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Proposal to Develop Customer Experience MVP and Roadmap for Start Service and Transfer Service

For Ameren Corporation

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**Submitted by:**

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# Who Is E Source?

For more than 30 years, E Source has been helping utilities tackle challenges in customer engagement and experience, energy efficiency, utility customer satisfaction, program design, marketing and sustainability. The skills and capabilities of our Consulting and Advisory team, combined with our long-standing and proven suite of Membership Services research and business advisory tools, will enable Ameren to tap into the best minds in the business—experienced industry thought leaders who understand the challenges utilities are facing and leading practices to address them.

E Source has been on the leading edge of helping utilities put customers first in all areas of their business through our Customer Experience (CX) practice. We have worked with many top utilities, from developing their CX strategy to customer journey mapping/management to voice-of-customer strategy deployment. It is with this “customer first” lens that we approach all of our projects.

Our North America Clients include:

# Project Background and Objectives

Ameren is establishing a Digital Service Order Agile team to deliver a premier customer experience (CX) for residential service orders. A priority focus is to establish the CX roadmap and define the Minimum Viable Product (MVP) of the future state for residential customers during two key service order interactions:

* Starting new service
* Transferring existing service

To support this transformation, E Source will design the preferred CX through customer journey mapping, Voice-of-the-Customer (VOC), and Voice-of-the-Employee (VOE). Through these efforts, E Source will lead Ameren in designing a future state that is rooted in leading CX practices to help Ameren achieve its business objectives. The project outcomes will enable Ameren to:

* Map the customer journey from initial contact to first billing statement in order to document pain points from the customer perspective
* Identify drivers of customer satisfaction and create actionable VOC metrics for the Start Service and Transfer Service Journeys
* Identify opportunities to leverage a customer relationship management (CRM) system to deliver a premier customer experience
* Prioritize recommendations to address CX pain points and increase customer satisfaction
* Define the Minimum Viable Product (MVP) for Start Service and Transfer Service Journeys
* Establish a backlog of user stories to ensure digital team can deliver the initial release for the MVP
* Develop a future state CX roadmap for the Start Service and Transfer Service journeys

# Project Approach

To ensure the CX roadmap anchored in customers’ priority need and wants, our approach incorporates five key components:

* Assess current state risks and assumptions
  + E Source will conduct interviews with subject matter experts (SMEs) and stakeholdesr, as well analyze Ameren’s existing VOC data, operational measures, and customer measures to understand business objectives, systems, procsses, and organizational attributes that drive the current customer experience.
  + We will identify key assumptions, risks, and uncertainties that can shape the definition and deployment of an MVP.
  + We will also identify KPIs needed to measure CX results and validate (or disprove) assumptions.
* Conduct qualitative and quantitative customer research
  + E Souce will interview up to 8 customers to hear their experiences and document their needs and preferences (E Source to provide customer incentive to participate).
  + E Source will also initiate and analyze VOC surveys. The results will help identify indicators of customer satisfaction (CSAT) and enable Ameren to create a systematic approach to measure CSAT.
* Develop a market scan
  + E Source will conduct strategic interviews with other utilities as well as leverage our market research to identify common industry practices as well as leading practices for Start Service and Transfer Service Journeys.
* Lead workshops to map journey and develop user stories
  + E Source will facilitate cross-collaborative workshops so that Ameren employees and leaders can develop the vision and strategy to improve pain points for Start Serivce and Transfer Service.
  + E Source will lead the group to refine the product vision, prioritize and create a release plan, define user stories and prepare the backlog.

# Project Schedule

The project plan comprises 14 weeks, with an estimated start date of July 9. See “Ameren Project Plan” on the next page.



# Project Deliverables

|  |  |
| --- | --- |
| Phases | Deliverables |
| Current State Assessment | * Finalized project plan * Completed interviews with Core Team, stakeholders, SMEs * Utility market scan * Current state assessment: MVP key risks and assumptions |
| Customer Feedback #1 | * Completed qualitative customer interviews: Insights and implications * Quantitative customer survey instrument |
| Journey Mapping & MVP | * Journey-mapping workshop summary * Start Service and Transfer Service MVP Recommendations * MVP user stories & release schedule |
| Customer Feedback #2 | * Quantative customer survey * Survey analysis and summary |
| CX Roadmap and Backlog | * Future state roadmap * Backlog user stories * Stakeholder Showcase |

# Consulting and Advisory Services Project Team

At E Source, we pride ourselves on our ability to establish a project team with expertise that matches your needs to ensure continuity throughout your project.

**Melanie Wemple, Managing Director, Consulting and Advisory Services**

**(Project Lead, 75%)**

Melanie Wemple leads customer journey-mapping workshops for large and small electric and gas utilities, and uses her deep understanding of utility operations to design and implement strategies that enhance customer interactions and improve utility operations. As part of her workshops, she convenes senior leadership to identify and prioritize the gaps between the utility’s current customer experience and what that experience should be. Melanie works closely with clients to design change management and communications plans that are rooted in the organization’s culture to ensure that the agreed-upon strategies can be deployed effectively. Among her recent projects, Melanie has helped major US and Canadian utilities transform the customer outage experience. Her topical expertise also includes electric and gas energy efficiency and demand-response programs. Before joining E Source, Melanie worked with Standard Renewable Energy, a company focused on lowering consumers’ utility bills through energy-efficiency and renewable technologies. Melanie holds a BA in geography with a minor in environmental studies from the University of North Carolina at Wilmington.

**Julie Rowey Managing Director, Consulting and Advisory Services**

**(Project Support, 100%)**

Julie Rowey has more than 15 years of experience in the utility industry and more than 25 years in developing national brands for the media, high-tech, financial-services, and energy industries. Before joining E Source, Julie served as vice president of marketing for Summit Utilities, where she built the company brand and was responsible for the marketing and sales operation that doubled company growth over three years. In addition, she led the company’s customer contact center, developed and implemented its customer satisfaction measurement initiatives, and deployed its sales strategy and marketing automation tools (SalesForce, Marketo).

Prior to her time at Summit Utilities, Julie led Southern California Edison’s residential and business customer marketing teams and directed customer service initiatives that moved the company from the bottom of the third quartile of J.D. Power rankings to the first quartile for large electric utilities in the Western Region. Julie also led the utility’s digital channels and directed its marketing strategy, including implementation of its first CRM platform (SAP). She was responsible for the company’s program implementation, including the largest portfolio of energy-efficiency programs and services in the US and advanced metering deployment. Julie has a BA in English and communications from the University of California at Los Angeles.

**Daniel Molvik, Senior Consultant, Consulting and Advisory Services**

**(Project Support)**

Daniel specializes in customer experience and market research for the utility industry. Daniel has more than 13 years of utility experience from a range of utility and consulting roles. Daniel started his professional career at Puget Sound Energy in the customer contact center and worked his way into field operations, where he became proficient in all utility database tools (e.g., CRM, SAS, SCADA).

Daniel then transitioned into energy consulting where he provides utilities with advisory services related to customer experience, contact center operations, and demand-side management (DSM) program design and evaluation. He brings extensive knowledge of qualitative and mixed-methods research designs, and is experienced in conducting ethnographic interviews, facilitating focus groups, and leading customer engagement studies.

He holds a BA in policy, ethics, and human behavior along with a MA in energy policy studies from the University of Washington. Daniel also has a MA in industrial and organizational psychology from Seattle Pacific University, where he completed all coursework in the PhD program track.

**Katie Ryder, Consultant, Consulting and Advisory Services**

**(Project Support)**

Katie Ryder is an expert in utility operations, particularly when it comes to demand-side management (DSM). Katie has worked as a consultant in the energy sector for more than nine years. In her time with E Source, she has written multiple reports, conducted one-on-one interviews with utilities, and led web conferences on various topics. In her time on the E Source Demand-Side Management Service team, Katie answered more than 1,000 member inquiries about utility operations best practices, and she conducted utility process and impact evaluations to verify the results and impacts of DSM programs. Before joining E Source, Katie worked at Nexant, where she analyzed and estimated energy consumption and savings in buildings; conducted cost-benefit analyses of energy conservation measures; and reviewed and verified residential, industrial, and commercial building energy analysis. For three years prior to that, Katie was with the Cadmus Group, where she contributed to DSM projects aimed at energy-efficiency program management, design, and evaluation, including large-scale statewide energy conservation initiatives and the evaluation of demand-response projects for utility companies. Katie holds a BS in physics and ecology and an MS in sustainability management, both from the University of Colorado.

**Stacey O’Neale, Senior Consultant, Consulting and Advisory Services**

**(Project support)**

Stacey has more than 15 years of experience in customer experience strategy design and execution in the utility and banking sectors, creating strategic road maps to help companies increase customer satisfaction through culture change, experience design, journey mapping, process improvement, and measurement systems.

Most recently at Duke Energy, Stacey implemented a series of programs designed to create a customer-focused culture and increase customer satisfaction. Stacey facilitated strategic planning and journey mapping sessions with the SMB/Commercial teams to identify opportunities to maximize the existing CRM tool to deepen customer relationships. Stacey also served as the customer advocate in the initial design of the customer preference center at Duke Energy. Stacey has expertise in strategy design facilitation, journey mapping facilitation, project management, change management, and customer satisfaction and loyalty measurement systems. Stacey has a BA in History/Politics from the University of the Incarnate Word with a minor in communications. She also holds a certification in Prosci change management.



**Alissa Tambone, Senior Consultant, Consulting and Advisory Services**

Alissa uses dynamic market data to provide clients with actionable insights that help them create the optimal customer experience. She specializes in identifying emerging trends and creating a strategic plan for implementation of best practices. Her research experience spans over a decade of qualitative and quantitative methodologies in furthering customer experience and user experience, as well as process, product, and technology innovation.