Getting your entire organization on board with your CX priorities

Eryc Eyl, Senior Solution Director
Lisa Schulte, Product Strategist

Online exchange

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Your hosts for today

Eryc Eyl

Senior Solution Director,
Customer Experience

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Lisa Schulte

Product Strategist,
Customer Experience

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This is a virtual roundtable discussion

Participation is essential

We'll publish a recording and slides on the event page

Use Zoom's Q&A feature to pose questions and share comments

Rename yourself to include your utility or city name

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Key takeaways

Utilities struggle to build customer experience (CX) support across all levels of the organization.

Cultivate more vocally supportive executives, midlevel managers that promote and empower employees to deliver great CX, and employees that understand CX and how it relates to their role at your utility.

Use CX councils to bring together cross-functional leaders to prioritize CX.

Employee councils for front-office employees can also be an effective tactic to engage customer-facing employees directly in CX improvements.

While most customer-facing employees receive soft-skills training, there's more opportunity to educate others across the organization about CX.
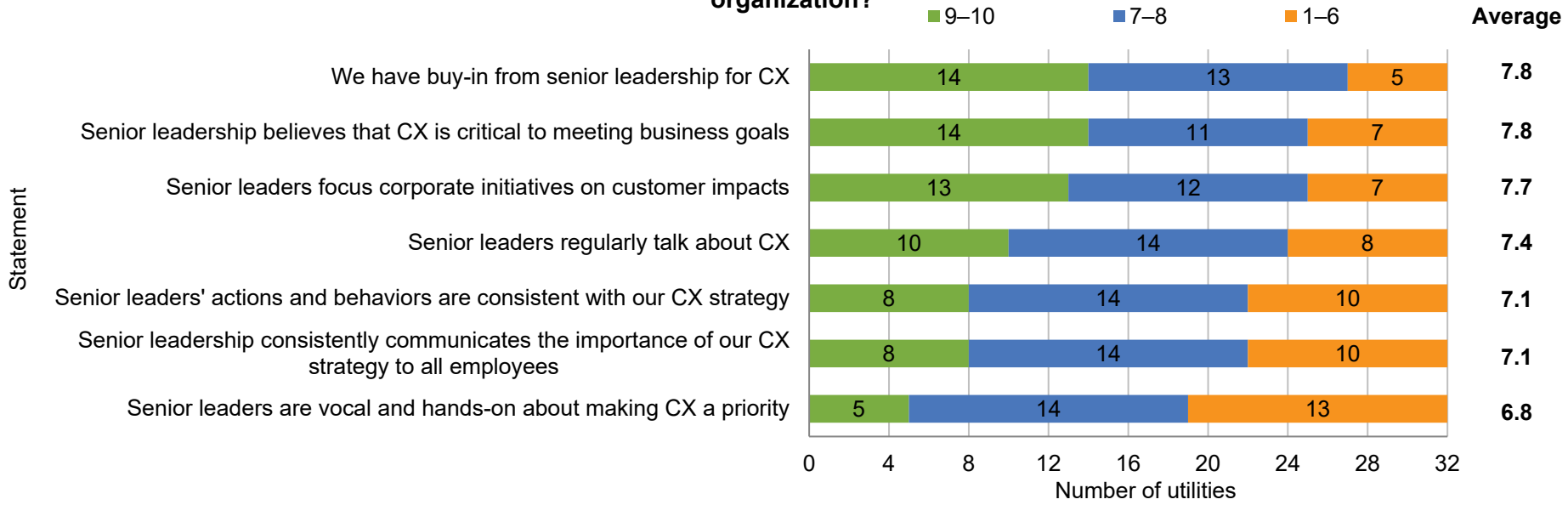
Senior leadership and those in departments like demand-side management aren't receiving much CX training.

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Challenges with building a customer-focused organization

Senior leadership doesn't effectively convey the importance of CX

How strongly do you agree or disagree with the following statements about CX management at your organization?
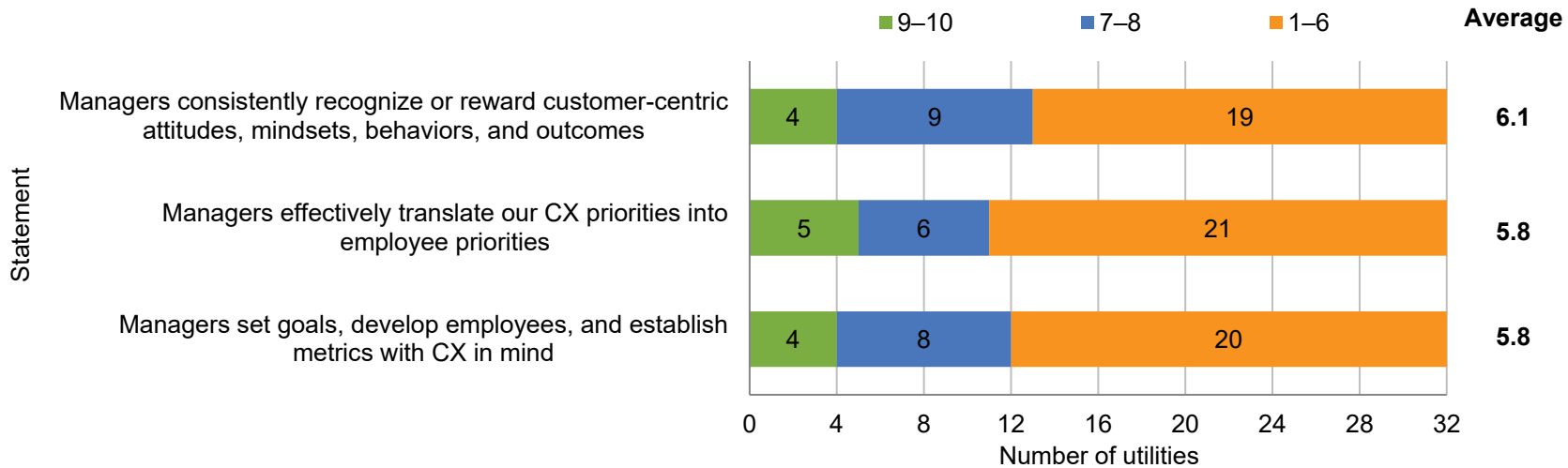
Legend: ■ 9–10 ■ 7–8 ■ 1–6

Average

Statement	9–10	7–8	1–6	Average
We have buy-in from senior leadership for CX	14	13	5	**7.8**
Senior leadership believes that CX is critical to meeting business goals	14	11	7	**7.8**
Senior leaders focus corporate initiatives on customer impacts	13	12	7	**7.7**
Senior leaders regularly talk about CX	10	14	8	**7.4**
Senior leaders' actions and behaviors are consistent with our CX strategy	8	14	10	**7.1**
Senior leadership consistently communicates the importance of our CX strategy to all employees	8	14	10	**7.1**
Senior leaders are vocal and hands-on about making CX a priority	5	14	13	**6.8**

Number of utilities (x-axis: 0, 4, 8, 12, 16, 20, 24, 28, 32)

Discussion

- How is leadership at your utility establishing the importance of CX? What tactics do they use (discussing it in company events, including CX in key performance indicators, etc.)?

- How have you had success cultivating support for CX priorities at the executive level?

- What are the biggest barriers to cultivating customer-focused or customer-centric executives?

Midlevel managers are critical to make CX "real" for individual contributors

How strongly do you agree or disagree with the following statements about CX management at your organization?

Legend: ■ 9–10 ■ 7–8 ■ 1–6

Statement	9–10	7–8	1–6	Average
Managers consistently recognize or reward customer-centric attitudes, mindsets, behaviors, and outcomes	4	9	19	**6.1**
Managers effectively translate our CX priorities into employee priorities	5	6	21	**5.8**
Managers set goals, develop employees, and establish metrics with CX in mind	4	8	20	**5.8**

X-axis: Number of utilities (0, 4, 8, 12, 16, 20, 24, 28, 32)

© E Source (2022 Customer Experience Survey). **Base:** All respondents (n = 32 utilities). **Question S2_2:** On a scale of 1–10, where 1 means strongly disagree and 10 means strongly agree, how strongly do you agree or disagree with the following statements about CX management at your organization? **Note:** CX = customer experience.
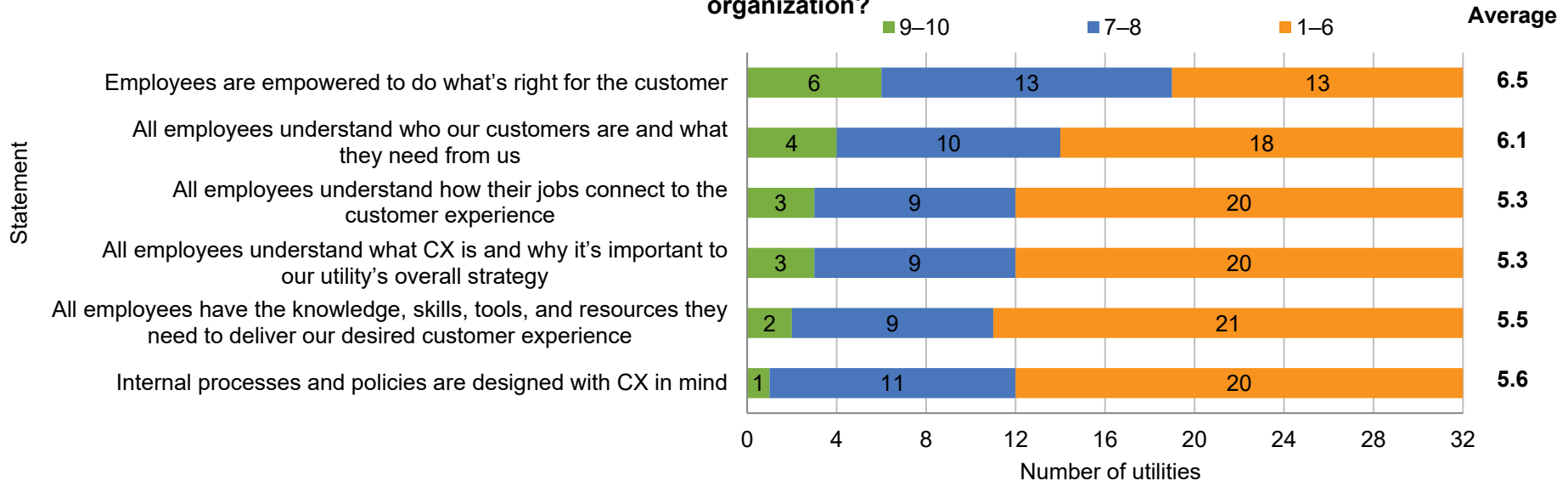
Discussion

- What are your expectations of managers regarding promoting CX with their direct supports and teams?

- What tools do managers have to develop understanding of CX and be a part of your CX strategy? Do you train managers in CX? Are they empowered to reward customer-centric behavior?

- What are the biggest barriers to cultivating customer-focused or customer-centric management?

Employees aren't enabled or empowered to deliver great CX

How strongly do you agree or disagree with the following statements about CX management at your organization?

Statement	9–10	7–8	1–6	Average
Employees are empowered to do what's right for the customer	6	13	13	6.5
All employees understand who our customers are and what they need from us	4	10	18	6.1
All employees understand how their jobs connect to the customer experience	3	9	20	5.3
All employees understand what CX is and why it's important to our utility's overall strategy	3	9	20	5.3
All employees have the knowledge, skills, tools, and resources they need to deliver our desired customer experience	2	9	21	5.5
Internal processes and policies are designed with CX in mind	1	11	20	5.6

Number of utilities (x-axis: 0, 4, 8, 12, 16, 20, 24, 28, 32)

Discussion

- How are you making it easier for employees to deliver great CX?

- How are you ensuring that employees have the knowledge, skills, tools, and resources they need?

- What are the biggest challenges to cultivating customer-focused or customer-centric employees?

Tactics to make CX a priority across the organization

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CX councils

What's a CX council?

A cross-functional group of senior leaders, managers, and subject-matter experts (SMEs) from across the utility that serves as a cornerstone of advocacy, engagement, and governance.

Who's involved?

- Executive sponsor such as the chief compliance officer or other VPs
- CX lead who runs the council and is responsible for agenda, recruitment, scheduling, etc.
- Cross-functional representatives from Customer Care, Public Affairs, Corporate Communications, Operations, Marketing, IT, Finance, etc.
- Project managers and SMEs to assist with prioritized projects

Key functions

- Evaluate and prioritize CX improvement opportunities
- Ensure progress on the portfolio of approved CX initiatives
- Review CX metrics and results
- Plan communications about CX initiatives

Keys to success for your CX council

Continuous, active, and visible executive support of the CX strategy and priorities

Cross-functional cooperation and collaboration of the council's members

Effective leveraging of change management practices in all CX improvement projects

Communication of CX strategy and priorities throughout the utility

Alignment with all business units, channels, and resources, including IT and outsourced partners, to deliver prioritized improvements

Discussion

- How is your CX council organized and what are its goals and responsibilities?

- Any advice to make a council more successful?

- What struggles do you have?

Employee councils

What's an employee council?

A group of front-office and other employees with direct experience in delivering services to customers. This group meets on a regular basis to identify CX opportunities and share with those responsible for prioritizing CX improvements.

Who's involved?

- Front-office employees such as customer service representatives (CSRs), billing, etc.
- New Jersey Natural Gas has two councils:
  - Office council—CSRs, cashiers, dispatch, revenue, and marketing CSRs
  - Field council—construction leaders, first responders, gas mechanics, utility workers

Key functions

- Bring employees together to serve as CX ambassadors
- Gather ideas for CX improvements based on direct experience delivering service to customers
- Prioritize ideas to present to leadership

Discussion

- Does your utility have any employee councils? How does it function?

- What's been successful?

- What struggles does the council have?

Employee CX training

The most frequently chosen type of CX training for each type of employee is:

Formal soft-skills training

- Contact center representatives (20 utilities)
- Field employees (16 utilities)
- Walk-in center employees (16 utilities)
- Business customer account managers (15 utilities)
- Product or service managers (12 utilities)

Other types of CX training

- Directors (11 utilities)
- Senior leaders (10 utilities)
- DSM or CDM program managers (8 utilities)

CX conference attendance

- Managers (13 utilities)
- DSM or CDM program managers (8 utilities)

CX training isn't offered for this group

- DSM or CDM program managers (8 utilities)

© E Source (2022 Customer Experience Survey). **Base:** All respondents (n = 32 utilities). **Question S2_7:** What type of training do the following groups of people in your organization receive regarding customer-centric attitudes, skills, and behaviors? Select all that apply. **Notes:** CDM = conservation and demand management; CX = customer experience; DSM = demand-side management. Only the top type of training for each group is shown.

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Discussion

- What type of CX training do you provide for employees?

- What has been most successful?

- Where do you struggle most with training employees in CX?

Other tactics?

- Have you used customer journey mapping to involve employees across the organization in improving CX?

- What other tactics have you used to help make CX a priority across your organization?

- What else did you want to discuss today?

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Questions?

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Contact us

Eryc Eyl

Senior Solution Director,
Customer Experience

E Source

eryc_eyl@esource.com

Lisa Schulte

Product Strategist,
Customer Experience

E Source

lisa_schulte@esource.com

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