

Commercial Excellence Academy

by  Asbiverse Group

Optimizing Route to Shopper® Capability for Winning in Retail

www.commercialexcellence.academy

Route to Shopper®

A Strategic Framework for
Integrated Shopper-based Value
Creation in the Energy Industry

The Route to Shopper® for Energy Sector

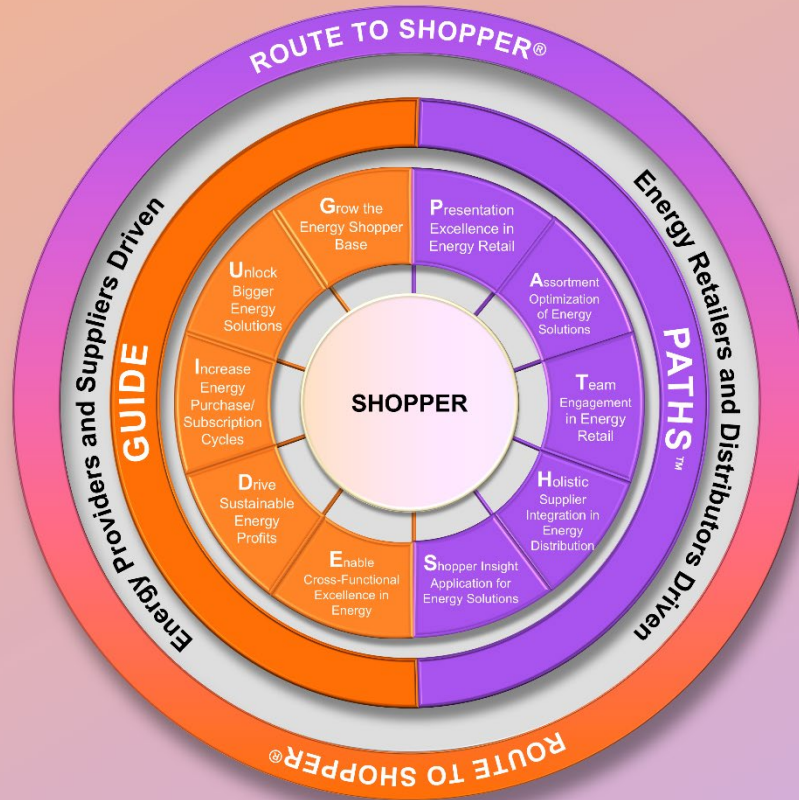
A Strategic Framework for Integrated Shopper-based Value Creation in the Energy Sector

A Strategic Positioning Document from the Commercial Excellence Academy

Table of Contents

Strategic Context & Purpose	3
GUIDE – PATHS™ Frameworks for Energy.....	4
GUIDE Framework (For Energy Providers and Suppliers).....	4
PATHS Framework (For Energy Retailers and Distributors).....	5
Illustrative Examples (Hypothetical)	7
Example 1: Residential Energy Plans	7
Example 2: Commercial & Industrial Energy Solutions	8
Potential Outcomes from Route to Energy Shopper®	9
AI Enablement in the Energy Industry	9
Role of Commercial Excellence Academy	10
Call to Explore.....	11
Contact.....	12

The Route to Shopper® Framework incorporating GUIDE – PATHS™ for Energy Sector



Strategic Context & Purpose

What does it really take to win a shopper's consideration in a world of endless options?

In an era defined by energy transition, digitalization, and consumer expectations, success belongs to energy organizations that master the art and science of Integrated Shopper-based Value Creation. The traditional energy business model, built on supply reliability and operational excellence, is giving way to a new paradigm where success depends on deeply understanding and serving the energy shopper's mission.

The **Route to Shopper®** Framework provides a next-generation commercial capability model specifically designed for energy providers, suppliers, retailers, and distributors navigating this transformation. This comprehensive framework recognizes the fundamental distinction between energy consumers (end users of energy) and energy shoppers (decision-makers who select providers, tariffs, technologies, and green solutions).

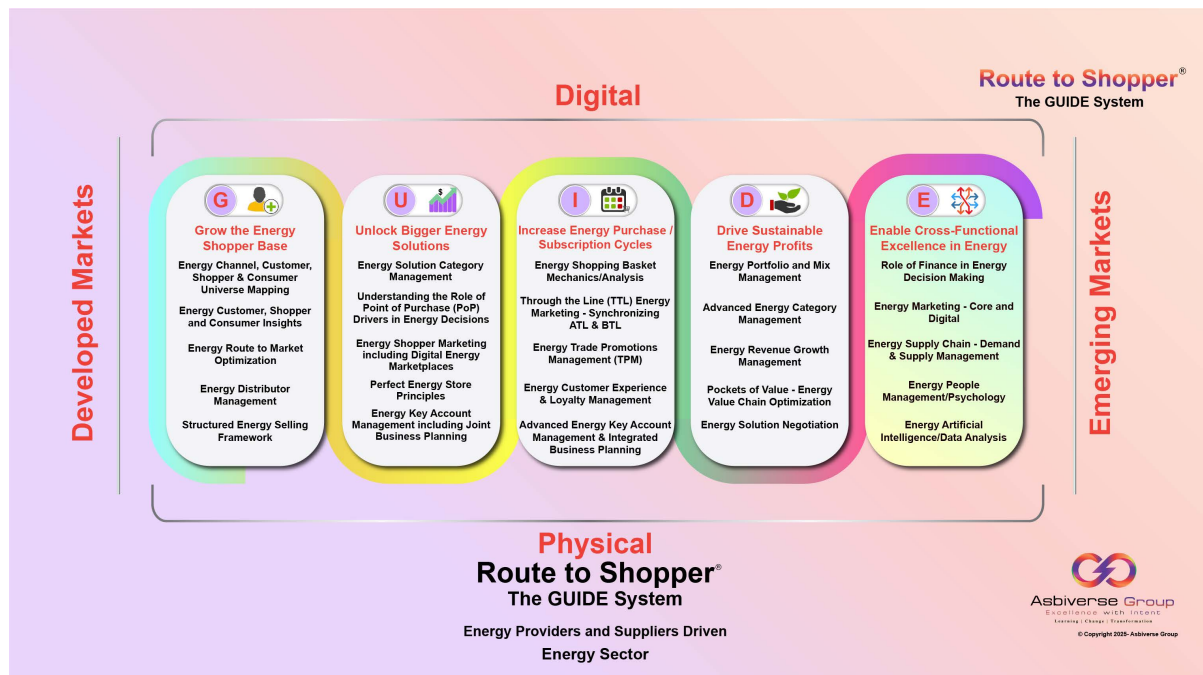
Today's energy marketplace demands a shift from static supply-based planning to mission-based energy engagement. Energy shoppers, whether residential, commercial, or industrial, are increasingly making decisions aligned with life-stage needs, sustainability objectives, carbon reduction targets, and smart home or building integration. The organizations that understand and serve these missions will capture disproportionate value in the emerging energy ecosystem.

This shift represents not merely an incremental improvement but a fundamental commercial transformation that touches every aspect of how energy is marketed, sold, and delivered. The **Route to Shopper®** Framework provides the strategic architecture and capability roadmap to lead this transformation.

GUIDE – PATHS™ Frameworks for Energy

The **Route to Shopper®** framework for Energy Industry consists of two complementary frameworks that together form a shopper-first commercial engine for energy transformation:

GUIDE Framework (For Energy Providers and Suppliers)



G: Grow the Energy Shopper Base

- Using advanced data modelling to identify untapped market segments
- Developing precision targeting for high-potential energy transitions
- Creating personalized outreach strategies aligned with shopper missions
- Establishing customer acquisition approaches optimized for lifetime value
- Leveraging predictive analytics to anticipate energy shopping triggers

U: Unlock Bigger Energy Solutions

- Designing bundled energy services that address comprehensive needs
- Developing integrated smart technology and energy management offerings
- Creating tiered green energy plans aligned with sustainability objectives
- Establishing energy-as-a-service models for specific shopper segments
- Leveraging cross-category opportunities (mobility, home, business)

I: Increase Energy Purchase/Subscription Cycles

- Implementing intelligent renewal nudges based on usage patterns
- Developing subscription models with embedded upgrade pathways
- Creating value-added services that enhance retention
- Establishing loyalty frameworks tied to energy behaviour
- Leveraging anticipatory engagement to prevent switching

D: Drive Sustainable Energy Profits

- Implementing sophisticated pricing aligned with grid optimization
- Developing decarbonization offerings with premium positioning
- Creating peak/off-peak incentive structures that improve margins
- Establishing energy efficiency services as profit centres
- Leveraging AI to optimize the profitability of energy portfolios

E: Enable Cross-functional Excellence in Energy

- Aligning product, marketing, and regulatory teams around shopper needs
- Developing integrated digital and data capabilities across functions
- Creating agile innovation processes for energy solution development
- Establishing collaborative frameworks between technical and commercial
- Leveraging AI to enhance cross-functional decision-making

PATHS Framework (For Energy Retailers and Distributors)



P: Presentation Excellence in Energy Retail

- Designing compelling energy solutions across digital platforms
- Developing immersive in-store experiences for energy technologies
- Creating intuitive comparison tools for complex energy decisions
- Establishing consistent omnichannel energy solution presentation
- Leveraging visualization to make abstract energy concepts tangible

A: Assortment Optimization of Energy Solutions

- Curating the optimal mix of energy plans and technologies
- Developing tiered home energy management solution portfolios
- Creating integrated offerings around EV charging infrastructure
- Establishing clear solar and storage solution hierarchies
- Leveraging data to localize energy solution assortments

T: Team Engagement in Energy Retail

- Equipping advisors with consultative energy solution capabilities
- Developing specialized knowledge in emerging energy technologies
- Creating customer-centric conversation frameworks for complex decisions
- Establishing performance standards for energy solution guidance
- Leveraging AI tools to enhance advisor effectiveness

H: Holistic Supplier Integration in Energy Distribution

- Synchronizing upstream provider innovations with frontline activations
- Developing seamless installation and service partner coordination
- Creating aligned messaging across the energy solution ecosystem
- Establishing collaborative planning with energy technology providers
- Leveraging digital integration to enhance partner effectiveness

S: Shopper Insight Application for Energy Solutions

- Implementing advanced energy behaviour and lifestyle analytics
- Developing personalized recommendation engines for energy solutions
- Creating predictive models for energy decision triggers
- Establishing closed loop learning from energy solution adoption
- Leveraging AI to enhance energy shopper understanding

While **GUIDE** informs growth and innovation strategy for energy providers and suppliers, **PATHS** ensures energy solutions are activated effectively at every touchpoint. Together, they form an integrated commercial capability system that

transforms energy organizations from product-centric to shopper-centric enterprises.

Illustrative Examples (Hypothetical)

Example 1: Residential Energy Plans

Opportunity: A forward-thinking utility seeks to accelerate adoption of green energy plans while improving retention and customer lifetime value.

Application of Route to Energy Shopper®:

GUIDE Implementation:

- **G (Grow):** The provider applies advanced segmentation to identify and target environmentally conscious renters with flexible green energy plans, using predictive models to identify properties with high solar potential.
- **U (Unlock):** They develop tiered renewable plans bundled with smart home energy management systems that provide real-time visibility and control.
- **I (Increase):** Subscription renewals are redesigned around smart meter data insights, with personalized energy-saving recommendations triggering engagement throughout the relationship.
- **D (Drive):** Premium pricing tiers are established for 100% renewable plans, while AI optimizes grid management to improve margins.
- **E (Enable):** Product, marketing, and customer service teams align around a unified view of the shopper journey, with shared metrics and incentives.

PATHS Activation:

- **P (Presentation):** Retail partners create immersive digital experiences that visualize renewable energy impact and savings potential.
- **A (Assortment):** Home automation tools are bundled with energy plans, creating good-better-best hierarchies based on shopper missions.
- **T (Team):** Energy advisors are equipped with tools to conduct personalized energy assessments and make tailored recommendations.
- **H (Holistic):** Smart thermostat manufacturers synchronize their marketing with the utility's renewable energy campaigns.
- **S (Shopper):** Usage data drives seasonally relevant communications and upgrade nudges tied to lifestyle transitions.

Potential Result: 15% higher conversion to green energy plans, 30% improvement in renewal rates, and 25% increase in adoption of value-added energy services.

Example 2: Commercial & Industrial Energy Solutions

Opportunity: An energy supplier wants to expand its B2B portfolio beyond commodity supply into comprehensive energy management solutions for small and medium enterprises.

Application of Route to Energy Shopper®:

GUIDE Implementation:

- **G (Grow):** The supplier identifies high-potential segments based on energy usage patterns, regulatory pressures, and sustainability commitments.
- **U (Unlock):** They develop integrated packages combining energy supply, efficiency audits, solar installation, and battery storage with clear ROI models.
- **I (Increase):** Multi-year energy transformation roadmaps are created for each client, with phased implementation tied to business objectives.
- **D (Drive):** Solutions are priced on value delivered (carbon reduction, cost savings) rather than on commodity rates alone.
- **E (Enable):** Technical specialists and account managers collaborate through shared digital platforms and aligned incentive structures.

PATHS Activation:

- **P (Presentation):** Solutions are showcased at regional energy expos with interactive ROI calculators and case studies.
- **A (Assortment):** Industry-specific package configurations are developed for key sectors (manufacturing, retail, healthcare).
- **T (Team):** Energy advisors receive specialized training in business financial analysis and sustainability reporting.
- **H (Holistic):** Implementation partners (installers, auditors) are integrated into the sales and delivery process from the beginning.
- **S (Shopper):** B2B buying committee analysis identifies key decision-makers and influencers with personalized engagement strategies.

Potential Result: 40% increase in comprehensive solution adoption, 20% improvement in customer retention, and 35% growth in average revenue per business customer.

Potential Outcomes from Route to Energy Shopper®

Energy organizations that successfully implement The **Route to Shopper®** Framework can expect transformative commercial results:

- **+10–20% uplift in shopper conversion** for energy plans and solutions through enhanced relevance and timing
- **15–25% increase in frequency** of subscription renewals and technology upgrades
- **20–30% higher ROI** from targeted energy marketing and solution bundling
- **25–35% reduction in churn** through needs-based shopper journey mapping and proactive engagement
- **30–40% improvement in cross-functional agility** in energy offer design and delivery
- **15–25% acceleration** in sustainable energy adoption and carbon reduction outcomes
- **20–30% enhancement** in customer lifetime value through expanded energy solution portfolios

These outcomes aren't merely commercial improvements; they represent a fundamental transformation in how energy organizations create, deliver, and capture value in a marketplace.

AI Enablement in the Energy Industry

The **Route to Shopper®** Framework equips energy businesses to thrive in an AI-facilitated operating environment, where technology amplifies human capability rather than replacing it. The framework's modular design provides the perfect architecture for AI enhancement:

AI-powered Energy Shopper Understanding

- **Real-time Usage Pattern Analysis:** Continuously learning algorithms that identify optimization opportunities in energy consumption
- **Predictive Life-event Modelling:** Anticipating transitions (moving, renovating, expanding) that trigger energy solution needs
- **Multi-dimensional Segmentation:** Identifying micro-segments based on behaviour, property characteristics, and sustainability attitudes
- **Propensity-to-switch Prediction:** Early warning systems for retention risk based on behavioural and engagement indicators
- **Visual Property Assessment:** Analysing satellite and street view imagery to identify solar potential, insulation needs, and EV readiness

AI-enhanced Energy Solution Development

- **Dynamic Bundle Optimization:** Continuously refining package configurations based on adoption patterns and profitability
- **Grid-customer Integration:** Balancing grid optimization with customer preferences through intelligent demand management
- **Personalized plan Configuration:** Automatically tailoring energy solutions to specific household or business profiles
- **Regulatory Compliance Automation:** Ensuring offers meet complex and changing regulatory requirements across jurisdictions
- **Competitive Response Modelling:** Simulating market reactions to new energy offerings to optimize positioning

AI-accelerated Energy Shopper Engagement

- **Omnichannel Journey Orchestration:** Coordinating consistent experiences across all energy shopping touchpoints
- **Next-best-action Recommendations:** Guiding energy advisors with AI-informed conversation and offer suggestions
- **Conversational Energy Interfaces:** Enabling natural language interaction for complex energy solution exploration
- **Timing Optimization:** Identifying ideal moments for renewal, upgrade, and expansion conversations
- **Visual Solution Simulation:** Creating realistic visualizations of energy solutions implemented in customer environments

The **Route to Shopper®** doesn't merely accommodate AI. It provides the strategic framework needed to ensure AI investments deliver meaningful commercial outcomes rather than becoming isolated technical experiments.

Role of Commercial Excellence Academy

The Commercial Excellence Academy serves as the strategic enabler helping energy organizations evolve into shopper-led, insight-powered, and AI-ready enterprises. Our approach combines strategic guidance with practical capability building:

Strategic Transformation Partnership

- Executive alignment on shopper-centric energy transformation vision
- Capability assessment against The **Route to Shopper®** benchmark
- Prioritization of high-impact commercial capability investments
- Design of transformation roadmaps with clear milestones and outcomes
- Governance frameworks for sustainable capability development

Capability Building & Knowledge Transfer

- Tailored training programs for leadership and implementation teams
- Coaching for key roles in the energy shopper journey
- Collaborative workshops to solve specific commercial challenges
- Knowledge repositories for energy shopper-centric best practices
- Communities of practice across functions and business units

Implementation Support & Acceleration

- Pilot program design and execution for key capabilities
- Measurement frameworks to track commercial outcome improvement
- Technology selection guidance for enabling systems and platforms
- Change management support for organizational transformation
- Performance analytics to identify optimization opportunities

The **Route to Shopper®** Framework serves as the commercial operating system that connects insight, innovation, and action. It creates a unified approach across energy providers, retailers, and distribution partners. The Commercial Excellence Academy brings this framework to life within your organization, accelerating the journey to shopper-centric commercial excellence.

Call to Explore

The energy industry stands at a pivotal moment. While the energy transition creates unprecedented technological and regulatory change, the true competitive advantage will belong to organizations that master the commercial capabilities needed to translate these changes into compelling shopper value.

We invite energy leaders to:

- **Reframe growth strategy** around the energy shopper's mission rather than the traditional product portfolio
- **Leverage AI-readiness** to create a sustainable commercial advantage in an increasingly digital marketplace
- **Build cross-functional alignment** around a shared understanding of energy shopper needs and journeys
- **Accelerate commercial transformation** to lead in an era of rapid energy system change
- **Make Route to Energy Shopper®** the foundation for modern energy commerce and competitive differentiation

The path to sustainable growth, customer loyalty, and industry leadership begins with a fundamental question: How well do you understand and serve your energy shoppers' missions? The **Route to Shopper®** Framework provides the answer, as well as the roadmap, to commercial excellence in the energy landscape.

Contact

To begin a strategic dialogue on implementing the **Route to Shopper®** Framework in your organization, please contact:

Strategic Partnerships Team

Commercial Excellence Academy

www.commercialexcellence.academy

info@commercialexcellence.academy

© Commercial Excellence Academy - **Route to Shopper®** is a registered trademark of The Asbiverse Group