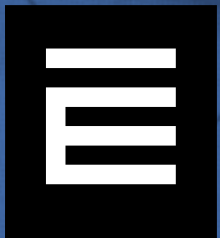


Increase Customer Participation in Value-Added Programs with Journey-Mapping

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Your utility's core business of delivering energy safely and reliably to commercial, industrial, and residential customers is running smoothly and efficiently. But getting customers to participate in optional offerings—whether they're energy-efficiency programs or paperless billing—never seems to get easier. If anything, as you juggle the sometimes competing priorities of customer needs, commission edicts, and organizational goals, increasing program participation becomes more difficult. **If you could improve the customer experience (CX) of those programs and make it easier for customers to engage and participate in them, you'd have happier customers, happier customer service representatives (CSRs), and happier executives. In short, it'd be paradise.**

Unfortunately, due to complexity, volume, and organizational silos, paradise is often lost. Crossed wires and those competing priorities cause improvements to programs to slip farther down the to-do list, so they never actually get done. Participation and customer satisfaction both suffer.

But it doesn't have to be that way. When program managers use CX management techniques like journey-mapping to collaborate with CX professionals and customers themselves, great things can happen. A large midwestern utility learned firsthand the power of mapping its processes from its customers' perspective so that it could analyze and improve the interactions. The results of the exercise speak for themselves. Before we get into that, let's explore what journey-mapping is and how it can help.

“When program managers use CX management, great things can happen.”



Take a Journey in Your Customers' Shoes

Journey-mapping is a way to map, analyze, and visualize how a customer engages with your utility's products, services, online experiences, trade allies, marketing efforts, and other channels. It captures customers' needs (what they're trying to accomplish or the problem they're trying to solve), processes (the steps they go through to achieve their goals), and perceptions (how they feel about their experience) at each touchpoint.¹ **In a recent E Source survey of utilities, 44 percent of respondents indicated that their utility has not done any journey-mapping.** This is a missed opportunity, because utilities that purposefully map their customers' journeys through key interactions accrue a number of benefits:

- Management and employees in various roles throughout the utility have the opportunity to discuss the delivery of products and services in a **customer-focused and cross-functional way**.
- The **cultural transformation** that enables utilities to stop thinking of their customers as “meters” or “ratepayers” moves forward.
- The utility's customers engage directly in **designing and improving their own experiences**.
- Stakeholders throughout a utility **think critically** about the company's brand promise, customer segments, personas, and sources of voice-of-the-customer (VOC) data.
- The utility is better able to **prioritize CX improvement efforts**, focusing on moments of truth.
- The utility develops a visual, easily digestible conversation piece that will help **gain support for CX** throughout the organization.

¹ Touchpoint Dashboard, “Cooking Up a Winning Customer Journey Map” (January 2013), www.touchpointdashboard.com/wp-content/uploads/2013/01/Whitepaper_Cooking-Up-a-Customer-Journey-Map_final.pdf.

Create Your First Journey Map

The journey-mapping process varies from utility to utility, and journey maps can take a variety of forms. Though some maps are highly data-driven, others might be more visual. Some might dive deep into process details, whereas others stay at the 30,000-foot level. More important than figuring out the “right” way to journey-map is to just do it, ensuring that you include the following elements, at a minimum:

- The customer persona (or at least the segment) whose journey you want to map
- The steps of the customer’s journey and the touchpoints within your utility that the customer encounters along the way
- Any available quantitative and qualitative data, including direct customer and employee feedback

While mapping, it’s helpful to keep the following guiding principles in mind:

- **Journey-mapping is an ongoing activity.** Once your first journey-mapping session is over, the actual process of continuous improvement has only just begun.
- **Journey-mapping is a collaborative process.** Engaging the right cross-functional stakeholders and keeping them informed and engaged are critical to a valuable journey map, so make it easy for others to participate, share, and contribute on an ongoing basis.
- **Journey-mapping must take the customer’s perspective.** Use data and empathy to view the journey through the customer’s eyes.



Creating your first journey map can be a challenging experience, requiring a great deal of preparation, customer insight, and facilitation skill. If you’re new to the exercise, consider finding someone who has led journey-mapping workshops in the utility industry before. E Source has helped an ever-growing list of utilities tackle this difficult but rewarding experience with our **Journey-Mapping Operational Optimization** consulting solution.

Prepare for Your Journey-Mapping Session

Like most things worth doing, good journey-mapping starts with good preparation (**Figure 1**). Begin by selecting the journey you're going to map. For your first mapping exercise, pick a bite-sized journey that won't wear you and your stakeholders out. If you start trying to map the entire meter-to-cash journey, you might have an unmanageable scope that will frustrate your journey-mapping team and won't result in the powerful insights and improvements that you're likely to achieve with a smaller journey. Consider, for example, looking only at how you handle customers in arrears, how you set up payment arrangements, or how customer payment and reconnection of service happens.

FIGURE 1: The journey-mapping journey

The process of mapping a customer journey doesn't have to be hard. Taken in steps, it can be its own journey.





Gather Stakeholders and Data

After you've chosen the journey to map, you'll need to make sure you get the right people in the room to create the map. Which internal departments are involved in the journey you've selected? Who provides inputs to or receives outputs from that journey? Who else is invested in, interested in, or affected by the journey? Which customers will you recruit to participate in the journey-mapping session or, at a minimum, to validate the first draft of the map? Once you have the answers to these questions, make sure you're able to secure participation from all of these key stakeholders.

Though all this preparation is critical, you're still not quite ready to get in a room and start mapping. Before you get started, you'll want to gather as much available data about the journey and its related touchpoints as you can. Whether this data comes from your customer information system, smart meters, billing, customer surveys, employee surveys, or anywhere else, you'll want to make sure that you're able to familiarize your mapping team with it so that you can validate or disprove assumptions and opinions during the mapping session.

Ready, Set, Map!

You've chosen a bite-sized journey, made sure the right people are in the room, and gathered plenty of data to guide the process. Now that you're well prepared, it's time to start journey-mapping.

At the outset of your journey-mapping session, it's very important to remind all participants that journey-mapping is done from the customer's perspective. After decades of internally focused process-mapping, this point cannot be overemphasized. Capturing internal processes that support, enable, or constrain the customer's journey is important, but **the primary purpose of journey-mapping is to truly understand what the customer experiences as he or she interacts with your utility.** Throughout the session, it will be necessary to ask the participants questions to keep the focus on the customer's experience. Following are some sample questions that you might find helpful:





- How does the customer feel at this point?
- What is the customer trying to accomplish here?
- What's the next step the customer will take?
- Where is the customer when he or she does that?





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There's no single correct way to create a journey map. Whether you use a spreadsheet, sticky notes, or purpose-built software like **E Source JourneyHub**, the process will be similar. To ensure that your journey map is as valuable as possible, you'll want to include the following elements:

-  **Persona or segment.** To ensure accurate customer empathy throughout the journey-mapping process, it's helpful to choose just one customer persona or segment through which to view the journey. As a reminder, personas are a bit like characters who represent a utility's different customer types. These types are differentiated by demographics, attitudes, behaviors, lifestyles, and so forth, and are used to segment, design, and monitor the customer experience. Make the persona as vivid as possible by giving him or her a name, a photo, and a short bio.
-  **Touchpoints.** These are the points in the journey when a customer interacts with or is directly affected or impacted by the utility.
-  **Emotions.** How does the customer feel at each touchpoint? Is it a positive, negative, or neutral emotion? Remember what poet Maya Angelou said: "People will forget what you said, people will forget what you did, but people will never forget how you made them feel."
-  **Key moments of truth (KMOTs).** Highlight the touchpoints on your journey map that occur at a time and place that can make or break your utility's relationship with the customer, that can increase or decrease the utility's brand value, or that can materially enhance or detract from customer satisfaction and the customer experience.

-  **Channels.** For each touchpoint, you'll want to capture how the customer is interacting with the utility, for example, via a phone call to the contact center, via the website, via the mobile app, via online chat, and so forth.
-  **Phases.** These are the major groupings of activities—or subjourneys—within a journey. Participating in a utility's program, for example, might involve the following phases: discovering the need, exploring options, inquiring, deciding to participate, and participating.
-  **Owners.** Internally, who is responsible for each touchpoint? Whose scorecard is—or should be—tracking the performance of that touchpoint?
-  **Measurements and metrics.** Include any currently available data that indicates the internally measured performance of any given touchpoint.

Expect your journey-mapping session to be filled with insights, surprises, and tension, as the true journey that your customer experiences collides with long-held assumptions, deep-seated misconceptions, and a sometimes shocking lack of awareness of the ground truth. The discussions, debates, and decisions that arise during a journey-mapping session can add tremendous value beyond that delivered by the completed journey map itself. The collaborative journey is its own reward.

Analyze Your Journey Map

Once you have a draft of the journey map that you feel accurately and thoroughly represents the customer experience currently being delivered, you're ready to analyze the map.

Begin your analysis by looking at the map holistically. On balance, do you see more positive emotions or negative emotions? Does your customer have a lot of interactions with you during the journey or only a few? Do your customers have their choice of channels for these interactions or are they restricted to just one or two?

Only after you have a holistic sense of the customer journey should you start homing in on individual touchpoints. As you do so, start with KMOTs and evaluate the types of emotions associated with them. Moments of truth with positive emotions can reveal strengths that should be leveraged, whereas KMOTs with negative emotions might be opportunities for improvement. Pay attention to neutral emotions too, because these can be interactions where the customer isn't as engaged as he or she could be.



Present Your Journey Map

After your initial analysis of the journey map is complete, it's time to share it broadly, both throughout the organization and with customers.

If you weren't able to include customers in the initial creation of the journey map, now is the time to invite their feedback and input. First, you want to validate the map with customers. Does it accurately represent their experiences? Are touchpoints missing? Are the associated emotions in line with their perceptions?

Next, you'll want to engage customers in analysis, improvement, and co-creation. If they could redesign the journey, what would it look like? Which touchpoints could be improved? Which are redundant or superfluous? In which channels would they prefer to initiate and complete this journey?

Some of the greatest power of your journey map, however, will come from sharing it with coworkers and leaders inside your utility. Just as the journey-mapping team confronted assumptions and debunked myths about the customer's experience, others throughout the organization will be similarly challenged by the true story your journey map tells. **Employees from the front lines to the back office will gain a much greater understanding of their impact on the customer's experience once they understand the whole journey.**



How Journey-Mapping Helped One Utility Increase Program Participation



Nicor Gas is the largest natural gas distributor in Northern Illinois, serving more than 2.2 million customers. The company's successful energySMART program has helped homeowners, renters, and businesses save more than 34 million therms and earn more than \$37 million in rebates and cash incentives. Recently, new and more-stable energy-efficiency goals have prompted Nicor to examine its CX and figure out innovative ways to improve customer satisfaction and achieve energy savings.

Meena Beyers, director of energy-efficiency marketing at Nicor, began the company's journey-mapping efforts using Microsoft Excel and Microsoft Visio, but has since migrated to E Source JourneyHub, finding it more intuitive and easier to incorporate into her daily workflow. She says, "We work very collaboratively here at Nicor Gas across different departments and with different teams, but we don't always have conversations about our customers together."

Beyers led the energy-efficiency marketing team as it created journey maps of many of Nicor's branded experiences. One of the more powerful insights the team gained was also one of the simplest.

While journey-mapping Nicor's rebate process, the team realized that the customer's journey begins when a furnace fails. At that point, the customer calls the contact center rather than the energy-efficiency program. The contact center, in turn, refers the customer to the phone book to find a contractor, unaware of Nicor's contractor network and the "find a contractor" feature on the website. Once the journey map helped identify this issue, the energy-efficiency team collaborated with Customer Care on a solution that will increase participation in rebate programs.



Choose a Solution to Simplify Journey-Mapping

Journey-mapping done right is no small undertaking. It requires a significant investment of people and time. Though the returns on that investment can be tremendous, it still pays to invest as smartly as possible by streamlining the process of mapping, analyzing, and presenting your journey map.

Guidelines to Simplify Journey-Mapping

Journey mapping can be challenging—especially the first time—so keep these guidelines in mind to simplify the process:

- **Make collaboration easy.** Cloud-enabled software solutions make it easy for people in multiple locations to create and analyze the map, either simultaneously or asynchronously.
- **Make analysis easy.** Purpose-built journey-mapping software allows people to view journey maps from different perspectives and with different filters.
- **Make sharing, updating, and customizing easy.** Journey-mapping solutions that enable creation, dissemination, and revision of compelling and clear journey maps will facilitate quick reviews and keep everyone on the same page.
- **Make the start-to-finish process easy.** An experienced partner—especially one with expertise in your industry—can shorten the learning curve and get you up and running faster.

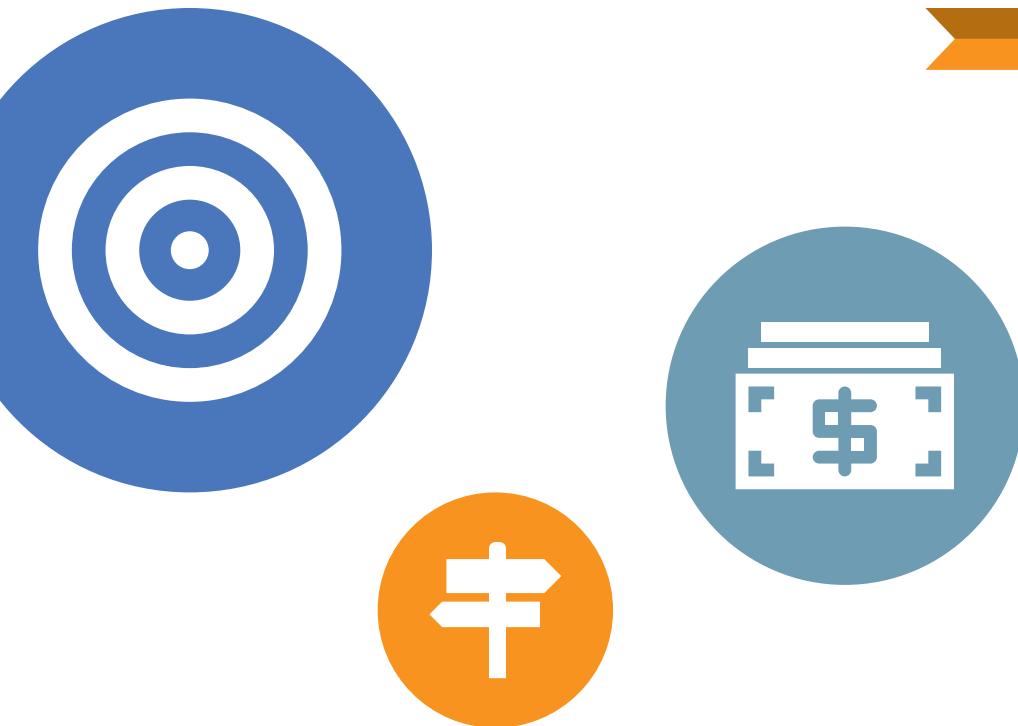
Journey-Mapping Can Take Your Programs from Pedestrian to Paradise

If you want to finally get a handle on streamlining and increasing participation in your value-added customer programs, journey-mapping could be the solution you've been looking for. As we saw from Nicor Gas' experience, the powerful insights that journey-mapping enables can have a dramatic impact on a utility's optional programs—not to mention the bottom line.

Don't feel badly if the whole process seems a bit overwhelming. Journey-mapping is a set of skills that has to be learned and practiced. Once you've got the training, however, you can be the catalyst that creates happier customers, happier CSRs, and

happier executives. It might not exactly be paradise, but it just might feel that way.

And if you need help along the way, E Source is always here. Our unique combination of deep knowledge of the utility industry and cross-industry CX expertise makes us the most powerful partner you can choose to journey-map your way to better results. Utilities throughout the US and Canada have found enormous value in our extensive library of research, the powerful JourneyHub cloud-based software application, and our cadre of expert researchers and advisors.



Visit **www.esource.com** or call
1-800-ESOURCE (1-800-376-8723)
to find out how we can help you
**find your way
to paradise.**





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Maureen Russolo, Vice President of Consulting Solutions at E Source, helps utilities improve their customer experience across all contact channels and touchpoints. Her collaborative approach delivers solutions that produce operational savings for utilities and an enhanced experience for their customers, drawing on her expertise in customer experience, journey-mapping, and self-service enhancements in energy, insurance, and consulting, as well as in customer relations, contact center management, change management, and strategic planning. Maureen has held customer experience leadership positions at Union Gas Limited and Green Shield Canada, and worked for Washington Web Architects, consulting with utility and technology companies to deliver optimal customer experiences and operational efficiencies. She is a founding member of the Customer Experience Professionals Association, a certified customer experience professional, and a certified change management professional.



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