

Inspire to purchase		Early Engagement		Deliver The Promise					Increase Value / Commitment			Leave	
Awareness Channel	Discovery	Enroll	Onboard	Billing & Payment	Treatment	Support	Renew	Winback	Product Engagement	Customer Engagement	Loyalty Program	Cancel Service	
Customer Referral	Talked to Consultant	Select Product & Plan	Email - Status Pending	Receive Bill - Paper	Disconnect Letter (DUN 1 & 2 @ Day 17)	Reconnect Energy	Renewal Reminder Email (TX 30 Day)	Email Offer	GSP Renewal Reminder Email (PJM Qtrly)	Email - Ambit Energy Advisor	Travel Rewards	Customer Cancels Service	
Consultant	View Ambit Website	Opp: Compare Plans w/ Ex. Forecase of Pricing	Third Party Verification	Receive Bill - Email	Payment Reminder (DUN 3 & 8 @ Day 17)	Account Management	Renewal Reminder Letter (TX 30 Day)	Can we ask why they came back to Ambit?	GSP Renewal Reminder Call (PJM Qtrly)	Email - Free Energy	Cool Saver Email (Houston)	Defector Survey (Email - April Bell)	
Self-Directed Inquiry	Opp: Make Rates Pg Easy to Find on AE.com	Complete Enrollment	Email - Welcom/Confirm	FIRST BILL SURVEY (ebill link or email survey)	Payment Reminder Email (DUN 1 & 2 @ Day 18)	Inquiry (bill,usage,rate,etc.)	Renewal Reminder Email (TX 14 Day)		GSP Renewal Reminder Email (PJM 30 Day)	Bill Inserts (TX)	Efficiency Connection Email (Houston)	NEW EXIT SURVEY	
	Talked to Customer Care	Select Start Date - Switch	Opp: Welcome Email Series (Structured)	Pay Bill - MAA	Opp: Make Reminder Email 1 Friendlier	Renewal	Renewal Reminder Letter (TX 14 Day)		GSP Renewal Reminder Email (PJM 30 Day)	Awareness Email - Automatic Payment			
	View Social Media	Select Start Date - Move-In	Email - Verify Paperless Billing	Opp: Walk Through MAA Billing Experience	Payment Reminder Call (DUN 1 & 2 @ Day 18)	Post Call Survey (IVR & Email - Tamer)	Online Renewal		Renewal Reminder Email 1	Awareness Email - Ebill			
	Product & Pricing	Select Start Date - Expedited Move-In	Opp: Expln Paperless = All Future Comm. Email	Pay Bill - U.S. Mail	Disconnect Letter (DUN 8 @ Day 22)	POST CALL CENTER - CUST. EFFORT SURVEY	Care Call Renewal		Commercial 4CP Email	Awareness Email - Green Energy			
	Non-Ambit Website	Deposit Required	Email - Paperless Billing Confirmation	Pay Bill - IVR	Payment Reminder Email (DUN8 @ Day 23)	POST CALL CENTER - AGENT PERF. SURVEY	Consultant Renewal		End of Fixed Rate Plan Email (CT)	Opp: Qtrly Email, Tips on How to Save in Season			
		Opp: Explain Why Deposit May be Req'd	Welcome Call	Pay Bill - Live Agent	Payment Reminder Call (DUN8 @ Day 23)	MAA USABILITY SURVEY (random/ease of use)	SELF-SELECTED RENEW SURVEY			CSAT - no contact for 6 mo (Email - April Bell)			
	Deposit Payment	Energized	Pay Bill - Automatic Payment	Disconnect Letter (DUN 3 @ Day 26)			Term Roll-Off			CSAT once per year, randomly select			
	POST ENROLLMENT SURVEY	Email - Status Energized	Pay Bill - In Person	Payment Reminder Email (DUN3 @ Day 27)			Welcom Kit (U.S. Mail)						
		Welcome Kit (U.S. Mail)	Pay Bill - Express Option	Payment Reminder Call (DUN3 @ Day 27)									
		View Onboarding Reference Materials	BILL PAY SURVEY (slide-up or email)	Opp: Reminder Call 5 Days Out - Ask, "Can we help?"									
		MAA Set-Up	Payment Confirmation Email	Payment Reminder Email (2 Days B4 Disconnect)									
		MAA - FIRST TIME USER (email)	Payment Extension	Power Disconnected									
		Enroll - Ambit Energy Advisor (AEA)	Deferred Payment	Final Bill Received									
	Enroll - Automatic Payment	Credit Card Expiration Email	Pay Reconnect Fee										
	Opp: Conf Email Auto-Pay Enrollment	Credit Card Expires	Restore Power										
		Opp: Ask, Can we make bill pay easier?											

Proposed Surveys

Existing Surveys