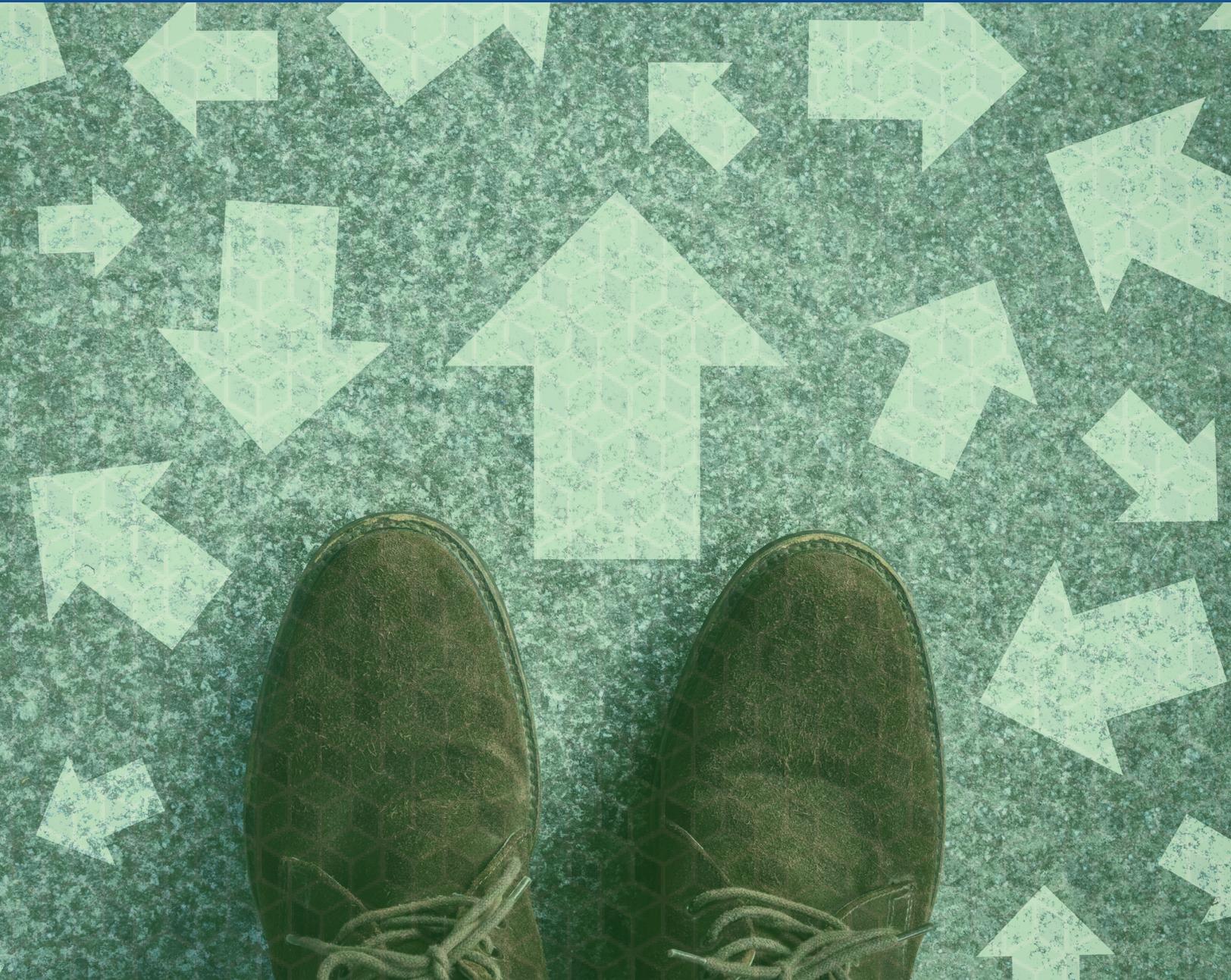


WHITE PAPER

# Utility Customer Engagement Begins with Journey Mapping

by Vikas Mukhi



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BI/Analytics • Applications • Databases

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# Abstract

Utility industry news and analysis provider, [Utility Dive's](#) 2018 State of the Electric Utility survey suggests that customer service will become increasingly important for power providers. That's because many organizations believe regulators will move from traditional, cost-of-service ratemaking to performance-based regulation (PBR).

"Under PBR, utilities are compensated for achieving well-defined performance metrics around reliability, customer service and other factors," the survey report notes. It also shows that while 32 percent of respondents say they're operating under a system that combines cost-of-service with performance-based rates today, but 50 percent expect such regulation in the coming decade.

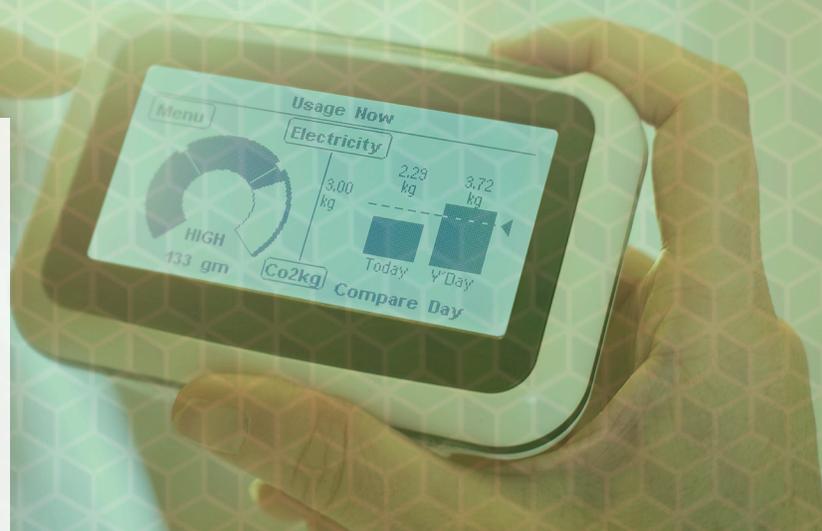
Similarly, only four percent of electric utilities earn revenue through a predominance of PBR today, but 23 percent expect to do so in 10 years.

Given this dynamic, utility companies will need stronger, more collaborative relationships with customers going forward. Mapping the customer journey is a first step to making such relationships happen. This paper covers why utilities need the customer insight and engagement journey maps deliver. It also covers best practices in effectively charting and improving the customer journey.

“

Consumers are telling us they want technology.<sup>1</sup>

Patty Durand, President & CEO,  
Smart Grid Consumer Collaborative



<sup>1</sup> <https://www.puco.ohio.gov/industry-information/industry-topics/powerforward/day-one-recap/>



## Customer expectations are changing. Is your utility?

When the Public Utilities Commission of Ohio (PUCO) launched PowerForward, a Buckeye State smart grid initiative, “focus on the customer” was the topic du jour for PUCO’s kickoff proceedings. Paul Di Martini, managing director for the Newport Consulting Group and a well-known authority on grid modernization topics told regulators that customer expectations have already been changed by other industries.

Consumers want information, control and opportunities to co-create with product or service providers, Di Martini said in a 2017 PUCO proceeding. Several trends convene to create this dynamic.

“Customers are increasingly leveraging technology,” he maintained. They’re also increasingly opting to install distributed energy resources like rooftop photovoltaics and battery energy storage systems. Such technologies that create more complexity in managing the grid at the same time they erode utility revenues.

To meet these trends, utilities will need new and innovative services to sell as well as more collaboration with customers for help balancing capacity and demand. These conditions make customer journey mapping vital for utilities looking to upgrade customer-facing technology, deploy demand-management programs or expand utility offerings. To strengthen relationships with today’s utility customer, insight is crucial.

# Where it all begins

What is customer journey mapping? A customer journey map is one or more diagrams that depict all the stages and steps customers go through when interacting with a company. Such maps may cover a variety of interactions, including buying products or services online, accessing customer service via telephone, airing grievances through social media or making account changes related to an ongoing service. Properly done, the journey map will identify all critical connections customers have with your organization.

For an accurate look at customer-company interactions, journey maps should reflect data-driven research that identifies and records all the different phases of contact and fulfillment that customers experience. Thorough maps include a number of customer characteristics, such as personas, sentiment toward a company, goals and, of course, touch points through which the customer and company conduct business.

Usually, organizations will need to create several customer journey maps covering various interactions and connection points for specific customer personas.

## Why map customer journeys?

Focusing customer journey maps on each task a customer must complete and channel through which the task might be completed enables application developers to precisely tailor applications to customer needs. It also helps keep costs down by ensuring that customer requirements are accurately charted and met without extensive revision.

For utilities, a customer journey is key to understanding how complicated or simple it is to complete certain tasks. Is it easy for customers to go online and sign up for new service? To notify the utility of an upcoming move? To report an outage or tree limbs that should be trimmed away from power lines? To request a disconnect of service for some activity, such as upcoming construction on the premises?

“A good journey map enables a utility to identify gaps between its customer experience (CX) strategy and its customers’ reality,” noted analyst Peter Haid from eSource, a utility-focused research organization. “The map also provides the targeted information needed to prioritize investments for improving CX cross-functionally,” he told attendees of a web conference.<sup>2</sup>

Other benefits of journey mapping include:

### Continuous improvement

After Toronto Water charted out 13 customer service journey maps documenting a variety of services and complaints, utility managers were able to prioritize a clear set of project and policy recommendations. Among the earliest projects tackled were website enhancements and expanding access to work-order information.<sup>3</sup>

<sup>2</sup> <https://www.esource.com/system/files/files/2014-08/CE-WC-2014-08-JourneyMapping.pdf>

<sup>3</sup> <http://www.ema-inc.com/docs/default-source/communicator-2014-issue-3/communicator-issue-3-14-trends-toronto-customer-journey-maps.pdf?sfvrsn=2>

## Higher ROE

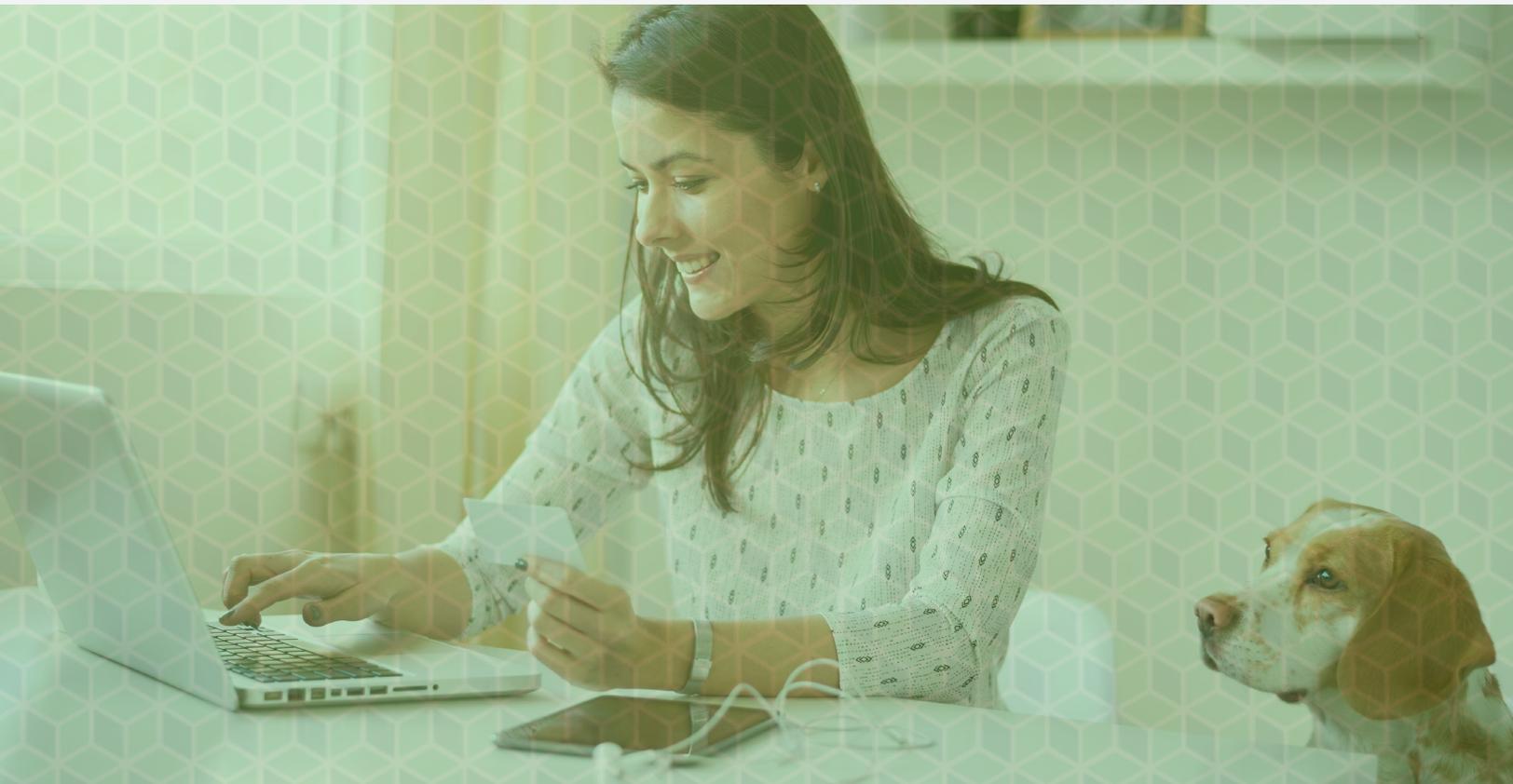
In 2012, J.D. Power and Associates examined the relationship between customer satisfaction and return on equity (ROE) for utilities. Study results showed that, "On average, a 10-point increase in customer satisfaction, based on the 1,000-point index scale utilized by J.D. Power and Associates, is associated with a .04% increase in ROE," the study report said.<sup>4</sup>

On an equity base of \$1 billion, that could mean an additional \$4 million in annualized increase in earnings for shareholders. Higher customer satisfaction scores also were associated with utilities receiving rate increases largely in line with their requests.

Along the same lines, a 2015 study by PwC found that utilities in the bottom quartile of customer satisfaction were granted a lower percentage of their requested rate increases than utilities in the top quartile, according to a Utility Dive article.<sup>5</sup>

## More engagement and collaboration

The easier it is to work with you, the more customers like you and the more they'll be likely to collaborate or participate in your programs. That will be of great importance for electric utilities trying to implement demand response programs to mitigate grid impacts cause by distributed energy resources. Likewise, water utilities dealing with drought and population growth will increasingly need customer compliance with water-management initiatives.



<sup>4</sup> <http://www.jdpower.com/sites/default/files/How%20Customer%20Satisfaction%20Drives%20Return%20On%20Equity%20for%20Regulated%20Electric%20Utilities%20White%20Paper.pdf>

<sup>5</sup> <https://www.utilitydive.com/news/utility-customer-engagement-goes-digital/444149/>



## Better insight and receptivity to changing customer expectations

Connectivity is changing customer expectations about how they interact with their utility as well as what they want it. For instance, the U.S. Energy Information Administration notes that as of 2016, there were some 70.8 million advanced (smart) meters installed for electricity customers.

EIA defines advanced metering infrastructure as “meters that measure and record electricity usage at a minimum of hourly intervals and that provide the data to both the utility and the utility customer at least once a day. AMI installations range from basic hourly interval meters to real-time meters with built-in two-way communication that is capable of recording and transmitting instantaneous data.”<sup>6</sup>

Nearly 90 percent of AMI meter are for residential customers, who are now starting to look for things like time-based rates, demand management built into the meter and real- or near real-time consumption data.

Even if a utility doesn't have AMI, customers still are beginning to see the benefits of connectivity. Last October, the City of Austin, Texas began enforcing a new ordinance that requires all new residential construction to be equipped with smart thermostats. “The thermostat controlling the primary heating or cooling system of the dwelling unit shall be capable of connecting to the internet via either a cable or WiFi connection and allow cooling and heating set points to be altered remotely,” the ordinance notes.

Utility Dive reports that Austin Energy, the city utility, now offers an \$85 rebate for customers with the thermostats who sign up for the municipality's PowerSaver demand response program, which allows Austin to adjust thermostats up to four degrees during peak demand days that typically occur around about 15 days per year.<sup>7</sup>

Getting a smart thermostat or signing up for a program like PowerSaver are two customer journeys worthy of mapping. This initial exercise will help utilities determine what steps customers should take, what back-end system need to be integrated to enable those steps and how to keep the process simple for all involved.

<sup>6</sup> <https://www.eia.gov/tools/faqs/faq.php?id=108&t=1>

<sup>7</sup> <https://www.utilitydive.com/news/austin-texas-to-require-all-new-homes-to-have-smart-thermostats/428589/>

# Best practices in customer journey mapping

Great customer journey maps cite the needs and goals of specific customer types conducting specific tasks. The team at eSource identifies three types of journeys utility customers take:

- Emotional journeys, such as billing complaints, outages and property issues
- Utility cost-saving journeys, which include self-service portals and other drivers of call-center volume
- Brand-building journeys, which eSource identifies as demand-side management programs, marketing campaigns and customer cost-savers like energy audits <sup>8</sup>

Why pay attention to what type of journey your customers are on? Because it will help you prioritize your technology upgrade efforts to meet strategic goals, such as increased customer satisfaction, utility cost savings or revenue growth.

Following are a few other best practices.



## Break it down

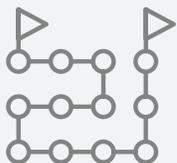
Start with a single objective a customer may have, like signing up for new service or opting into a green-power option. That first item – signing up for new service – may bring the customer to the green-power choice, so you need to carefully map the logical flow of choices you'd present.

For instance, when someone signs up for new service, do you also want to present them with the opportunity to sign up for paperless billing? Automatic payments? While every journey might lead to other activities, your job is to know the first step customers are likely to take so you can make those activities the most easily accessible via your contact channels.



## Know the touch points

A touch point is more than an access channel, such as your web portal or call center. It's also the various things a customer sees, hears and likely feels when making contact. Does an IVR toss the customer from one menu to the next? Does a website make it hard to find self-service options? Those are the types of questions your journey map will answer.



## Track the attributes of each journey

Determine specifics such as how often a specific channel is used (i.e. call-center statistics or website hits), how when customers switch channels, costs drivers, cost savers and other data that informs prioritization and strategy.

<sup>8</sup> <https://www.esource.com/system/files/files/2014-08/CE-WC-2014-08-JourneyMapping.pdf>



## Be where customers are looking

When J.D. Powers and Associates evaluated water utilities that earned top customer satisfaction marks, they found this trait: Leaders leverage lots of technology. All of the top performing water providers had online billing and payment systems. Often, they had easy-to-use systems that let customers track usage. Most had a presence on at least three and often five or more social media platforms, and many had YouTube channels for posting helpful videos.



## Be prepared to connect the dots ... and IT systems the journey needs

A call-center representative may access as many as a dozen or more systems to support customer service activities. When your journey mapping indicates that customers want to do such activities themselves, you need to be sure you have strong systems integration support to enable the functionality and applications your customers will use.

# Getting maximum benefit from your journey maps

## Identify what is, what could be and what should be

A major municipal utility in Canada has worked with Datavail for more than seven years on various customer-focused technology initiatives. One was a highly functional self-service web presence that increased self-service use by some 30 percent. Call center volume dropped significantly, but journey mapping showed that customers still needed more options for outage reporting.

After all, when customers have no power on the premises, land-line phones don't work. That's why the utility prioritized a multi-channel reporting system that the Datavail team built with SharePoint 2016. The mobile-first solution allows customers to report an outage on any device and from any location. The system also enabled customers to sign up for alerts about outages in their areas, a function associated with higher customer satisfaction.<sup>9</sup>

Along with enhancing the customer journey, this utility was able to bring outage-related call center volume down some 25 percent, so the service improvement was also a cost-saver.

## Partner up

Creating customer journey maps isn't a task you need to tackle alone, and neither is the act of leveraging those journey maps into better customer service offerings.

"Utilities can't do it all," wrote Utility Dive's Rob Walton in a recent article on electric industry trends. "Their primary functions are maintaining power lines and delivering energy — not designing websites, smart phone apps and cellular networks. But as those ancillary tasks play a larger role in how they connect with customers, utilities are reaching out to specialized tech companies to build the interfaces and products they need."<sup>10</sup>

<sup>9</sup> <http://www.jdpower.com/press-releases/jd-power-2017-electric-utility-business-customer-satisfaction-study>

<sup>10</sup> <https://www.utilitydive.com/news/5-trends-to-watch-in-utility-customer-engagement/444627/>

In an article on the customer services transformation undertaken by Consumers Energy a few years back, Utility staffer Tobin S. Williams promoted the value of partnerships and noted, “Our project teams were rounded out with internal staff to deliver the right bench strength, as well as outside expertise — third party consultants and vendors — to help guide us through rougher waters.”<sup>11</sup>

Datavail has extensive experience helping utilities enhance customer service with digital transformation and navigate the customer journey.

As a specialized IT services company focused on data management, Datavail empowers digital transformation by helping clients collect and manage organizational data, leverage it with best-in-class software and streamline processes through automation. Datavail gives you:

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“  
62% of consumers will pay more for a simple customer experience. 61% would recommend a company that saves them time.”<sup>12</sup>

Siegel+Gale, 2017



<sup>11</sup> <https://www.westernenergy.org/news-resources/10-steps-for-a-successful-customer-journey-from-one-midwest-utility/>

<sup>12</sup> <https://www.marketingweek.com/2017/02/03/consumers-spend-more-simple-brand-experiences/>



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## Biography

Vikas Mukhi is an Director, Pre-Sales Solution Architecture & Consulting at Datavail, formerly Navantis with 15+ years of successful leadership and experience in business processes, complex applications and secure enterprise-class solutions necessary for 24/7 business operations.

His responsibilities include solution strategy and implementation for business operations and has been recognized as a customer-trusted advisor throughout the project life cycle.

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