

# All The Feels: Journey Mapping Across a Portfolio of Programs

## Navigant

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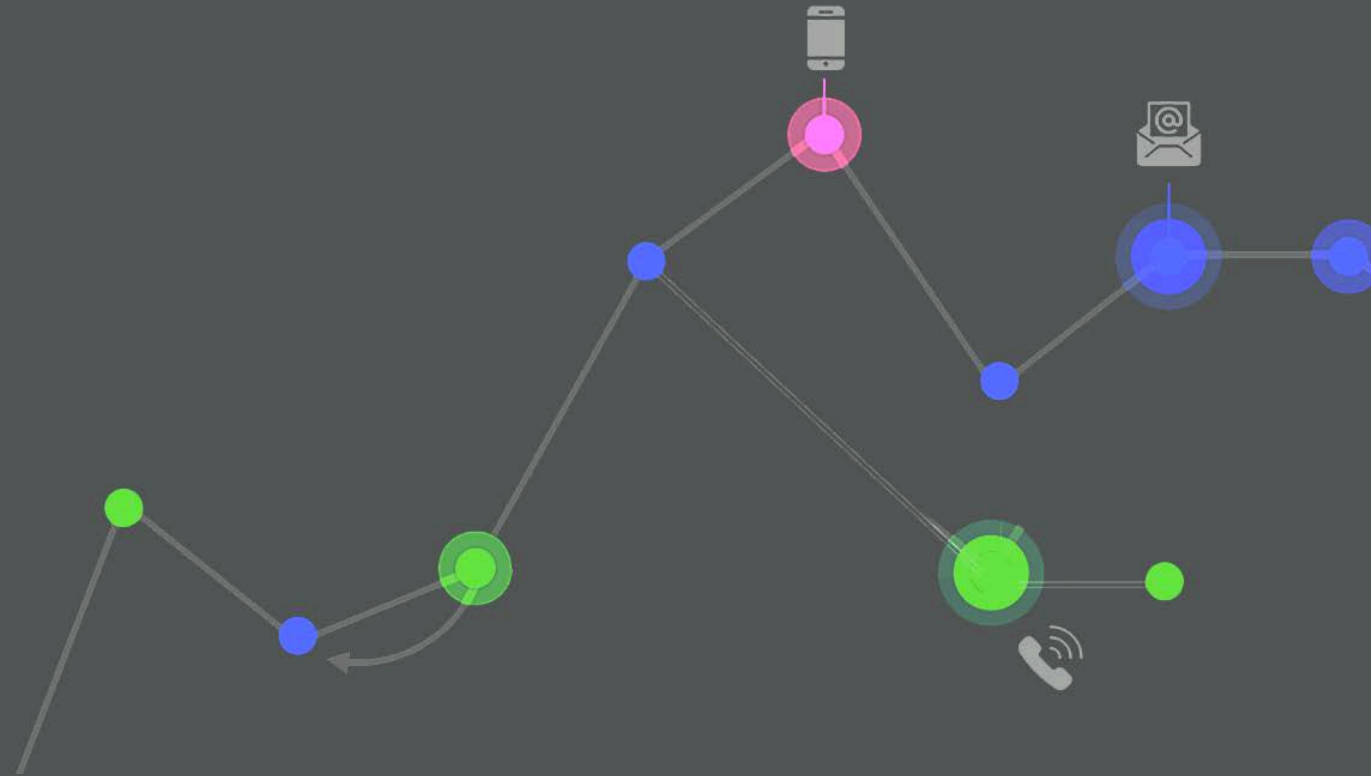
## Consolidated Edison Company of New York, Inc.

Alyssa Blumenthal

IEPEC Conference

Denver, Colorado

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The Why?  
and the What ?  
**Journey Mapping**

Why?

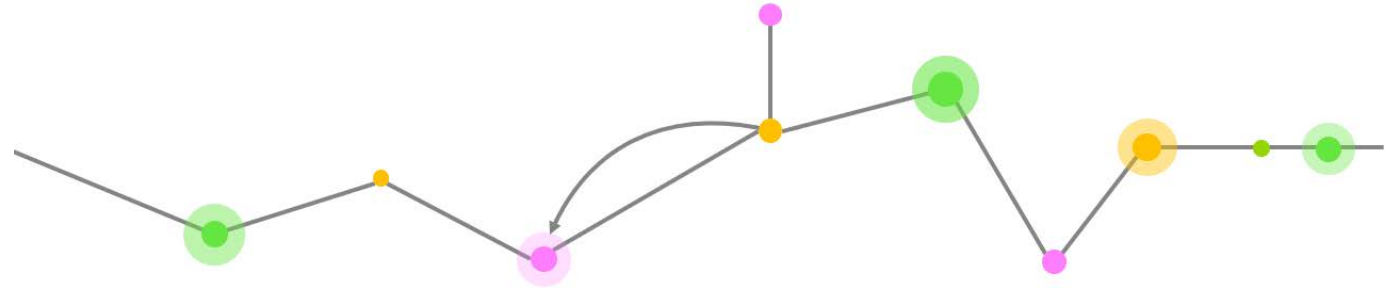
Customer Experience  
Interaction Points

What?

Visual mapping  
Satisfaction  
Barriers  
Opportunities for Improvement



Where to Start?  
Determine your  
Planning Approach



ESSENTIAL RESEARCH  
PLANNING APPROACH

Provides fast feedback to identify  
issues and prioritize improvements

STANDARD RESEARCH  
PLANNING APPROACH

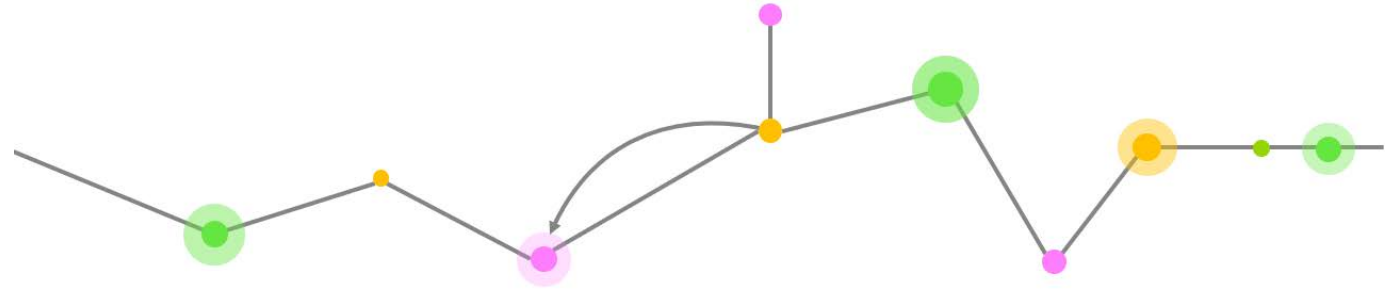
Examines alignment or divergence  
from program design and intention  
  
Establishes performance metrics and  
allows for internal benchmarking

COMPREHENSIVE RESEARCH  
PLANNING APPROACH

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



# 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



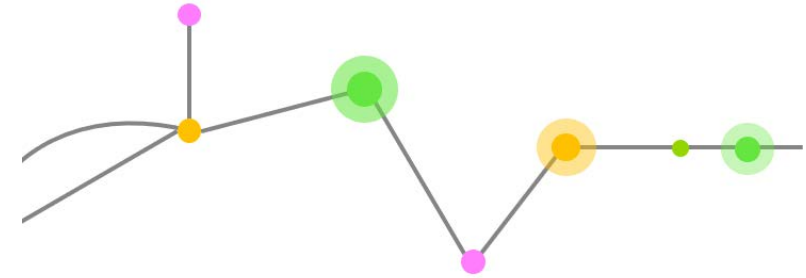
Stakeholder Interviews



Phone Surveys



Online Surveys



# Where to Start? Determine your Planning Approach








## COMPREHENSIVE RESEARCH PLANNING APPROACH

Applies diverse data collection strategies

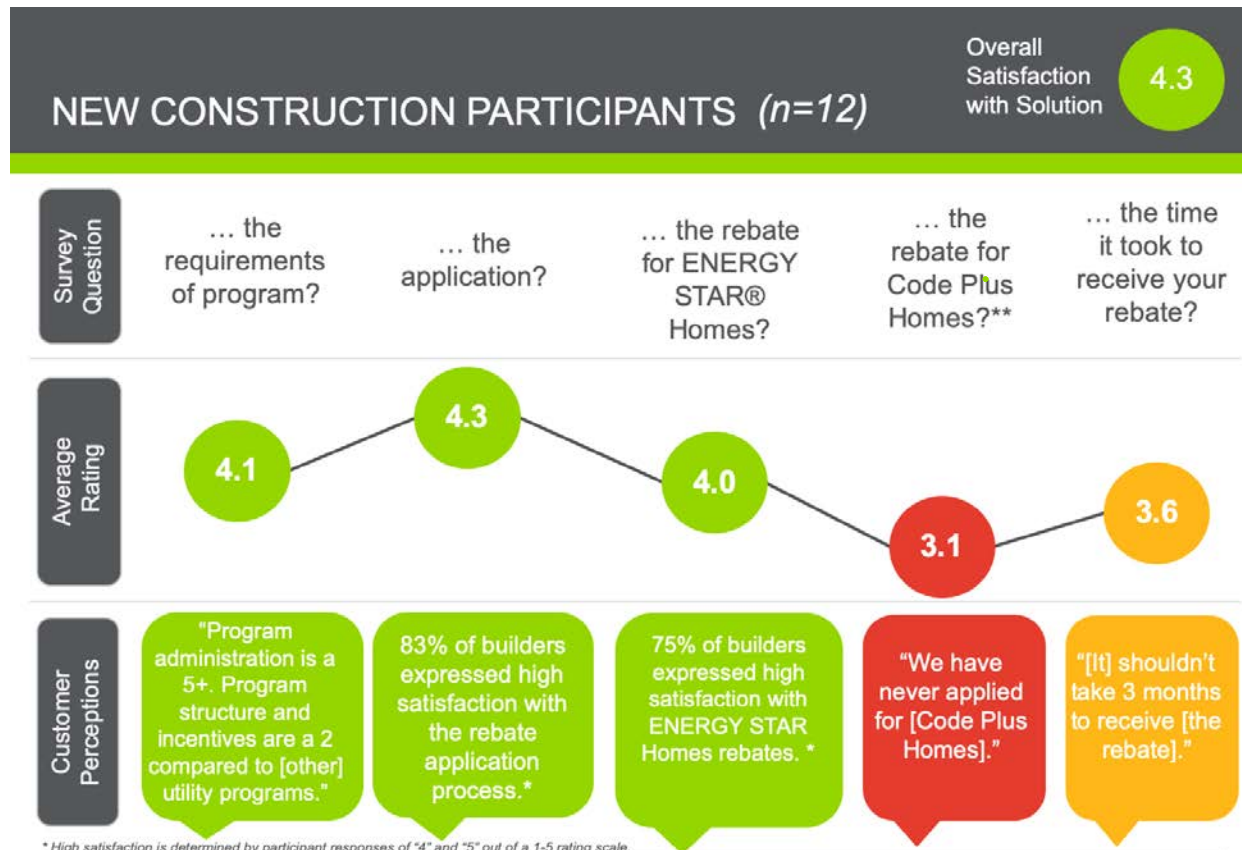
Examines multiple viewpoints/personas

Establishes extensive plan forward  
rooted in stakeholder engagement

## DATA COLLECTION METHODS

	Program Materials Review
	Program Staff Interviews
	Process Map
	In-person Workshop
	Stakeholder Interviews
	Phone Surveys
	Online Surveys

# Case Study 1 Essential Journey Map



Using a scale of 1 to 5, with 5 meaning "Extremely Satisfied" and 1 meaning "Extremely Dissatisfied,"...?



\* High satisfaction is determined by participant responses of "4" and "5" out of a 1-5 rating scale.  
\*\* Two out of seven builders interviewed expressed not having knowledge of Code Plus Homes.

## RESEARCH METHOD

Essential Planning Approach

## DATA COLLECTION

Online Survey

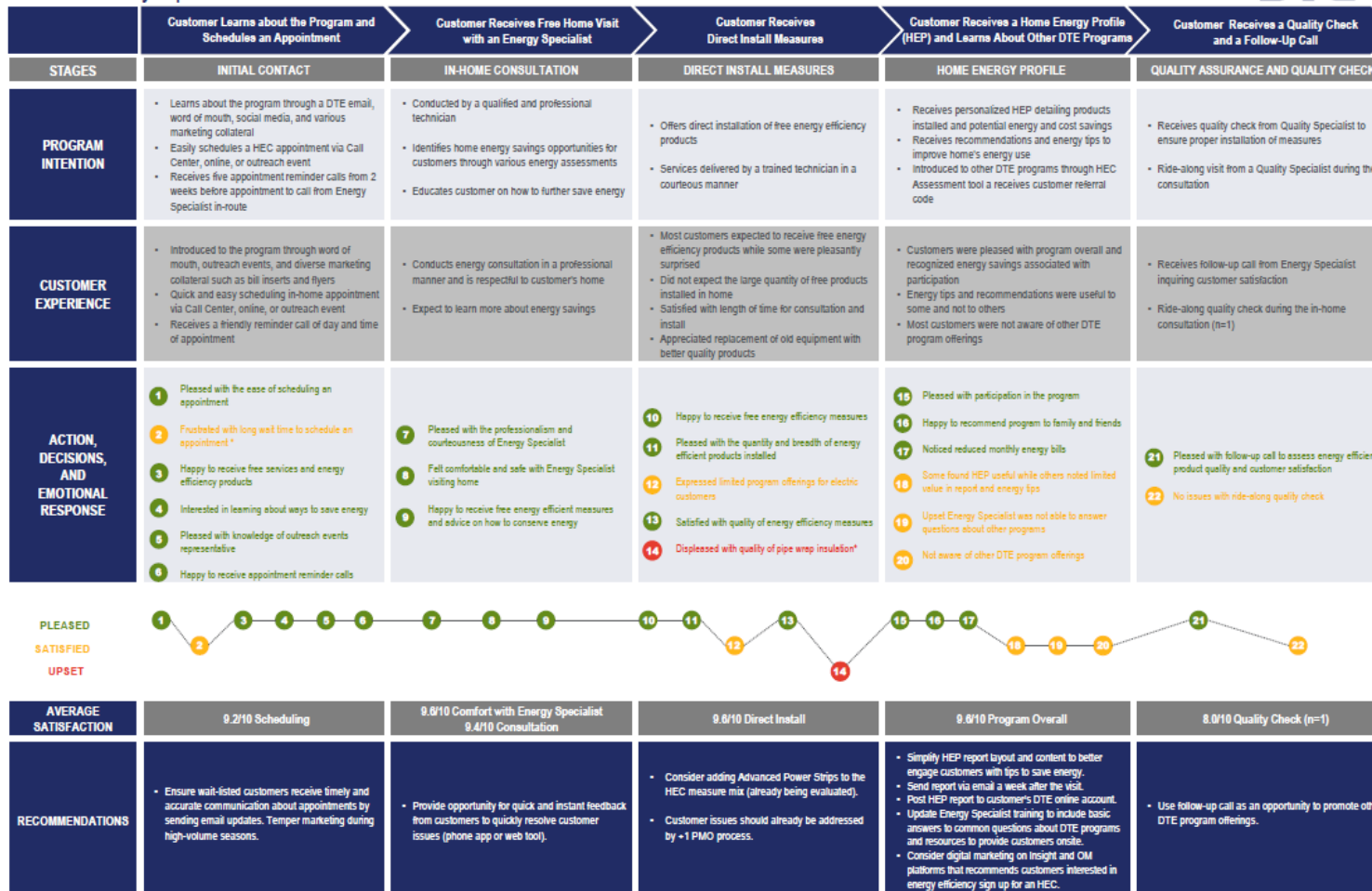
## KEY BENEFITS

- 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

# Case Study 2 Standard Journey Map

## Home Energy Consultation (HEC) Program Customer Journey Map

DTE



\* Response was based on an isolated incident and does not reflect the majority of customers interviewed.

## RESEARCH METHOD

Standard Planning Approach

## DATA COLLECTION

Program Material Review  
Process Map  
Targeted In-depth Interviews

## KEY BENEFITS

Determines alignment or divergence from program design and intention

Establishes performance metrics and allows for internal benchmarking

Moderate budget and resources



# 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

### 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

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

Source: Con Edison in-person workshop

# Con Edison's Journey Mapping Takeaways.

## PAIN POINTS

Lead generation

Project  
implementation

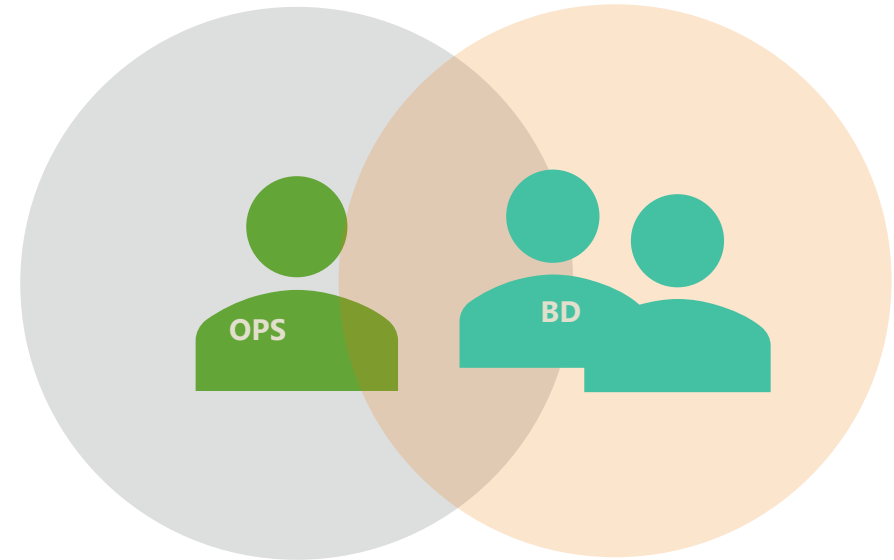
Project timeline

## OPPORTUNITIES

Develop marketing collateral specific to industry verticals

Pair Operations and Business Development staff to increase operational efficiencies and create a more streamlined experience for participants










Allow Participating Contractors to schedule pre-inspections through the "Incentive Navigator" portal



# 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.

	ESSENTIAL MAP	STANDARD MAP	COMPREHENSIVE MAP
<b>EFFORT</b>			
<b>TIME</b>			
<b>COST</b>			
<b>CASE STUDIES</b>	<b>EAST COAST UTILITY</b> Utility need: Fast feedback to provide suggestions for timely program improvements	<b>DTE ENERGY</b> Utility need: Understand customer's experience to support continuous improvement opportunities	<b>CON EDISON, INC.</b> Utility need: Identify areas for improvement shortly after undertaking implementation of C&I program in-house

# Thank You

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For more information on journey mapping, please visit:

[\*Getting Higher in the Tree: Using Customer Journey Mapping to Understand Customer Experience\*](#)

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Baltimore, MD