E Source Toolbox for Customer Experience Strategists

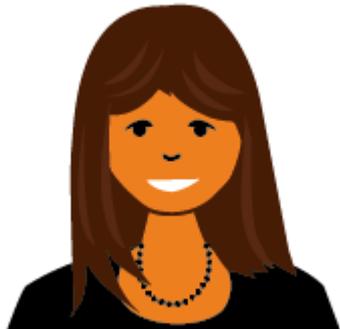**Jeffrey Daigle**

E SOURCE HUB

AT THE FORUM

forum

Meet the CX strategist persona

- Works on customer experience (CX) business cases, strategy, governance, and implementation

- Empathetic, visionary, change agent

- Attempts to follow industry leaders while bringing in the nonutility perspective

- Looks ahead for what's next

CX strategist

The Utility Customer Care Toolbox

Research
Our library of topical research can help you improve all of your customer experience strategy

Market research
In-depth analysis of CX efforts across the industry

Ask E Source
If we haven't already written research on it, our experts will do custom research for you

Networking
Use our in-person and online events to connect with other industry professionals

Tools
The E Source CX Resource Center empowers you to drive CX in your organization

"

Can E Source help me develop a business case for customer experience in my organization?

CX Strategist

CX ROI Calculator

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E Source Customer Experience Management ROI Calculator

The E Source Customer Experience ROI (Return-on-Investment) Calculator helps provide a rough estimate of operational savings associated with customer experience management (CXM). Below are sample calculations for CXM initiatives such as channel containment, moving high-volume transactions to self-service channels, first-contact resolution, and cross-selling and up-selling new programs and services. We pr[...] estimates to give you an idea of possible savings; however, we encourage you to refine these figures by entering your own compa[...] right column. This calculator is meant to be a companion piece to the E Source report "The Business Case for Customer Experie[...]

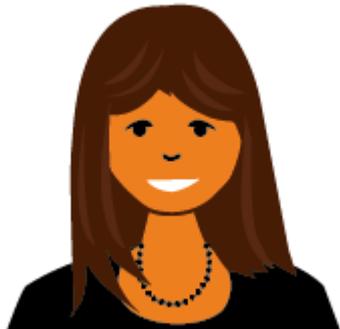Return to The Business Case for Customer Experience Management.

Green shade indicates a field that the user populates.   estimates[a]

Channel Containment

Having a large number of customers who switch contact channels to resolve an issue or complete a transaction may indicate that [...] contact channels and transactions on those channels are operating inefficiently. Typically, customers leave the web or interactive voice response (IVR) self-service channels for the most expensive channel to the utility: the live agent. These inefficiencies cost more and can also decrease customer satisfaction. This calculator can identify how much you could save the organization if you increased IVR and web self-service channel containment.
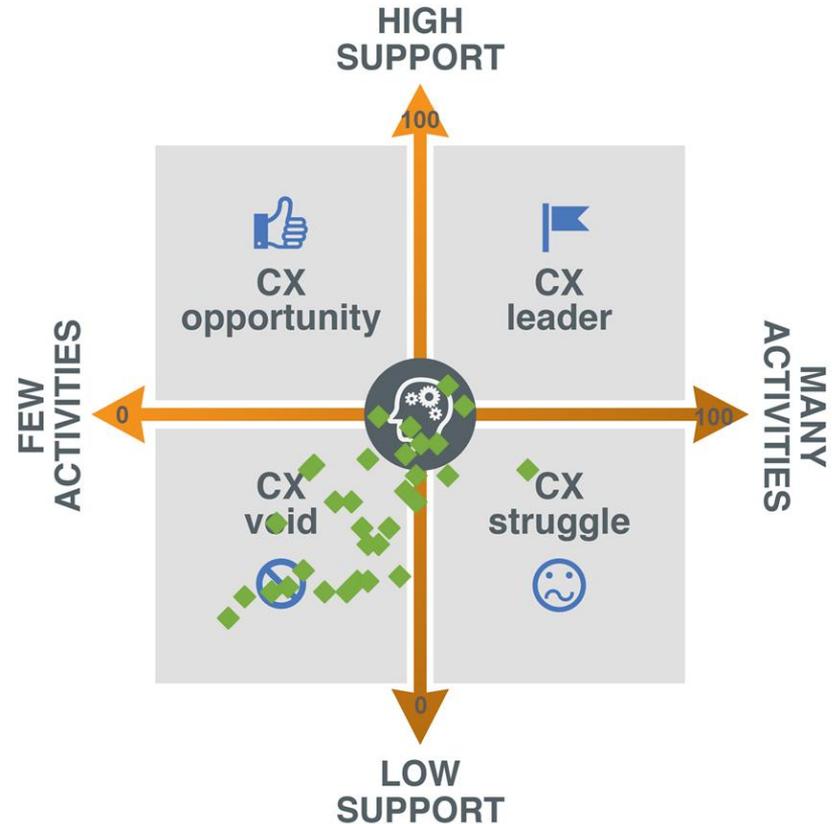
> "How mature is my organization in customer experience and what CX initiatives should I prioritize? How do I create a CX strategy?"

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Assessing CX maturity

CX maturity model:

- *Activities:* techniques, tactics, and strategies done to improve CX; externally focused

- *Support*: techniques, tactics, and strategies done to embed customer-centric mind-sets and behaviors into culture and operations; internally focused

E Source CX Maturity Assessment

www.esource.com/cxmaturityassessment

Institute CX metrics

Start journey mapping

Launch CX governance

Create personas
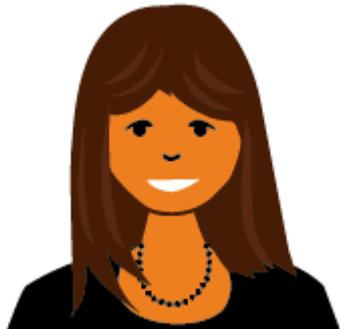
Develop CX strategy

Create CX intent statement

Capture VOC feedback

E Source Customer Experience Survey

More than **40 questions** for assessing how well utilities have implemented best-practice CX initiatives from outside the industry and within their organizations

CX metrics report series

Customer Experience Metrics—Part I

Utilities can benefit from building upon the traditionally used customer satisfaction scores with a more robust, actionable set of metrics to indicate and track customer experience success.

Metric type	Definition
Descriptive	What actually happened during an interaction
Perceptual	Performance relative to customer expectations
Outcome	How customers will react to their entire experience

© E Source

Customer Experience Metrics—Part II

Using descriptive, perceptual, and outcome metrics, utilities can build a robust and actionable customer experience (CX) scorecard. By following the best practices for each type of metric, utilities can generate the right data to drive CX improvements.

Transaction-level perceptual metrics

Brandwide metrics (including outcome metrics)

Transaction-level descriptive metrics

© E Source

Customer Experience Metrics—Part III

Customer experience metrics serve a purpose for utilities beyond simply understanding performance. When these measurements are collected and presented in an actionable way, utilities can make real improvements to operations, and ultimately, to the customer experience.
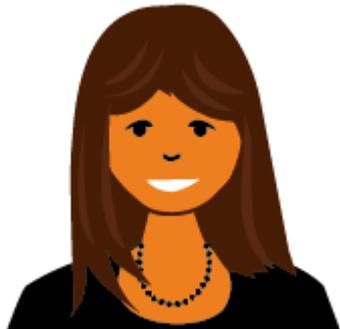
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"We need to build a strong customer-focused culture across the organization (outside of the traditional customer-facing groups like the call center). What are other utilities doing to make this happen?

Customer-centric culture guidance

Engaging Employees to Create a Customer-Centric Culture

Eryc Eyl, Jeffrey Daigle, Joy Herbers, Keenan Samuelson
July 26, 2016

Contents

Ask E Source

Through our Ask E Source service, you can ask our experts questions related to any of the subject areas your organization has access to.

Submit an inquiry

Shifting Culture to Support Customer Experience

By now, most utilities realize that customer experience (CX) improvement initiatives are strategic imperatives that can differentiate them in the marketplace, deepen brand advocacy, and impact the bottom line. But to ensure consistent delivery of a positive and memorable customer experience, utilities need to develop a

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" Can E Source help with my journey-mapping efforts?
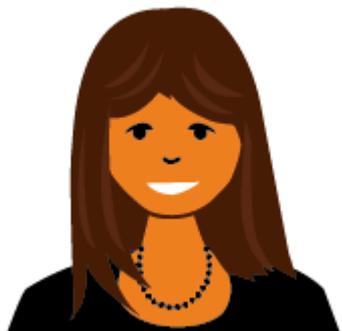
A customer journey map is one of the most powerful tools a utility can use to understand how its customers experience the organization.

Process mapping versus journey mapping

Typical process-mapping focus	Journey-mapping focus
Company / organization	Customer
Internal	External
Operational efficiency	Customer experience and operational efficiency
Internal steps and department-to-department handoffs	Customer's intent and preferred interaction channels
Specific department roles	Cross-functional teams
Consistency	Pain points and customer emotions

Build an effective business case with journey mapping

Reveal interactions and channels

Justify emotions and key moments

Evaluate solutions

Prioritize improvements

Build an effective business case with journey mapping (cont.)

Reveal interactions and channels

Justify emotions and key moments

Evaluate solutions

Prioritize improvements

Replicate as needed

Journey-mapping outcomes

✓ Increased customer satisfaction

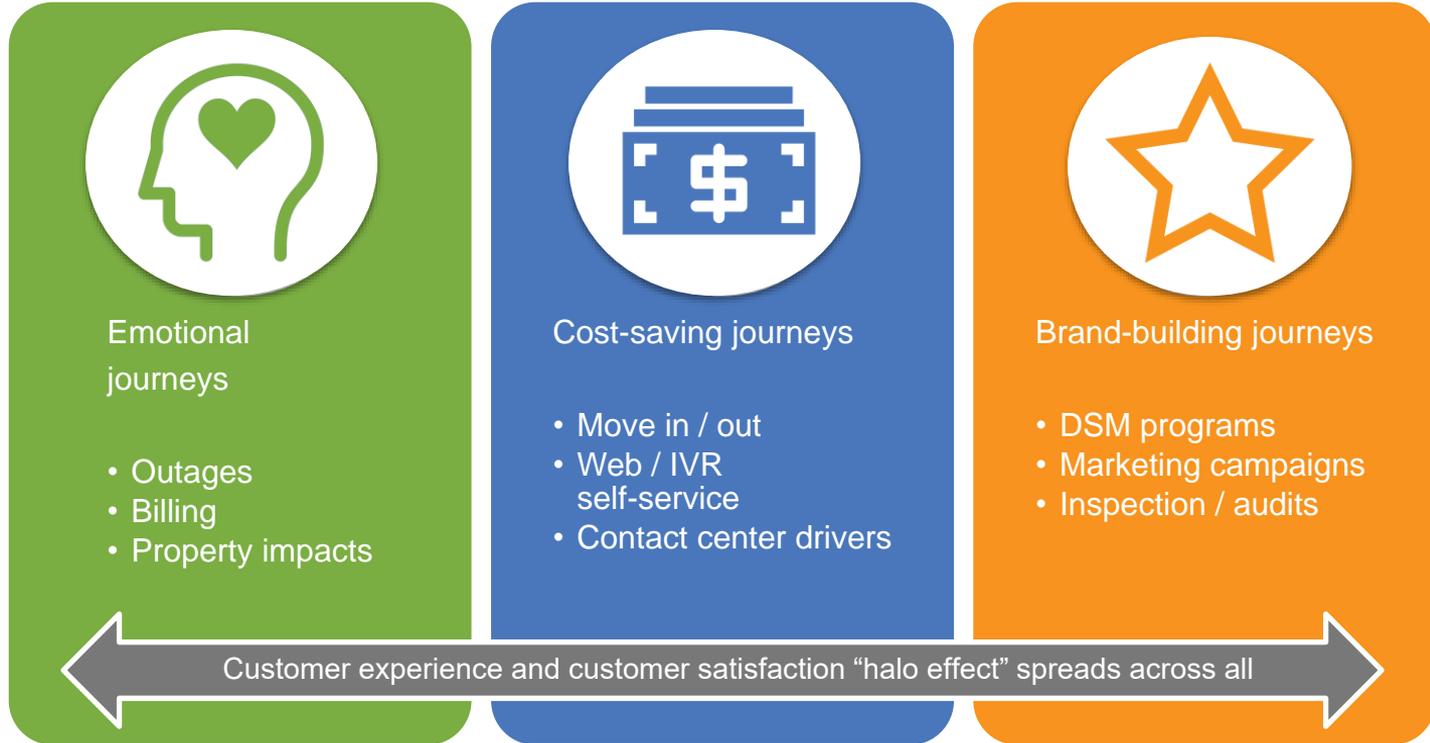✓ More-informed process design and improvement

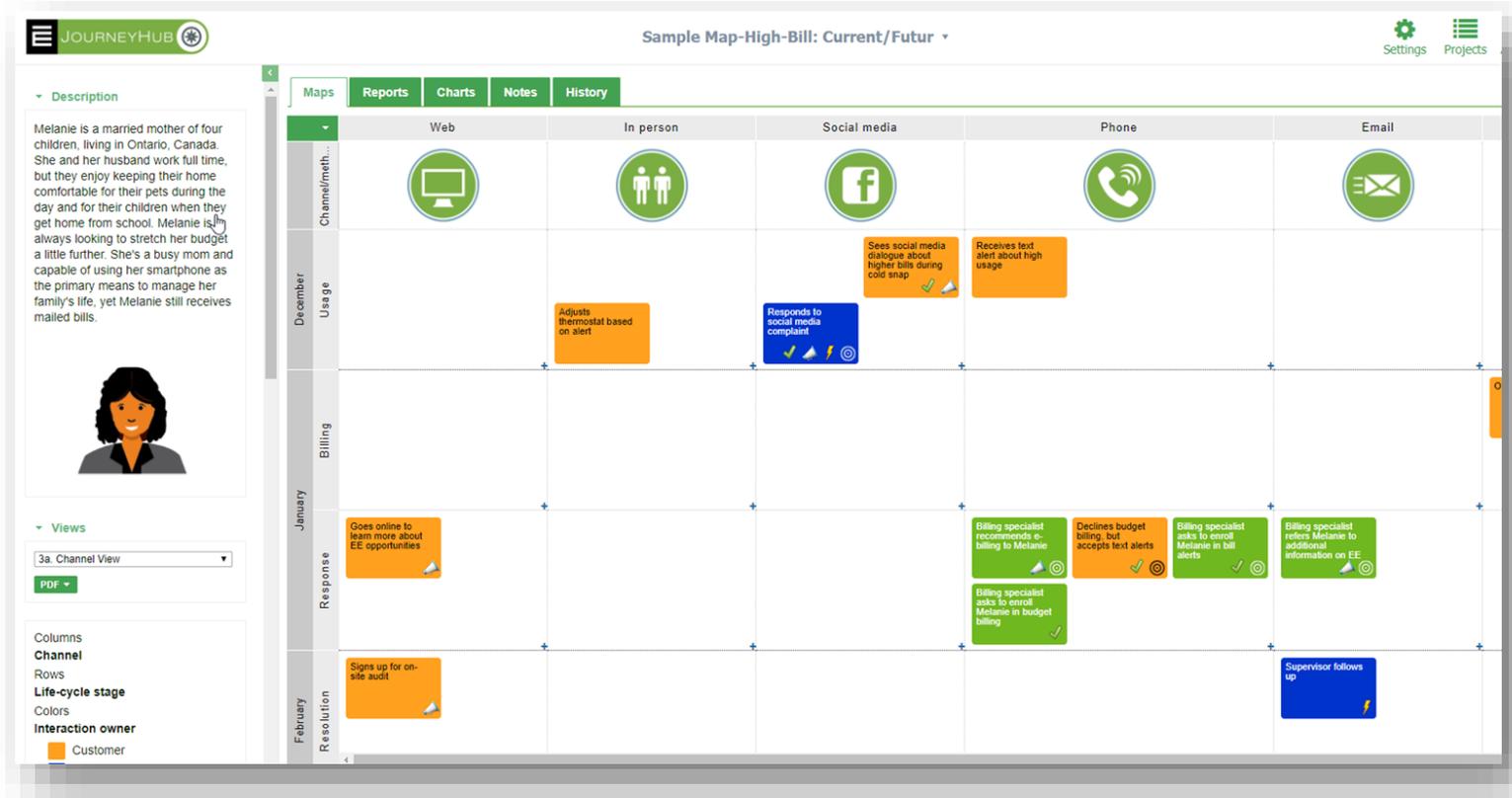✓ Cost savings

✓ Deeper engagement

Benefits of journey mapping

Increased program enrollment

Positive outcomes in rate cases

Meaningful marketing

Alignment with utility CX initiatives

More-informed budget decisions

Increased shareholder equity

Where should utilities start?

Emotional journeys

- Outages
- Billing
- Property impacts

Cost-saving journeys

- Move in / out
- Web / IVR self-service
- Contact center drivers

Brand-building journeys

- DSM programs
- Marketing campaigns
- Inspection / audits

Customer experience and customer satisfaction "halo effect" spreads across all
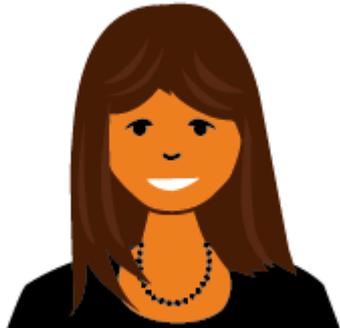
E Source JourneyHub

CX Strategist
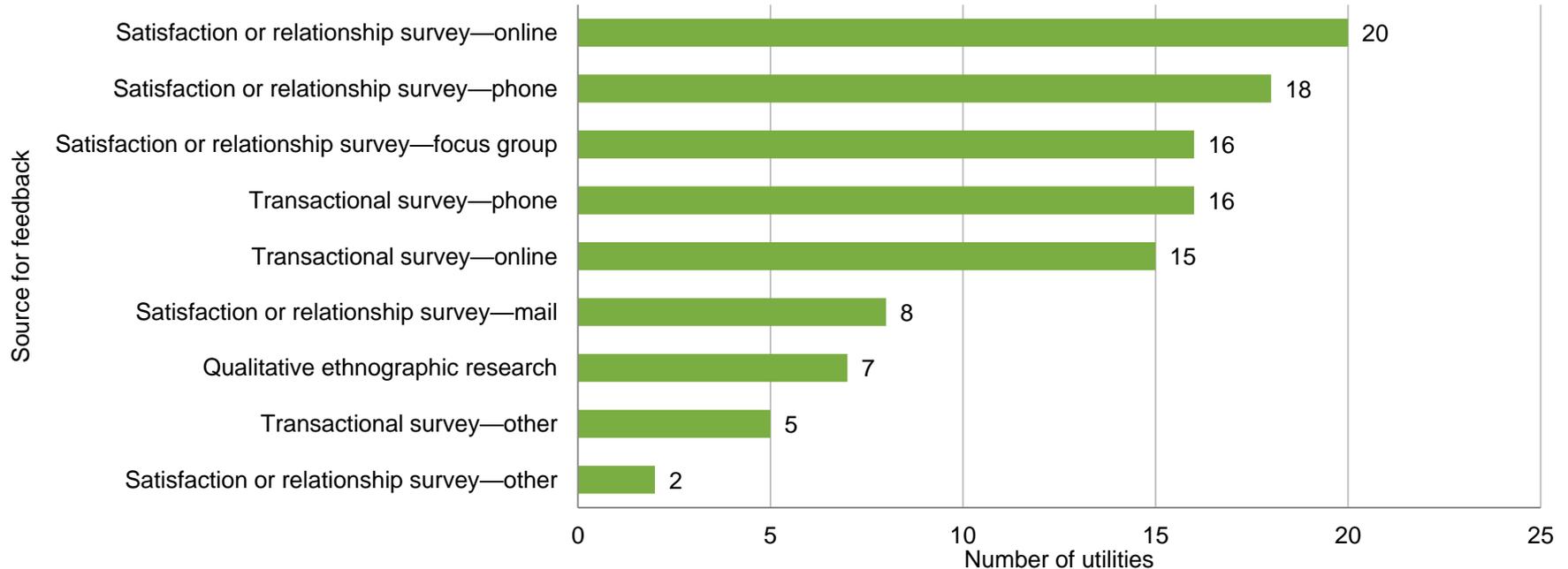
" Can E Source help with my voice-of-the-customer (VOC) and voice-of-the-employee (VOE) strategy work?

You have customer feedback, but could you make better use of it?

Chart: Number of utilities by Source for feedback

- Satisfaction or relationship survey—online: 20
- Satisfaction or relationship survey—phone: 18
- Satisfaction or relationship survey—focus group: 16
- Transactional survey—phone: 16
- Transactional survey—online: 15
- Satisfaction or relationship survey—mail: 8
- Qualitative ethnographic research: 7
- Transactional survey—other: 5
- Satisfaction or relationship survey—other: 2

X-axis: Number of utilities (0, 5, 10, 15, 20, 25)
Y-axis: Source for feedback

Base: n = 23 utilities. **Question S3_6:** How does your organization capture feedback from its customers on their perceptions of and satisfaction with the company?

© E Source (2018 Customer Experience Survey)

What about employee feedback?

Capturing feedback on ideas for improving CX

- We don't gather feedback from employees on this topic
  6
- Ad hoc, as needed
  9
- Other frequencies
  8
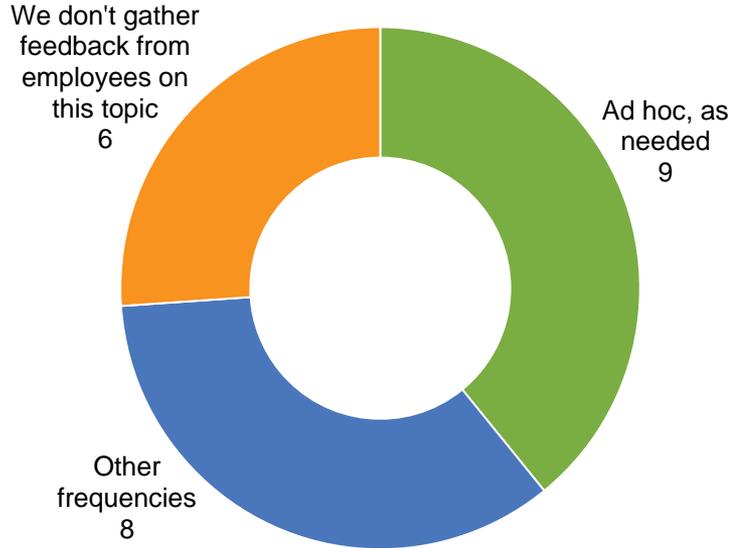
Capturing feedback on the company and its culture and employee satisfaction with the company

- We don't gather feedback from employees on this topic
  4
- Annually
  10
- Other frequencies
 9

© E Source (2018 Customer Experience Survey)
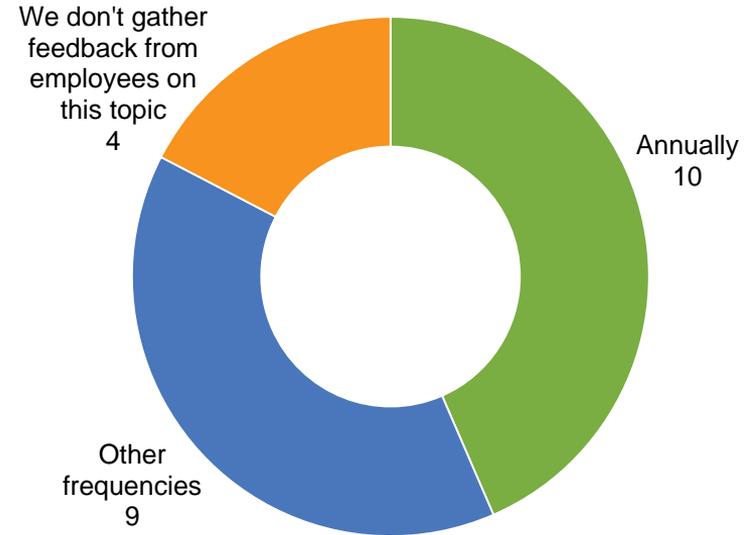
Base: n = 23 utilities for S2_4; n = 17 and 19 utilities for S2_5 for feedback for improving CX and feedback on the company respectively. **Question S2_4:** How often does your organization conduct research to gather feedback from its employees on the company and its culture, their satisfaction with the company, and ideas for improving CX? **S2_5:** How often does your organization capture feedback from its employees on the company and its culture, their satisfaction with the company, and ideas for improving CX? Select all that apply. **Note:** CX = customer experience.

The solution: VOC and VOE

Collect structured and unstructured data from multiple internal and external sources.

Analyze

Listen

Act
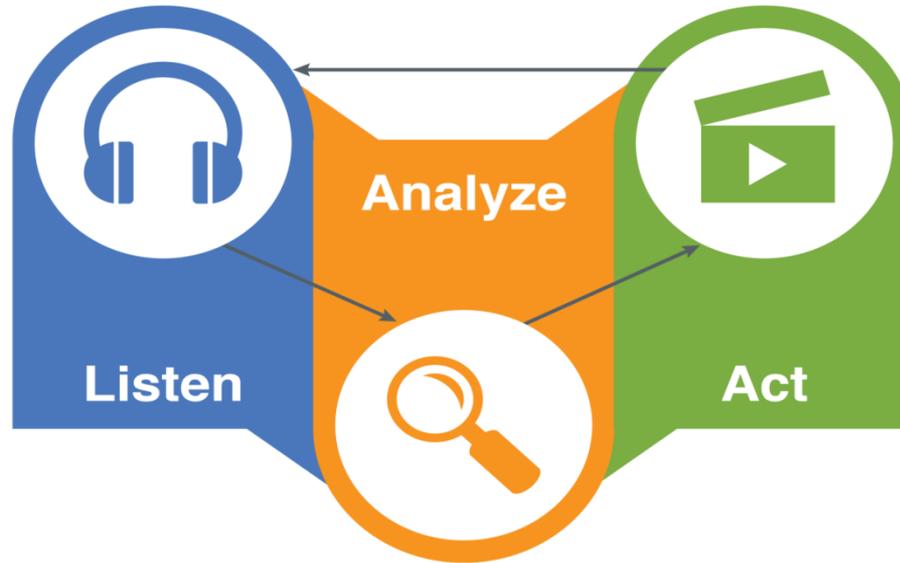
Prioritize and facilitate both closed-loop actions and systemic improvements. Monitor the effect on business results.

Perform real-time analysis that delivers true insights across the organization.

Role-based dashboards drive action
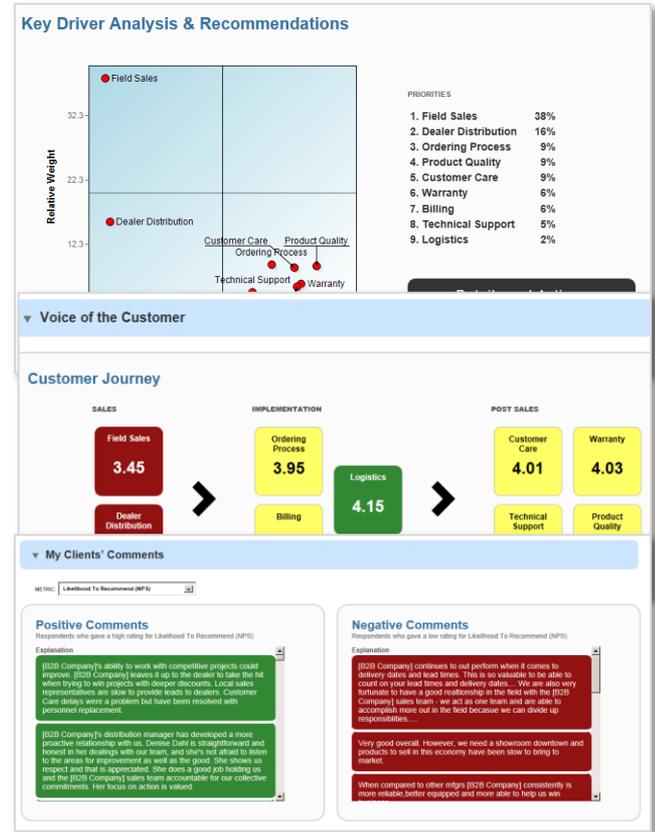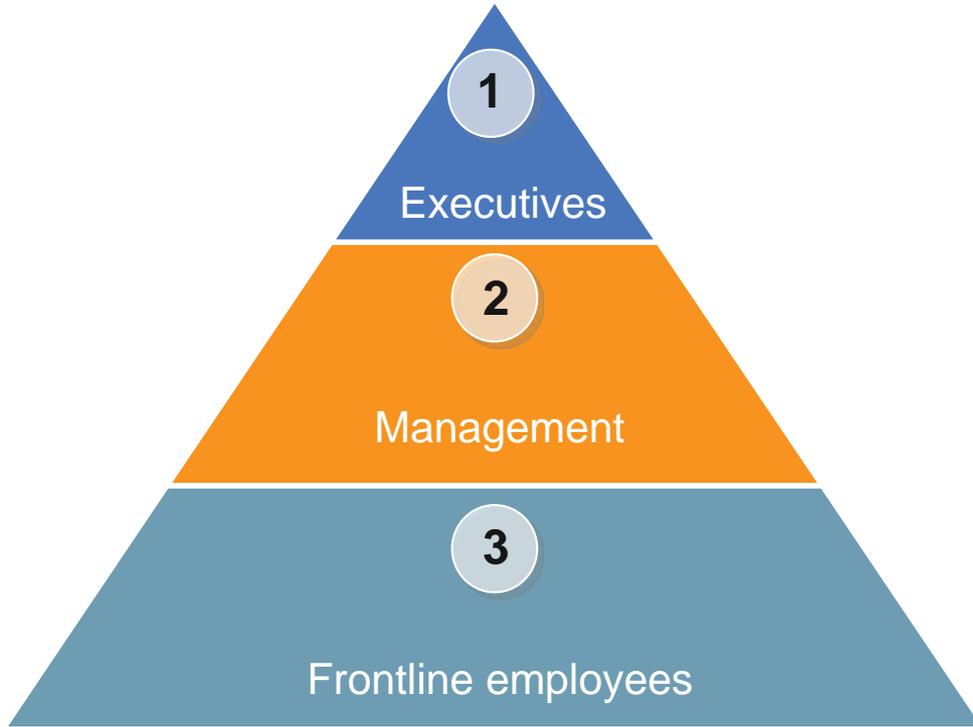
Next steps

Visit the Learning Lab to try our tools for yourself

Schedule a meeting at the Forum with your customer success director

Attend all Forum sessions marked with a "C" for CX content

Call us after the Forum to schedule a time for us to meet with your team

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