All The Feels: Journey Mapping Across a Portfolio of Programs

Navigant
Latisha Younger-Canon
Monica Pagnotta

Consolidated Edison Company of New York, Inc.
Alyssa Blumenthal

IEPEC Conference
Denver, Colorado
August 22, 2019
The Why? and the What? 
Journey Mapping

Why?
Customer Experience
Interaction Points

What?
Visual mapping
Satisfaction
Barriers
Opportunities for Improvement
Where to Start? Determine your Planning Approach

<table>
<thead>
<tr>
<th>ESSENTIAL RESEARCH PLANNING APPROACH</th>
<th>STANDARD RESEARCH PLANNING APPROACH</th>
<th>COMPREHENSIVE RESEARCH PLANNING APPROACH</th>
</tr>
</thead>
<tbody>
<tr>
<td>Provides fast feedback to identify issues and prioritize improvements</td>
<td>Examines alignment or divergence from program design and intention Establishes performance metrics and allows for internal benchmarking</td>
<td>Applies diverse data collection strategies Examines multiple viewpoints/personas Establishes extensive plan forward rooted in stakeholder engagement</td>
</tr>
</tbody>
</table>
Where to Start?
Determine your Planning Approach

ESSENTIAL RESEARCH PLANNING APPROACH

Provides fast feedback to identify issues and prioritize improvements

DATA COLLECTION METHODS

- Program Materials Review
- Phone Surveys
- Online Surveys
Where to Start? Determine your Planning Approach

STANDARD RESEARCH PLANNING APPROACH

- Examines alignment or divergence from program design and intention
- Establishes performance metrics and allows for internal benchmarking

DATA COLLECTION METHODS

- Program Materials Review
- Program Staff Interviews
- Process Map
- Stakeholder Interviews
- Phone Surveys
- Online Surveys
### Where to Start?

**Determine your Planning Approach**

#### COMPREHENSIVE RESEARCH PLANNING APPROACH

- Applies diverse data collection strategies
- Examines multiple viewpoints/personas
- Establishes extensive plan forward rooted in stakeholder engagement

#### DATA COLLECTION METHODS

<table>
<thead>
<tr>
<th>Method</th>
</tr>
</thead>
<tbody>
<tr>
<td>Program Materials Review</td>
</tr>
<tr>
<td>Program Staff Interviews</td>
</tr>
<tr>
<td>Process Map</td>
</tr>
<tr>
<td>In-person Workshop</td>
</tr>
<tr>
<td>Stakeholder Interviews</td>
</tr>
<tr>
<td>Phone Surveys</td>
</tr>
<tr>
<td>Online Surveys</td>
</tr>
</tbody>
</table>
**Case Study 1**

**Essential Journey Map**

**DATA COLLECTION**

**KEY BENEFITS**

**RESEARCH METHOD**

**NEW CONSTRUCTION PARTICIPANTS (n=12)**

<table>
<thead>
<tr>
<th>Survey Question</th>
<th>Overall Satisfaction with Solution</th>
</tr>
</thead>
<tbody>
<tr>
<td>... the requirements of program?</td>
<td>4.3</td>
</tr>
<tr>
<td>... the application?</td>
<td>4.1</td>
</tr>
<tr>
<td>... the rebate for ENERGY STAR® Homes?</td>
<td>4.3</td>
</tr>
<tr>
<td>... the rebate for Code Plus Homes?**</td>
<td>4.0</td>
</tr>
<tr>
<td>... the time it took to receive your rebate?</td>
<td>3.1</td>
</tr>
</tbody>
</table>

Using a scale of 1 to 5, with 5 meaning “Extremely Satisfied” and 1 meaning “Extremely Dissatisfied,”…?

- Great (4.5+)
- Very Good (4.0 – 4.4)
- Good (3.5 – 3.9)
- Needs Improvement (below 3.5)

**RESEARCH METHOD**

**Essential Planning Approach**

**DATA COLLECTION**

Online Survey

**KEY BENEFITS**

- Fast feedback of the user experience
- Easy-to-read journey layout
- Ability to prioritize continuous improvement efforts
- Not labor-intensive or burdensome on budget or resources

---

*High satisfaction is determined by participant responses of “4” and “5” out of a 1-5 rating scale.*

** Customer Perceptions:
- “Program administration is a 5+. Program structure and incentives are a 2 compared to [other] utility programs.”
- 63% of builders expressed high satisfaction with the rebate application process.
- 75% of builders expressed high satisfaction with ENERGY STAR Homes rebates.
- “We have never applied for [Code Plus Homes].”
- “[It] shouldn’t take 3 months to receive [the rebate].”
Case Study 2
Standard Journey Map

Home Energy Consultation (HEC) Program
Customer Journey Map

Data Collection
- Program Material Review
- Process Map
- Targeted In-depth Interviews

Research Method
- Standard Planning Approach

Key Benefits
- Determines alignment or divergence from program design and intention
- Establishes performance metrics and allows for internal benchmarking
- Moderate budget and resources

Source: DTE Energy
Con Edison Commercial and Industrial Energy Efficiency Program.

Source: Con Edison website
Case Study 3
Con Edison: Comprehensive Journey Map

RESEARCH METHOD
Comprehensive Planning Approach

DATA COLLECTION
Program Material Review
Program Manager/Implementor Contractor Interviews
Process Map
In-Person Working Session
Trade Ally (Participating Contractor) Mapping
  • Active Contractor In-depth Interview
  • Inactive Contractor In-depth Interview
Customer Mapping
  • General Participant In-depth Interview
  • Strategic Energy Partner (SEP) In-depth Interview
  • Dropout In-depth Interview
  • Participant Survey

KEY BENEFITS
Ability to leverage diverse data collection strategies
Examines the experiences of multiple participant viewpoints
Helps to establish an extensive plan forward rooted in stakeholder engagement

Source: Con Edison in-person workshop
Con Edison’s Journey Mapping Takeaways.

**PAIN POINTS**

<table>
<thead>
<tr>
<th>Issue</th>
<th><strong>OPPORTUNITIES</strong></th>
</tr>
</thead>
<tbody>
<tr>
<td>Lead generation</td>
<td>Develop marketing collateral specific to industry verticals</td>
</tr>
<tr>
<td>Project implementation</td>
<td>Pair Operations and Business Development staff to increase operational efficiencies and create a more streamlined experience for participants</td>
</tr>
<tr>
<td>Project timeline</td>
<td>Allow Participating Contractors to schedule pre-inspections through the “Incentive Navigator” portal</td>
</tr>
</tbody>
</table>
Key Takeaways.

Journey mapping can help utilities uncover ways to improve how customers, trade allies, and other key stakeholders experience their program offerings.

Journey mapping is customizable and scalable to accommodate different data collection methods, resources and budgets.

<table>
<thead>
<tr>
<th>CASE STUDIES</th>
<th>ESSENTIAL MAP</th>
<th>STANDARD MAP</th>
<th>COMPREHENSIVE MAP</th>
</tr>
</thead>
<tbody>
<tr>
<td>EAST COAST UTILITY</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Utility need: Fast feedback to provide suggestions for timely program improvements</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>DTE ENERGY</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Utility need: Understand customer’s experience to support continuous improvement opportunities</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>CON EDISON, INC.</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Utility need: Identify areas for improvement shortly after undertaking implementation of C&amp;I program in-house</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

**Effort**

- ESSENTIAL MAP
- STANDARD MAP
- COMPREHENSIVE MAP

**Time**

- ESSENTIAL MAP
- STANDARD MAP
- COMPREHENSIVE MAP

**Cost**

- ESSENTIAL MAP
- STANDARD MAP
- COMPREHENSIVE MAP
Thank You

Navigant
Latisha Younger-Canon
t: 608.497.2346
latisha.younger.canon@Navigant.com

Monica Pagnotta
t: 303.728.2459
monica.pagnotta@Navigant.com

Consolidated Edison Company of New York, Inc.
Alyssa Blumenthal

PECO
Nick Dedominicis

DTE Energy
Denise Allard

For more information on journey mapping, please visit:
Getting Higher in the Tree: Using Customer Journey Mapping to Understand Customer Experience
IEPEC 2017
Baltimore, MD