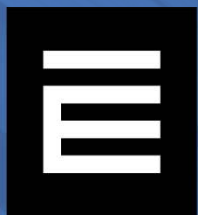


Enhanced Service Orders Executive Debrief



E Source

www.esource.com

November 14, 2018

Agenda

Transforming to the future state for start-, stop-, transfer-service

E Source approach key and deliverables

Market research summary

2018 MVP identification

Priority recommendations for 2019

Cost savings estimates

Next steps

Appendix



Transforming to the future state for start-, stop-, transfer-service interactions

Current State

- Phone is the primary channel that customers use
- High web abandonment rate
- Limited digital customer support
- Lack of alignment between web and phone processes

Future State

- An exceptional move-service experience that allows customers to self-serve; measured by
 - Increased rate of web self-service
 - Decreased customer effort as measured by transactional surveys
 - Increased overall customer satisfaction as measured by J. D. Power
 - Fewer move-service related calls
 - Increased productivity for contact center and field employees

Getting to the future state

E Source approach

- Conducted in person interviews with Ameren staff to understand current state of operations
- Collected operational and customer experience metrics, customer-facing collateral, and related documents
- Journey mapped the start- stop- and transfer-service experiences with cross-collaborative group of employees, supervisors, and managers
- Interviewed Ameren customers (in-person and remote) to glean qualitative insights about their experiences
- Interviewed utility representatives to understand their online practices
- Conducted reviews of utility websites and IVRs to provide state-of-the-industry comparisons
- Surveyed Ameren customers to establish baseline measurements of CX and determine CX priorities



E Source deliverables

- Current state assessment
- Future state journey map and summary of customer pain points
- Analysis and summary of customer market research (interviews and survey)
- List of Identified MVP features and user stories
- CX roadmap of prioritized recommendations

An aerial view of a city skyline, likely Chicago, with numerous skyscrapers and a complex network of white, glowing lines that arc across the scene, suggesting a global or digital network. The image has a blue tint.

Market research summary

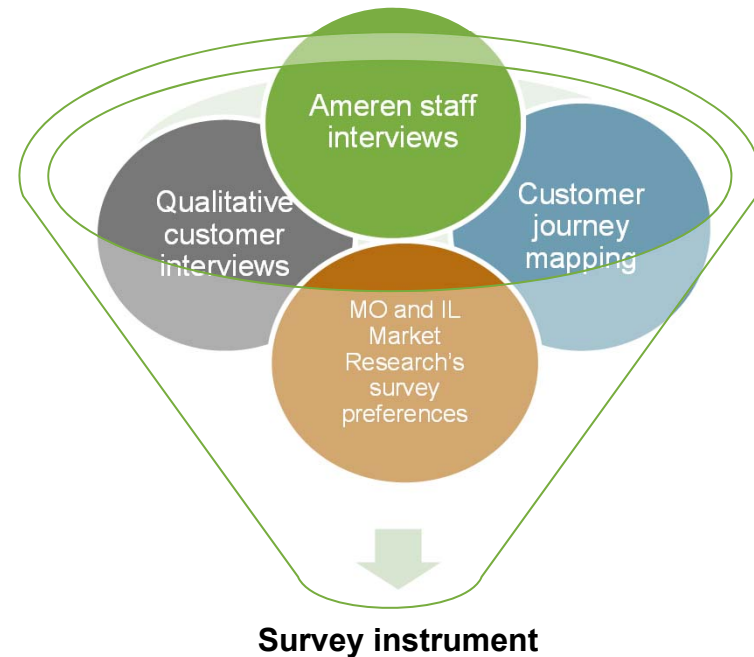


Market research background

Key research questions

- What is the overall satisfaction of customers who start, stop, or transfer Ameren service?
- How easy is it to start, stop, or transfer service?
- Which channels do customers use and what is the experience like?
- Which channels would customers prefer to use and how do preferences align with their actual behavior?
- What are the key drivers of “ease”?

Survey development inputs



Respondent profile

9% response rate

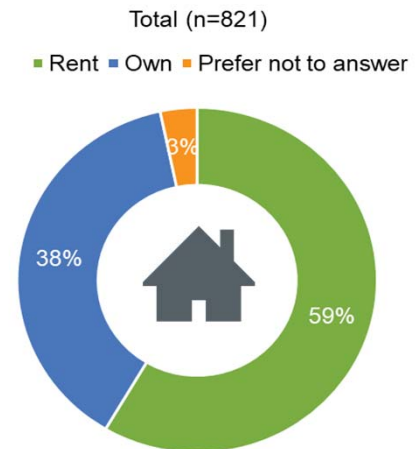
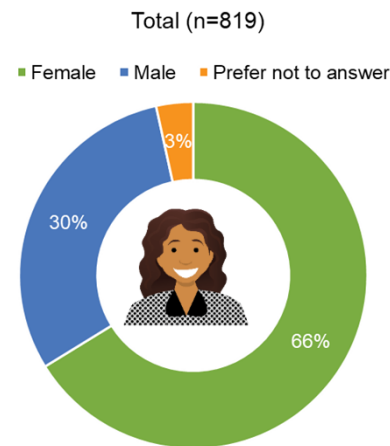
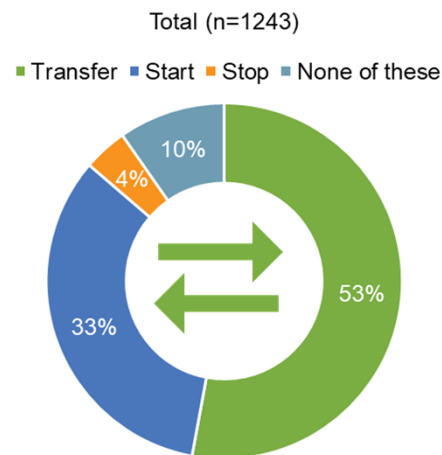
- 1,285 responses

65% completion rate (n=819)

- Ameren IL: n=368; Ameren MO: n=451

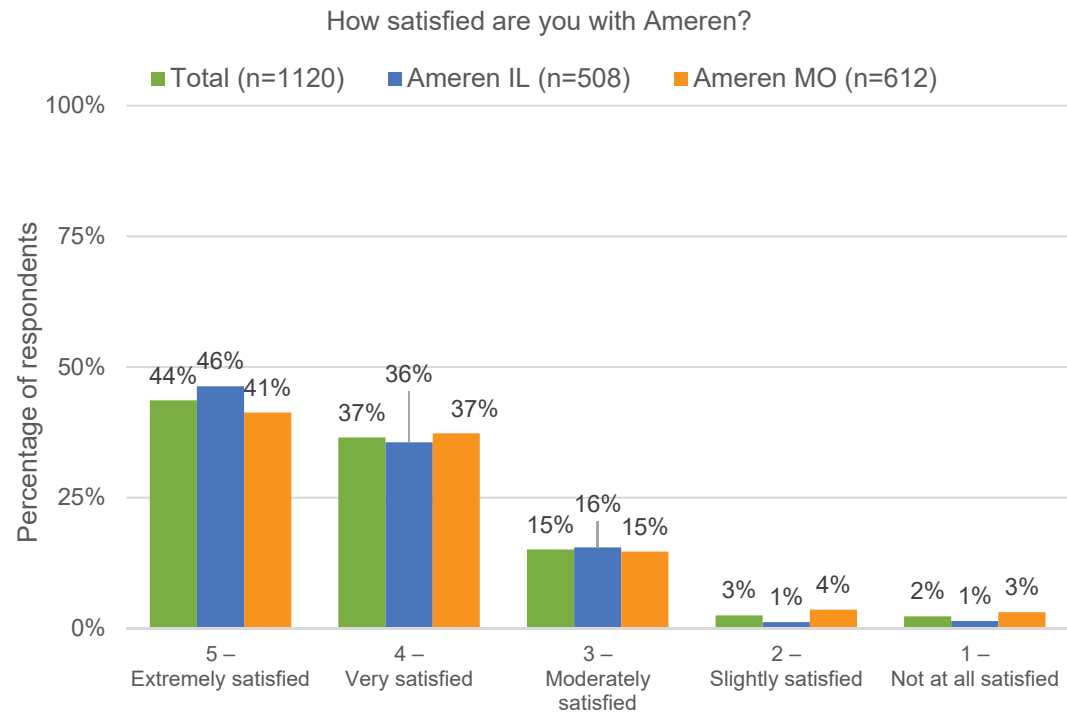
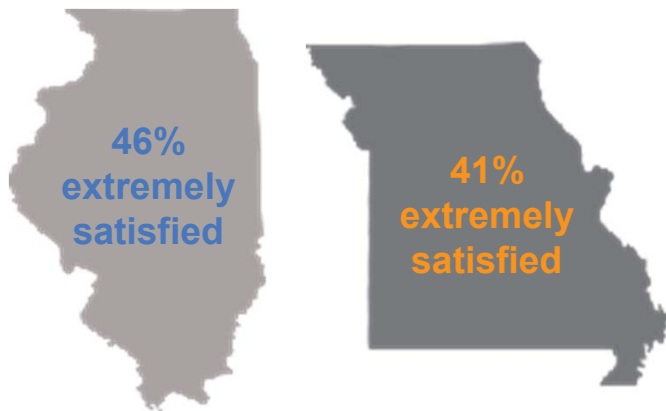
Similar profile across both states

- Primarily transfer transactions
- Mostly female
- Majority renters
- More than 1/2 have been a customer ≤5 years



Overall customer satisfaction is similar across both states.

Key Findings



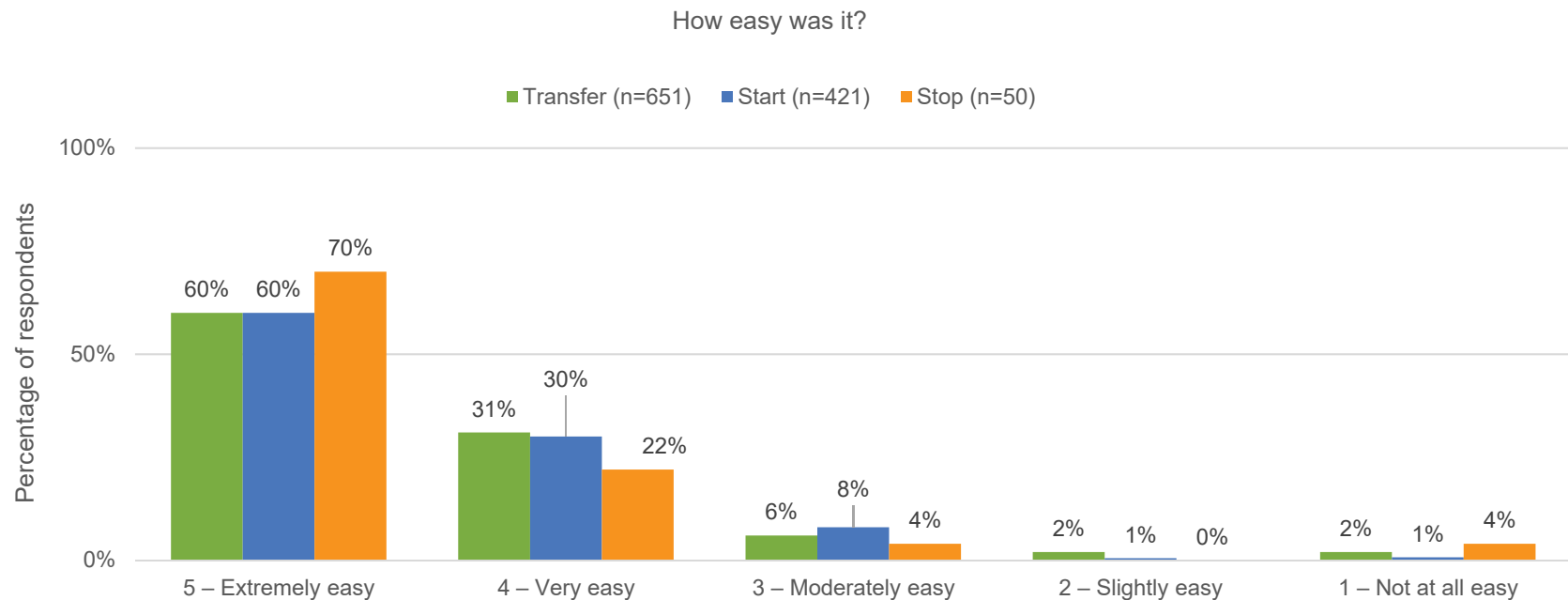
Base: Varies Q4: How satisfied are you with Ameren?



Most customers indicated it was easy to start, stop, or transfer service.

It was particularly easy to stop service.

Key Findings



Base: Varies **Q5** How easy was it to start a new account with Ameren? **Q21** How easy was it to transfer or move your existing Ameren account? **Q39** How easy was it to stop service with Ameren?



Regardless of transaction type, most customers only used one channel—the phone.

Overall, **89%** used only 1 channel to start, transfer, or stop their service. Of those who used one channel...

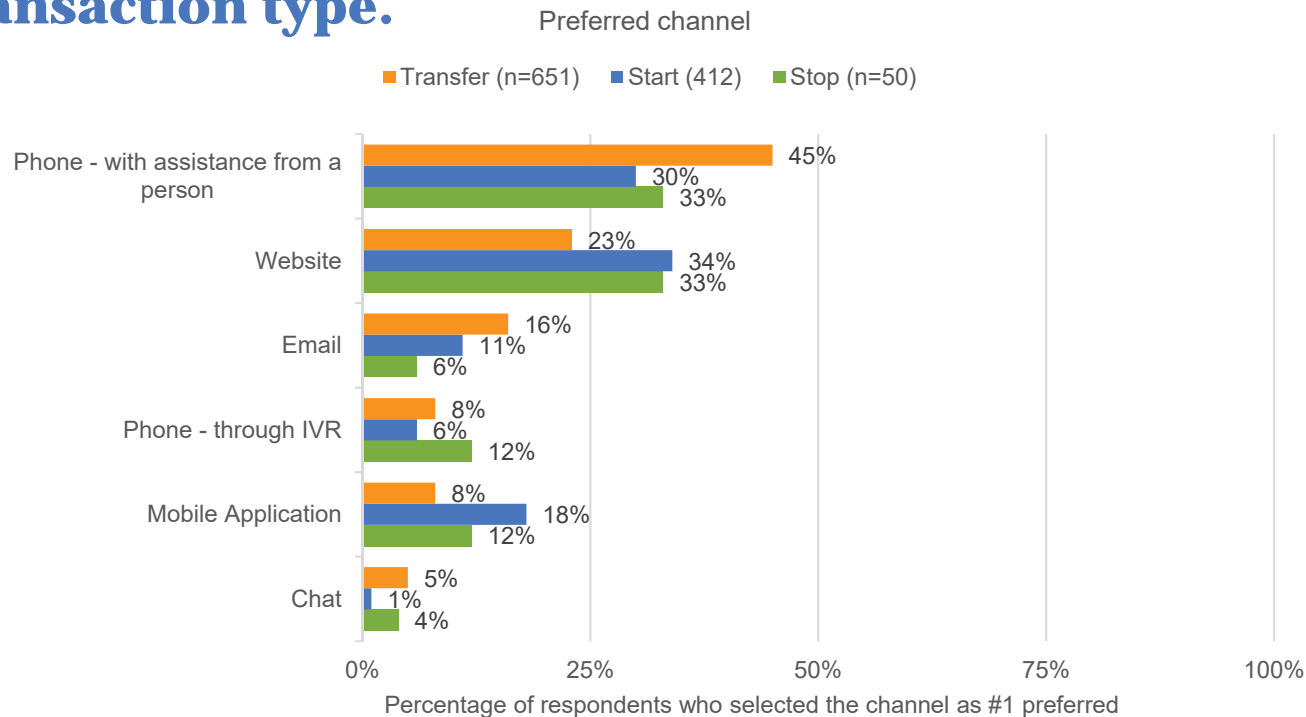
88% used only the phone to *transfer* their service

83% used solely the phone to *start* their service

58% used only the phone to *stop* their service

Customers use the phone channel, but prefer to use other channels, depending on transaction type.

Key Findings



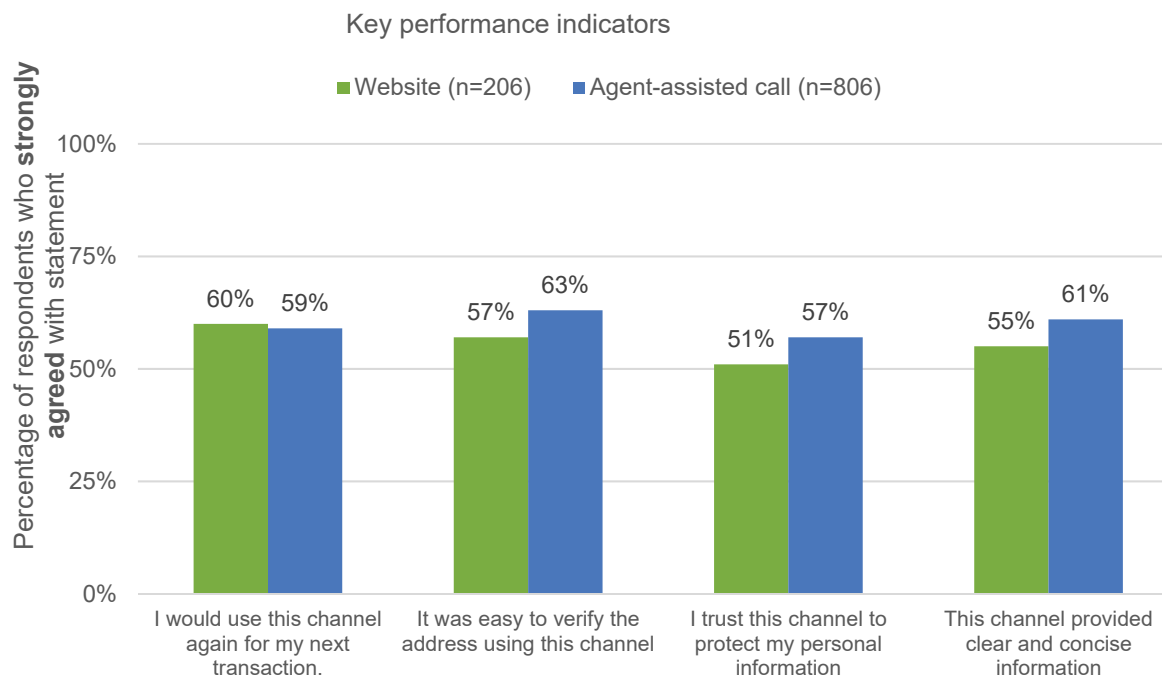
Customers who are transferring service may need more “motivation” to utilize a non-phone channel compared to customers who are starting or stopping service.

Base: Varies **Q7:** Please rank your top 2 channels to start service. **Q23:** Please rank your top 2 channels to transfer service. **Q37:** Please rank your top 2 channels to stop your Ameren service. Note that customers were provided more options to select from. See appendix for all options.



The digital experience needs to be as good as—or better than—a call.

Key Findings



12% of Ameren's start-service orders and **50%** of stop-service orders that are attempted online are successful.

(Source: Web Trends reporting, Jan-Aug 2017)

Base: Varies Q12/Q28/Q45: Thinking about your online experience, to what extent do you agree with the following attributes? Q13/Q29/Q46: Thinking about your phone experience, to what extent do you agree with the following attributes?



Web containment rates are varied amongst utilities, but generally higher than Ameren



- ~8,000 start-stop-transfer web transactions per month, combined
- ~80 percent web containment

Anonymous (large western utility)

- ~125,000 successful online orders annually
- Web containment rates vary: Transfer: 48%, Start service: 58%, Stop: >70%;



- ~1,500 start-stop-transfer web transactions per week
- >1/3 web containment
- Start-service form takes ~3mins to complete; 2 minutes faster than the start service call



- ~285,00 attempted *start-service* in 2017;
- Web containment rates: New customers: 34%, Existing customers (add or move service): 50%, Stop service: 75%

Matching customer preference with behavior requires more than just increasing web containment.

Key Findings

These customers indicated that the web was their preferred channel to move their service. Yet, they called Ameren instead. Hear why...



[Calling the customer service center] was the first thing that came to mind. I like to talk to somebody when it's a big change like that...



I had no idea what I was getting into [with moving accounts] so I was frozen...

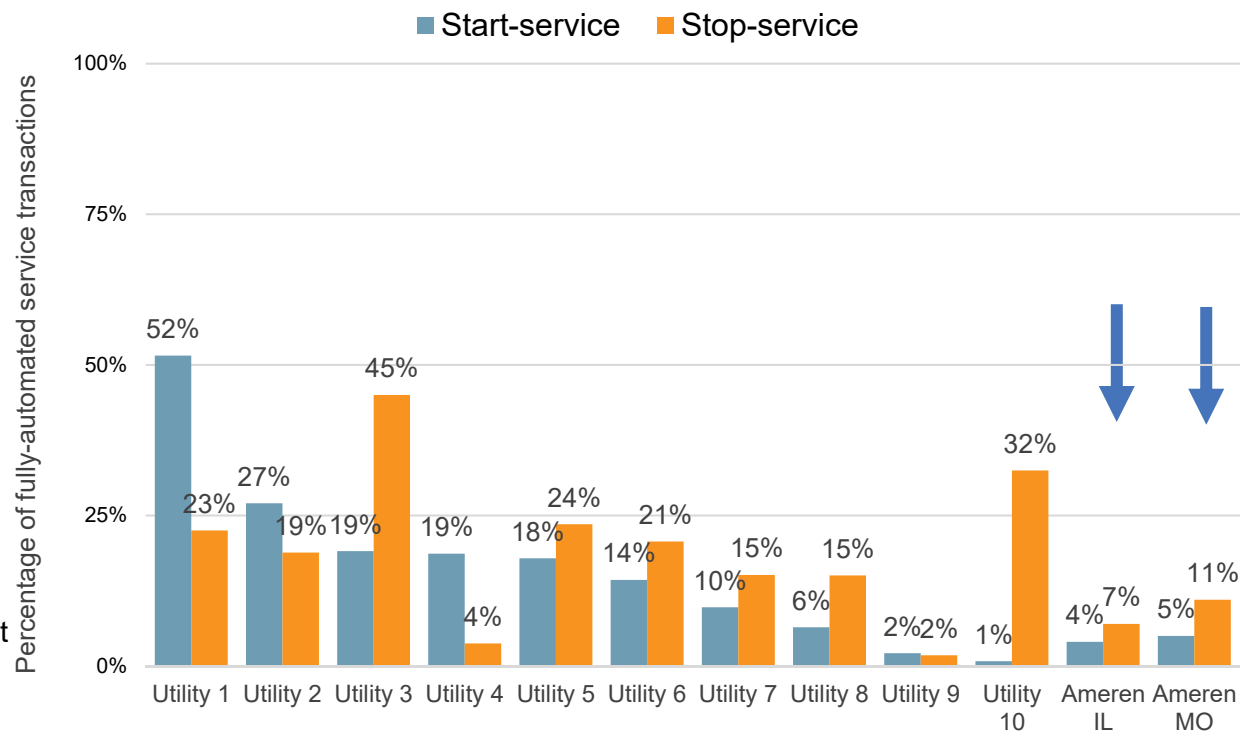


These two options [web and phone] were preferred. I think I called up Ameren because I was in the middle of too many formalities with the home and everything; I called them up...

Ameren's shares of automated start- and stop-service transactions are below utility average

On average,
15% of start-
service
transactions
and 18% of
stop-service
transactions are
fully-automated.

"Fully-automated" refers to transactions that do not require an agent to intervene at any point in the process.



Source: data from E Source E-Business Metrics Survey 2016 and utility interviews in 2018





2018 MVP



Identifying the MVP features

MVP focuses on increasing web containment by realigning premise- and customer-level verifications. MVP is...

- Based on journey mapping recommendations
- Based on technical feasibility
- Supported by customer market research
- Supported by utility market scan

Web will distinguish by transaction type and adjust “red flag” logic

Current: Web doesn’t recognize and adjust processes based on whether a customer is attempting to disconnect or connect service; usually these types transactions can be processed with assistance from an agent, but they’re denied online.

Pending connect/disconnect red flag

MVP: Customers who attempt to connect online at a premise with a pending disconnect *will be allowed* to connect (as long as dates don’t overlap).

MVP: Customers who attempt to disconnect online at a premise with a pending connect *will be allowed* to disconnect (as long as dates don’t overlap).

46% of red flags are due to a pending disconnect / connect on premise

Hot locks and cut for non-payment

MVP: Customers who attempt to *disconnect* online at a premise with an active hot lock or at a premise that’s been cut for non payment *will be allowed* to disconnect service because service is already off.

MVP: Customers who attempt to *connect* online at a premise with an active hot lock or at a premise that’s been cut will not be allowed to connect if it’s within 20

~4% of “red flag” are due to “hot lock” or cut for non-payment on premise

Missouri deposit policy will be aligned across channels

Current: Deposits *are not* assessed online for Missouri customers; however, they are assessed over the phone. Deposits *are* assessed both online and over the phone for Illinois customers.

MVP: Deposits will be assessed online for Missouri customers, when applicable.

Illinois AMI billing failures will be proactively addressed

Current: Illinois CAD office manually processes hundreds of AMI readings that fail to connect/start billing at the customer-scheduled time.

MVP: Working with complementary project to implement order banking process for read-only order failures.



Priority recommendations for 2019



Prioritizing recommendations

Recommendations by key moments of truth

(number reflects # of recommendations in category)

Awareness – 4

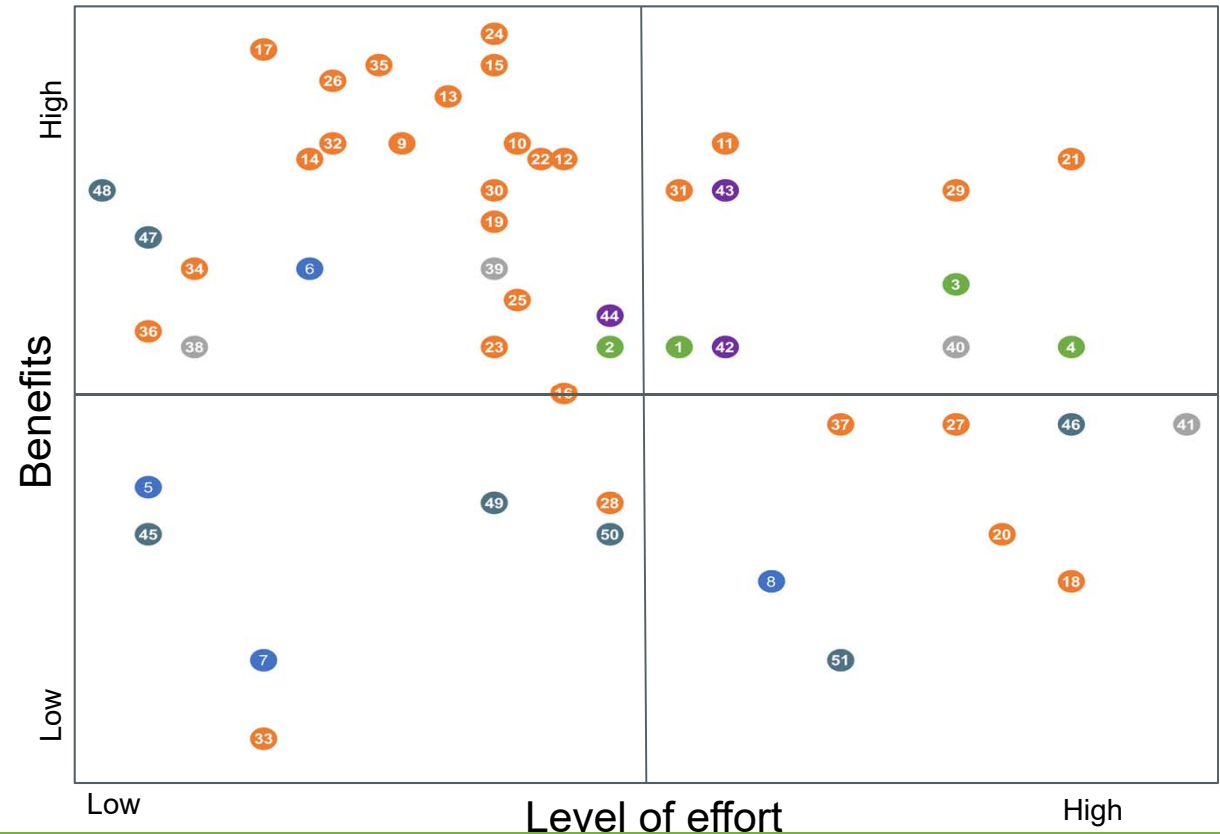
Research – 4

Action – 26

Response – 4

Connect / Disconnect – 3

Follow-up – 7



Key drivers of “ease” for transferring service used to support recommended priorities

Performance indicator		Average performance (n=562)	t distribution	p-value
#1 driver	It was easy to access customer support when I needed	4.32	5.809	0
#2 driver	My billing and payment preferences easily transferred to my new account	4.33	3.914	0
#3 driver	Verifying my identity was easy	4.46	2.714	0.007
#4 driver	The information I received in my confirmation was accurate	4.42	2.421	0.016
influencer	Service started or stopped on date and time I selected	4.52	1.743	0.082
No correlation	Sending documents to Ameren was easy	3.07	-0.847	0.397
No correlation	I knew the information I needed to complete transaction	4.57	-0.760	0.447

Performance on 1-5 scale, with 5 being “Extremely easy”

The strength of the correlation; the larger, the better

The significance of the correlation; closer to 0 is better;

Base: n=562 **Q27** To what extent do you agree with the following attributes describing the experience when transferring or moving your Ameren service? **Q21** How easy was it to transfer or move your existing Ameren account? **Methodology:** Linear regression models were run on all performance indicators of the transfer service process; ease of transfer was dependent variable; performance indicator were the independent, or influencing variables. Results are statistically significant.



Key drivers of “ease” for starting service used to support recommended priorities

Performance indicator		Average performance (n=343)	t distribution	p-value
#1 driver	Service started on date and time I selected	4.54	3.642	0
#2 driver	I knew the information I needed to complete transaction	4.52	3.127	0.002
#3 driver	The information I received in my confirmation was accurate	4.50	2.73	0.006
#4 driver	It was easy to access customer support when I needed	4.17	2.193	0.029
No correlation	Verifying my identity was easy	4.45	1.46	0.265
No correlation	Sending documents to Ameren was easy	3.19	0.604	0.546

Base: n=343 **Q11** To what extent do you agree with the following attributes describing the experience when starting your service with Ameren? **Q5** How easy was it to start a new account with Ameren? **Methodology:** Linear regression models were run on all performance indicators of the transfer service process; ease of transfer was dependent variable; performance indicator were the independent, or influencing variables. Results are statistically significant.

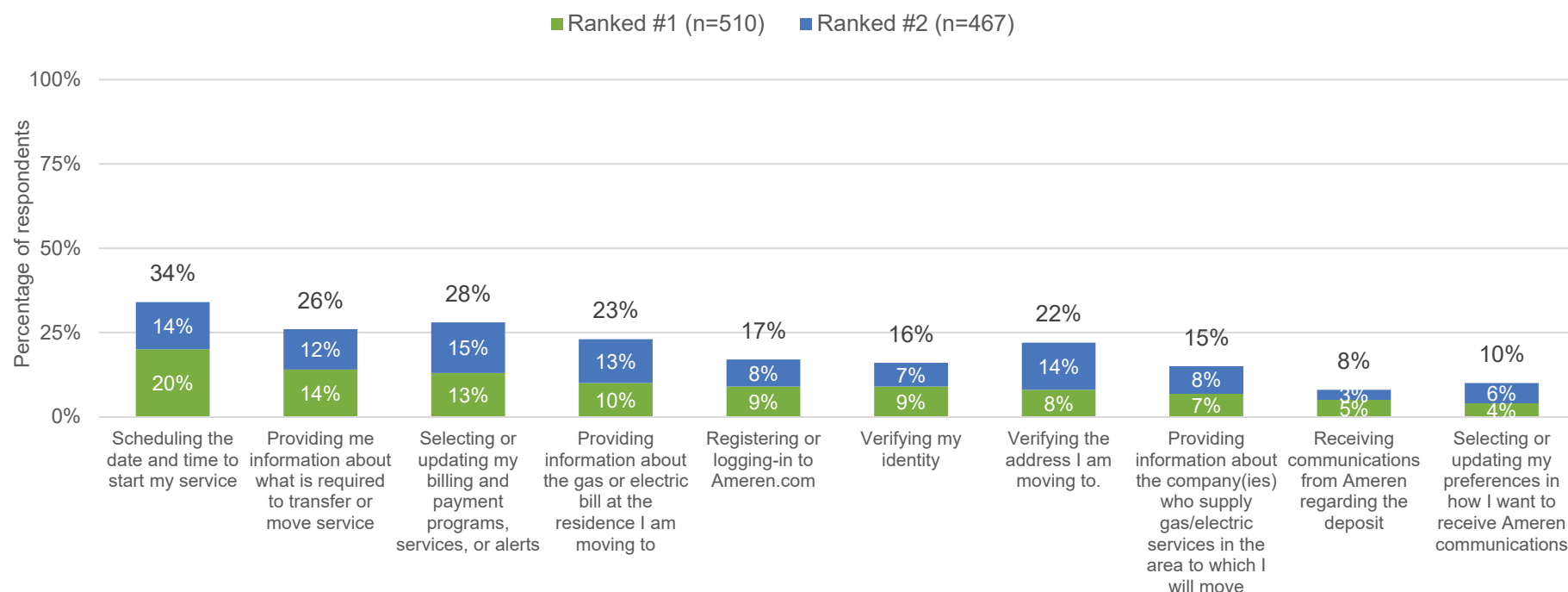
Key drivers of “ease” for stopping service used to support recommended priorities

	Performance indicator	Average performance (n=39*)	t distribution	p-value
#1 influencer	Service stopped on the date and time I selected	4.67	2.181	0.037
#2 influencer	The information I received in my confirmation was accurate	4.54	2.041	0.05
No correlation	Verifying my identity was easy	4.44	1.004	0.323
No correlation	I knew the information I needed to complete transaction	4.18	0.249	0.805
No correlation	It was easy to access customer support when I needed	4.05	-0.126	0.9
No correlation	Sending documents to Ameren was easy	2.51	-0.245	0.808

*Small sample size **Base:** n=39 **Q44** To what extent do you agree with the following attributes describing your experience when stopping service with Ameren? **Q39** How easy was it to stop service with Ameren? **Methodology:** Linear regression models were run on all performance indicators of the transfer service process; ease of transfer was dependent variable; performance indicator were the independent, or influencing variables.



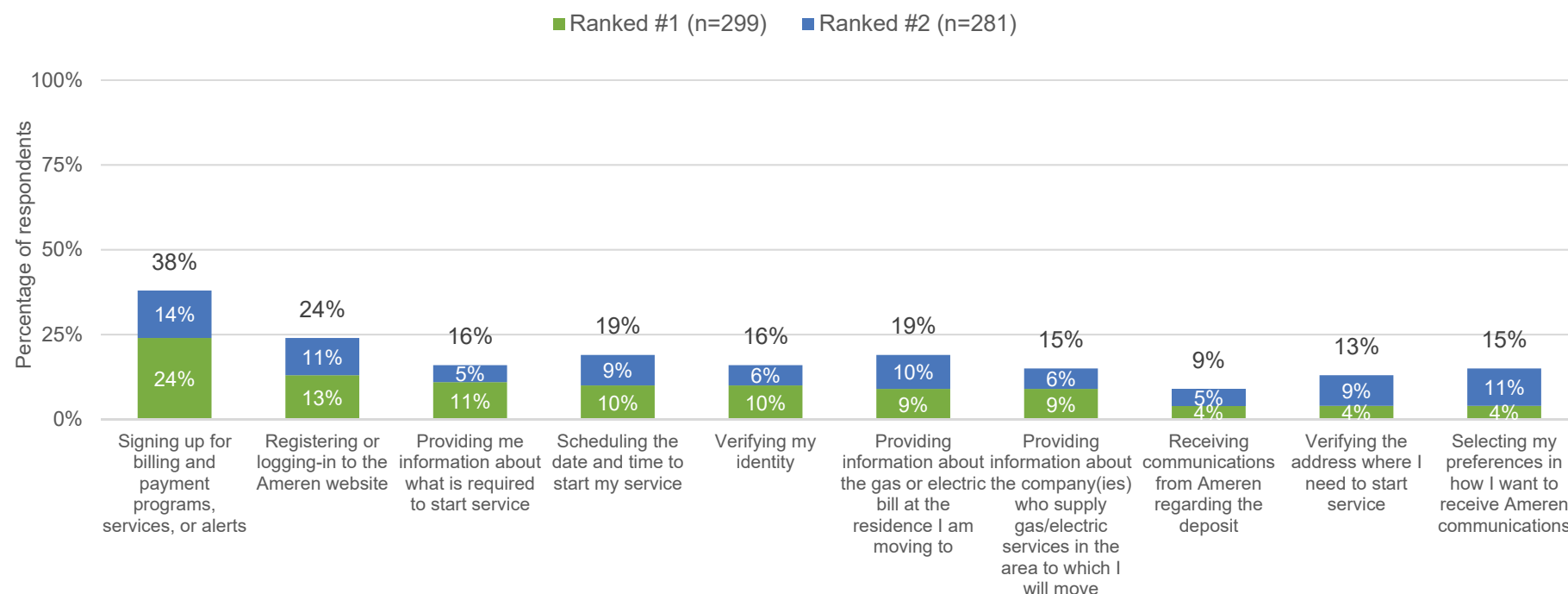
Transfer customers prioritized scheduling, upfront info., and billing and payment options



Base: Varies **Q31:** Thinking about the process you went through to transfer or move your service, which of the following opportunities should Ameren focus on to create the best experience possible?



Start customers prioritized signing up for billing and payment options and logging in



Base: Varies **Q15:** Thinking about the process you went through to start your service, which of the following opportunities should Ameren focus on to create the best experience possible?



Web optimization will impact the priority of recommendations

Key assumption: Web optimization (Transforming the Web Experience) will deploy some identified improvement opportunities for ESOT:

- Move address verification to be the first step in the start service process
 - Current: Personal information → Address → Date/time details → Verify → Confirmation
 - Web optimization: Address → Personal information → Date/time details → Verify → Confirmation
- Improve navigation to find start-, stop-, and transfer-service webpages
 - Current: Finding the transaction page takes multiple clicks and many seconds
 - Web optimization: Shift to mobile optimized view with fewer drop downs, that should improve overall navigation
- Make paperless billing the “happy path” in the new design, so that customers are encouraged to sign up for it

2019 Priorities: Monitor web containment rates and improve foundational features

- Reinststate Web Trends reporting to monitor web containment rates
 - No tracking since August 2017
- Continue to improve address search capabilities
 - Evaluate effort to clean up existing CSS addresses **vs.** deploying new address search feature
 - Utilities report best results from starting with zip code → street number → street
- Notify customers of deposit amount, remaining balances, etc. (if applicable) during the online transaction *and* in their emailed confirmation

2019 Priorities: Increase access to digital customer support

- Proactively prompt customers with chat when they linger or fail on an input online (like address verification, positive identification, or date/time of service change)
- Improve error messages to better explain why transaction failed online
 - Consider providing helpful tips to input optional information (if empty), which could help customers succeed (i.e., DL #)
- Include the list of information customers need to start, stop, or transfer on the front page (don't require additional clicks to get)

2019 Priorities: Reduce customer effort and move calls from agents to the web

Design online experiences for “new” customers and “existing” customers

- Allow *new* customers to start service without account registration
 - Allow them to register an online profile when starting service
 - Consider enabling web chat on the public side of the website for start service
- Create a seamless experience for *existing* customers to transfer service, so that their billing and payment programs follow them to the new address.
- Provide a guest path that does not require *existing* customers to log in to start, stop, or transfer service online

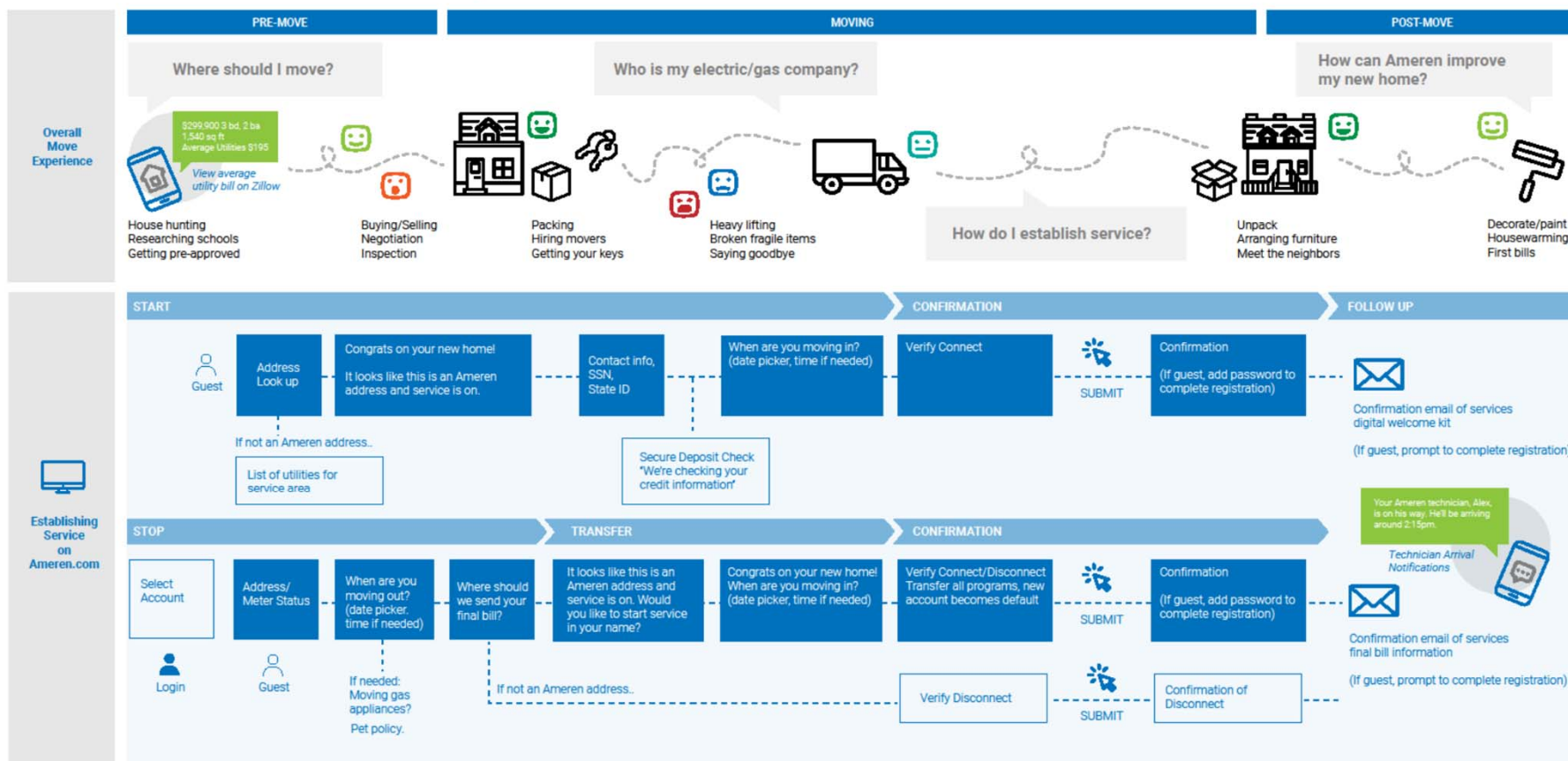
81% of utility websites **do not** require customers to log-in to start service.

49% **do not** require customers to log-in to transfer or stop service.
(n=75)

2019 Priorities: Reduce customer effort and move calls from agents to alternative self-service channels

- Promote the ways Ameren protects customers from fraud (having a secure website, verifying your ID, etc.) via social media, on the start service webpage
- Include message in the move-tree of the IVR about the ease of connecting, disconnecting, or transferring service online
- Create a start, stop, move marketing campaign that focuses on the “ease” of doing business online
 - Provide a “happy path” to sign up for billing and payment following starting service
- Create a path to self-serve in the IVR to stop service

Start, Stop & Transfer – Digital Future State



An aerial view of a city, likely New York City, with a dense network of glowing white lines connecting various points across the skyline, symbolizing a global communication or data network. The lines are semi-transparent and overlap, creating a complex web. The city buildings are visible in the background, and the overall color palette is a mix of blue and green.

Estimated cost and call savings

Potential Cost Savings

Estimated annual total
cost savings:

**\$312K to
\$894K**

\$77K – \$274K by increasing web containment

- Assumes achieving 20-60% containment for start service, 65-80% for stop service; current web containment rate: 12% for start and 50% for stop

\$150K – \$450K by shifting calls from agents to web

- Assumes reducing move-related calls by 5% to 15%

\$85K – \$170K by containing stop service calls in IVR

- Assumes containing 25% - 50% of stop service calls in IVR



Potential Call Reduction

Annual call
reduction potential:
74K to 215K

Deflect **14K to 66K** calls by increasing web containment

- Assumes achieving 20-60% containment of current start service visits, 65-80% of current stop service visits

Move **40K to 109K** calls from agents to the web with target marketing and better website navigation

- Assumes reducing move-related calls by 5% to 15%

Contain **20K to 40K** stop service calls in IVR

- Assumes containing 25% - 50% of stop service calls in IVR



An aerial view of a city, likely New York City, with a blue overlay. Overlaid on the city are numerous glowing white lines that form a complex network, connecting various points across the city. The lines are curved and intersect, creating a sense of connectivity and data flow. The text "Next steps" is centered within a white rectangular box in the middle of the image.

Next steps

Next steps

- E Source and Ameren finalize deliverables
- Ameren to use recommendations to build Agile team based on expertise
- Ameren project team to develop project charters and determine governance of IT and non-IT recommendations

An aerial view of a city, likely Chicago, with a dense network of glowing white lines connecting various points across the skyline. The lines form a complex web, suggesting a network or data flow. The city buildings are visible in the background, and the overall color scheme is a mix of blue and green.

Appendix

Appendix

All recommendations



Awareness recommendations

Current State		Future	VALUE	EFFORT
			3.0	2.8
1	Lack of designed customer experience for awareness of Ameren and Ameren's process for becoming customer. Customers generally "stumble upon" starting service and Ameren. Ameren doesn't leverage external partners to help drive general customer awareness of Ameren, the move-in/move-out process, or "utility" considerations at a future or current residence. Lack of optimized search engine results; results vary based on the browser (Safari, Chrome, etc.); Safari appears least optimized DATA: June of 2017-2018 Chrome: 3.9 M Safari: 2.5 M Chrome mobile: 1.7M IE: 1.7M Firefox: 774K	Design outreach and channel engagement strategy/program that guides customers into finding Ameren (i.e., who is Ameren?), as well as how to start or stop service - Ensure awareness plan covers peak move-in season (summer) and channels like social media. - Consider how supplier choice plays into awareness plan Supplier choice in IL; No supplier choice in MO - Create videos for customers that show how to start/stop/transfer service, ways to save, Ameren programs, etc. - Consider creating videos to explain about Ameren meters--how to read, how to find, what it does, etc. - Evaluate third-party sites like Zillow, myUtilityScore, or Splitwise as opportunities to drive awareness of Ameren during start service journey.	3.0	2.5
2		Optimize search engine results through SEO (search engine optimization)		
3	Existing realtor and property management tools are underutilized due to lack of internal training and clear value proposition between the two. Customers can get average utility bill usage data through non-Ameren resources, like MyUtilityScore.com if they simply provide their address; opportunity for Ameren to be involved;	Deeper review of Realtor and Property Management tool; Determine value prop; Ensure advisors are knowledgeable about Realtor and Landlord Portals, services offered, etc.	3.4	4.0
4	Ameren doesn't partner with Zillow or other online real estate agencies to provide usage data to customers.	Provide customers with usage data about new premises on websites like Zillow or UtilityScore to drive customer awareness of Ameren, starting service, and home energy usage	3.0	4.5



Research recommendations

	Current State	Future	VALUE	EFFORT
5	Many of Ameren's policies regarding positive customer identification follow its desires to protect customers from fraud and identity theft; however, Ameren doesn't promote these as efforts protect customers in general communications, messages, etc.	Promote how Ameren is protecting customer from fraud (credit checks, ID verification through (Netverify in IL) on social media, on the website (start service page) and in customer welcome information (post cards) etc.	2.1	0.5
6	Navigating to find information about what's needed to start/stop service on Ameren.com, Ameren.com/IL and Ameren.com/MO is lacks a clear and simple customer path. Customers who may start their journey on Ameren.com have to figure out that they have select a state and then find start service within that state's page; Ameren.com has simple paths for outages and billing and payment but not starting service.		3.5	1.2
7	If a customer makes it to the state-level page and locates start service, which is hard to find, they are abruptly required to log-in from the start service page: https://www.ameren.com/illinois/csc/start-stop-transfer .	Improve overall web site navigation so that customers can find start/move/transfer in fewer clicks and less time. (Quickly navigate) Develop content to explain what's needed in simple terms that customers can understand. Include straightforward communication on what is needed to Start Service (ID verification process as well as deposit process) and why, as well as possible customer outcomes (deposit amounts) and how customers can manage the deposit (monthly payments, single payments, guarantor, etc.)	1.0	1.0
8	There is a lack of clear and customer-friendly information across channels explaining "what do I need" to start/move/stop service, and what to expect in the process (and content is spread out and hard to find, requiring extra clicks to get to "what do I need")	- Deliver content across channels as part of overarching awareness campaign (see other recommendation); Maximize social media channels for communicating start service information;		
	IVR does not include information about, "what you'll need to start/move/stop service" to help prepare customers.	Update IVR with a prompt/message of information about what's needed to start/move/stop service (in the start/stop/move IVR tree); customer centric and easy to understand	1.5	3.2



Action recommendations

Current State	Future	VALUE	EFFORT
9 General CSRs lack training regarding online functionality	Ensure CSR training is included in change management plan for web redesign implementation, which will require customers to enter their address first	4.3	1.6
10 Inconsistencies on required/non-required fields/information needed to start service: Kayla was denied the ability to start service online (when DL# was added with CSR, she was processed with no issue; however adding the DL# is not the solution 100% of the time, sometimes, CSRs report that online transactions can simply be processed when they enter the data in CSS); this is potentially a common issue for younger individuals starting service for the first time--also the same segment of customers who are more likely to want to complete their transactions online. As part of Equifax, IL pays extra to search/use DL#; IL may stop using this requirement? Data needed regarded the frequency of customer requirements/ID-related "stops" online or CSR; HIGHLIGHT: Increase in volume of web transactions during move-in @ college (Aug)	Review and identify truly required fields, synchronize across all channels; identify optional fields and synchronize as well - Consider making DL number required during Start Service online to improve odds of successfully verifying credit or identity - For online: Sync address or meter look-up with premise data to provide customer with basic service information: "You're an Ameren customer!" service type (gas/elec/lighting), service status (on/off), service category (res/com); care center screens should have access to same information and - For CSR: Train agents to clearly share premise information with customers (service type (gas/elec/lighting, in particular), service status (on/off), service category (res/com) - Using customer addresses, provide information regarding the companies that service other utilities for the address (cable, gas, electric, water, trash, etc.); Add to website and social media channels; train CSRs to share location of this information with customers new to area (CSRs have excel sheet to track non-Ameren services)	4.3	2.1
11 Ameren knows the services a customer has at address but doesn't provide this information consistently; Customers may not be aware of what mix of services are available at new premise (e.g., electric, gas, lighting) Missed opportunity to "wow" customers by providing information on non-Ameren services with customer address (online primarily)		4.3	3.0



Action recommendations (cont'd)

	Current State	Future	VALUE	EFFORT
12	Poor online error messages that do not provide specifics when/if customers "fail" to start/move/stop service; no good call to action to correct	Improve error messages to tell customers why online transaction failed; consider providing helpful tips to input information in optional fields (if empty), which could help customers bypass block (i.e., DL #)	4.2	2.3
			4.6	1.8
	Red flags that prevent online start/move/stop transactions are not in alignment with preferred business rules today			
13	<ul style="list-style-type: none"> - Customers cannot disconnect/stop if the account is in collections or was cut for nonpay recently - Online connect process doesn't block duplicate connect requests. If there is pending conn on account, another request for a connect is able to be processed when it should have a block - Customers are unable to issue service orders online when there is a pending connect or disconnect (but not necessarily duplicate) 	<ul style="list-style-type: none"> Review web blocks/business rules ("red flags") to revise, and simplify and align with business rules for CSRs (as necessary) Premise red flags and customer red flags (see tabs for summary) 		
14	Customers start the process by entering personal information before Ameren has confirmed if the address is serviced by Ameren. Address should be confirmed first to ensure Ameren services the address	- Initiate start service with the address look up to first confirm services	4.2	1.2
15	Address lookup is a critical failure point online and with CSRs, however CSRs are able to manually search other resources to find the correct address in CSS; online customers abandon at the location step 75% of the time	- Evaluate alternative tools to look up look up addresses to increase accuracy of returned results (zipfource, salesforce, etc.)	4.8	2.0



Action recommendations (cont'd)

	Current State	Future	VALUE	EFFORT
16	Entering the address in a consistent format initially is critical; there has been process improvements, but it's all manual; are there tech solutions to automate checking addresses	- Improve accuracy when Ameren inputs the address initially (USPS for CCP window) (Note that CSS limits number of characters for addresses, which is a huge issue to fix)	2.7	2.3
17	Clean up for existing customer mailing addresses happens today, but clean up for existing premise/service addresses does not. For mailing addresses, Ameren send a batch of bills to Fiserv every night; Fiserv returns a file of updated addresses, which is used to automatically correct billing addresses (system called Finalist?)	- Execute an address clean-up of customer/premise records; Evaluate other tools like datavolve/zipfource; can we use Finalist to update service addresses?	4.9	1.0
18	Customers can enter a meter number online to identify their service address and start service; no metrics available on how frequently this happens, advisors can add meter numbers today to find addresses	- Evaluate new technology to allow customers to scan a meter (in app) or use GPS to identify address/location; this could prove exceptionally valuable technology for municipality inspectors, etc., customers may not be the best target audience initially, since they have less awareness of where to find their meter, etc.	1.5	4.5
19	Stopping customers online for "red flags" forces them to quit working in their preferred channel and forces them to call or email Ameren; Note: Customers cannot complete the start/move/stop transaction via email IF completing the transaction requires sending PII; Mobile First plan was to red flag the customer and ask them to call (not email) to avoid adding in ineffective touchpoints...	- Don't simply stop customers for ALL red flags. Allow them to enter their information so Ameren can collect it; keep the order in a "held-connect" status, which is what a CSR would do for orders that could be processed, but needed further action to complete. Then Ameren would work on the back end to either finish processing, call or email the customer as needed. Considerations: right message "Ameren needs additional information to complete your request; we'll contact you within X hours to process... Consider call back option where customers can select a time (using virtual hold tech); ensure that when call-backs are made, reps receive pop-up with customer/transaction information - Proactively prompt customers with chat as an option when a customer lingers or fails on something	3.8	2.0

Action recommendations (cont'd)

	Current State	Future	VALUE	EFFORT
20	Email is not an available channel to start/stop service; it used to be a channel that customers used	Reinstate email as a channel to start service: Evaluate the business barriers that prevent Ameren from utilizing the email channel for start/move/stop, and customer value. Number of customers impacted by not providing email option, etc.	1.8	4.2
21	Chat is available on the secure side of Ameren.com	- Proactively prompt customers with a chat option on the start/stop pages if a customer lingers on a field or fails on something	4.2	4.5
22	Deposits are not assessed online in MO; if a customer who should have been assessed a deposit successfully completes transaction online, no deposit is charged; In IL, if a customer successfully completes the transaction online, and requires a deposit, the deposit is applied to the account (equal payments over 3 months); the are notified via a letter in the mail that they are assessed a deposit (potential pain point--will be asked in customer survey) Deposit thresholds: Credit score of 699 and below = deposit in MO Credit score of 654 and below = deposit in IL	Assess deposits for online transactions in MO; the self-service channel should ultimately ensure that deposits are assessed, because more customers will use it as this channel is improved; Improve notification of deposits for online transactions in both states (provide ample notification, consider sending an email for faster correspondence; provide details about how to pay for the deposit)	4.2	2.2
			3.0	2.0
23	Customers can create duplicate customer records--Customer Application is created each time a customer tries to submit online request for service (regardless if the customer was unsuccessful); customers will create multiple customer records (upwards of 5-10) during the online connect process if they are red flagged because they continuously hit the "submit" button because they don't understand that they are failing to complete	Do not allow customers to create multiple records when transaction to start service online is unsuccessful; or allow CSRs to delete duplicate records; see recommendation #19 as a way to process red flags through online, and not encourage multiple records by even red flagging the customer		



Action recommendations (cont'd)

	Current State	Future	VALUE	EFFORT
			5.0	2.0
24	Customers have to register or have an account log-in (authenticate) to start/move/stop service; this can be a huge pain point; customers can get locked out; brand new customers who want to start service are not going to have an account; this adds multiple extra steps to register an account	Do not require user ID and password to start, move, or stop service; find alternative ways to authenticate customers		
			3.3	2.1
25	Customers may get locked out after 5 attempts to sign-in, but are not provided a warning message or a message that they are locked out	Warn customers that they will get locked out; provide step-by-step to unlock account if locked out.		
			4.7	1.3
26	When customers have to move from online to phone for start service (because it failed online), CSRs don't know the issues customers dealt and may not proactively acknowledge online failure This may be more of a training issue; Is a contact created in CSS if a customer is "red flagged"--customer red flags are logged as a customer contact in CSS; premise red flags are logged on the premise, if the customer is associated with premise, the information would be linked; if not, the CSR has to look in multiple places (Customer of record and premise)	Upskill customer care on dealing with failed start service via online transaction; is there a tech option to show why a customer failed, to better link premises and customers?		



Action recommendations (cont'd)

Current State		Future	VALUE	EFFORT
			2.5	4.0
27	When connecting online, customers who have both gas & electric service are not provided the option to be connected at the same time on the selected day--gas is a 2-hour window and electric is all-day window (non-AMI)	Further investigate the online process to confirm the windows customers are provided; Investigate if this is a business decision or tech limitation; Need to test the start service process to confirm how customers pick the time (or window); both services should be able to be connected at the same time; gas connects have 2-hour window; in IL electric connects are all-day windows	2.0	2.5
28	AMI window to connect or disconnect is 2 hours, but power is turned on/off at the beginning of the window (not truly a window)	Update communications online, and via CSR to be clear that power will be turned off at the beginning of the window; alternatively, remove the window and have customers select the actual time to connect/disconnect power	4.0	4.0
29	Start/Move is a good opportunity to update all customer information (in particular, move, since this is an existing customer, but no preference center to capture this information and processes do not ensure that customer information is updated in CSS currently)	Build process and preference center to capture customer communications preferences during start/stop transaction across all channels (online, CSR); coach rep on obtaining updated preferences and communication channels; build into AHT metrics, etc.	4.0	2.0
30	Online, start does not provide options to enroll in billing and payment programs, alerts, etc. Mobile first has alerts built in, but paperless billing is not the "happy path" (account dashboard is the happy path);	Make paperless the happy path, since it should have them confirm the account within the account dashboard		



Action recommendations (cont'd)

	Current State	Future	VALUE	EFFORT
			4.0	2.8
31	Customers cannot direct transfer online; they must complete 2 transaction to "move service" -- stop and start service (or vice versa) -- if they do this, none of their enrolled programs transfer; huge headache for customers enrolled in budget billing, paperless billing, and autopay because unenrollment may not be caught until subsequent billing cycles when payments haven't been made and the customer goes in collections, do not receive a bill, or bill amount is different from what they were expecting	Enable direct transfer online; default/automatically transfer all existing product enrollments to new account; provide an option to update or change enrollments		
32	<ul style="list-style-type: none"> - Deposits are reassessed for existing customers who transfer or move service; new deposits may be larger despite a customer being in good payment standing, or possibly reaching the end of their deposit timeframe; - The deposit timeframe requirement is also reset at transfer 	<ul style="list-style-type: none"> - Evaluate ending the process of reassessing deposits during move (process and policy change) - Do not reset deposit timing (12 month minimum) 	4.3	1.3
33	Customers are not being advised if a Seasonal Reconnect Fee is going to be assessed when issuing an online connect.	Advise about seasonal reconnect fee online; consider adding message to IVR about seasonal reconnects in the "what you need" menu (#8 recommendation)	0.5	1.0
34	New account number is not default on ECustomer; customers must link/associate account number manually;		3.5	0.7
	For transfer customers, the old account number is shown and customers must associate their new account with Ecustomer	Make account number default on ECustomer if the email links with the email for the account		



Action recommendations (cont'd)

	Current State	Future	VALUE	EFFORT
			4.8	1.5
35	Many red flags will stop a customer from completing online transactions	Review online blocks ("red flags"); consider processing some (or all) orders that would be stopped online and follow up with customers after the issue is known, etc.		
			3.1	0.5
36	Current state: no self service in the IVR at all	Allow authenticated customers to leave a voicemail to STOP service; Ameren will process or follow up as necessary		
			2.5	3.5
37	Text message is not an option to move or stop service but is something that customers mention they want (survey and interviews)	Enable text message as a channel to transfer or stop service. These channels seem like they would have higher success rates than starting new service, given that the customer is an existing Ameren customer.		



Response recommendations

Current State		Future	VALUE	EFFORT
			3.0	0.7
38	Too much information may be thrown at customers during call; sign-ups, etc. (process)	review start service scripts to see if information can be better "grouped" to provide information in more easily absorbed "chunks" that would align with Follow-Up correspondence		
			3.5	2.0
39	Customers do not get updates day-of connection to let them know when a crew may be on the way, and when power/gas is connected; If a customer signs up for alerts, they ARE provided notification when service is connected (text or email); they do not get the "pizza tracker" of when crews are on the way	Provide email or text alerts to customers on day-prior and day-of connect/disconnect; Notification when technician is dispatched, assigned, completed or unable to complete connect/disconnect (Field/process change Could cut down calls on reconnect process		
			3.0	4.0
40		evaluate misalignment between KPIs like AHT and CSAT; research shows that AHT not a key driver of customer satisfaction, particularly with the first customer touch; first contact resolution is the driver		
	Critical KPI is call length; start service calls should not be rushed;	Pull start service calls out of AHT metrics		
			2.5	5.0
41	smart home technologies aren't utilized for start/stop/transfer service	ideate on how smart home technologies (e.g., Amazon Alexa) could be used to allow customer to start utility services		



Connect/Disconnect recommendations

	Current State	Future	VALUE	EFFORT
			3.0	3.0
42	<p>AMI meters may fail to connect/start billing at the scheduled time ; IL is manually updating time to reflect the customer-selected time; there are thousands of failures a month and significant manual effort to correct</p> <p>On a DAILY basis, IL CAD receives a failure report with 100+ failures; EXAMPLE: Total Count : 1477 Fail Count : 120 Fail Percentage : 8.12%</p>	Evaluate business decision to manually recalculate failed AMI billing connects to determine customer satisfaction impact		
43	<p>AMI meters may fail to connect/start billing at the scheduled time</p> <p>On a DAILY basis, IL CAD receives a failure report with 100+ failures; EXAMPLE: Total Count : 1477 Fail Count : 120 Fail Percentage : 8.12%</p>	Investigate root cause of why AMI meters fail to be connected for billing; is this a capacity/threshold issue; do systems need to be updated to limit the number of AMI meters that can be connected; update CSR and online start/move/stop service calendars to limit the number of AMI meters at one time if there is a capacity issue	4.0	3.0
44	AMI failures to physically connect are not proactively addressed--if the meter doesn't turn on and a truck roll is required, customers must call and alert Ameren?	Create process to proactively address AMI connection failures that require a truck roll rather than reactively addressing after billing failure or customer's call	3.2	2.5

Follow-up recommendations

	Current State	Future	VALUE	EFFORT
45	welcome packets are only sent by mail	offer digital option of welcome packet; add PDF to "success page," consider making it available on Ameren.com	1.8	0.5
46	Lack of brand consistency in customer communications; CSS deposit letters "look like they came from a typewriter"	Ensure one-brand look and feel for all customer communications	2.5	4.5
47	deposit letter is sent immediately; account may not be activated immediately	Send deposit letter after the account is activated, instead of immediately	3.7	0.5
48	Customers are asked to verify all information in the confirmation letter and alert Ameren if anything is inaccurate; however, the letter does not include the full address in the disconnection letter (full address is in the connection letter, but cannot be sent in follow-up communications); Customers call to correct address since it's not the full address		4.0	0.3
	Schools accept this as confirmation Landlords use this as confirmation	Include the full address in disconnection letter; may be Cyber issue?		

