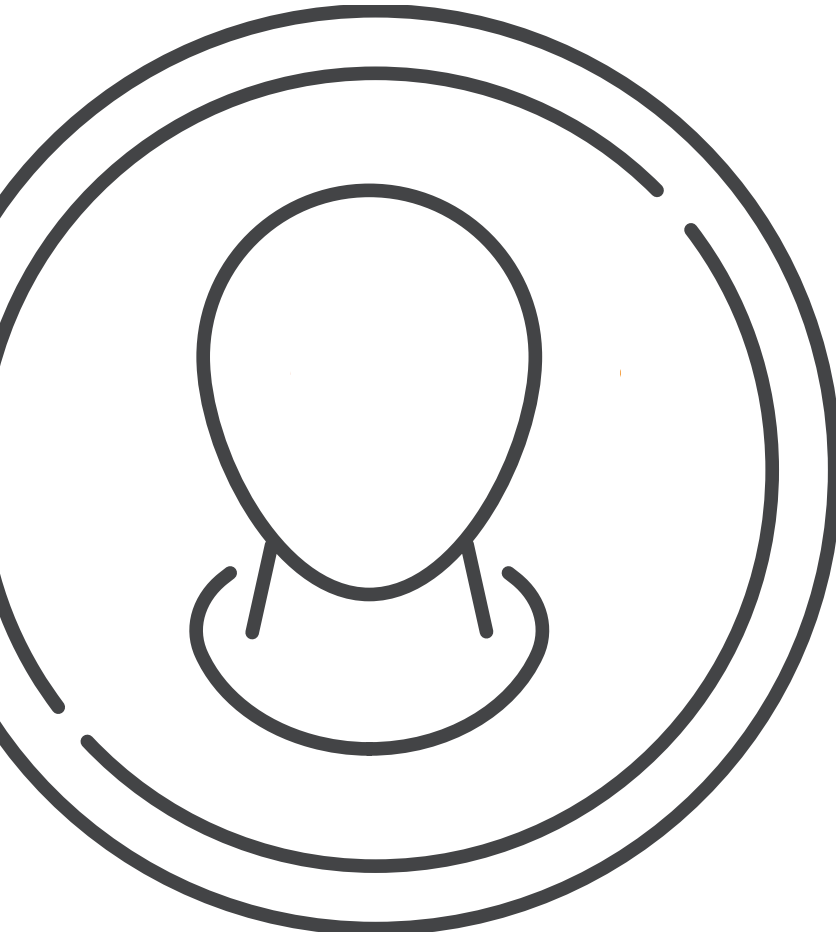


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# CUSTOMER ENGAGEMENT FOR THE FUTURE

*your energy partner®*  
**OPPD**  
Omaha Public Power District





**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.



# 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

# MOMENTS THAT MATTER



Service Orders



Economic Development



Billing & Payment



Product & Service Delivery



Manage Energy Use



Business Development



Issue Resolution



Outage Experience



Strategy Updates



Youth Outreach



Stakeholder Outreach



Project Updates



Customer Listening



Community Events



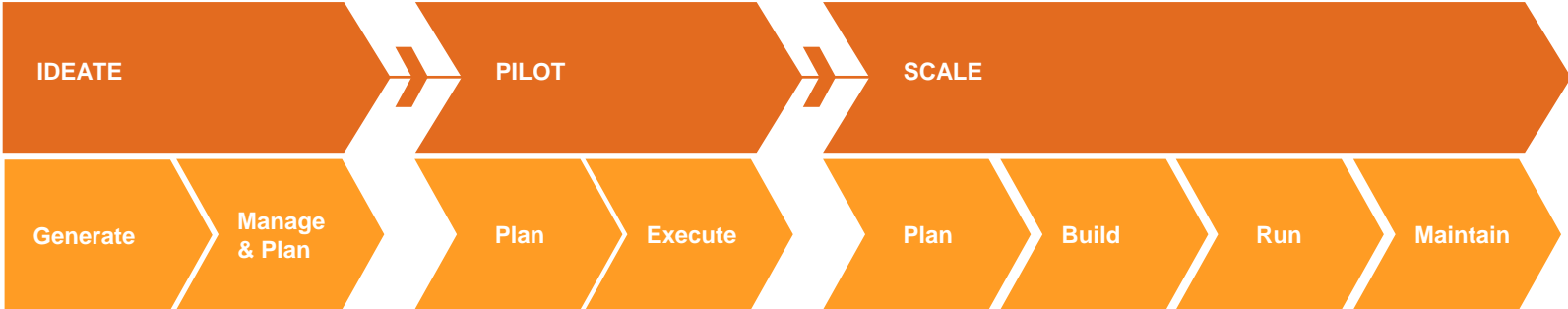
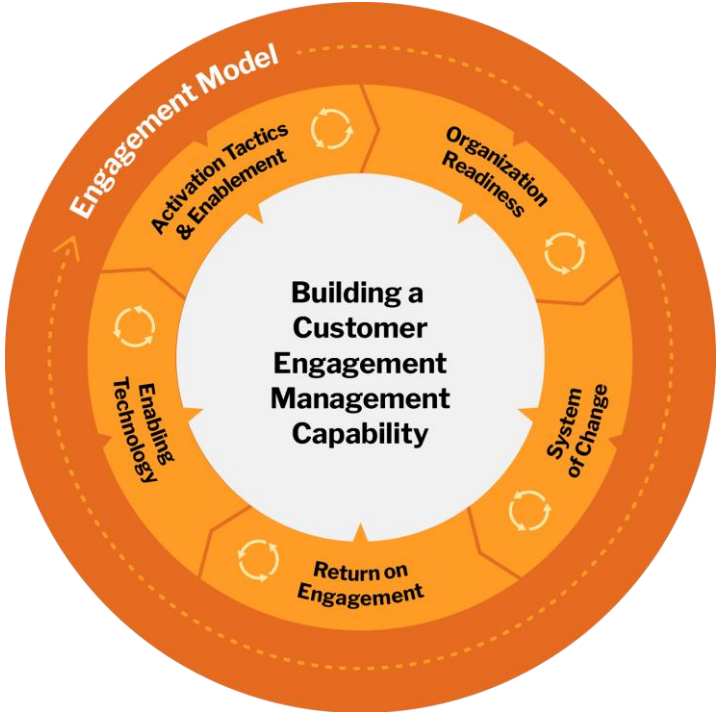
Education Opportunities

# 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



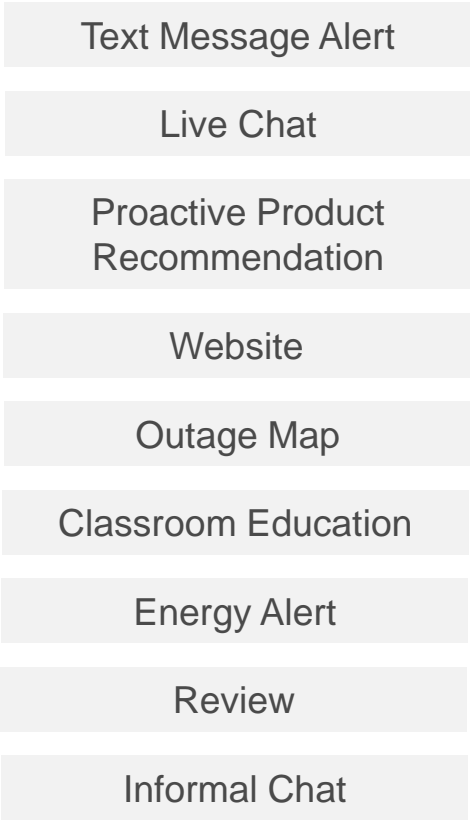
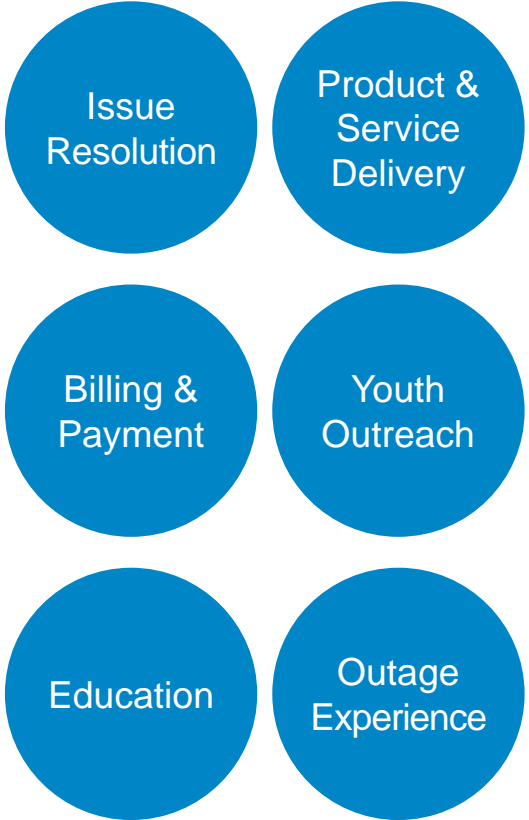
# ENGAGEMENT PLAYBOOK



# ENGAGEMENT IN ACTION



Average Joe



Persona

Moments that Matter

Journey Touchpoints

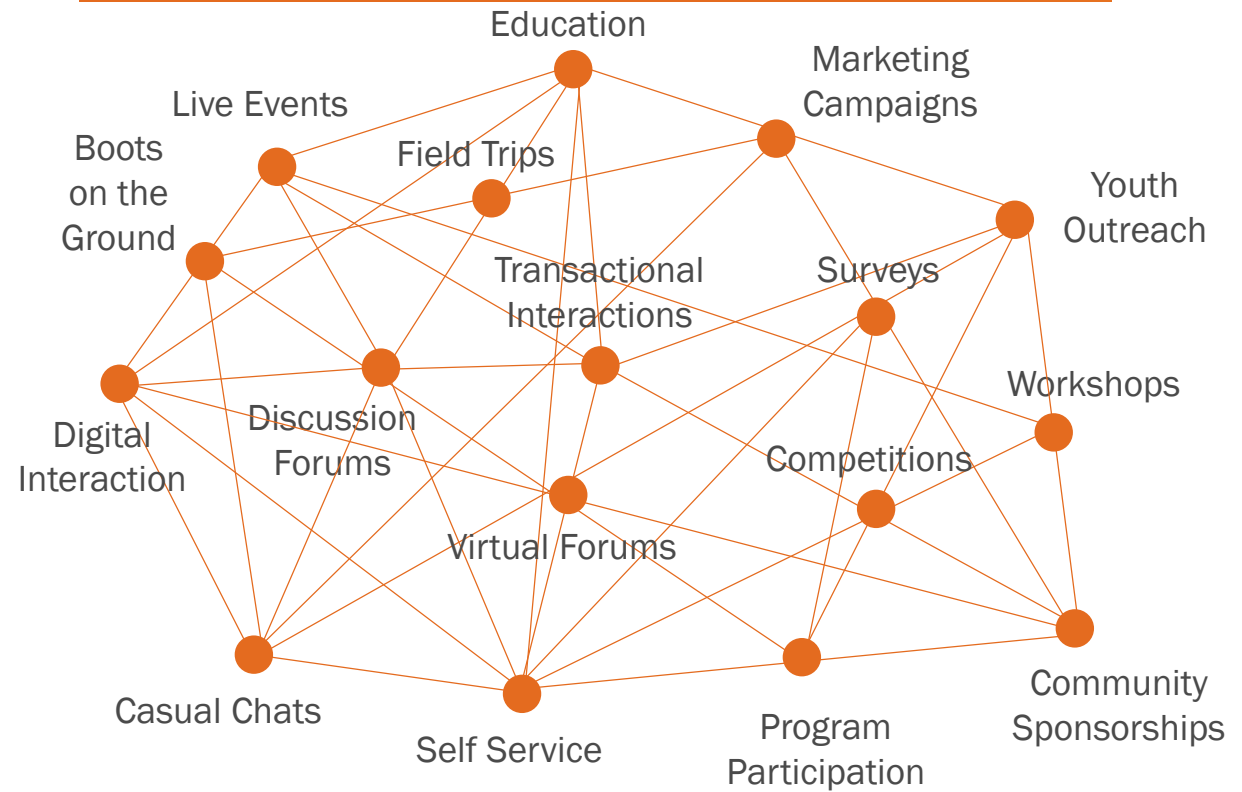
Measurement & Outcomes

# 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



# NEXT STEPS



- 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*
- 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



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**QUESTIONS?**

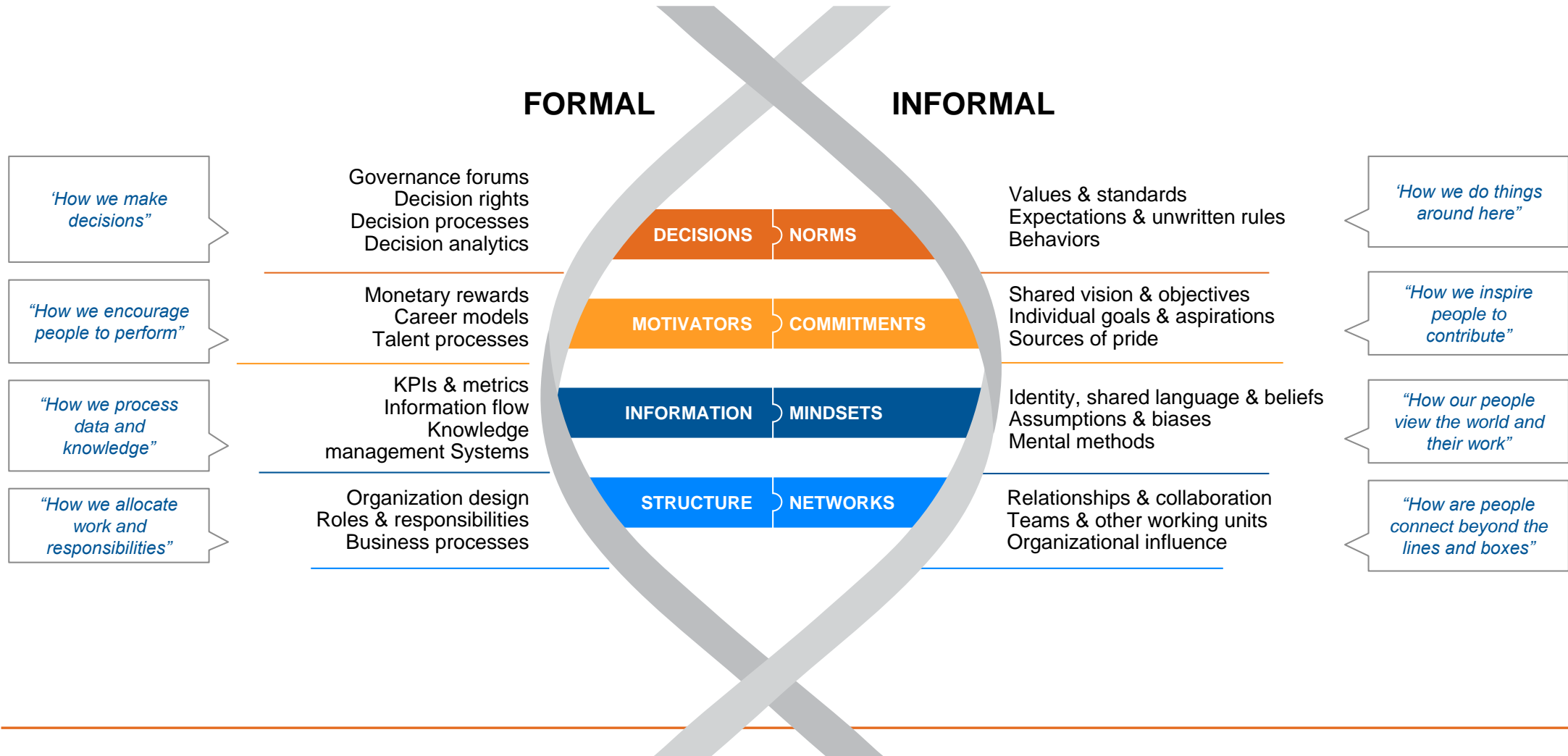
# APPENDIX



# Change Management, Culture, Training

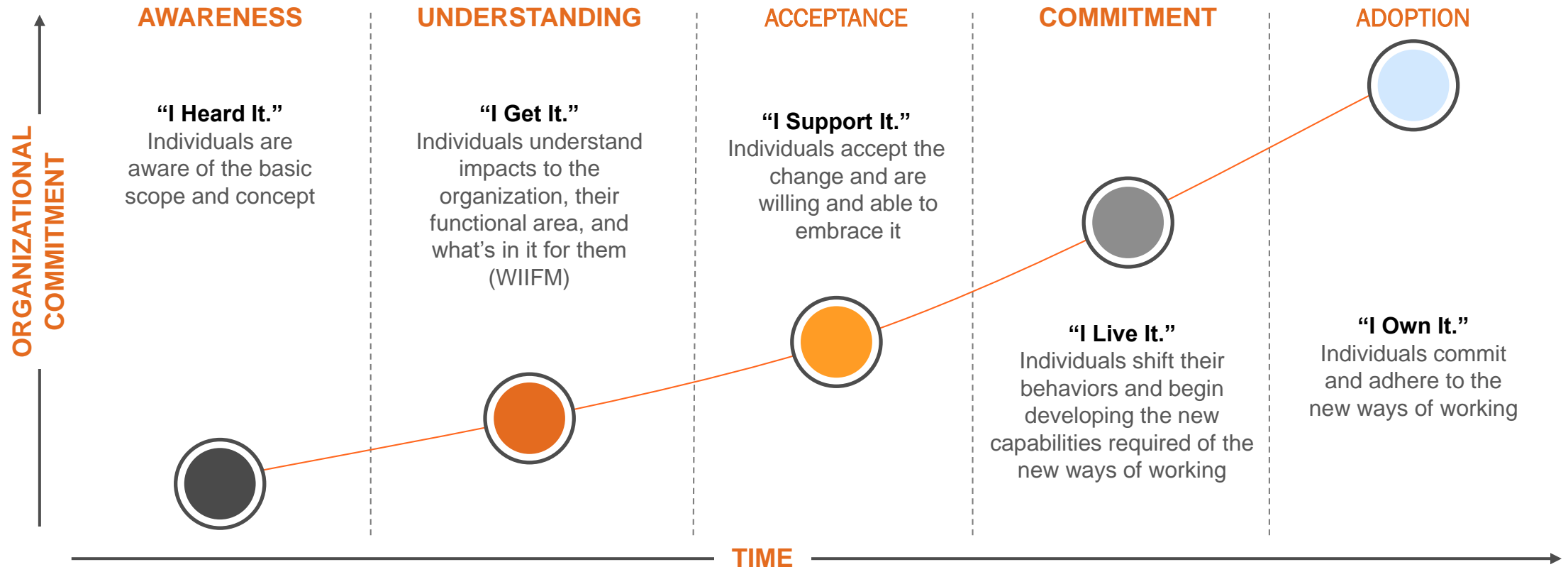


# ORG DNA FRAMEWORK





# CHANGE MANAGEMENT CURVE



# A BEHAVIOR EVOLUTION

## Katzenbach Center Methodology for Behavior Evolution



Set your cultural compass



Find your "critical few"

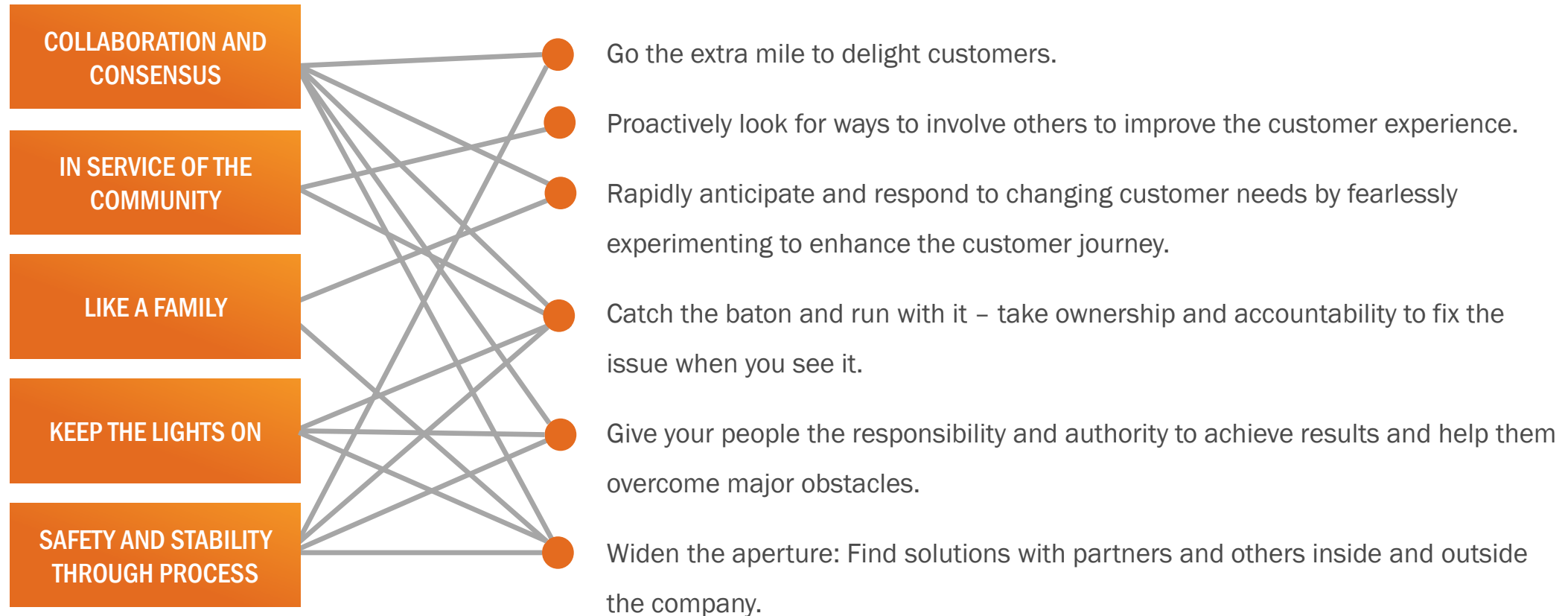


Build a movement to drive behavior adoption



Leverage E and O data to drive value

# CRITICAL FEW BEHAVIORS



# AUTHENTIC INFORMAL LEADER NETWORK

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

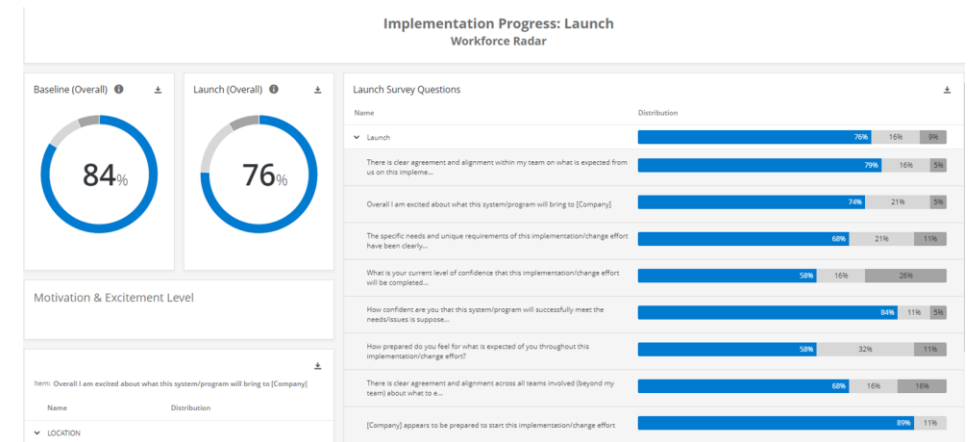
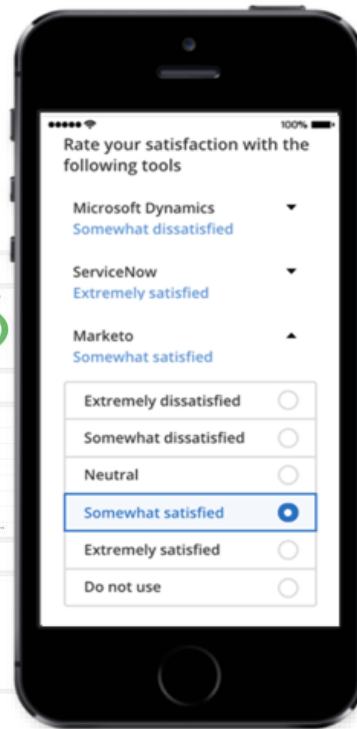
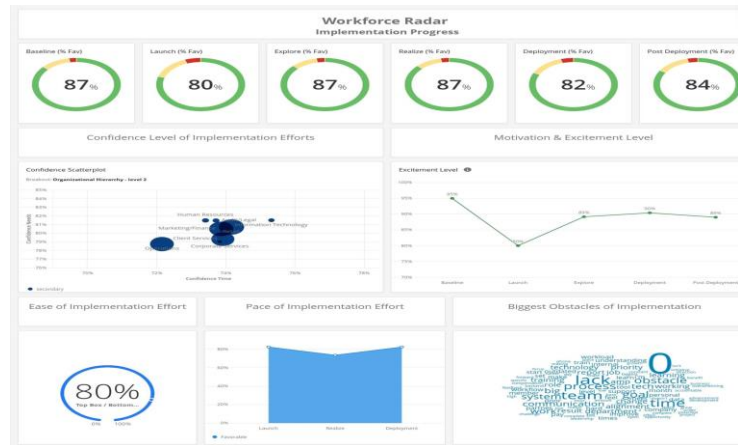
- These are additional just-in-time interactive training sessions in support of specific CE opportunity initiatives across moments that matter that will be prioritized over the roadmap (e.g., manage energy use, youth outreach, issue resolution, outage, etc.).
- The target audience are the individuals 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.

# CHANGE RADAR

## 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



# Organizational Design





# 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



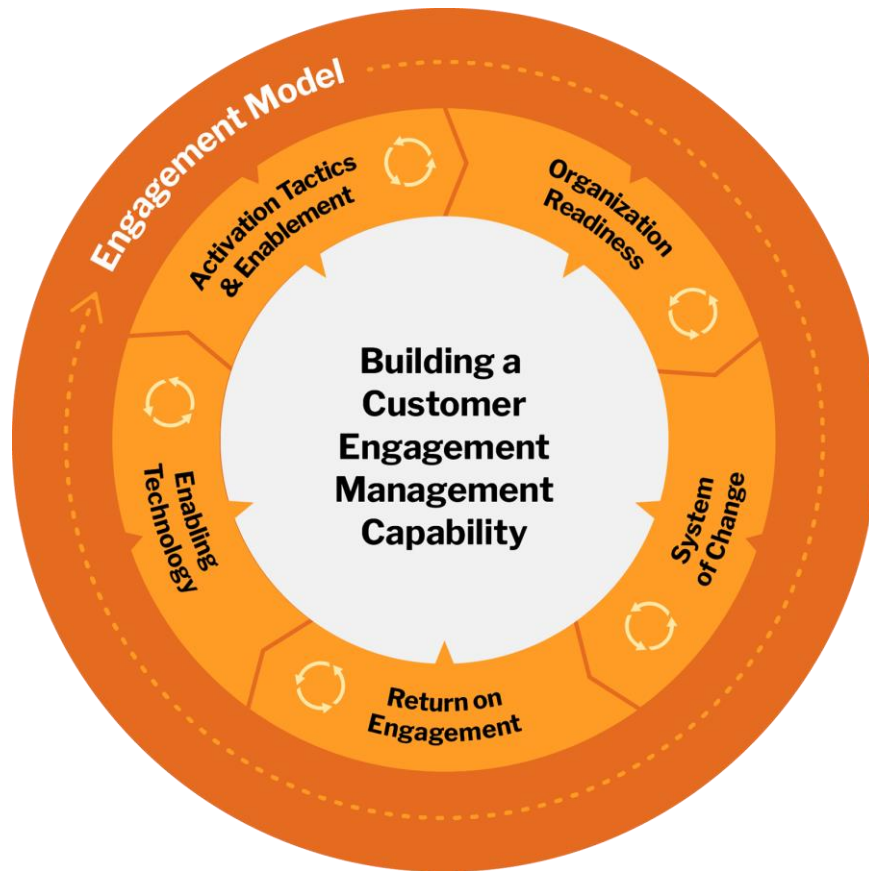
Frequency and  
Comprehensiveness of Insights



# Engagement Playbook



# 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

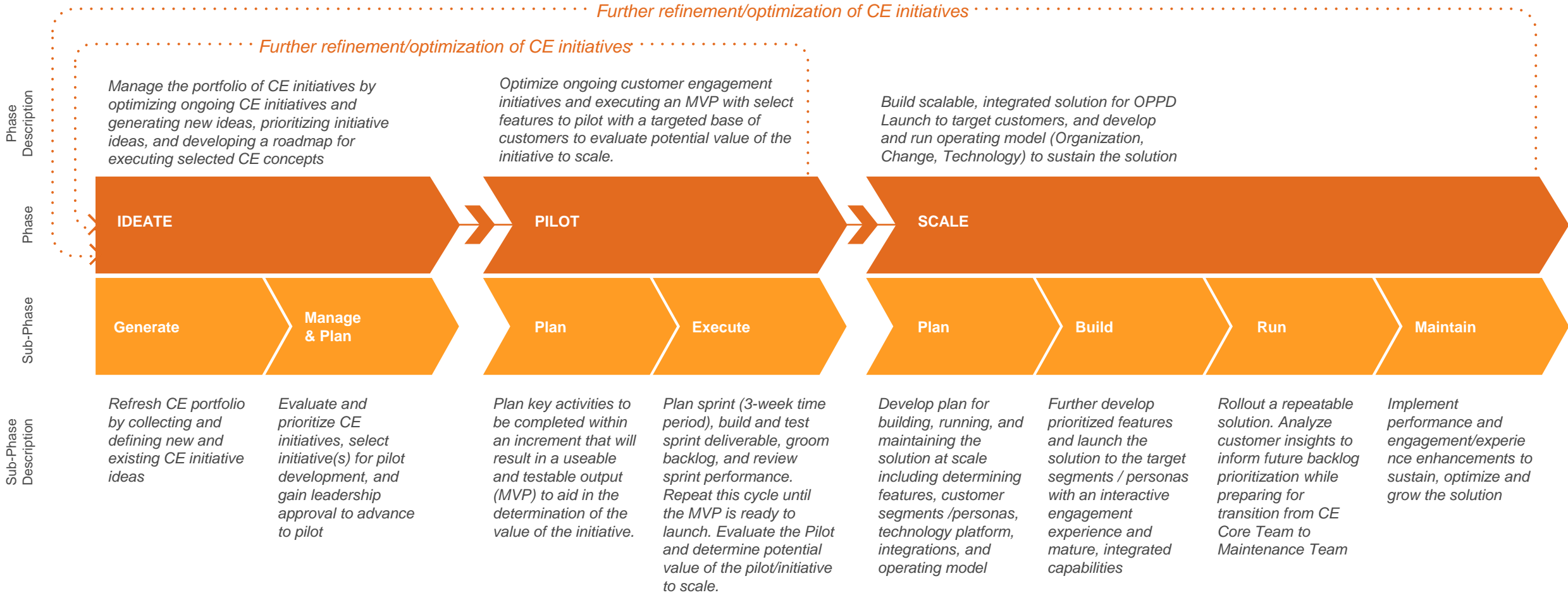
## Return on Engagement (ROE)

- 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



# THE PATH TO ADVOCACY



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

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

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

**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



# OPPD JOURNEY

## Journey to Achieving 360 View of Customers



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



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

# A HOLISTIC VIEW OF THE CUSTOMER





# 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.)



# Metrics and Dashboards



# RETURN ON ENGAGEMENT



### Holistic View of CE Impact

Build a more comprehensive view of the customer across their journey



### Combining E + O Data

Compliment operational data with VOC to add speed and context to insights



### Establishing Experience Baseline

Build internal and external experience benchmarks across the customer journey



### Driving Insights to Action

Identify and act on opportunities to close loop with customers and associates

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 (ROE)

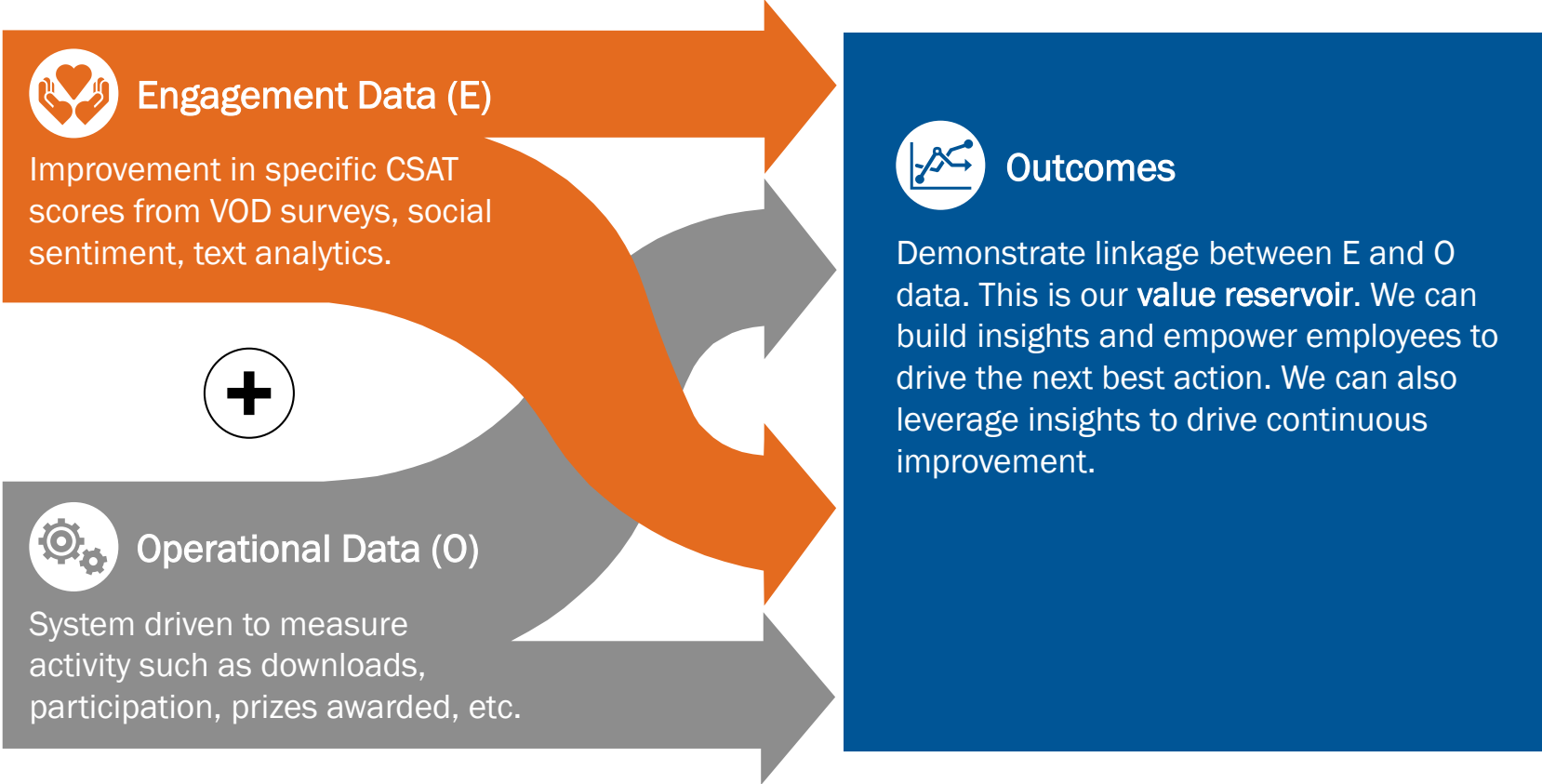
# RETURN ON ENGAGEMENT

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**



# 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.



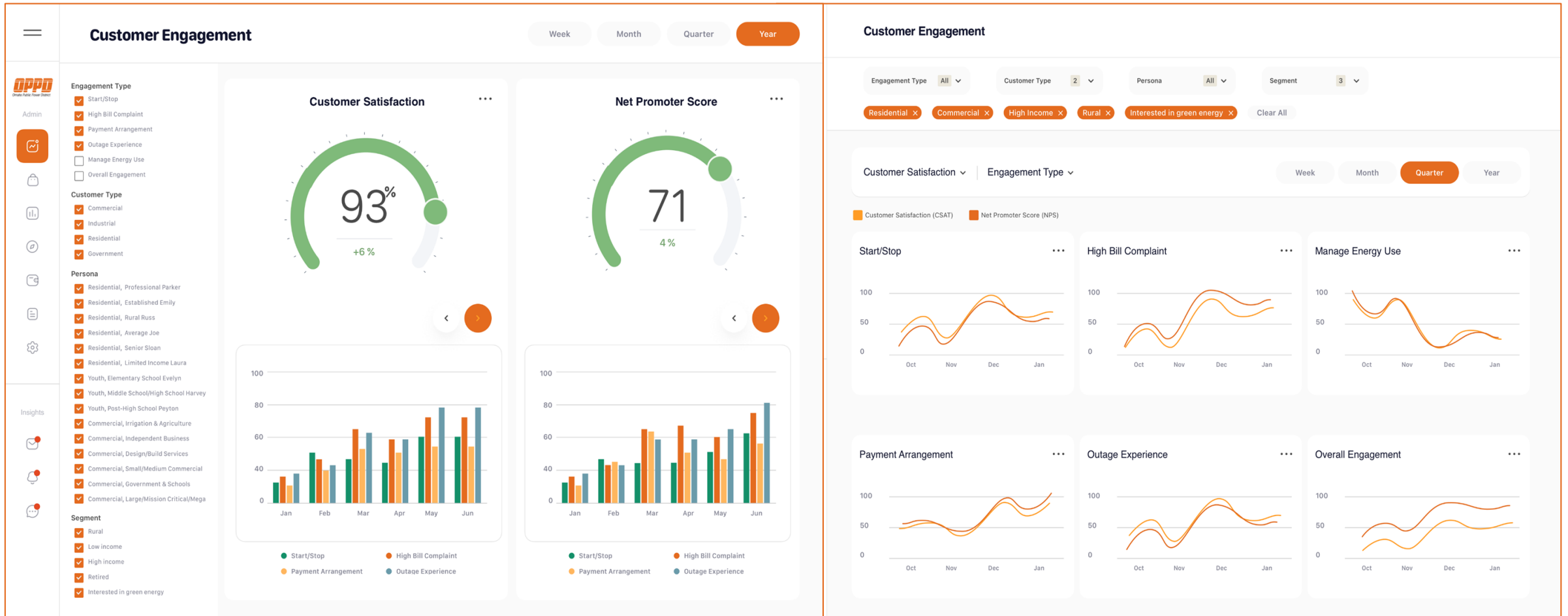
# ENERGY BRANDING BENCHMARKING INDEX

 <h3>DIFFERENTIATION</h3> <p>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.</p>	 <h3>SEGMENTATION</h3> <p>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.</p>	 <h3>PERCEPTION</h3> <p>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.</p>	 <h3>SUSTAINABILITY</h3> <p>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.</p>
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- 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**

# ENGAGEMENT DASHBOARD





# Personas



# WHAT'S DIFFERENT?



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.

# PERSONAS



**Professional Parker**



**Established Emily**



**Average Joe**



**Senior Sloan**



**Limited Income  
Laura**



**Rural Russ**



**Elementary School Evelyn**



**Middle School/ High  
School Harvey**



**Post-High School Peyton**



**Irrigation &  
Agriculture**



**Independent Business  
/ Mom & Pop**



**Large/ Mission  
Critical / Mega**



**Government &  
Schools**



**Design / Build  
Services**



**Small / Medium  
Commercial**



# Segmentation & Personalization



# PROCESS TO PERSONALIZED JOURNEYS



Moments that Matter	Data & Analytics	Customer Persona	Insights Gathered	Micro-Segmentation	Optimize
<ul style="list-style-type: none"> <li>• Manage Energy Use</li> <li>• Energy Savings Competition</li> <li>• Marketing Outreach Integration</li> </ul>	<p>Identify Engagement and Operational Data for:</p> <ul style="list-style-type: none"> <li>• Level 1 (Enterprise)</li> <li>• Level 2 (Stakeholder)</li> <li>• Level 3 (Initiative)</li> </ul> <p>(Including Transactional data, Energy usage data)</p>	<ul style="list-style-type: none"> <li>• Established Emily</li> <li>• Senior Sloan</li> <li>• Elementary School Evelyn</li> <li>• Etc.</li> </ul>	<p>Identify processes and tools to act on data gathered and operationalize via:</p> <ul style="list-style-type: none"> <li>• Customer interactions across web, app, phone, traditional</li> <li>• Engagement with marketing campaigns</li> <li>• Voice of the District (VoD - Surveys, Focus groups)</li> </ul>	<ul style="list-style-type: none"> <li>• Channel Optimization</li> <li>• Retargeting across partner sites</li> <li>• Education</li> <li>• Awareness</li> <li>• Advertisement campaigns</li> <li>• Call-to-action</li> <li>• Download app</li> </ul>	<p>Return on Engagement (ROE) via:</p> <ul style="list-style-type: none"> <li>• Optimize Experience by Segment</li> <li>• A/B/N Testing</li> <li>• Business Goal Refinement</li> </ul>



# Engagement Prioritization





# THE FUTURE OF ENGAGEMENT

