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Presentation Title: All the Feels: Journey Mapping Across a Portfolio of Programs

Abstract: Customer experience research is a hot topic in the energy industry and with good reason, as we close in on reductions in lighting-related savings, utilities must look to other avenues to generate energy savings. While one option is to look towards research and development to find new measures and new program delivery approaches, this paper suggests looking inward and reconsidering design and engagement concepts within existing programs. Leveraging already available research and applying strategic planning, journey mapping provides a fast and effective solution to gathering grounded data in settings highly focused on aligning stakeholder interests, developing actionable recommendations, and prioritizing operational improvements.

Beyond its surface level benefits, journey mapping allows utilities to dig deep not only within their programs, but also across their portfolios to understand how both customers and trade allies connect to their services. Along the way, journey mapping research unlocks critical information about program operations compared to plans and identifies how participants react to each step of the operation. Pulling these pieces together, utilities can make more informed decisions about how to manage, reengage, and channel participants into other aspects of their portfolio offerings.

This paper will delve into what data resources can be available to support journey mapping exercises and how they can be applied to maximize the effectiveness of the data collected. The authors will show to leverage both internal and externally available materials, as well as how to target stakeholders for participation in either in-depth interviews, focus groups, or broader survey efforts. They will also present alternative journey mapping approaches focused on providing options for new and mature programs, as well as how to develop journey maps using minimal and exhaustive resources. Likewise, the paper will provide examples from both residential and commercial and industrial programs across the Midwest and East coast to demonstrate how to generate customer-driven insights oriented towards utility timelines, budgets, interests, and impacts.

The paper will start with an overview of journey mapping best practices drawing on the latest market research-based techniques. In the second section, the paper will delve into how to develop a strategic research plan to support the journey mapping process. The final section will provide case study examples of program-based journey mapping exercises and will also delve into how to connect customer journeys to map across an entire portfolio. Ultimately, the goal of this effort will be to illustrate how journey mapping can provide a great deal of valuable customer experience information that as a research effort, can be highly customizable to meet the needs of any utility. In this case, readers of the paper and attendees of the presentation will leave with concrete tools to support their program design, planning, implementation, and evaluation tasks.