

# Enhanced Service Orders Project

Executive Kick-off  
August 3, 2018



**E Source**



# Agenda

## **Welcome & Introductions**

E Source Overview

Enhanced Service Orders Team

Project Pillars & Approach

Timeline & Key Deliverables

Project Success Factors

*Current State Assessment: Key Themes*

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Welcome & Introductions

## **E Source Overview**

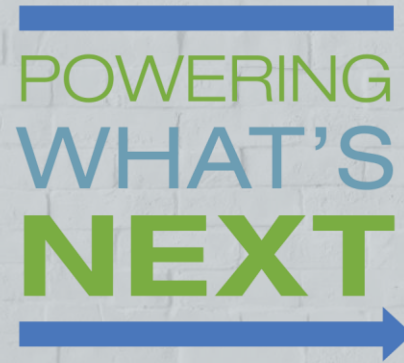
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Customer-Centric  
Transformation



Market  
Intelligence/  
Analytics



Strategic Innovation &  
Planning



Utility Business  
Model of the Future

# Our Areas of Expertise

Demand-Side  
Management



Customer  
Experience



Technology  
Assessment



Marketing and  
Segmentation



Account  
Management



Solar &  
DERs



# We're proud to count Ameren among our utility clients from across the US and Canada.



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# Enhanced Service Orders Team Objectives

- Understand and manage the customer experience associated with service orders
  - Moving, new construction, street lighting, etc.
- Establish a “digital” agile team to develop and deploy solutions
- Identify and prioritize opportunities to improve the customer experience and optimize operations





Project Objective: Design a “Wow” residential  
**MOVE-IN/MOVE-OUT** customer experience

# Project Objectives

- Develop a future state experience for residential **“Move In/Move out”**
- Map the journey from initial contact to first billing
- Develop prioritized recommendations to address CX pain points
- Align and coordinate internal stakeholders to drive effective implementation of recommendations

# The Experience Economy



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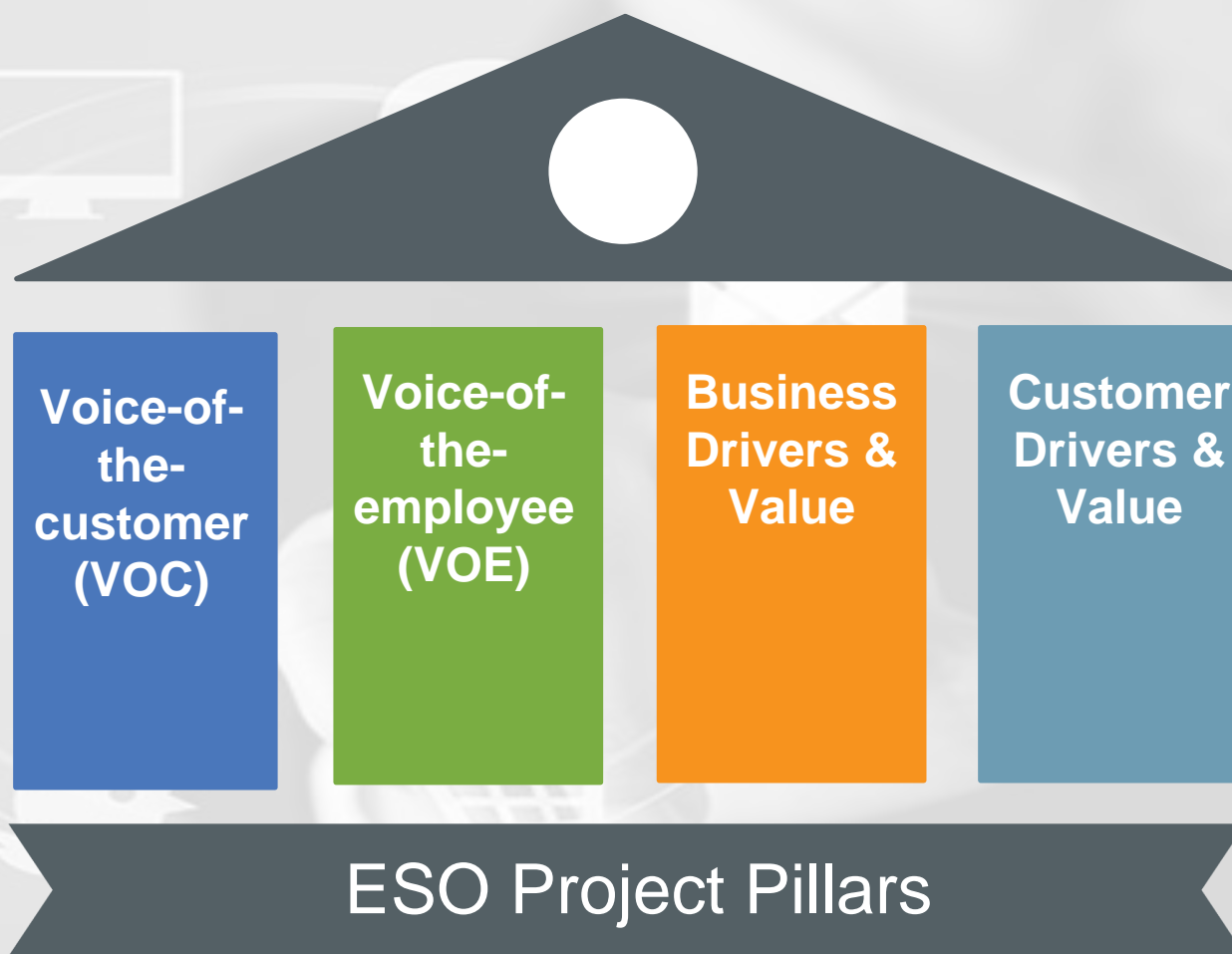
Enhanced Service Orders Project

**Project Pillars & Approach**

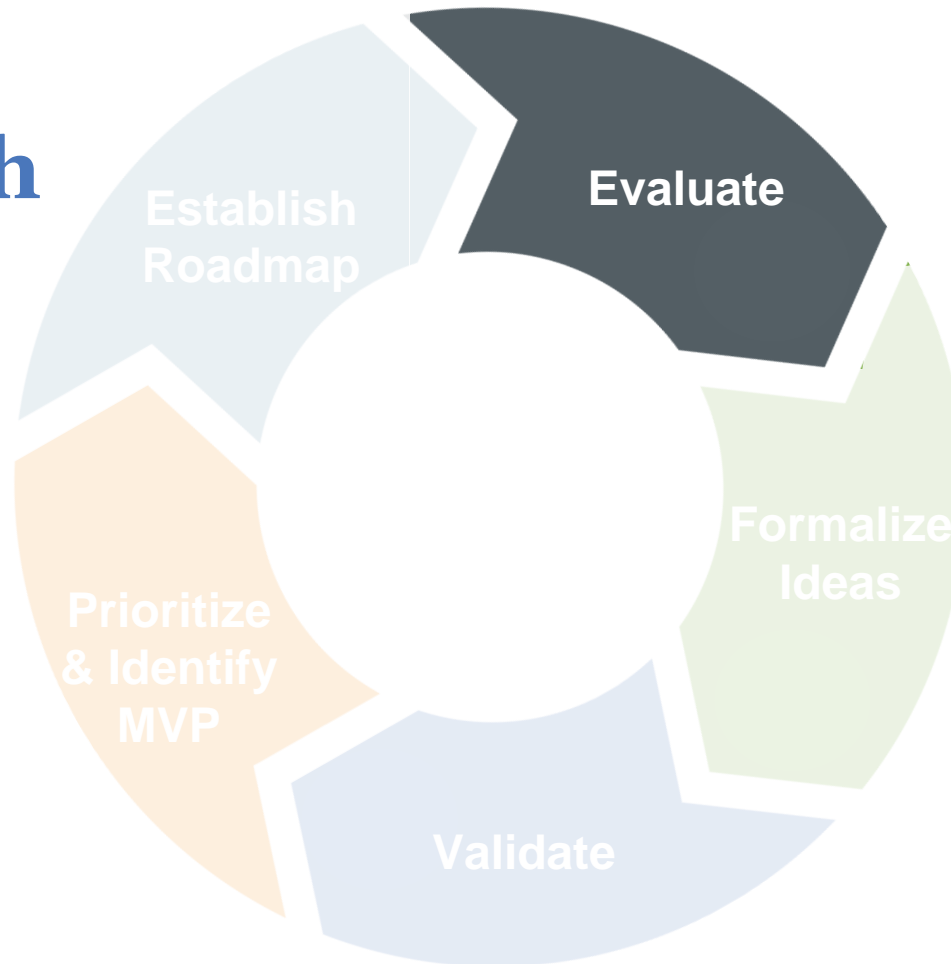
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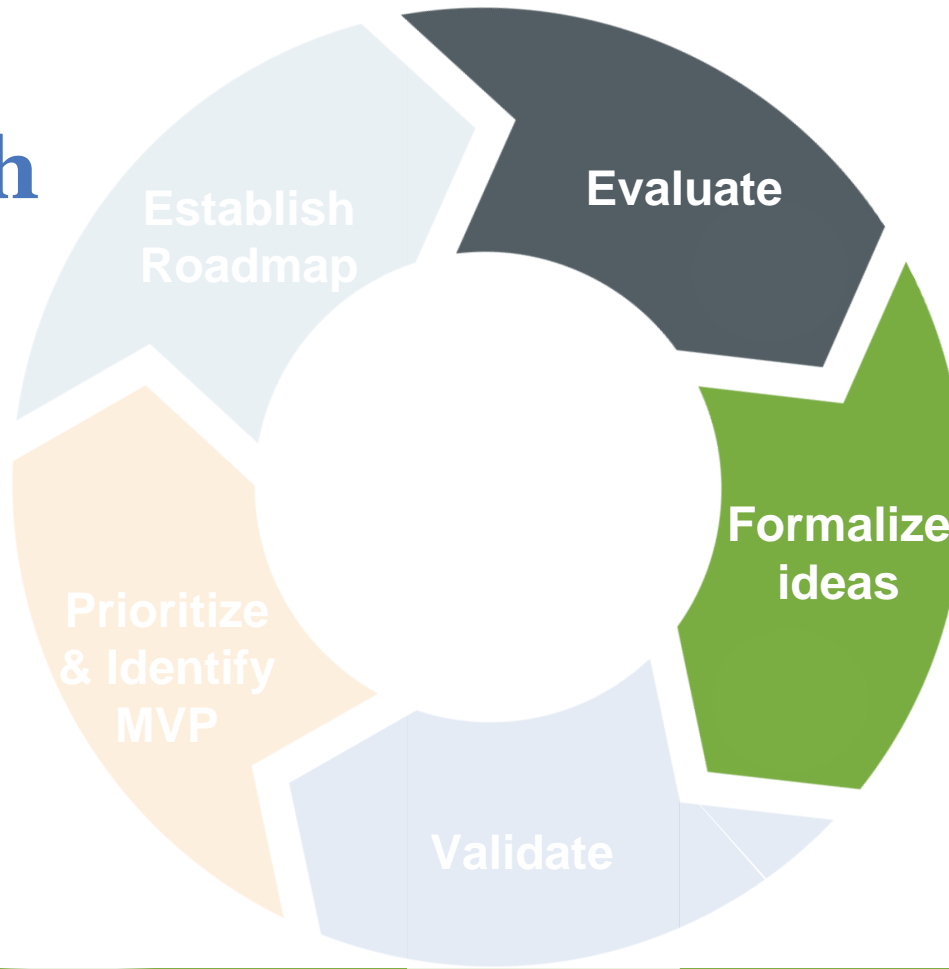
# Project Approach



**Interview employees and review existing data to determine the starting point**

- Processes, Structure, Policies, & Systems
- Customer surveys, Tealeaf interactions, operational metrics

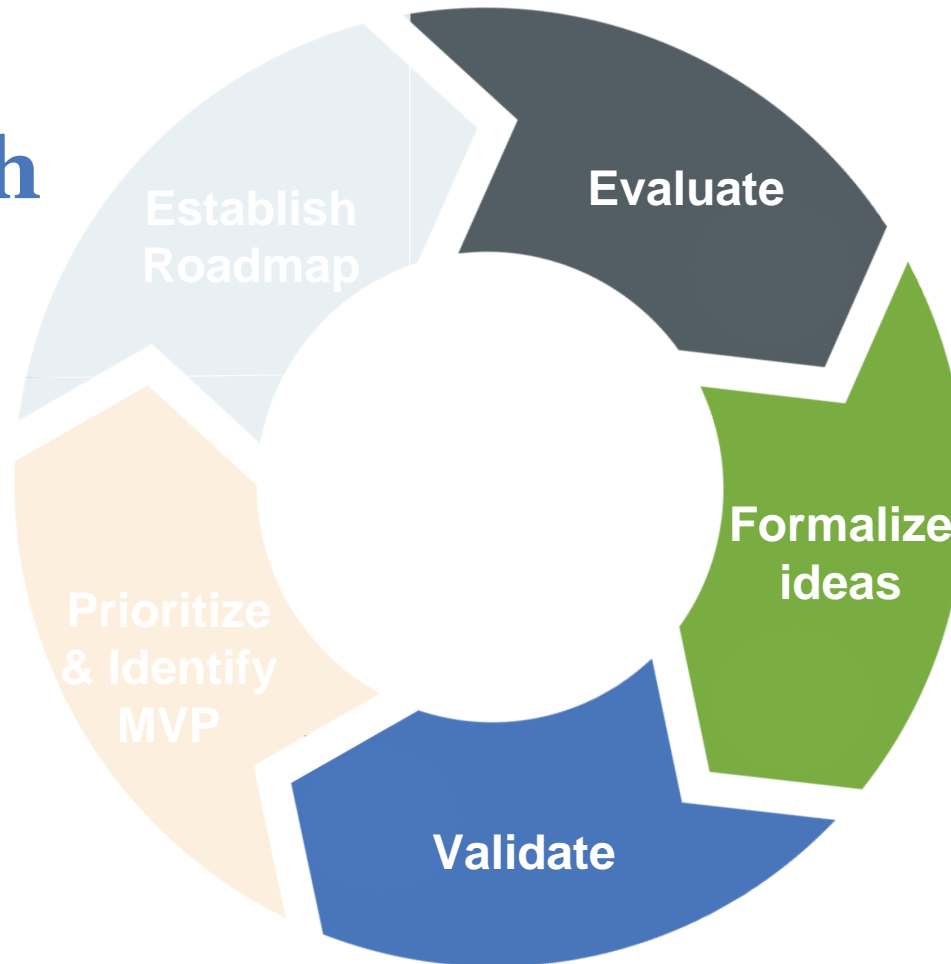
# Project Approach



**Use journey mapping to connect the customer experience and reveal business opportunities within and between Operating Companies**

- Start service
- Transfer service
- Stop service

# Project Approach

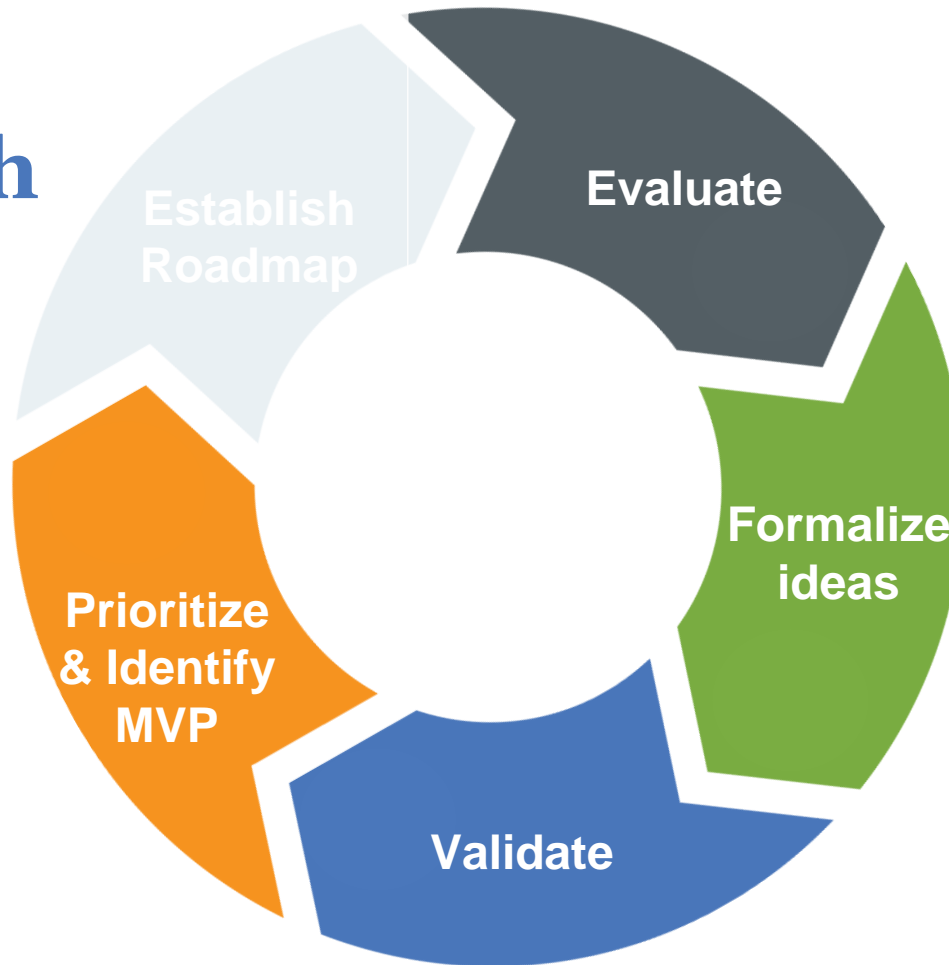


## **Validate findings and concepts**

- Qualitative, in-person customer interviews
- Quantitative customer survey



# Project Approach



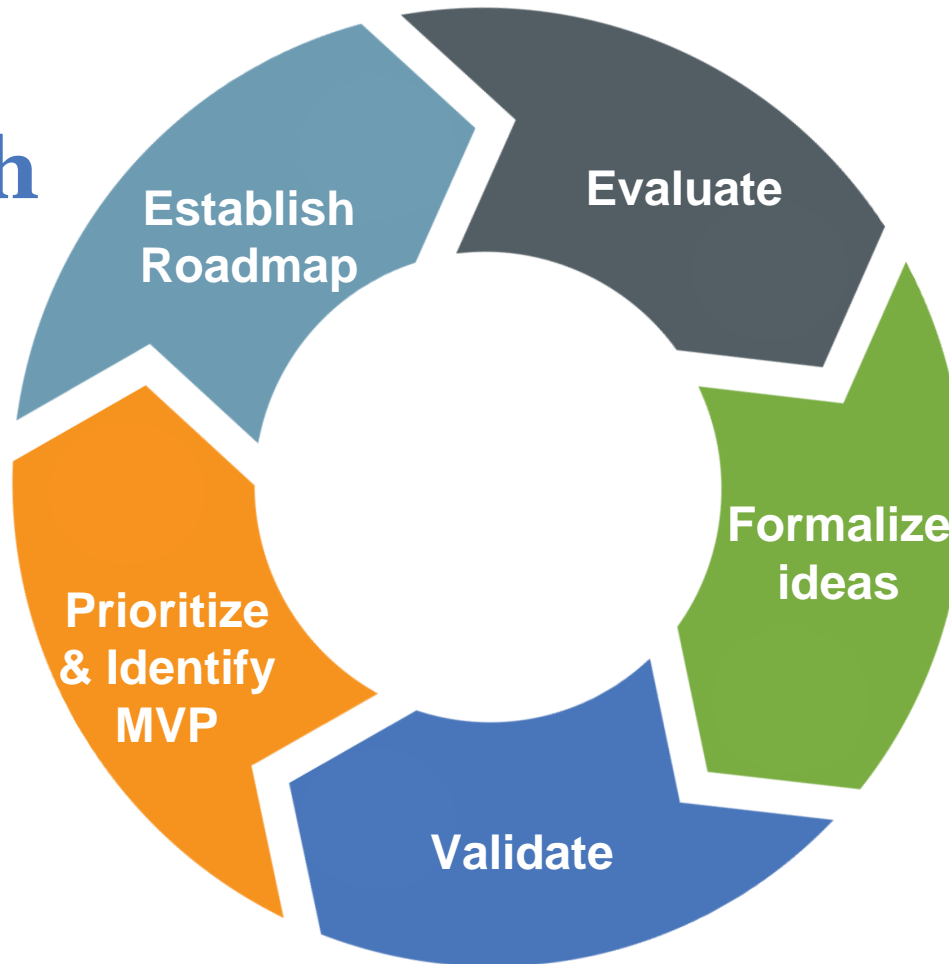
## Prioritize recommendations

- Weigh benefits and feasibility
- Determine MVP

# Project Approach

## Establish CX Roadmap

- Create user stories for future releases



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# Project Timeline

## Evaluate Current State

July 9 – Aug 3

- Mobilize team and establish project plan
- Interview SMEs and stakeholders
- Identify personas for journey-mapping
- Assess existing VOC and operational data
- Market scan of the journey

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## Solicit & Analyze Customer Feedback

July 23 – October 1

- Identify and screen customers
- Conduct qualitative customer interviews
- Deploy quantitative customer survey
- Analyze survey results
- Summarize insights and implications

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## Map Journeys and Identify MVP

Aug 6 – Aug 31

- Lead journey-mapping workshops
- Validate workshop findings with SMEs
- Develop recommendations to address CX pain points
- Identify MVP opportunities

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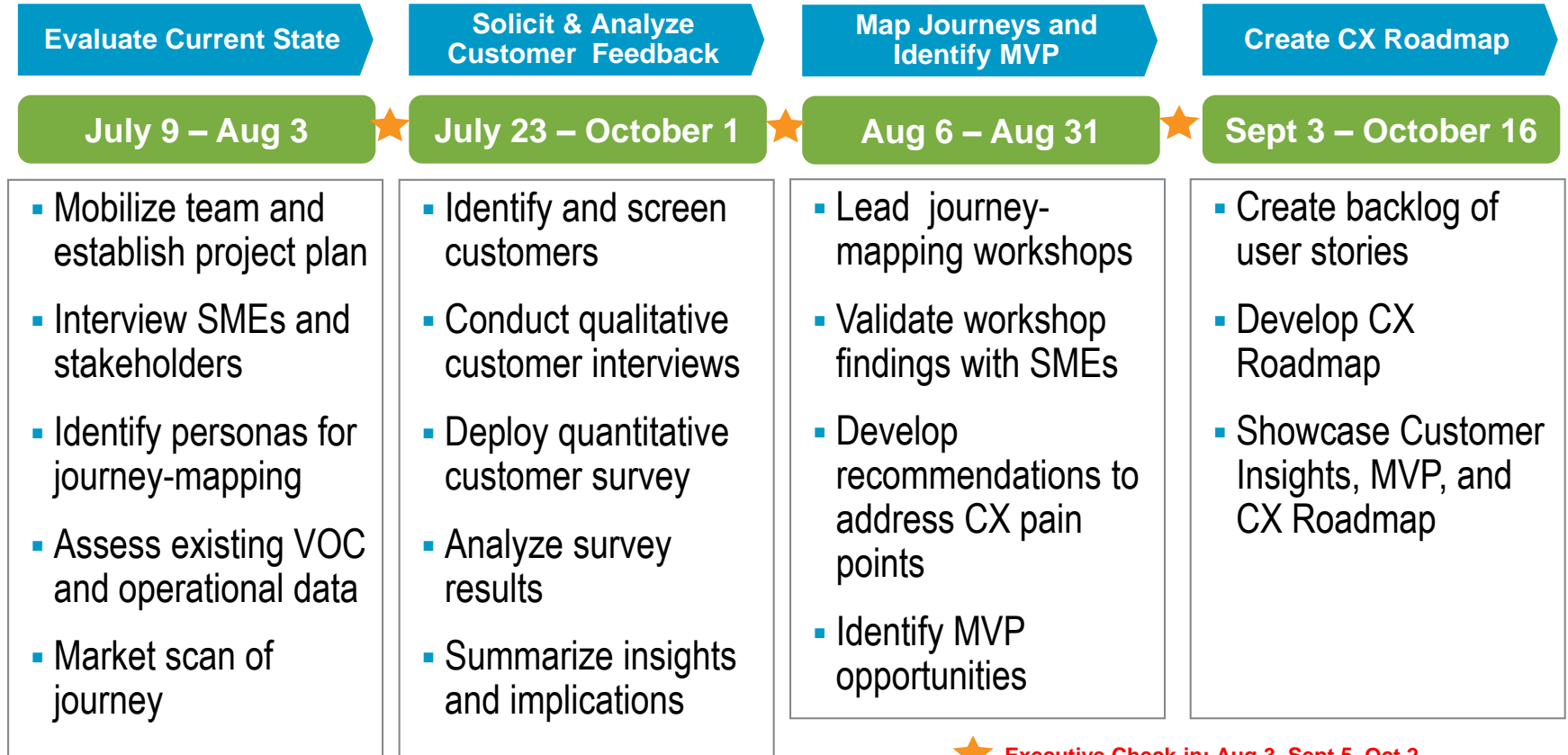
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## Create CX Roadmap

Sept 3 – October 16

- Create backlog of user stories
- Develop CX Roadmap
- Showcase Customer Insights, MVP, and CX Roadmap

# Project Timeline



★ Executive Check-in: Aug 3, Sept 5, Oct 2



# Key Deliverables

- “As is” customer journey map for 3 selected residential personas
- Future State vision of **Start/Stop/Transfer** customer journeys
- MVP Features and User Stories
- CX Roadmap of prioritized opportunities to close CX pain points
  - Quick Wins
  - Medium Term
  - Long Term
- Qualitative customer research and report
- Quantitative customer survey analysis and report
- Showcase of insights and CX roadmap

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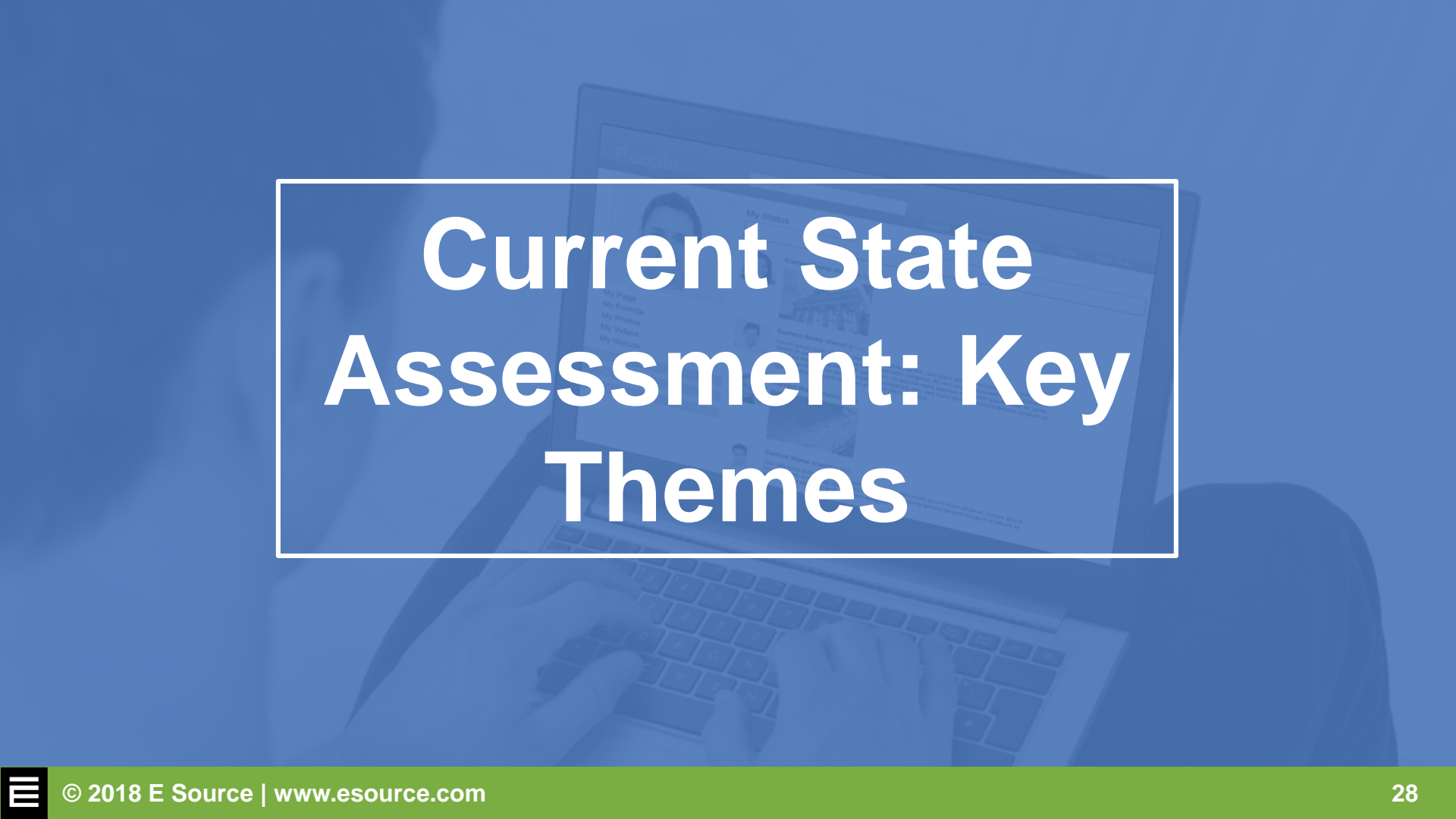
Timeline & Key Deliverables

**Project Success Factors**

*Current State Assessment: Key Themes*

# Project Success Factors: What's Needed

- Executive support and visibility
  - Presence to kick off journey mapping workshop next week
  - One-on-one interview to solicit exec perspectives
- Timely information from shared services and Op Co-specific departments who support the customer journey
  - **Risk to VOC efforts:** Customer lists to identify customers for in-person interviews and survey responses
  - **Impact:** Designing MVP with minimal or no customer input



# Current State Assessment: Key Themes

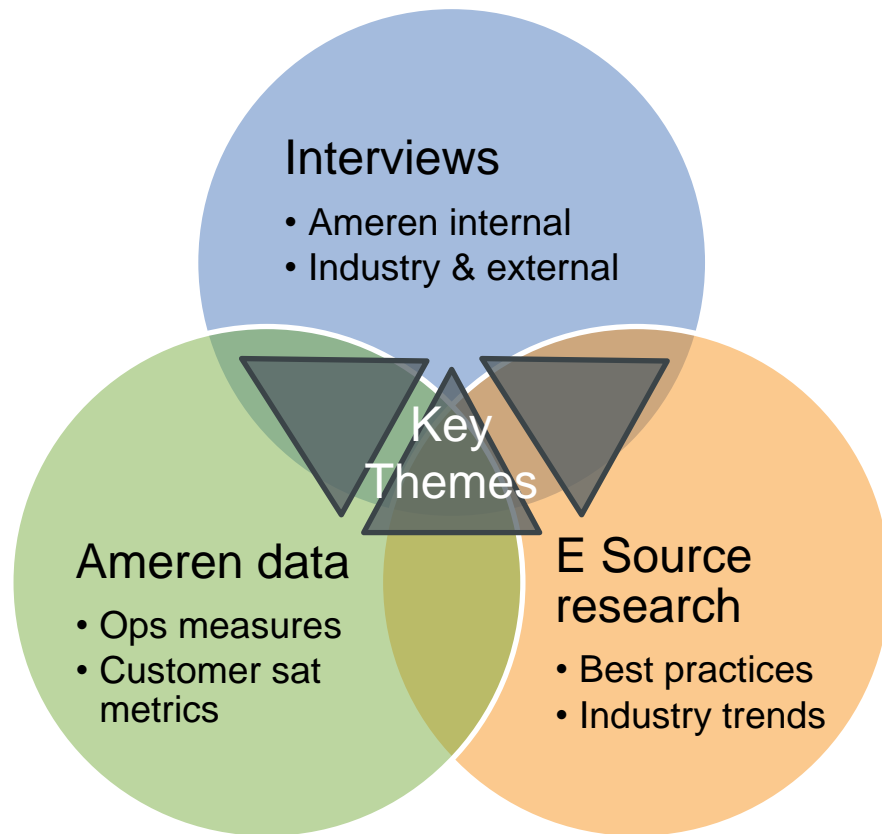
# Current State Assessment

## Objective:

- Triangulate available information to identify “Key Themes”

## Today:

- Check point to review key themes
- Align on current state of residential start/stop/transfer



# Key Themes

- Enthusiasm to address CX pain points and operational issues was countered by strong skepticism based on repeated, previous, yet unfulfilled initiatives for move-in journey
- Distinct differences between operating companies raised questions about desires (or plans) for a more aligned customer experience and back-end processes & systems
  - Contact center training, customer verification, CRM pilot
  - Regulatory requirements

# Key Themes

- Address lookup is a pain point for customers and employees (for both companies)
  - Causes customer frustration and online start service failures
  - Extends call length and requires using multiple search options
- The start service call has become an avalanche of information and customer requests
  - Significantly more material/info than the online interaction

# Key Themes

- Limited opportunities to self-serve
  - None on the IVR
  - Currently, no path to “transfer” service online
  - Overall at Ameren (IL & MO) 5% of start service requests and 10% of stop requests take place online



# Key Themes

- The online process is cumbersome for customers and creates redundancies and opportunities for error in the back-office
  - Believed/reported that a *significant* share of customers who attempt online, fail to complete the transaction (verification and address issues)
  - “Red flags” stop customers from completing transaction
  - Error messages don’t provide enough information to help customers
  - Customers unknowingly create multiple applications when attempts online fail

# Key Themes

- Lack of system integration and lack of ability to search customer & premise records
  - Extends call length because CSAs manually enter information from one system to another
  - Order of operations in CSS can be challenging, and makes calls haphazard
  - Employees want to be able to easily search information to identify credit and collections issues and circumstances

# Your E Source Project Team



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