Customer Journey Mapping Project Summary

Emily McGraw, Consumers Energy Amanda Dwelley, Illume Advising

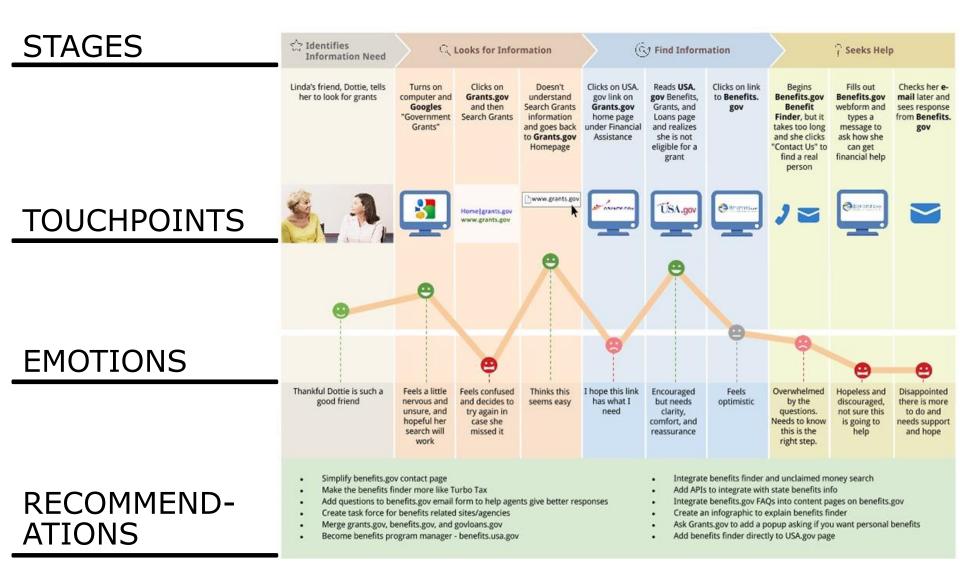


Project Objectives

- Adapt residential programs fit the customer
- Guide EE customer journey within & across solutions
- Improve customer experience & satisfaction



What is a Journey Map?



https://www.digitalgov.gov/2015/08/12/journey-mapping-the-customer-experience-a-usa-gov-case-study/

ILLUME





CLEAResult





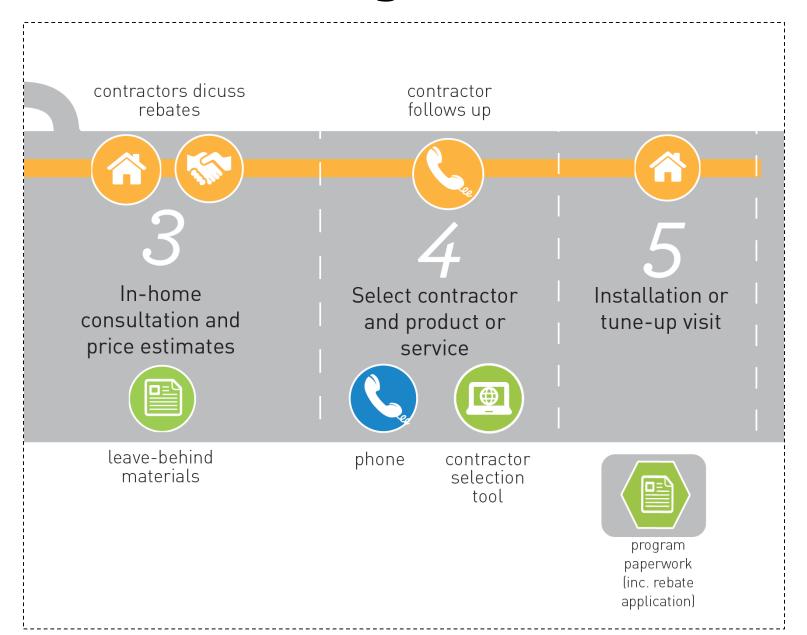


Example Future State Map



one map for each residential program

stages

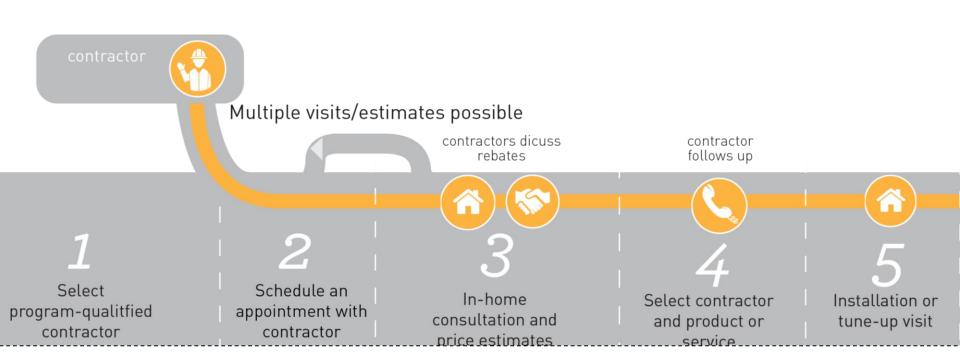


entry points

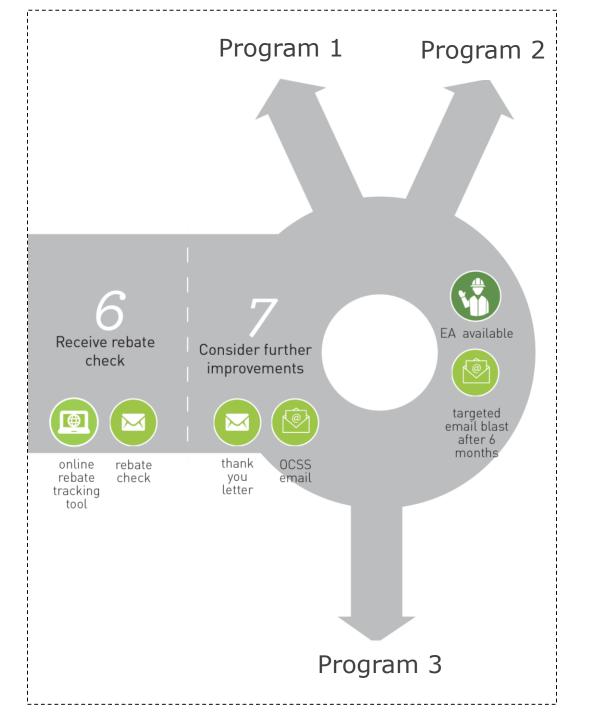
word of mouth CE website home shows mass marketing advertising Select program-qualitfied direct mailing contractor advertising targeted email blasts word of in contracto call mouth person contractor selection contractor 1 interaction mass tool marketing contractor direct mail

touchpoints

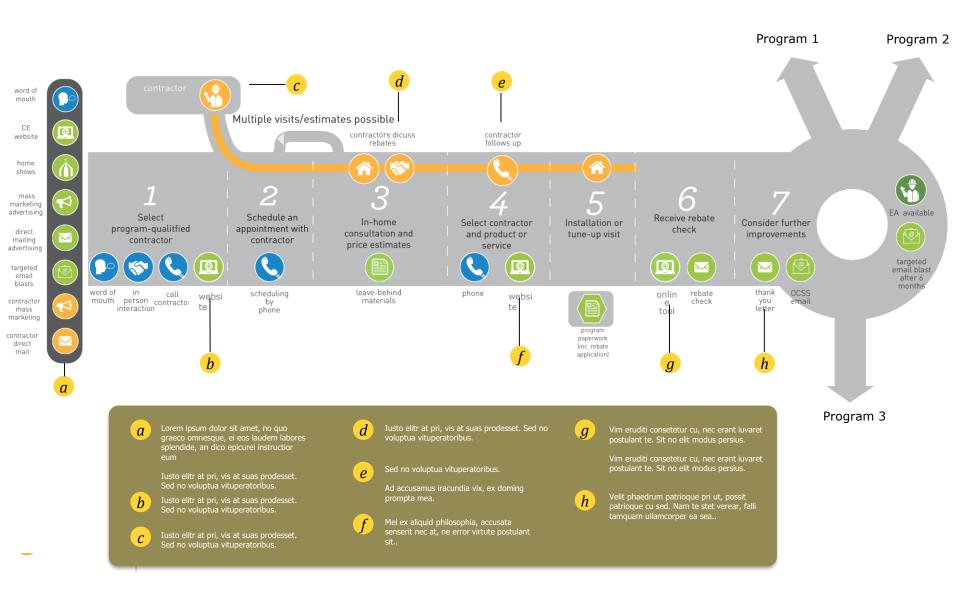
facilitators



next steps



recommendations

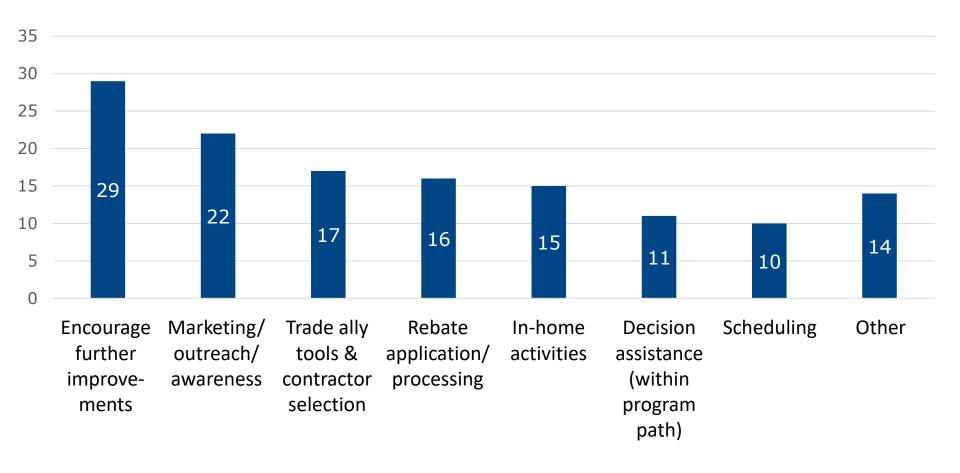


Gap Action Plan

| | | | | | | | | | • | |
|-------------------------|--|--|---|---|-------------------------------------|--------------------------------|-----------------------------|---|--|--|
| FUTURE STATE ITEM | RECOMMENDATION | | | TOUCHPOINT | IMPACT ON CUSTOMER EXPERIENCE | EASE OF IMPLEMENT- ATION | INITIATIVE UNDERWA' ? | | | |
| a (1) | Highlight the non-energy benefits of appliances in mass marketing. | | | Mass marketing | Medium | Moderate | No | Long-term planning | | |
| a (2) | Create a find-a-retailer tool to help customers find qualifying equipment. | | | CE website | Medium | Difficult | No | Long-term planning | | |
| b | Create separate re | reate separate rebate stickers for single-fuel areas. | | | Medium | Easy | Yes | Easy Win | | |
| С | Partner with retaile | artner with retailers to provide in-store application support. | | | Medium | Moderate | No | Long-term planning | | |
| d | Provide paper app | lications and clea | r directions to online application in stores. | Rebate application | High | Easy | No | Easy Win | | |
| e f (1) | Encourage retailer product page. Create a clear pat webpage. | 4 | Submit rebate application | | | | | ENERGY S | TAR® Appliance Future State Gap Analysis and Action Plan | |
| f (2) | Develop a rebate information. | o a rebate RECOMMENDATION | | | ACTION PLAN DETAILS | | | RATIONALE | | |
| g h | Promote the abilit run, develop a pho Improve flaw lette | e | Encourage retailers to link directly to the online rebate application on the product page. | Consumers Energy is working with retailers to add a link to the online application on their product page. | | | | Some customers struggle to find the online application on the Consumers Energy website. | | |
| i | Send rebate proce checking rebate st | | | House all rebate applications in one place, and provide "use case" based navigation from each program page. | | | | Some customers struggle to find the online application on the Consumers Energy website. | | |
| | | | Develop a rebate application form that can auto-populate known customer information. | Auto-populate the into Consumers Er | | | | mers may not be ration to receive th | notivated to fill out the rebate eir rebate. | |
| | | g Mobile phone | Promote ability to complete applications using mobile devices. In the long run, develop a phone app, which allows application submission. | Short-term: Promo application using a to submit supporti phones. | a mobile device, w | hich will allow cust | omers online | | le to upload proof-of-purchase to the In may require multiple steps using their | |
| | | | | Long-term: Development their applications | | hich allows custon | ers to | | | |
| | | h Flaw | Improve flaw letter language and communication methods. | | applicants. Allow | applicants to text | custon | | tess causes frustration for some | |
| | | communications | | | | | | | | |



Types of Recommendations





The Approach

- Current state maps
- Conduct field research
- Workshop week (ideas/recommendations)
- Future state maps
- Gap action plans
- Manage and track implementation of recommendations



Current State Maps (Iterative)

Ongoing Program materials/ **Customer Sat** documents **Surveys (OCSS) Program** staff & **Primary** implementer Research interviews



Field Research

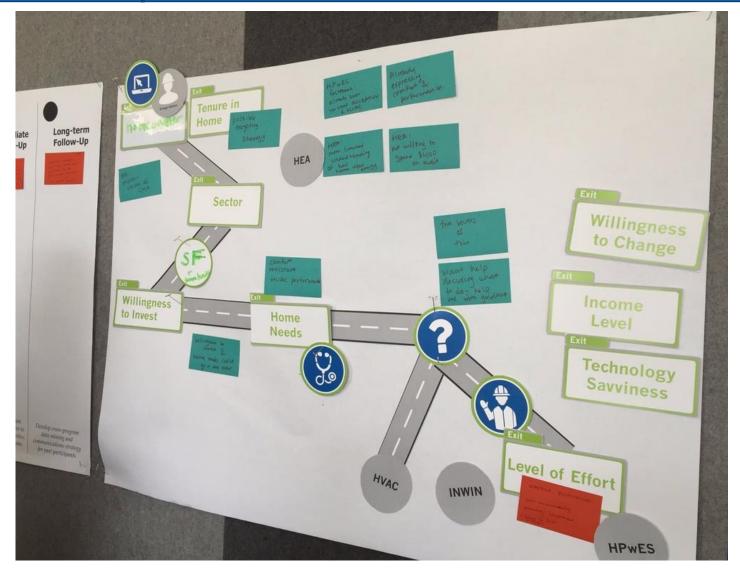
Over 130 customers and trade allies interviewed or observed

Ride-alongs, mystery shopping, focus groups, in-depth interviews with customer and trade allies





Workshop Week





Track Implementation of Recommendations

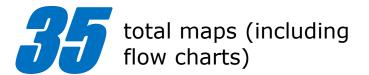




What we accomplished















What we learned

- Programs are far more complex than we realize
 - Many touchpoints, and many opportunities
- Opportunities to make programs more consistent, especially with multiple implementers
- Opportunities to make programs more intuitive
 the way we see programs "behind the scenes" may not be how customer moves through
- Journey doesn't end with rebate check –
 Opportunities to improve flow between programs
- Educational & online resources support the journey – they add value & tie experience together



What next for Journey Mapping?

- Continuing on journey to become more customer-centric
- Multi-year integration of recommendations
- Maps are a key reference for program management
- Leveraging findings for website improvements





Emily McGraw, Consumers Energy: emily.mcgraw@cmsenergy.com

Amanda Dwelley, Illume Advising: amanda@illumeadvising.com



