
THE POWER OF CUSTOMER ENGAGEMENT CAN BRIGHTEN OUR FUTURE.

Board of Directors Update

Presented by: Heather Siebken

July 16, 2020





ENGAGEMENT IS ELECTRIC

What is customer engagement? It's simple really. It's the direct and indirect interactions with a brand over time: before, during or after a transaction by phone, online or in person. It also includes likes, shares, tweets and posts on social or comments on review sites.

Customer engagement is an ongoing relationship with a brand as opposed to a singular customer experience or event. And it's proactive. Brands can reach out to customers to inspire purchases, build brand recognition, solicit feedback and gather information. The idea is to build an ongoing dialogue with customers that creates an emotional attachment. ***Make them want you.***



A TWO-WAY CONVERSATION

Today's customers want to hear from the brands they use — maybe not daily, but often. They want to have an open dialogue and receive relevant content, offers, tips and more. We want this as well and continuously engage our customers in conversation, like a friend at the kitchen table, listening to their input, delivering on their requests and partaking in too much coffee.

That's why top brands focus on engagement efforts — asking, listening and delivering time after time. Customers judge a brand and perceive its value based on an overall experience and engagement level. The good, and the bad, interactions resonate with customers for a long time.

FLYING HIGH WITH CUSTOMERS



Southwest Airlines · Jun 12
Hi there! While they may be open, it's going to take some additional time for us to restart our international operations. We appreciate your patience with us while we work through this. -Rocky

PM @_PM_PM_ · Jun 12
OK thank you i will wait until your airlines are ready 🙏👍👍

Southwest Airlines · Jun 12
We appreciate you! -Rocky

Southwest

Pssst. Got a second to give us some feedback?

Help us make the One Report even better.

[Count me in](#)

Share your thoughts on this year's One Report!

Thanks for your interest in the Southwest Airlines One Report. In an effort to better understand your interests, please take a few minutes to complete our questionnaire.

would you identify yourself (select all that apply)

Customer
Employee
Investor
Non-Governmental Organization
Student
Other (please fill in below)

2. Which of our priority topics interest you most (check all that apply)

Customers
 Employees
 Communities
 Energy
 Greenhouse Gas (GHG) Emissions
 Waste
 Economic Performance
 Our Network
 Other (please fill in below)

3. Please rate your experience in the following areas (scale 1-5)

Overall visual appeal/design aesthetics of the site: Poor Fair Good Excellent

Photos: Poor Fair Good Excellent

Videos: Poor Fair Good Excellent

Infographics and charts: Poor Fair Good Excellent

4. Please rate your experience in the following areas (scale 1-5)

The stories were relevant: Poor Fair Good Excellent

Southwest FLIGHT | HOT

[Community Home](#) [Discussion Forum](#) [Blog](#) [Knowledge Base](#)

May 26 · Nice touch Southwest Airlines! The best airlines customer service I've ever experienced on any flight, ever! I asked if they had any extra masks because mine was getting worn out and the customer service rep in Tulsa took me behind the counter and into the back offices where she introduced me to other staff...

[22](#)

[2 Comments](#)

BUT WHY?

At OPPD, our products power homes, businesses and lives.

Literally. But as we face a changing industry, we need to better define and target investment in the customer experience, tailoring it to the changing environment if we want to beat future competitors and keep customers.

By better connecting and engaging with customers to understand what is important and desired, we can define, plan and prioritize initiatives that help meet their changing expectations. We are already a customer-led company, but a deeper understanding of our customers will allow us to help solidify our position in their hearts and minds for years to come.

READY, SET, GO

Customers give utilities roughly **10 minutes** per year. Wise companies keep it short, simple, elegant and targeted.

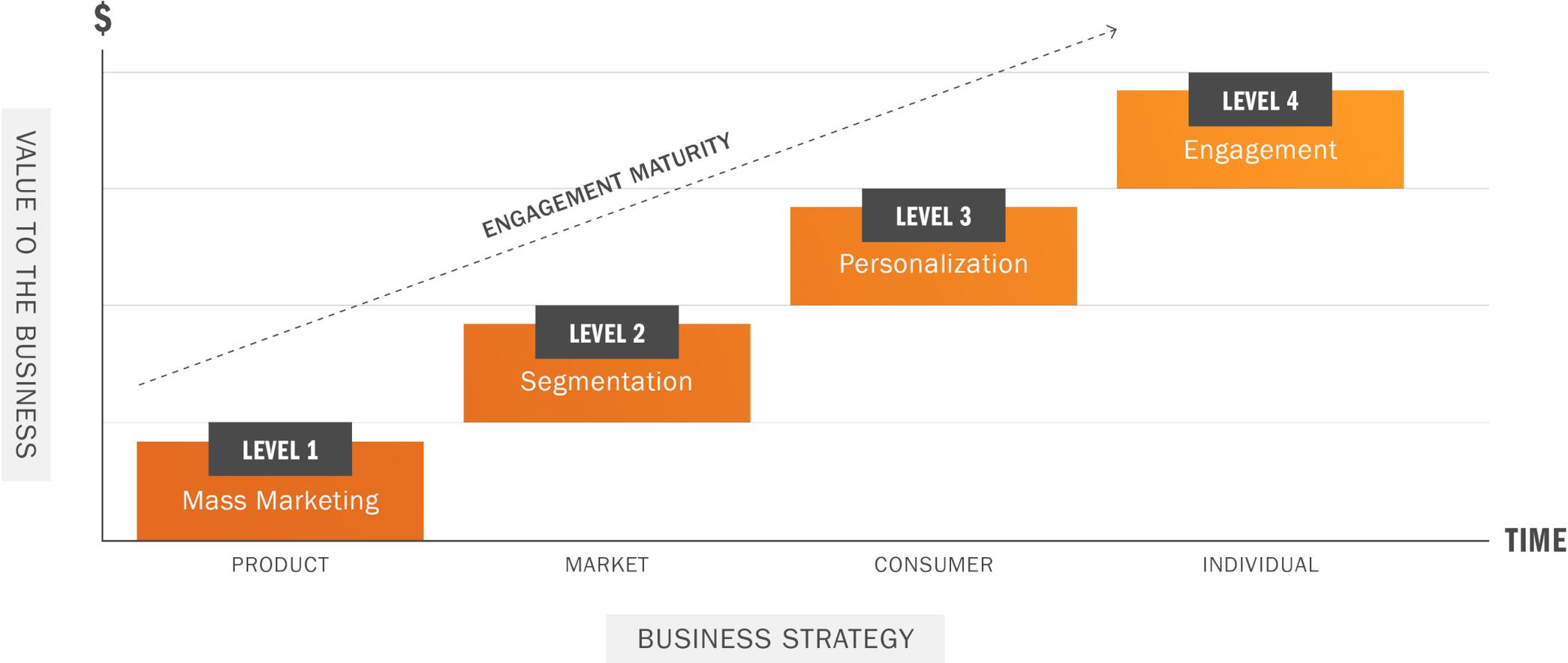


Via digital channels
AVERAGE TIME SPENT INTERACTING



Via non-digital channels
AVERAGE TIME SPENT INTERACTING

A SHIFTING STRATEGY



A SHIFTING STRATEGY

1. PUT PROMOTERS TO WORK

- Promoters bring in new customers who become promoters.
- Give promoters a platform to be a mouthpiece to promote your business/brand.

2. ENGAGE PASSIVES

- Passives only need a reason to promote you.
- Tell them what you are doing to improve.
- Ask them to help prioritize.

3. CONVERT DISTRACTORS

- Target specific customers.
- Ask them to help you improve.
- Make them trusted advisors.
- Show them you're listening and taking action.

4. REACH OUT TO NON-RESPONDERS

- They're tired of telling you what to do to keep their business.
- They're just waiting for one more reason to leave you.

5. IMPROVE PRODUCTS, SERVICES AND RELATIONSHIPS

- Take action on customer insights.
- Incorporate employee insights.
- Ask customers to help validate and prioritize.
- Provide regular progress updates.

6. SIMPLIFY BUSINESS PROCESSES

- Make it easy for employees and customers to do business.
- Simplify business infrastructure.
- Simplify language inside and out.
- Dissolve the silos.

ADVOCACY

Improve Loyalty,
Satisfaction and
Engagement

THE *MUSTS* GUIDING US FORWARD...



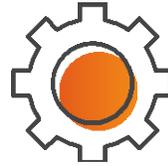
Customer Understanding

We must discover and deeply understand the needs and expectations of our customers, businesses and communities. Customer data can be one of the greatest assets when we capture it intentionally and strategically – and use it to develop and deliver the solutions our customers desire.



Customer Empowerment

We must help our customers do business with us in the manner they desire. This means personally engaging with them throughout their journey and empowering them to make informed decisions that meet their energy objectives.



Solutions Engineering

In our transformation as an energy provider of choice, **we must** offer solutions that solve our customers' problems. When we understand our customers on a deeper level, we can deliver differentiated products, services and resolutions that our customers value.



Operational Efficiency

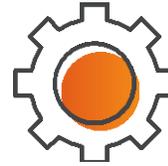
As financial stewards, **we must** invest our customers' dollars wisely. This means we are obsessed with operational excellence, continuous improvement, timely decision-making, innovative thinking and efficient use of resources. We deliver value to our customers when we proactively seek their insights and feedback.

...ARE THE *GOALS* OUR CUSTOMERS DESERVE



Customer Understanding

OPPD understands my expectations, utilizing those motives to develop and deliver business goals to support **my needs**.



Solutions Engineering

OPPD enables access to a variety of differentiated products, services and solutions that I value at different states in **my life**.



Customer Empowerment

OPPD engages with me throughout my personal journey and empowers me to make informed decisions that meet **my energy-related goals**.



Operational Efficiency

OPPD proactively seeks insights and feedback from consumers, like myself, for everything that it does, in order to assure what it delivers serves **my expectations**.



**ADVOCACY IS THE
ULTIMATE GOAL**

GO, TEAMS. GO!

ORGANIZATIONAL READINESS TEAM

- Create customer engagement playbook for teams to follow.
- Assess our current state and benchmark us against other utilities and organizations.
- Propose roles and responsibilities.
- Secure/provide training.
- Use the customer engagement maturity model and identify actions needed to gather customer insights.

ADVANCED ANALYTICS AND TOOLS TEAM

- Investigate, acquire and implement tools to support storage of customer insights.
- Conduct analyses to better predict outcomes and inform company actions or responses.
- Determine how to utilize new and/or existing marketing tools to better target customers.
- Leverage enhanced customer-attribute and customer-transactional data to create and optimize segmentation models.

CUSTOMER INSIGHTS AND OUTPUTS TEAM

- Focus on the inputs and outputs that lead to successful customer engagement.
- Create targeted customer personas, develop transactional survey instruments and collect customer insights on specific topics.
- On the output side, create tailored messaging, build a customer “product and service” review process and post and monitor social media.

PROJECT APPROACH



RESOURCES



PERSONNEL SUMMARY

- Total Personnel Involved = 30+ personnel
- Total Personnel Hours = 31k+ hours

ADVISORS

ORGANIZATIONAL READINESS TEAM

- Austin Martinez, CS
- Nina Swanson, HC
- Kate Thomas, PA

ADVANCED ANALYTICS AND TOOLS TEAM

- Sara Biodrowski, CS
- Tim McAreavey, FS
- Sarah Riley, BT

CUSTOMER INSIGHTS AND OUTPUT TEAM

- Corey DeJong, CS
- Jennifer Johnston, CS
- Laurie Zagurski, PA

SUPPORT TEAM

- Mindy Wells, Project Coordinator
- Adam Haynes, Change Management
- Mary Oswald, Communications

CORE TEAM + SUBJECT MATTER EXPERTS

- Approx. 20 additional resources
- Diverse mix from across all business units
- Will onboard to the team in preparation for Phase II

Customer Engagement Video



ENERGIZED FOR POSITIVE CHANGE

There's no question — customer engagement will power our future and result in OPPD becoming a trusted energy provider to our thousands of customers. Thank you for your unconditional support of this initiative.

Now go forth and engage...