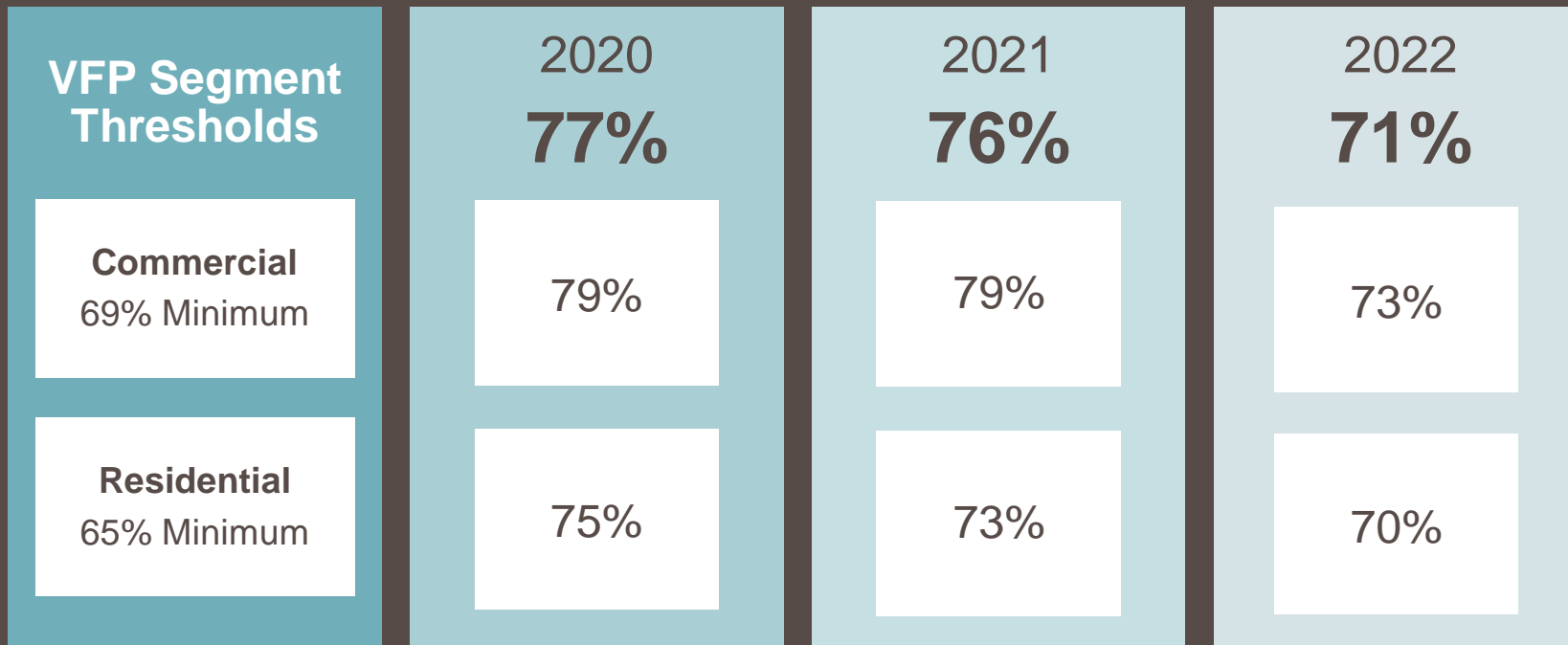
“Therefore, the Board establishes an overall customer satisfaction target of 95 percent with no individual component measured falling below 85 percent.”

Overall Satisfaction	2020	2021	2022
Tree Trimming	95%	96%	95%
New Connects	99%	99%	98%
Bill Inquires	96%	96%	96%
Outage	95%	94%	96%
IVR Payment	97%	98%	98%
IVR Payment Arrangement	93%	94%	95%

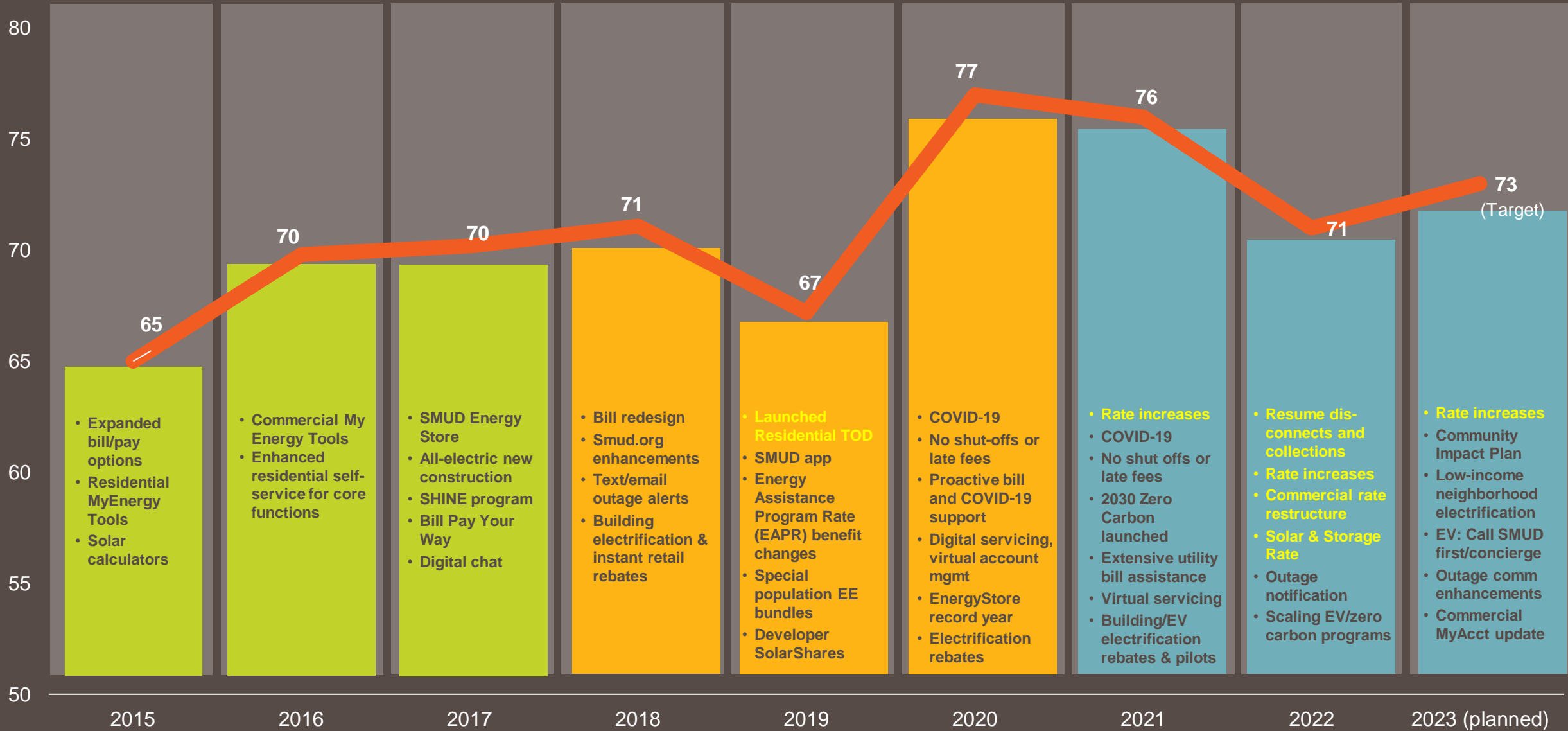
Value For What You Pay (VFP)

Policy:

“The Board establishes an overall customer experience “value for what you pay” target of 70 percent by the end of 2025 and 80 percent by 2030, with neither the average commercial customer score falling below 69 percent nor the average residential customer score falling below 65 percent in any year.”



Customer Experience Progress

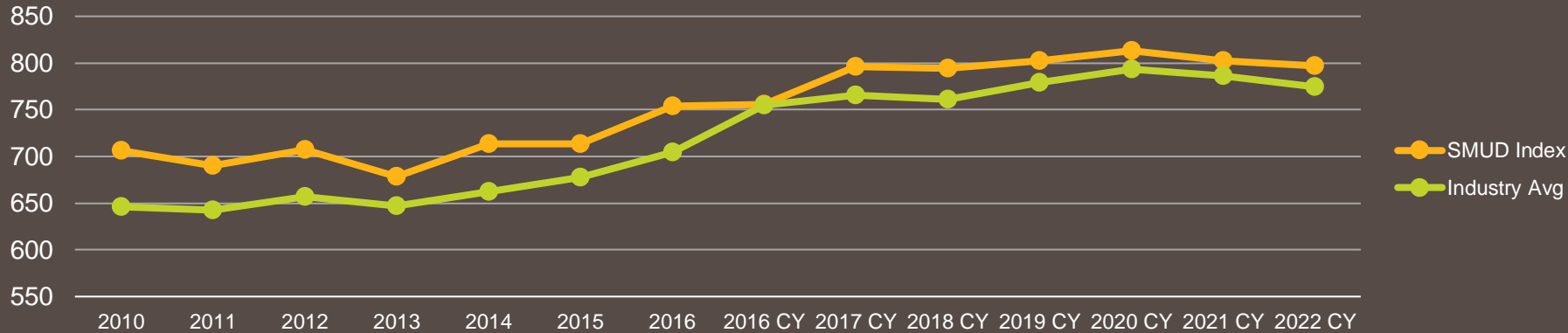


— Overall VFP



J.D. Power & Associates

Commercial Overall Customer Satisfaction



Commercial

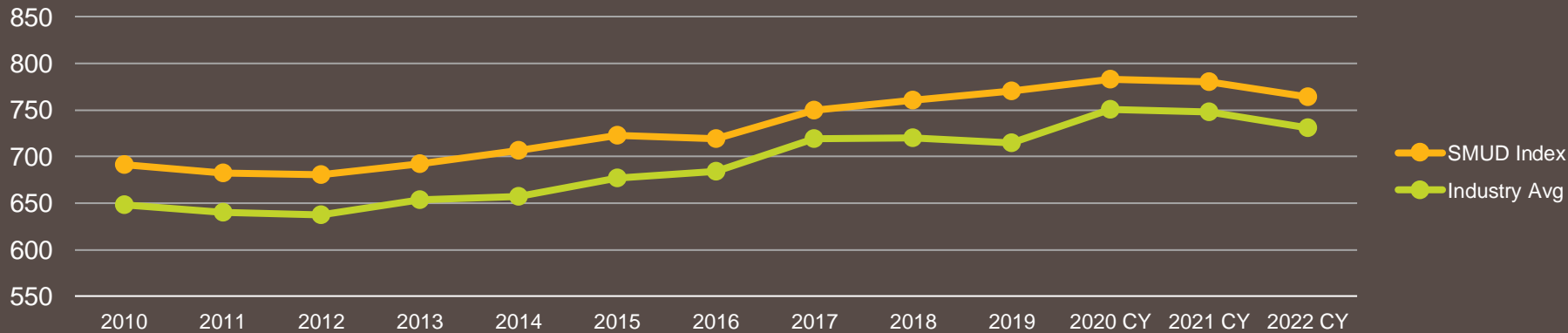
California Ranking

- **2022CY: #1**
- 2021CY: #1
- 2020CY: #1

West Midsize Ranking

- **2022CY: #2**
- 2021CY: #2*
- 2020CY: #2

Residential Overall Customer Satisfaction



Residential

California Ranking

- **2022CY: #1**
- 2021CY: #1
- 2020CY: #1

West Large Ranking

- **2022CY: #2**
- 2021CY: #2
- 2020CY: #2

CY = Calendar Year



Value our residential customers & community



2,964

took steps to electrify their homes (HVAC, cooktop, heat pump)



42,764

SMUD app downloads



9,525

shade trees planted



+\$19.0M

in financial bill assistance



\$1.69M

SMUD Energy Store sales (21% above historical avg.)



+457,174

billing notifications sent



17,229

EV residential rate participants



941

residential EV charging incentives



43%

increase in outage alerts for text and email notifications

Value our commercial customers & community



1,093

Level 2 and DCFC EV charging incentives



902

Customer engagements (programs & services)



\$5.5M

In improvement grants for affordable housing and small businesses



104

EV Fleet incentives



2,932

Customer interactions (billing, rates, 2030 ZCP, technical advisory)



\$1.1M

incentives for small and midsize businesses



213

Building electrification projects



1200

Proactive event calls (storm, rotating outages, curtailment)



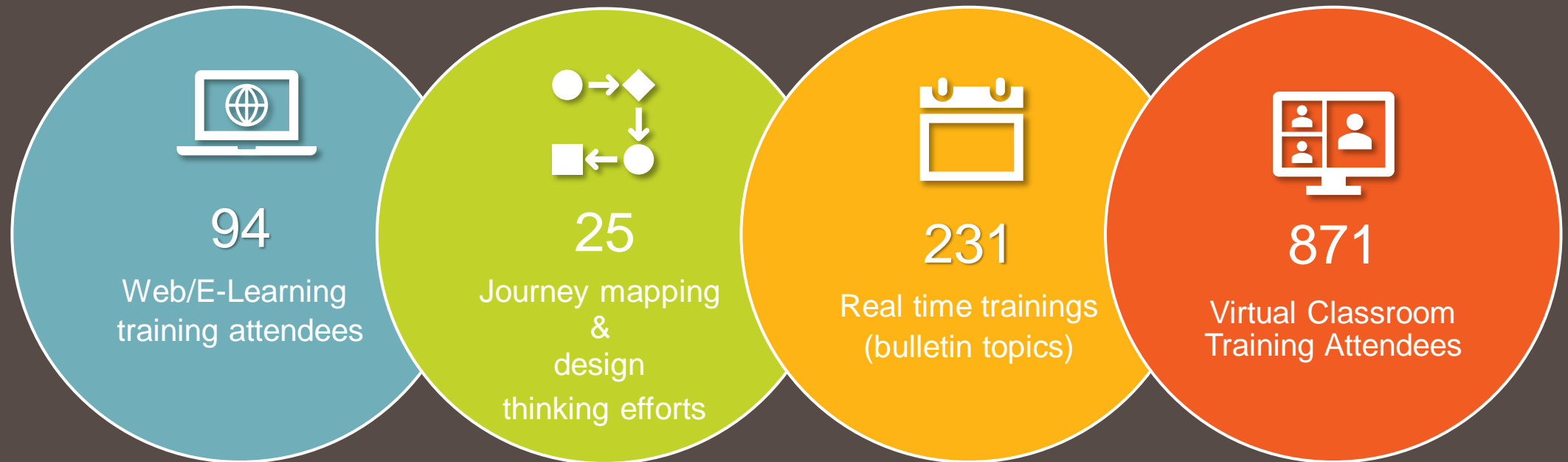
133

engagements, 60 walks, 7 languages, 33 businesses enrolled in electrification pilot

Policy: “...(a) SMUD customers shall be treated in a respectful, dignified and civil manner.”

2022 Status:

Customer experience supported by internal training and customer-centric experience design



Customer Relations SD-5

Policy:

“...(b) SMUD shall communicate a procedure for customers who believe they have not received fair treatment from SMUD to be heard.”

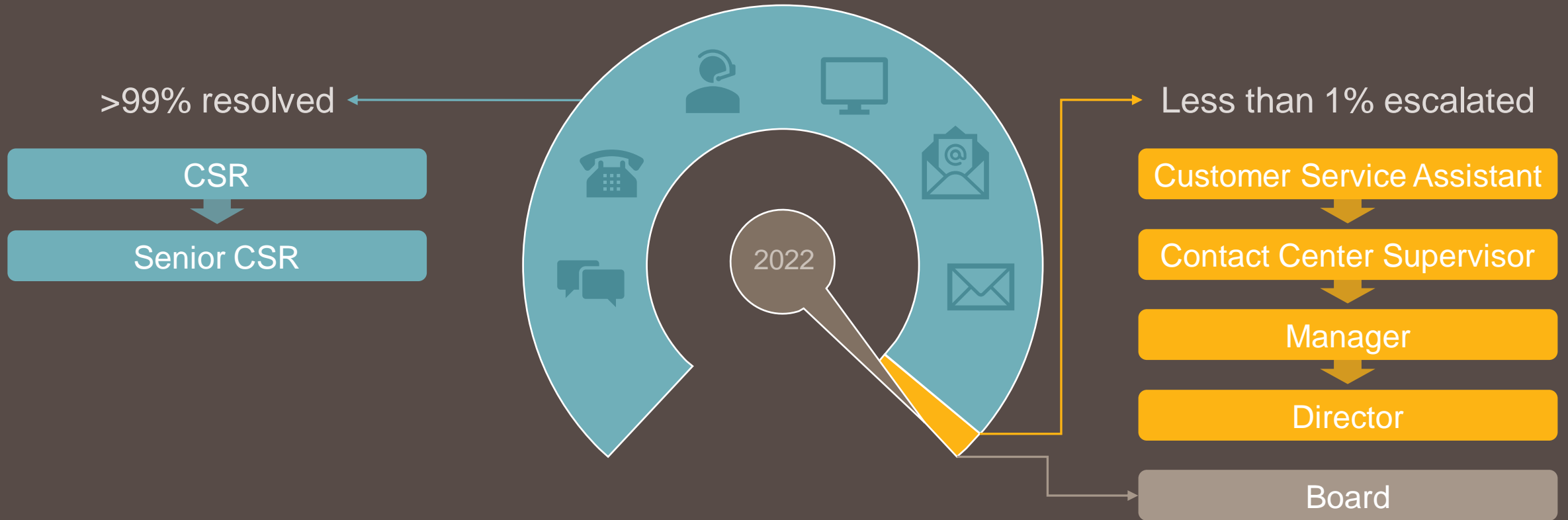
Status:

Hearing and appeal process is found in detail on smud.org

- smud.org/assets/documents/pdf/Board-Meeting-Procedures.pdf - Pg. 14 & 15
- The process is described on the back page of every bill

Customer Communication Process

+798,000 contacts



2022 Awards & Recognitions



Community Partner Award



Best Real Estate Projects for Infrastructure



Culture Transformation



Net-Zero Leader of the Year



ICON Award Sustainable Communities Program



Green and Environmental Stewardship



Best-in-state employer America's Best Mid-Sized Employers



Voluntary Protection Program (VPP) Star certification



EPRI Power Delivery & Utilization Technology Transfer Award



Reciprocity Partner of the Year Award



Utility Transformation Program of the Year finalist for Solar + Storage Rate



Most trusted Brand in residential Environmental champions Easiest to do business with



Community Bridge Builder Award



Energy Innovator Safety Excellence Excellence in Communications Sustainability Index



Sustainability Index

Request the Board accept the SD-5 monitoring report.