

Customer Experience Optimization Maximizes Engagement to Drive Higher Program Retention

By rethinking the customer journey, Franklin Energy helped a large Southeast utility reduce appointment cancellations in its free in-home assessment program, leading to stronger participation and lasting energy savings.



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THE STORY

Serving over 7 million customers across multiple states, this large Southeast investor-owned utility was seeking to reduce persistently high cancellation rates for its free in-home energy assessment program. Despite the program's clear value, nearly one-third of scheduled appointments were cancelled, undermining energy savings goals and increasing delivery costs.

THE GOAL

To address this challenge, the utility turned to Franklin Energy to strategically reduce appointment cancellations, increase completed assessments, and ultimately boost program performance and customer satisfaction. Franklin Energy embraced the opportunity by taking a customer-centric approach: mapping the full appointment lifecycle, identifying key friction points, and optimizing interactions to increase confidence, reduce drop-off, and improve follow-through. The objective was clear—maximize the value of each scheduled appointment by transforming passive interest into active participation through a more seamless experience.

THE SOLUTION AND RESULTS

Franklin Energy led a comprehensive customer journey-mapping initiative to identify pain points and triggers for cancellations across the full appointment lifecycle. Guided by data and customer insights, the team implemented enhancements that prioritized clarity, confidence, and connection at every touchpoint.

Key enhancements included:

- Optimized confirmation and reminder emails with clear, timely messaging
- A new “abandoned scheduling” recovery series to re-engage customers who didn't complete sign-up
- Personalized content to maintain engagement between enrollment and appointment
- Data-informed adjustments to subject lines and email cadence to boost open and click-through rates

By aligning customer experience improvements with program delivery, Franklin Energy demonstrated that a streamlined customer journey makes participation easier and more rewarding for customers, while strengthening program performance and driving measurable impact for utilities.

76%
INCREASED EMAIL OPEN RATE

92%
IMPROVED CLICK-THROUGH
BEHAVIOR

19%
REDUCTION IN APPOINTMENT
CANCELLATIONS

668
APPOINTMENTS SAVED IN
THE FIRST QUARTER OF
IMPLEMENTATION



These enhancements to our customer journey are proving so powerful that we are working with Franklin Energy to expand their work across our portfolio of programs.

Client Program Manager