Journey-Mapping Customer Service Operations

Rachel Buckley
Director, Data Product Strategy,
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Web conference
Today’s Speakers

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Agenda

Why Journey Mapping?
Potential Customer Service Outcomes
AGLR Case Study: Building a Customer-Centric Culture
E Source Journey-Mapping Approach
AGLR Case Study: Lessons Learned
E Source JourneyHub Demonstration
AGLR Journey Map Example
Wrap-up
Q&A
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

<table>
<thead>
<tr>
<th>Typical process-mapping focus</th>
<th>Journey-mapping focus</th>
</tr>
</thead>
<tbody>
<tr>
<td>Company / organization</td>
<td>Customer</td>
</tr>
<tr>
<td>Internal</td>
<td>External</td>
</tr>
<tr>
<td>Operational efficiency</td>
<td>Customer experience and operational efficiency</td>
</tr>
<tr>
<td>Internal steps and department-to-department handoffs</td>
<td>Customer’s intent and preferred interaction channels</td>
</tr>
<tr>
<td>Specific department roles</td>
<td>Cross-functional teams</td>
</tr>
<tr>
<td>Consistency</td>
<td>Pain points and customer emotions</td>
</tr>
</tbody>
</table>
It’s All About Perspective

Source: http://thehandyschoolcounselor.blogspot.com
Journey Mapping Helps Determine ...

- **What should the customer’s experience be?**
- **What are the gaps between the current experience and how we want it to be?**
- **How will we prioritize improvements?**

How do our customers truly experience this process?
Build an Effective Business Case with Journey Mapping

- Reveal interactions and channels
- Justify emotions and key moments
- Evaluate solutions
- Prioritize improvements
Journey-Mapping Outcomes

- Increased customer satisfaction
- More-informed process design and improvement
- Cost savings
- Deeper engagement
Applying Journey Mapping to Customer Service Operations

- Credit and collections
- Outage management
- New service installations
- Fixed bills
- Paperless billing
Benefits of Applying Journey Mapping to Customer Service

- Gain external perspectives of your utility
- Expand the number of payment arrangements created and kept
- Enhance communications with customers and contractors
- Reduce call volume and call-handling time
- Increase use of online tools
- Make it easier to do business with your company
Building a Customer-Centric Culture via Journey Mapping

Doris Yon
Senior Business Analyst
About AGLR

By the Numbers

- **4.5 million end-use customers**
- **1.2 million retail contracts**
- **80,700 miles of pipe**
- **5,200 employees**
- **15 states**
Why Journey Mapping?
Engaging E Source’s Consulting Services

Customer Experience

JourneyHub

AGL Resources®
Continuing Our CX Journey

1. Customer satisfaction
2. Customer experience management
3. Trust
4. Engagement
5. Loyalty
6. Advocacy
Outcomes from Our E Source Engagement

- Discovery
- Review of Current Customer Experience Strategy
- Review of Life-Cycle Map
- Prioritization of Journeys to Be Mapped
- Revise Customer Experience Vision
"A *Customer-Centric Culture* that intentionally delivers an outstanding experience that increases engagement, retention, and growth."
Journey-Mapping Outcomes from E Source Engagement

Onboarding process identified as top priority by:

- Presidents & Operations VPs
- Sales & Marketing
- Corporate Communications
- Customer Experience Leaders
- Front-line Employees

Inventory of Journeys and Mapping Onboarding Experience
Creating a Cross-Functional Team

- Construction Operations
- Business Intelligence & Analysis
- Customer Care Center
- Energy Connection Center
- Voice & Quality
- Training
- Utility Business Systems
- AGL Resources
E Source Journey-Mapping Team

Rachel Reiss Buckley

Shawn Silzer

Maureen Russolo

Dan Dent

Melanie Wemple
# E Source Journey-Mapping Approach

<table>
<thead>
<tr>
<th>Educate</th>
<th>Apply</th>
<th>Drive</th>
<th>Champion</th>
</tr>
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<tbody>
<tr>
<td>🎓</td>
<td>🔧</td>
<td>🔑</td>
<td>🏆</td>
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</tbody>
</table>

The image depicts a journey mapping approach from Educate to Champion.
Journey-Mapping Methodology

**Life-cycle inventory**
- Align with strategy
- Prioritize journeys

**Journey map**
- Discovery
- Current state
- Ideation
- Future state
- Gap analysis
Life-Cycle Inventory

The customer life cycle defines the stages a customer goes through when deciding, purchasing, using, and maintaining loyalty to a product or service.

- It creates a framework for inventorying the journeys to be mapped.
- It allows a company to understand the stages a customer goes through when doing business with your company.
- It’s developed from a customer’s perspective, and it begins before direct contact occurs with a company.
Discovery

**Goal:** Determine the goal of journey mapping

Collect data: Voice of the customer (VOC), voice of the employee (VOE)

<table>
<thead>
<tr>
<th>Quantitative</th>
<th>Qualitative</th>
</tr>
</thead>
<tbody>
<tr>
<td>Customer satisfaction scores</td>
<td>Customer surveys</td>
</tr>
<tr>
<td>Net Promoter Score</td>
<td>Focus groups</td>
</tr>
<tr>
<td>Customer effort score</td>
<td>Interviews</td>
</tr>
<tr>
<td>Revenue impacts</td>
<td>Social media feedback</td>
</tr>
<tr>
<td>Call center metrics</td>
<td>Email inquiries</td>
</tr>
<tr>
<td>Website metrics</td>
<td>Regulatory issues</td>
</tr>
</tbody>
</table>
Mapping and Ideation

1. Specific journey
   Narrow the focus to a single customer “intention”

2. Persona
   Use a persona to accurately capture how different people interact with the company

3. Touchpoints
   Collect the artifacts a customer sees, hears, feels, etc.; everything that leaves the walls of your building and enters their world

4. Attributes
   • Emotion
   • Voice of the customer
   • Channels
   • Bonus:
     • Cost
     • Counts
     • Quantitative / qualitative data
Gap Analysis

How to get from here
Gap Analysis

to here.
Impacts of Changes

<table>
<thead>
<tr>
<th>CX</th>
<th>Resources</th>
<th>Cost</th>
</tr>
</thead>
</table>

People

Processes

Systems

Policies
What Did We Learn About Current State?

- Complicated internal & external process
- Complex website navigation
- Limited customer options
- Reactive communication strategy
Where Does Future State Take Us?

From Current State:
- Complicated process
- Complex website navigation
- Limited customer options
- Reactive communication strategy

To Future State:
- “Easy to do business”
- Simple website navigation
- Do business “my way”
- Proactive communication strategy
Improving the Customer Experience

Links allow customers to return to corresponding page to edit information.
Improving the Customer Experience

Previously, customers did not know who to contact with additional questions.

Thank you for submitting your information to Atlanta Gas Light.

A representative from our Energy Connection Center will contact you within the next 2 business days to obtain any additional information needed and finalize your service request.

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Thank you for adding or increasing natural gas service to your home. A representative from our Energy Connection Center will contact you within 2 business days to discuss your order.

If you have any questions, please contact the Energy Connection Center at 800.599.3770, Monday - Friday from 8 a.m. to 6 p.m. or email us at: constructionoperations@aglresources.com. When calling, reference your service address.

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Lessons Learned

Gather VOC data on the front end

Journey mapping is just the start

Not everyone drinks the Kool-Aid

Journey mapping is a continuous process
Journey Mapping Doesn’t Have to Be Painful!

Before

Companies have spent valuable resources to create maps in tedious journey-mapping workshops through a messy manual process.

JourneyHub offers an efficient online platform, not just for visualizing, but also for *collaborating on and sharing* the maps a utility creates.
Why JourneyHub?

- Online platform makes it easy to collaborate, edit, and visualize touchpoints
- Takes analysis to the next level by ranking and calling out focus areas
- Easily share findings
View touchpoints across all channels and business lines

Objectively show which activities need improvement

Build an action plan to reduce O&M costs

Deliver best-in-class customer experiences
M.A.P. Methodology

And now ACCOUNTABILITY too!

MAP

ANALYZE

PRESENT
JourneyHub Demonstration
# E Source Journey-Mapping Offerings

<table>
<thead>
<tr>
<th></th>
<th>Journey-Mapping Road Map and Operational Optimization</th>
<th>Journey-Mapping Operational Optimization</th>
</tr>
</thead>
<tbody>
<tr>
<td>Days on-site</td>
<td>3</td>
<td>2</td>
</tr>
<tr>
<td>Prep and discovery tasks</td>
<td>✓</td>
<td>✓</td>
</tr>
<tr>
<td>Customer life-cycle workshop</td>
<td>✓</td>
<td></td>
</tr>
<tr>
<td>Ongoing customer life-cycle framework and journey-mapping strategy support</td>
<td>✓</td>
<td></td>
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<tr>
<td>Journey-mapping application workshop</td>
<td>✓</td>
<td></td>
</tr>
<tr>
<td>Journey-mapping application assistance and communications strategy</td>
<td>✓</td>
<td>✓</td>
</tr>
<tr>
<td>Summary of key decisions made during the workshop and a business case template</td>
<td>✓</td>
<td>✓</td>
</tr>
<tr>
<td>E Source JourneyHub technical training, sample maps, map templates, and access to the journey-mapping community network</td>
<td>✓</td>
<td>✓</td>
</tr>
<tr>
<td>E Source JourneyHub licenses</td>
<td>✓</td>
<td>✓</td>
</tr>
<tr>
<td>E Source trainers</td>
<td>2</td>
<td>2</td>
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</tbody>
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## E Source Journey-Mapping Offerings (cont.)

<table>
<thead>
<tr>
<th>Journey-Mapping Facilitator Training</th>
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<tbody>
<tr>
<td>Days on-site</td>
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<tr>
<td>Facilitator workshop</td>
<td>✔</td>
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<tr>
<td>Detailed facilitator’s guide</td>
<td>✔</td>
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<tr>
<td>Ongoing, remote facilitator assistance for journey-mapping efforts</td>
<td>✔</td>
</tr>
<tr>
<td>E Source trainers</td>
<td>1</td>
</tr>
</tbody>
</table>
Clients
Learn More

Learn
- E Source Journey-Mapping Operational Optimization
- E Source JourneyHub: Customer Experience Mapping Redefined

Read
- Compass Optional, Using Journey Maps to Improve Customer Experience

Listen
Contact Us

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