

# Reduce operating costs while improving the customer experience for new construction

Barbara McCabe, E Source  
Melanie Wemple, E Source  
Dan McNair, SoCalGas  
Lanita Greer, ComEd

Web conference



**E Source**

We understand utilities and municipalities because we've made them our business for more than 30 years.



## Utility research and consulting

Using market research data, expert analysis, and industry experience to help utilities put their customers first, meet their business objectives, and solve their corporate challenges



## Predictive data science

Helping electric and gas utilities make data-driven decisions that improve their bottom line and increase customer satisfaction



## Strategic utility consulting

Advancing business and technology solutions that strategically enhance operations for utilities and their cities.

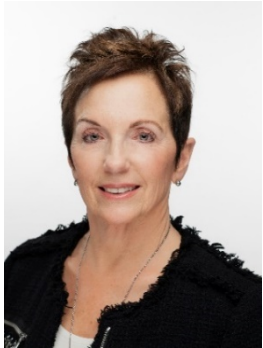
# Today's presenters



Melanie Wemple  
Senior Managing Director,  
Consulting and Advisory Services  
E Source  
720-425-2262  
[melanie\\_wemple@esource.com](mailto:melanie_wemple@esource.com)



Dan McNair  
Manager, New Business  
Customer Experience  
Southern California Gas Co.

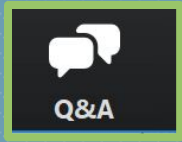


Barbara McCabe  
Senior Managing Director,  
Consulting and Advisory Services  
E Source  
619-884-5838  
[barbara\\_mccabe@esource.com](mailto:barbara_mccabe@esource.com)



Lanita Greer  
Customer Experience  
Manager, Distribution  
Operations  
ComEd

# Submit your questions using Zoom Q&A



Use the Q&A button on the bottom of the screen to send your questions to our team.

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# We're polling today!

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# Why now?

## The value of examining new construction

- Construction trends are generally positive despite COVID-19-induced health and economic uncertainty
- There are many opportunities to innovate and redesign work practices and policies while keeping employees and customers safe
- “Doing more with less” continues to be utility mantra
- The new-construction experience habitually dissatisfies customers, contractors, and builders

# Is improving the new-construction process on your roadmap?

- Yes, starting within 3 to 6 months
- Yes, starting within 6 to 12 months
- Yes, starting in more than a year
- Nope, not yet
- I don't know
- We've already started

Online: [pollev.com/esource1](https://pollev.com/esource1)

or

Text: **ESOURCE1** to **22333**

When poll is active, respond at [PollEv.com/esource1](https://www.poll-ev.com/esource1)

Text **ESOURCE1** to **22333** once to join

## Is improving the new construction process on your roadmap?



Total Results: 25



# Today's agenda

- E Source's transformational approach
- Redesigning SoCalGas's large-builder experience
- Improving ComEd's residential experience

# How we do it: From first call to install




## Current-state assessment

- Interview project managers, crews, set desk, meter installers, etc.
- Analyze existing operational and VOC data
- Assess customer-facing documents and the digital experience
- Summarize findings and validate



## Voice of the customer (VOC)

- Interview customers (homeowners, contractors, and builders)
- Survey customers
- Summarize key drivers, insights, and implications



## Customer journey mapping

- Share current-state assessment and VOC data with a cross-functional team
- Map the current state
- Design the future state



## Improvement initiatives roadmap

- Validate improvement ideas with stakeholders
- Prioritize recommendations
- Finalize the roadmap

# Typical new-construction insights

## Customer experience improvements

- Lack of definition of customer
- Key moments not identified
  - Design complete, payment, inspection, construction, meter set, billing
- Poor pre- and postinstallation communications with customer
- Complex or inaccurate guides and manuals

## Cost-saving opportunities (approximately 20% to 30%)

- Reduce unnecessary calls with self-service and preemptive communications
- Break down silos and reduce back-and-forth between departments
- Increase access to and understanding of end-to-end project information

An aerial view of a city with a complex network of glowing white lines overlaid, representing a digital or network infrastructure. The lines connect various points across the city, creating a web-like pattern. The background is a blue-tinted aerial photograph of a city with many buildings and roads.

# Redesigning SoCalGas's large- builder experience



# IMPROVING THE BUILDER CUSTOMER EXPERIENCE

Dan McNair, NBCX Manager

# Business Drivers for New Business Customer Experience (NBCX)

2018

Political pressure increases and intensifies push to electrification

Major builders express dissatisfaction in the support received from SoCalGas on new construction projects

2019

Natural gas banned or restricted in new construction  
E.g.:

- Berkley
- San Jose
- Santa Rosa
- Mountain View
- West Hollywood
- Santa Monica
- Marin County

New semi-competitive environment where natural gas is optional in new construction

NBCX was created to...



**Focus on the Customer Journey**

Measure and act on new business customer experience feedback and input



**Technology Enhancements**

Create and enhance applications that improve customer experience



**Process Improvements**

Implement process efficiencies that improve customer experience

# NBCX Project Timeline

May - June

## CURRENT STATE ASSESSMENT

Interviewed 53 employees:

*Globally, if we truly want to make a change in builder satisfaction, there needs to be a priority placed on the builder relationship (...because they are pushing toward electrification). We view them internally as hard to deal with.*

*They are the customer - we are delivering gas to them, for future homes. This needs to be viewed as a partnership. For the front lines, this is not a priority...Everyone must feel they have a stake in the game.*

*There needs to be a culture change regarding how we view New Business. These are our customers too - they are not needy, we need to meet them where they are.*

July

## VOICE OF THE BUILDER

Interviewed 27 employees from 8 major builders; received survey responses from additional 7 companies :

- Desire for one point of contact end-to-end
- Planners make or break the relationship
- Performance is inconsistent

*“We don't have any way of predicting what's going to happen. It's hard to plan. We need to close escrow.”*

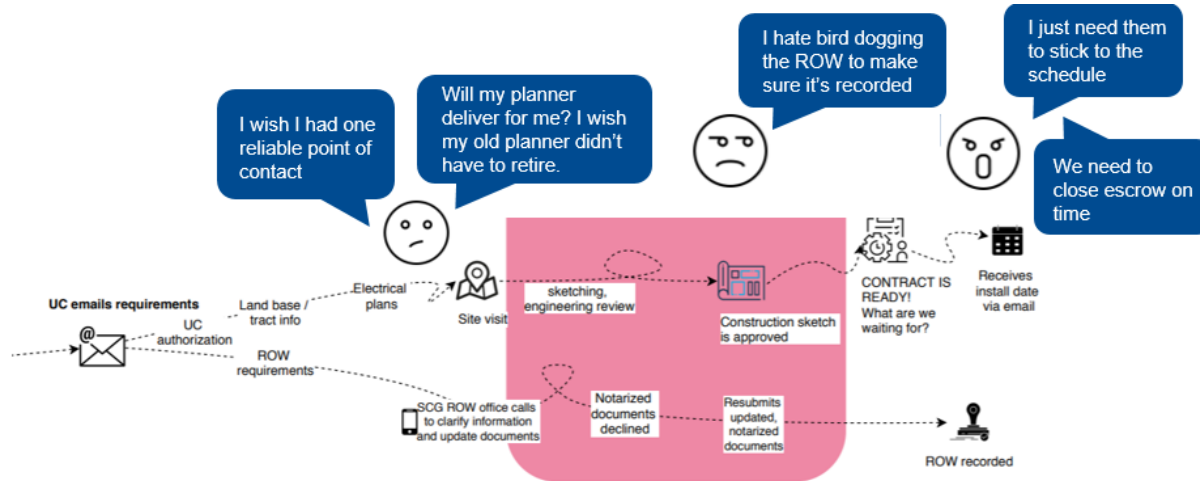
*—Toll Brothers*

# NBCX Project Timeline (continued)

August

## JOURNEY MAP CURRENT STATE

- Cross-functional team of SMEs



## DESIGN FUTURE STATE

- Create efficient and consistent experience
- Improve planning and scheduling
- Provide one consistent point of contact
- Measure builder relationship
- Effectively manage changes



# Begin Detailed Design and Implementation

Q42019 – YTD

## CX Alignment & Change Management

- Executive listening tour
- CX intention statement
- CX playbook
- Change management strategy
- Road shows

## Planner Training and Coaching

- Redesigned training curriculum
- Designed, approved nesting & coaching program
- Created training prerequisite
- Developed day-in the-life video
- Updated job description

## Voice of the Customer Survey

- Created builder survey at 5 key points in NB process
- Designed closed loop feedback process
- Defined builder health scorecard and metrics

## Builder Executive Role

- Conducting pilot – providing one consistent point of contact across five business units
- At work on future-state role that's more accountable for a major builders' long-term success

# Complete Implementation and Continue Improvements June to December 2020

## CX Alignment

- Continue to engage sr. execs
- Develop / implement comm. plans
- Implement CX Ambassador program to support cultural change
- Onboard internal change management resources
- Introduce & reinforce overall NB changes

June-EOY

## Planner Performance

- Redesign **training content** to meet new curriculum
- Prepare, introduce, align **nesting program**
- Prepare, introduce, align **coaching program**

June-EOY

## Builder Executive Role

- Create Builder Executive Training Program
- Develop plan and timelines to implement territory-wide
- Get the builder executive role started with HR
- Explore process changes to support the builder executive role

June-EOY

## Voice of the Customer

- Construct customer sample and analyze data
- QA contractor calls
- Audit data for accuracy of Health Scorecard
- Manage internal feedback loop to complete root cause analysis
- Leverage survey results

June-Sept

## NB Support Processes

- Deep dive current state
- Identify quick wins
- Create roadmap to achieve CX vision

### For:

1. **Quit-claim**
2. **Meter Set Desk**
3. **Scheduling & Dispatch**

July-October

## CRM

- Define business requirements
- Assess vendors & products based on business requirements
- Develop business case to make data-driven go/no-go decision

July-October

# Thank You!



# Improving ComEd's residential experience



An Exelon Company

# Improving the residential customer experience

June 2020

# Business Drivers for the Project

- Low customer satisfaction due to:
  - Delays in initial customer contact and quality of communications
  - Lack of timeliness in providing power and responses to customers
  - Inexperienced and inadequately trained GSRs and NCRs
  - Large number of excluded surveys unaddressed
  - Low call-ahead rates
  - Lack of respect for customer property



# New Business Project Background

- Q2 2018: New Business Strategy Development
  - Current-state assessment
  - Voice of the customer (residential and contractors)
  - Journey mapping and CX strategy
- Q3-Q4 2018: ComEd partnered with E Source to
  - Review our business processes
  - Overhaul our training offerings
  - Examine organizational structure

# New Business Initiatives

- 2019: New Business Leadership Team launched several initiatives based on E Source's recommendations:
  - Improve communication with customers and stakeholders
  - Provide employees with improved, sustainable training curriculums
- ✓ Ultimately make it easier for customers to do business with us



# Improvement Initiatives

- New Business Central (call center) improvements
  - Management training on systems
  - Incumbent employee training
  - New call center metrics
- Deployed Process Improvements for Construction & Maintenance and Field & Meter Services
  - Customer call-aheads for installation date
  - Doorknob cards for ComEd inspections
  - Developed scripts for consistent communication
  - Established 48-hour call-back expectations

# Improvement Initiatives

- Project Planning Improvements
  - Soft skills training for GSRs, who manage projects, so they can:
    - Provide timely, accurate information
    - Provide timelines for project execution
    - Increase customer confidence in project owners
  
- Training during COVID-19
  - Shifted to virtual
  - May continue long term due to significant cost savings, reduced drive time, etc.
  
- Expected results
  - Better interactions between NB and our customers
  - Increased customer satisfaction rates
  - Improved reputation of NB with customers

# Improvement Initiatives

- New Business Surveys
  - Centrally located records provide greater access and action for improvements
  - Increased accountability to performance
  - Better understanding of customer pain points
- Internal Stakeholders Toll Free Number
  - Quicker contact with NCRs
  - Reduced hold times for external customers
  - No impact to service level or KPIs
- Better Oversight of Outstanding Customer Requests
  - Reporting to drive accountability and track measurements
  - Work down action plans implemented – **63% reduction**

# Improvement Initiatives – NEXT

- Make it Easier for Customer to Self-Serve Online
  - Improve NB Online Portal
  - Obtain feedback from portal users
  - Implement “Quick Hits” for customer use
  
- Make it Easier for Customers to Pay Us
  - Allow NBC to take payments
    - Currently restricted to general call center = poor customer experience
  - Increase limits for credit card payments
    - Currently \$5,000 limit
  - Review and improve customer contract language

THANK YOU!

# How E Source can help

- Identify bottlenecks in the new-construction process
- Pinpoint the numerous handoffs and help eliminate them
- Bring the voice of the customer into the process
- Develop a tailored training curriculum for employees in the new-construction process

# Thank you!



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