CUSTOMER ENGAGEMENT FOR THE FUTURE
ADVOCACY IS THE ULTIMATE GOAL
PROJECT APPROACH

- Catalog of current-state OPPD operations
- Research and discovery of best-in-class engagement organizations, within the industry and broader
- High-level recommendation for OPPD moving forward.
THE ENVIRONMENT

We explored, a lot.

Other utilities, brands known for high customer engagements, industry experts, published studies and more.

This slide is illustrative and not meant to be an all-inclusive list. The slide conveys a number of organizations explored as part of the strategic initiative.
# WHAT WE STUDIED

## ORGANIZATIONAL READINESS
- Customer engagement playbook
- Change management
- Training
- Culture and accountability
- Organizational design, roles and responsibilities

## ADVANCED ANALYTICS AND TOOLS
- 360 customer view
- Data and insights repository
- Marketing and engagement technologies, including digital experience
- Segmentation models
- Metrics and corporate dashboards
- Data privacy, governance and regulations

## CUSTOMER INSIGHTS AND OUTPUTS
- Customer personas and segmentation strategies
- Voice of the District in varying scale and frequency
- Tailored messaging and personalized materials
- Customer engagement activities
OUR JOURNEY

- Researched 84 companies
- Generated 100+ engagement ideas
- Mapped 30 processes
- Created 2,226 PPT slides… and counting
- Studied 31 customer moments
- Explored 300+ tech capabilities
- Surveyed 424 customers
- Considered 203 cultural behaviors
- Interviewed 70+ employees
- Hosted 8 employee workshops

This slide is illustrative.
ENGAGEMENT TACTICS

- Updated digital experience (DX) channels (website & related portals, mobile app)
- Online chats
- Website ‘pop-up’ surveys
- Outage notifications
- Billing notifications
- Education booth at school events
- Customer job shadow opportunities
- Museum exhibit
- Scholarships
- Elected youth to the Board (leadership development)
- Annual Energy summit (youth and regular)
- Trade ally events
- Energy ‘joke of the week’ / editorial cartoons
- Annual festival
- Holiday lights show
- Live reviews
- Blog – employee and customer contributions
- Usage alerts
- Online discussion forum
- Annual “Edison Awards” event
- OPPD ‘pop-up’ events
- Ask the Expert forum
- OPPD sponsored school clubs
- ‘Touch a Truck’ events
- Transactional surveys
- Customer product advisory council
- Lunch and learn events
- Social media polls & interactions
- Neighborly competitions
- Personalized annual energy report
- Energy consultations
- Gamification and other reward opportunities
- New customer welcome package
- College orientation booth
- Product attrition survey
- Personal check-in 30-60 days following start and/or transfer service
- Promotional incentive for a product review
- Energy challenges and competition
- Marketing toolkit for customer sharing
- Physical & virtual field trips
- Personal, handwritten notes
- Community event cross-sharing

This slide is illustrative and not meant to be an all-inclusive and/or checklist. The slide conveys a number of recommendations being made as part of the strategic initiative.
ENGAGEMENT PLAYBOOK

IDEATE
Generate
Manage & Plan

PILOT
Plan
Execute

SCALE
Plan
Build
Run
Maintain
ENGAGEMENT IN ACTION

Average Joe

- Issue Resolution
- Product & Service Delivery
- Billing & Payment
- Youth Outreach
- Education
- Outage Experience

Level 1: Strategic Goals
- Text Message Alert
- Live Chat
- Proactive Product Recommendation
- Website
- Outage Map
- Classroom Education
- Energy Alert
- Review
- Informal Chat

Level 2: Engagement Objectives

Level 3: Initiative Metrics

Persona Moments that Matter Journey Touchpoints Measurement & Outcomes
A NEW VISION

CURRENT STATE

- Start service
- Billing
- Payment
- Account changes
- Service calls
- Outage response
- Trade allies
- Issue resolution
- Transfer service
- Stop service
- Energy use management
- Business customer management

FUTURE STATE

- Education
- Marketing Campaigns
- Youth Outreach
- Workshops
- Community Sponsorships
- Live Events
- Field Trips
- Surveys
- Competitions
- Program Participation
- Casual Chats
- Self Service
- Virtual Forums
- Discussion Forums
- Transactional Interactions
- Boots on the Ground
- Digital Interaction
- Community Sponsorships
• Prioritize engagement ideas within each moment that matters and develop more detail and definition around the activity
• Execute on high-value foundational work (i.e. “no regret work”)
• Finish Youth Engagement Study
• Socialize internally with employees
• Conduct outreach with customers
• Begin the transition and project closure process

• Build a visual roadmap of all CEF recommendations and deliverables
• Roadmap to include all identified organizational, technology and engagement deliverables and the following:
  • *Approximate timeframe to complete*
  • *Estimated budget*
  • *Expected internal and external resources*
  • *Known risks and dependencies*
APPENDIX
Change Management, Culture, Training
ORG DNA FRAMEWORK

**FORMAL**

- Governance forums
- Decision rights
- Decision processes
- Decision analytics

- Monetary rewards
- Career models
- Talent processes

- KPIs & metrics
- Information flow
- Knowledge management Systems

- Organization design
- Roles & responsibilities
- Business processes

**INFORMAL**

- Values & standards
- Expectations & unwritten rules
- Behaviors

- Shared vision & objectives
- Individual goals & aspirations
- Sources of pride

- Identity, shared language & beliefs
- Assumptions & biases
- Mental methods

- Relationships & collaboration
- Teams & other working units
- Organizational influence

**MOTIVATORS**

- DECISIONS
- COMMITMENTS

**INFORMATION**

- NORMS
- MINDSETS

**STRUCTURE**

- NETWORKS

**COMMITMENTS**

- "How we make decisions"
- "How we encourage people to perform"
- "How we process data and knowledge"
- "How we allocate work and responsibilities"

- "How we do things around here"
- "How we inspire people to contribute"
- "How our people view the world and their work"
- "How are people connect beyond the lines and boxes"
“I Heard It.” Individuals are aware of the basic scope and concept.

“I Get It.” Individuals understand impacts to the organization, their functional area, and what’s in it for them (WIIFM).

“I Support It.” Individuals accept the change and are willing and able to embrace it.

“I Live It.” Individuals shift their behaviors and begin developing the new capabilities required of the new ways of working.

“I Own It.” Individuals commit and adhere to the new ways of working.

CHANG MANAGEMENT CURVE
A BEHAVIOR EVOLUTION

Katzenbach Center Methodology for Behavior Evolution

- Set your cultural compass
- Find your “critical few”
- Build a movement to drive behavior adoption
- Leverage E and O data to drive value
CRITICAL FEW BEHAVIORS

COLLABORATION AND CONSENSUS
- Go the extra mile to delight customers.
- Proactively look for ways to involve others to improve the customer experience.
- Rapidly anticipate and respond to changing customer needs by fearlessly experimenting to enhance the customer journey.

IN SERVICE OF THE COMMUNITY
- Catch the baton and run with it – take ownership and accountability to fix the issue when you see it.
- Give your people the responsibility and authority to achieve results and help them overcome major obstacles.

LIKE A FAMILY

KEEP THE LIGHTS ON

SAFETY AND STABILITY THROUGH PROCESS
- Widen the aperture: Find solutions with partners and others inside and outside the company.
An “Authentic Informal Leader” (AIL) is someone who influences and energizes others without relying on their title or formal position in the hierarchy to do so.

Authentic Informal Leaders typically exhibit a set of common traits regardless of the organization or its culture.

What is the value to the organization to have an AIL network?

- Spread Critical Few Behaviors (CFBs)
- Encourage adoption of CFBs through informal channels
- Adopt a tinkerer’s love to experiment with solutions
- Provide a “real” pulse of the organization to leadership

What problems do AILs help solve?

- Sounding board to help leadership make important team decisions
- Sharing proof points of culture evolution in action
- Mechanisms to spread behaviors (e.g., brainstorming how AILs could drive awareness & adoption of CFBs)
- AIL network engagement (e.g., stakeholder outreach, how to engage leaders)
TRAINING & GENERAL EDUCATION

Experiential Learning
- (8 lessons identified: understanding CE, creating CE, CE behaviors, CEF playbook/framework, CEF leadership, AIL specific training, Agile, Human Centered Design)
- These sessions will address “What is Customer Engagement?”, build awareness and understanding of the CEF Playbook, and drive adoption of CE behaviors.
- The target audience is specific and should include OPPD leaders across the organization, Authentic Informal Leaders, customer-facing stakeholders, and team members for future CE initiatives governed by the Council
- The goal is to rotate everyone through within the first 6-9 months, over multiple sessions, with involvement of an expanding Authentic Informal Leader network to help drive the sessions (i.e., train-the-trainer approach to amplify behavior adoption).

Micro Learning
- Includes things like podcasts, videos, interactive quizzes, infographics, and other engaging - and often interactive - digital content components.
- The target audience is the broadest set of stakeholders engaged in CE across the organization.
- The goal is to reinforce and sustain the organization’s learning and support its ongoing cultural CE-central evolution.
- Content will help showcase and celebrate CE behaviors via stories and recognition of OPPD leaders and employees, while supporting ongoing awareness and upskilling for CE capabilities.

Skill / Role Based Learning
- Provides content specifically around a skill used in their daily job. This helps them also connect their role to the broader CE strategy and success. Specific content will be developed and used to support the various roles and skill sets identified. This training can also include training of new processes or technologies acquired.

Mobilization Training
- These are additional just-in-time interactive training sessions in support of specific CE opportunity initiatives across moments that matter that will be prioritized over the roadmap (e.g., manage energy use, youth outreach, issue resolution, outage, etc.).
- The target audience are the individuals on each pilot team involved in a particular initiative. These sessions can be delivered regularly as teams are stood up.
- The goal is to deliver these sessions every three months as part of the pilot team’s ramp-up adoption of the CEF playbook and CE behaviors.
Communications and Surveys

Item library is configurable for all phases of a digital transformation addressing:

- Program satisfaction/impact
- User feedback
- Development process and cycles
- Team engagement/productivity

Real-time Dashboards

Real-time dashboards giving teams data they need to drive MoC across priority initiatives. Ability to see the adoption of cultural behaviors as progress along the change management journey.
CHANGE COMMUNICATIONS PLAN

- Identified highly-impacted stakeholder groups: Contact Center, Corporate Communications, Customer Sales & Service, Customer Experience, Economic Development & External Relations and Product Development & Marketing
- Crafted an overarching Change Statement for cross-BU leadership alignment
- Developed a structured communications plan for all stakeholder groups across 5 project phases
- Segmented stakeholders into 4 categories for customized approach to content, communications channels, and frequency
## DESIGN GOALS

1. Define roles and responsibilities needed to achieve optimal customer engagement

2. Design for efficient operations, balanced between speed-to-market and quality

3. Create role clarity on operations supporting customer-facing operations

4. Commit to a level of focus on building a sustainable customer organization
ORGANIZATIONAL DESIGN STRATEGY

Capability-Building and Upskilling

Frequency and Comprehensiveness of Insights
CAPABILITY MODEL

Activation Tactics & Enablement (AT&E)
- Customer engagement and interaction tactics
- Personas, data and analytics for delivering targeted solutions
- Targeted journeys/lifecycles for developing engagement ideas and tactics

Organization Readiness (OR)
- Pilot and Scale teams design, including transitioning and accountability
- Process- and role-impact identification and management

System of Change (SOC)
- Change management and leadership modelling
- Training and upskilling
- Stakeholder engagement
- Experiential learning and storytelling

Return on Engagement (ROE)
- Program and initiative metrics and measurement
- Identifying Operational and Engagement data (RoE)
- Creating actionable insight and systems of action

Enabling Technology (ET)
- Assess and enhance CE solutions
- Procure and implement new solution
- Data and analytics (E and O data)
- Scorecarding and measurement
## ENGAGEMENT MODEL

### Further refinement/optimization of CE initiatives

<table>
<thead>
<tr>
<th>Phase</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>IDEATE</td>
<td>Manage the portfolio of CE initiatives by optimizing ongoing CE initiatives and generating new ideas, prioritizing initiative ideas, and developing a roadmap for executing selected CE concepts</td>
</tr>
<tr>
<td>PILOT</td>
<td>Optimize ongoing customer engagement initiatives and executing an MVP with select features to pilot with a targeted base of customers to evaluate potential value of the initiative to scale.</td>
</tr>
<tr>
<td>SCALE</td>
<td>Build scalable, integrated solution for OPPD Launch to target customers, and develop and run operating model (Organization, Change, Technology) to sustain the solution</td>
</tr>
</tbody>
</table>

### Sub-Phase Description

<table>
<thead>
<tr>
<th>Sub-Phase</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>IDEATE</td>
<td>Refresh CE portfolio by collecting and defining new and existing CE initiative ideas</td>
</tr>
<tr>
<td>PILOT</td>
<td>Evaluate and prioritize CE initiatives, select initiative(s) for pilot development, and gain leadership approval to advance to pilot</td>
</tr>
<tr>
<td>Plan</td>
<td>Plan key activities to be completed within an increment that will result in a useable and testable output (MVP) to aid in the determination of the value of the initiative.</td>
</tr>
<tr>
<td>Execute</td>
<td>Plan sprint (3-week time period), build and test sprint deliverable, groom backlog, and review sprint performance. Repeat this cycle until the MVP is ready to launch. Evaluate the Pilot and determine potential value of the pilot/initiative to scale.</td>
</tr>
<tr>
<td>Plan</td>
<td>Develop plan for building, running, and maintaining the solution at scale including determining features, customer segments/personas, technology platform, integrations, and operating model</td>
</tr>
<tr>
<td>Build</td>
<td>Further develop prioritized features and launch the solution to the target segments/personas with an interactive engagement experience and mature, integrated capabilities</td>
</tr>
<tr>
<td>Run</td>
<td>Rollout a repeatable solution. Analyze customer insights to inform future backlog prioritization while preparing for transition from CE Core Team to Maintenance Team</td>
</tr>
<tr>
<td>Maintain</td>
<td>Implement performance and engagement/experience enhancements to sustain, optimize and grow the solution</td>
</tr>
</tbody>
</table>
THE PATH TO ADVOCACY

AWARENESS
A customer becomes aware of the brand, via marketing/advertising efforts or word of mouth.

EDUCATION
A customer begins to form opinions of the brand, via sustained interaction and/or continued interactions.

ENGAGEMENT
An ongoing relationship between brand and customer — necessary to gain brand advocates and ambassadors.

ADVOCACY
Customer has an affinity for the brand, developed over time via sustained engagement and exceptional experiences.

EXAMPLES
- Customer hears radio spot announcing that OPPD is providing free home energy assessments.
- Customer is provided a free home energy assessment by OPPD; learns about better energy management in the home.
- Customer subscribes to monthly OPPD newsletter with energy-saving tips; acts upon OPPD’s advice.
- Satisfied customer encourages her friends and family to connect with OPPD to schedule home energy assessments of their own.
Customer 360 Framework
<table>
<thead>
<tr>
<th>OPPD JOURNEY</th>
<th>Journey to Achieving 360 View of Customers</th>
</tr>
</thead>
</table>
| **1. Identify the Customer** | - Identify customer golden record  
- Track customer interactions across channels  
- Integrate customer data across platforms |
| **2. Understand the Customer** | - Define and build customer personas and segments  
- Understand their behaviors and channel preferences  
- Estimate their lifetime value  
- Understand loyalty drivers  
- Understand their needs and wants |
| **3. Communicate with the Customer** | - Determine best engagement channel  
- Provide personalized and relevant recommendations on next best product  
- Offer contextual digital offers across channels  
- Proactively anticipate and address their needs and concerns |
| **4. Empower the Customer** | - Provide an integrated view across lines of businesses & channels  
- Make it easy for them to interact and transact  
- Evoke an emotional response, and deliver on moments that matter |
| **5. Optimize the Engagement** | - Track results of engagement efforts and feedback  
- Improve the engagement approach through data and analytics  
- Refine customer personas and segments to improve individual personalization |
Customer Golden Record

Customer feedback, surveys collected across channels

Voice of the District

Append lifestyle variables such as hobbies, interests, media preferences and marketing psychographics

Psychographic

AAID (Android), IDFA (iOS), IP address, IoT signals

Device

Enrich your customer data by knowing the world they live in: roads, shopping areas, weather, traffic conditions

Neighborhoods

Service and engage your customers at the right place and time by tracking mobile location activity

Geolocation

Planned, unplanned outage and field work, appointments, crew status, comments and feedback

Field services

Electric vehicles, solar, community solar, battery storage, microgrid

Beyond the grid

Energy usage, disaggregation insights, peak demands, usage patterns

Energy insights

✔ Secure and compliant with customer consent
✔ Harmonized and cleaned from different sources
✔ Matched, resolved from different identities into a unified customer profile
✔ Low latency and can be activated in real-time

Physical

Mailing address, service address, meter number, etc.

Party

Traditional customers, non-traditional customers, business partners, community partners, governmental partners, 3rd party data partners

Contact

Personal email, work email, junk email, home telephone, work phone, mobile phone/SMS

Social

Twitter, pinterest, linkedin, YouTube, Facebook, Instagram

Web/mobile

Web browser, search ad clicked, website visits, opened email offer, click-thru to site on mobile

Demographic

Household size, employment data, income level, age, gender, credit risk score, etc.

firmographic

Transaction

Cases, payments, bills, enrollments, complaints, subscriptions, products

CUSTOMER GOLDEN RECORD
A HOLISTIC VIEW OF THE CUSTOMER

INTEGRATE
- Customer listening, analytics and survey tool (new)
- Billing/collections system
- Customer Relationship Management tool (new)
- Other customer systems

ENRICH
- Cloud
- Cookies
- Energy Usage
- Online Activities
- Household
- Social Media

BUILD
Customer Profile
Golden Record
A single source of truth about a customer profile sourced from backend systems, engagement channels and devices

USE
- Improve products and services
- Map customers to personas to identify needs, wants and pain points
- Personalize customer messaging
- Anticipate future needs in building products
- Resolve issues more quickly because of 360-view of customer
- Increase effectiveness and efficiency of staff
- Strategically capture feedback
Technology Recommendations
INVESTMENTS IN TECHNOLOGY

- Digital Experience (DX) Channels (website & related portals, mobile app)
- Customer Relationship Management (CRM)
- Content Management System (CMS)
- Customer Data Platform (CDP)
- Chatbots and Live Chat Software
- Marketing Automation System
- Consent and Preference Management
- Voice of the District Survey & Listening Tools
- E-Wallet and Digital Payment
- Knowledge Management System
- Text/SMS & Customer Notifications
- Data Configurations, Integrations & API’s
- Digital Asset Management (DAM)
- Enterprise Listening
- Descriptive & Predictive Analytics
- Artificial Intelligence (AI)
- Data Visualization
- Cross-Channel Customer Identity
- Live Reviews
- Language Translation
- Blog
- Omni-Channel Marketing
- Work and Inventory Management
- Virtual Assistance & Voice Assistant
- Event Management and Hosting Software and Hardware
- Virtual Reality / Metaverse
- Ecommerce Marketplace
- Gamification and Rewards Management Platforms
- Proposal Management System
- Creative Design Tools
- Advanced Metering
- Asset Maps (outage, streetlight, etc.)

This slide is illustrative and not meant to be an all-inclusive and/or checklist. The slide conveys a number of recommendations being made as part of the strategic initiative.
Metrics and Dashboards
To create a sustainable competitive advantage, we need to understand, prioritize, and act on experience enhancement opportunities across the end-to-end customer journey.
RETURN ON ENGAGEMENT
A system of metrics used for measuring, understanding, and accelerating progress towards business outcomes

Return on Engagement (RoE)
Combining VOD surveys with operational data to build insights and drive continuous improvement toward key outcomes.

Quality x Frequency of Interactions = VALUE

Engagement Data (E)
Improvement in specific CSAT scores from VOD surveys, social sentiment, text analytics.

Outcomes
Demonstrate linkage between E and O data. This is our value reservoir. We can build insights and empower employees to drive the next best action. We can also leverage insights to drive continuous improvement.

Operational Data (O)
System driven to measure activity such as downloads, participation, prizes awarded, etc.
CORPORATE MEASURES

ENGAGEMENT
We’ll increase engagement across all OPPD channels, resulting in more successful campaigns and better insights.

TRUST
We’ll engage with customers in a way that results in building our reputation as a trusted, credible, reliable and transparent brand.

SATISFACTION
We will meet or exceed customer expectations in all the moments that matter.
ENERGY BRANDING BENCHMARKING INDEX

DIFFERENTIATION
Measures how well the brand differentiates itself from its competitors. Questions relating to uniqueness, brand promise, product offer and the brand’s name and logo.

SEGMENTATION
Measures how well the brand divides its customers into segments and how well it appeals to each segment. Questions that identify segmenting trends such as age and price sensitivity.

PERCEPTION
Measures customer experience. Questions related to elements such as trust towards the brand, perceived experience and reliability, and the level of brand responsibility perceived by customers.

SUSTAINABILITY
Measures how the brand is considered to impact the environment and society. Strength of brand associations that relate to sustainability, the environment and corporate social responsibility.

1. Pinpoint key areas of brand growth through scientifically curated customer feedback
2. Differentiate from your competitors and grow your market share
3. Maximise your Marketing ROI
4. Build your Customer-centric Brand
5. Global Comparison of your brand positioning
WHAT’S DIFFERENT?

Behavioral

- Level of Engagement
  (Set It and Forget It, Would Engage, Want More)
- Products
  (Autopay, Cool Smart, Eco 24/7, Electric Vehicles, Smart Thermostats, etc...)
- Usage Rates
- Digital Savviness

Psychographic

- Community Involvement
- Environmental Consciousness
- Budget Awareness
- Values
- Interests

Demographic

- Age
- Family Status
  (Single, Married, Widowed)
- Work/WFH Status
- Income

The team has identified specific data attributes from the data dictionary to map to the personas so we can continue to gather insights by actual behaviors and continuously optimize and expand in the future.
Segmentation & Personalization
PROCESS TO PERSONALIZED JOURNEYS

Moments that Matter
- Manage Energy Use
- Energy Savings
- Competition
- Marketing Outreach
- Integration

Data & Analytics
- Identify Engagement and Operational Data for:
  - Level 1 (Enterprise)
  - Level 2 (Stakeholder)
  - Level 3 (Initiative)
  (Including Transactional data, Energy usage data)

Customer Persona
- Established Emily
- Senior Sloan
- Elementary School Evelyn
- Etc.

Insights Gathered
- Identify processes and tools to act on data gathered and operationalize via:
  - Customer interactions across web, app, phone, traditional
  - Engagement with marketing campaigns
  - Voice of the District (VoD - Surveys, Focus groups)

Micro-Segmentation
- Channel Optimization
- Retargeting across partner sites
- Education
- Awareness
- Advertisement campaigns
- Call-to-action
- Download app

Optimize
- Return on Engagement (ROE) via:
  - Optimize Experience by Segment
  - A/B/N Testing
  - Business Goal Refinement
Engagement Prioritization
THE FUTURE OF ENGAGEMENT

This slide is illustrative and not meant to be an all-inclusive and/or checklist. The slide conveys how each potential engagement tactic has been prioritized.