THE POWER OF CUSTOMER ENGAGEMENT CAN BRIGHTEN OUR FUTURE.

Board of Directors Update
Presented by: Heather Siebken
June 17, 2021
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. 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.
# PROJECT APPROACH

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<tr>
<td>- Define high-level scope</td>
<td>- Team selection, onboard, role clarity and education</td>
<td>- Internal capabilities and gap analysis</td>
<td>- Future roles &amp; responsibilities</td>
<td>- Development &amp; implementation timeline</td>
<td>- Engagement Playbook</td>
<td>- CX/CE enterprise-wide training</td>
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<td>- Identify strategic resources</td>
<td>- RFP, vendor workshops, onboard vendor</td>
<td>- External market analysis</td>
<td>- Future operating model &amp; organizational alignment</td>
<td>- Segmentation models and personas</td>
<td>- Transactional surveys</td>
<td>- Integrate learnings, tools and more into current state projects</td>
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<tr>
<td>- Prepare Logistics</td>
<td>- Baseline customer insights and engagement interest</td>
<td>- Identify benchmarking sets</td>
<td>- Future integration and cross-functional processes</td>
<td>- Review SD’s and recommend modifications</td>
<td>- Integrate existing customer engagement data</td>
<td>- Technology solutions &amp; necessary training</td>
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<td>- Strategic initiative (SI) objectives and plans</td>
<td>- Gather historical customer engagement data</td>
<td>- Future tools, technologies and processes, assess how others can use too to build RFP</td>
<td>- Non-digital engagement process/plans</td>
<td>- Review SD’s and recommend modifications</td>
<td>- Modify current state engagement channels</td>
<td>- Hire and orchestrate role and responsibility changes</td>
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<td>- Prioritize our efforts and identify our capabilities to be assessed</td>
<td>- Heuristics assessment</td>
<td>- Future interactions, touchpoints, surveys, workshops and more</td>
<td>- Targeted, humanized, personalized messaging and interactions</td>
<td>- Alignment workshop</td>
<td>- Website, mobile app</td>
<td>- Engagement events</td>
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<td>- Align with other on-going initiatives</td>
<td>- Stakeholder outreach</td>
<td>- Alignment workshop</td>
<td>- Success reporting</td>
<td>- Future roles &amp; responsibilities</td>
<td>- Website, mobile app</td>
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<td>- Brainstorm potential capabilities and needs</td>
<td>- Review youth engagement opportunities</td>
<td>- Stakeholder outreach</td>
<td>- Quick wins</td>
<td>- Vendor and/or Technology, etc. RFP process</td>
<td>- Technology solutions &amp; necessary training</td>
<td>- Engagement events</td>
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VIRTUAL BEGINNINGS
**THIS IS US**

**LEADERSHIP TEAM**
- Juli Comstock, Strategic Initiative Sponsor
- Heather Siebken, Strategic Initiative Director

**SUPPORT TEAM**
- Mindy Wells, Project Coordinator
- Adam Haynes, Change Management
- Mary Oswald, Communications
- Bob Kaminski, Strategic Initiative Coordination

**ADVISORS**
- Nina Swanson
- Kate Thomas
- Tim McAreavey
- Aaron Smith
- Laurie Zagurski

**ORGANIZATIONAL READINESS**
- Austin Martinez
- Sara Biodrowski
- Corey DeJong

**ADVANCED ANALYTICS/TOOLS**

**CUSTOMER INSIGHTS/OUTPUTS**

**CORE TEAM**
- Dustin Axtell, Business Technology
- Christene Bywater, Energy Production
- Angela Carter, Human Capital
- Denton Cushing, Customer Service
- Nitty Gambhir, Customer Service
- Alyssa Kidd, Customer Service
- Gina Langel, Corporate Strategy & Governance
- Michael Leary, Public Affairs
- Nicole Luna, Customer Service
- Matt Neal, Customer Service
- Shelby Reeker, Energy Delivery
- Sam Shehata, Financial Services
- Jennifer Skupa, Human Capital
- Laura Strode, Customer Service
- Jamie Wagner, Public Affairs
- Wyndle Young, Customer Service
REQUEST FOR PROPOSAL (RFP)

Q3 2020:
- Vendor Workshops
- Prepare RFP

Q4 2020:
- Issued RFP
- Q&A Period
- RFP Submission Review

Q1 2021:
- First Round Interviews
- Q&A Period
- Finalist Interviews
- Scoring and Selection
- Negotiations

Q2 2021:
- Contracting
- Onboarding
PwC is the largest professional services network in the world with 44,980+ professionals in the US, supporting a diverse range of clients through a broad range of services.

Our Power & Utility (P&U) practitioners have deep industry knowledge in helping utilities achieve business value and outcomes in this unique sector.

**1,400+**
Professionals focusing on serving utilities in the US, with 4,500 utility practitioners worldwide

**65%**
Of Investor Owned Utilities are served by PwC

**4,700+**
Professionals specializing in delivering customer transformation initiatives

**250+**
Power & Utility companies served globally

**HOW WE HELP**

Our purpose is to build trust in society and solve important problems. Our advisory, tax, and assurance services address today’s business imperatives.

- Simulate innovation
- Align costs with business strategy
- Transform human capital
- Accelerate digital and technology impact
- Grow and create competitive advantage
- Navigate risk and regulatory complexity
- Optimize deals
- Create unique customer experiences
- Strengthen trust and transparency
- Reimagine analytics possibilities
- Unlock data possibilities
- Secure assets

Source: provided by PwC
## UTILITY EXPERIENCE

This is a representation of some of our long-standing utility clients. We serve nearly all of the utilities within the Fortune 1,000, and more than 250+ utilities globally.

### Non audit – Investor-Owned Utilities

- AES Corporation
- Entergy
- NextEra Energy
- Portland General Electric
- UGI Corporation
- Alliant Energy
- Eversource
- NiSource
- PPL
- Vistra Energy
- CenterPoint Energy
- evergy
- NRG Energy
- Sempra Energy
- WEC Energy Group
- Dominion Energy
- FORTIS
- Pacific Gas and Electric Company
- Southern Company
- Xcel Energy
- Duke Energy
- New Jersey Resources
- Pinnacle West Capital Corporation

### Public-Owned Utilities

- Seattle City Light
- Seattle Public Utilities
- American Electric Power
- Edison International
- Exelon
- FirstEnergy
- Calpine
- CMS Energy
- PugetEnergy
- Southwest Gas

### Audit

- Ameren
- DTE Energy
- EDG
- American Water

Source: provided by PwC
REQUEST FOR PROPOSAL PLAN

Build the Foundation

Develop a holistic strategy that puts the customer at the center, and build an organization and operations that focus on generating value for them — and for OPPD. Pilot the operational model and use early Voice of the District (VoD) insights to refine.

Operationalize

Increase maturity of turning insights to tailored customer engagement initiatives.

Evolve

Continuously improve, based on customer and internal feedback, track outcomes, and success measures.

Customer Engagement Strategy
Organizational Design
360 Customer View and VoD Insights
Technology and Data Roadmap
Experience Design and Orchestration
Digital Media and Marketing
Measurement and Continuous Improvement

Agile, Iterative Approach

Outcome-driven, People-centric System of Change

Customer Research and Personas
Capability Maturity Assessment
Organization Design, Training Plan
Customer Engagement Playbook
Voice of the District and Insights
Prioritized Roadmap (Process, Org, Tech/Data)
Technology Enablement
Drip-Feed Training and Culture Change
Marketing and Content
Execute Customer Engagement Activities
Enhanced Analytics and Reporting
BASELINE

CURRENT STATE

- Sponsor and/or participate in community events
- Conduct outreach events on proposed utility actions through multiple channels
- Utilize standard customer persona’s to help tailor insights
- Survey customers, periodically, for insights, plus conduct more regular transactional surveys for feedback on contact center support
- Coordinate focus groups to review content/material for feedback
- Empower account executives to support business clients
- Respond to requests for involvement

RECENT ENGAGEMENT SURVEYS

- Respondents view OPPD and its efforts to engage favorably
- Preference for interactive engagement channels/methods is relatively low and traditional media channels (direct mail, traditional media and digital) are preferred
- Indicated lack of desire for engagement seems to be driven primarily by trust in OPPD to be the expert decision-maker
- Often feel we are communicating reactively or not inside their journey
- Don’t think about OPPD until it is time to pay their bill or their power is out

We are making strides, but we have opportunities to help our customers see us as more than a “transactional utility”.

Sources: JD Power, Communications Study, Sentiment Study, Cogent, Engagement Survey and others
OUTREACH
Building consensus with insights, opinions and a firm handshake. Or elbow bump.
Discussion groups with invested individuals, focus groups, surveys, public meetings
Nature of Relationship: Informational

CUSTOMER ENGAGEMENT
Connecting personally and creating lifelong advocates over a (virtual) cup of coffee. Extra sugar please.
Nature of Relationship: Relational, Advisory and Involved

SERVICE
Addressing the needs and resolving concerns of our customers.
Online, phone, in-person, mail, social media
Nature of Relationship: Transactional

EXPERIENCE
Making a good impression throughout the entire customer journey. Smiles all around.
Empathy interviews, focus groups, informal chats
Nature of Relationship: Emotional
ADVOCACY IS THE ULTIMATE GOAL
HOW WE GET THERE

Data Convergence & Repository
HOW WE GET THERE

Data Convergence & Repository

Voice of the Customer
HOW WE GET THERE

Data Convergence & Repository

Voice of the Customer

Transactional Experiences
HOW WE GET THERE

Data Convergence & Repository
Voice of the Customer
Transactional Experiences

Segmentation & Personas
HOW WE GET THERE

Data Convergence & Repository
Voice of the Customer
Transactional Experiences
Segmentation & Personas

Customer Research Framework
HOW WE GET THERE

Data Convergence & Repository
Voice of the Customer
Transactional Experiences
Segmentation & Personas
Customer Research Framework

People & Organization
HOW WE GET THERE

Data Convergence & Repository
Voice of the Customer
Transactional Experiences
Segmentation & Personas
Customer Research Framework
People & Organization

Marketing & Data Technology
HOW WE GET THERE

Data Convergence & Repository
Voice of the Customer
Transactional Experiences
Segmentation & Personas
Customer Research Framework
People & Organization
Marketing & Data Technology

Materials & Messaging
HOW WE GET THERE

The Future

Although we have identified these eight areas of interest, we are keeping our minds and process flow open for what may arise as part of our initiative.

Anything is possible.
BRAND ENGAGEMENT DIMENSIONS

Dimension Prioritization
What dimensions do we focus on to achieve our aspiration?

Differentiated
- Information
- User Experience

Competitive
- Personalization
- Accessibility

Tablestakes
- Invention
Effective customer engagement requires capabilities spanning the areas of go-to-market, operations, and technology. This is the “The What”—foundational capabilities OPPD needs to have in order to achieve the North Star.

Capabilities focused on establishing and growing the business
- Marketing
- Measurement
- Sales & Account Management
- Product & Services

Capabilities focused on operating and supporting the business
- Human Resources
- Revenue Management
- Regulatory
- Deliver Services
- Operations

Capabilities focused on driving the development and maintenance of the enabling technology platform
- Information Technology
- Digital Experience Technology
- Data

Go-to-Market

Enabling Technology

Operations
This slide is illustrative and not meant to be an all-inclusive and/or checklist. The slide conveys a number of areas being explored as part of the strategic initiative.
ONLINE AND OFFLINE ENGAGEMENT

- Treat our employees as our first customer
- Build an emotional connection with customers
- Get real (time) about feedback
- Focus furiously on individual customer needs
- Practice social listening
- Use AI (artificial intelligence) to your advantage
- Prove that we really, really appreciate our customers
- Freshen things up with live chat
- Speak human
- Encourage engagement

- Build a customer-first culture
- Think different, think ahead
- Harness hand-held technology
- Grow up socially
- Get our UX (user experience) on
- Gamify it
- Get physical with digital
- Personalize it
- Show, don’t tell (with video)
- Make it happen with events

https://senseimarketing.com/10-unique-customer-experience-examples-best-practices-boost-brand
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INVESTMENTS IN TECHNOLOGY

- Customer Relationship Management (CRM)
- Content Management
- Omni-Channel Marketing
- Customer Data Platform (CDP)
- Marketing Automation
- Digital Asset Management (DAM)
- Consent and Preference Management
- Digital Ethics
- Work and Inventory Management
- Personalization
- Enterprise Listening
- Descriptive & Predictive Analytics
- Artificial Intelligence (AI)
- Data Visualization
- Customer Notifications
- Cross-Channel Customer Identity
- Digital Experience (DX) Channels
- Text, Chat, Blog
- Live Reviews

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### NEXT STEPS: SCAN THE ENVIRONMENT

|----------------|--------------------------------|--------------------------------|----------------------------|-------------------------------|-----------------|--------------------------------------------|

- Internal interviews
- External interviews and outreach
- Voice of the District engagement survey
- Gap analysis, heuristics assessment
- Research best practices, industry benchmarking

- Conversations with leaders of customer engagement (local and national)
- Synthesize insights from existing surveys and materials
- Begin to explore youth engagement
- Begin discussions around customer engagement metrics
- Continue alignment with other Strategic and District-level initiatives

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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...
OUR STORY, OUR GUIDING STAR

To transform customers into loyal advocates, every touchpoint – every communication – must be authentic, focused and relevant. This is the essence of Customer Engagement and the heart of our strategic initiative. Our focus on the future is to establish an ongoing dialogue with our customers. Direct feedback gives us the data and insights to make informed, timely decisions – decisions that transform into long-term strategic plans. It’s all about relationships and a determination to make life better for our customers, and ultimately, our communities.

Over the next 10 years, we will transform the way we do business. We will educate on the value of personalized customer relationships. We will develop processes and tools and will harness—more aggressively than ever before—technology, data, customer insights and two-way conversations to bring us and our customers together. We will actively and proactively work to solidify our position in their hearts and minds for years to come.

This will lead to a district-wide understanding of customer engagement, complete with customer segmentation models, personalized interactions, and the ability to turn customer insights into action. But most importantly, this will lead to life-long customer advocates who feel valued and taken care of as a part of our community.