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

### **Navigant**

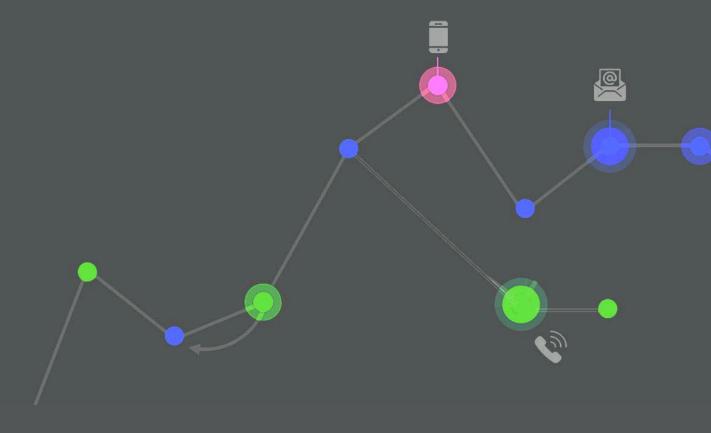
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#### **IEPEC Conference**

Denver, Colorado August 22, 2019













The Why? and the What?

Journey Mapping

Why?

**Customer Experience Interaction Points** 

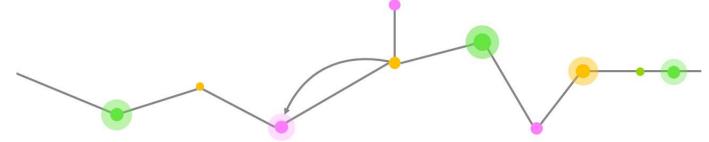
What?

Visual mapping
Satisfaction
Barriers
Opportunities for Improvement



### Where to Start?

# Determine your Planning Approach



### 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

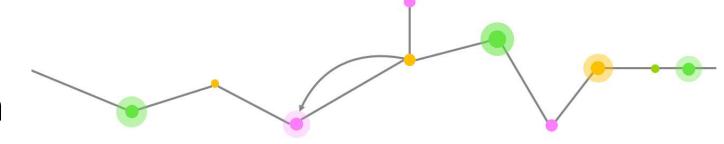
Applies diverse data collection strategies

Examines multiple viewpoints/personas

Establishes extensive plan forward rooted in stakeholder engagement

### Where to Start?

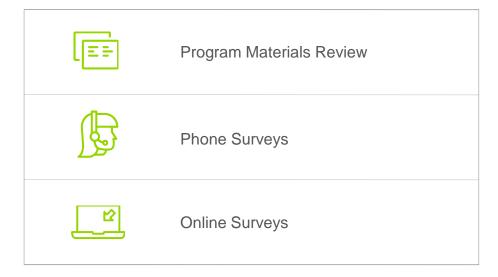
# Determine your Planning Approach



### ESSENTIAL RESEARCH PLANNING APPROACH

Provides fast feedback to identify issues and prioritize improvements

### **DATA COLLECTION METHODS**



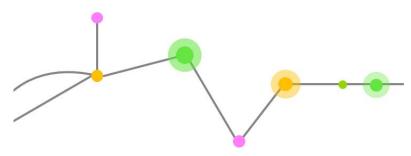
### Where to Start?

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### **DATA COLLECTION METHODS**

EF	Program Materials Review
ed and	Program Staff Interviews
<b>6</b>	Process Map
	Stakeholder Interviews
	Phone Surveys
₩ P	Online Surveys

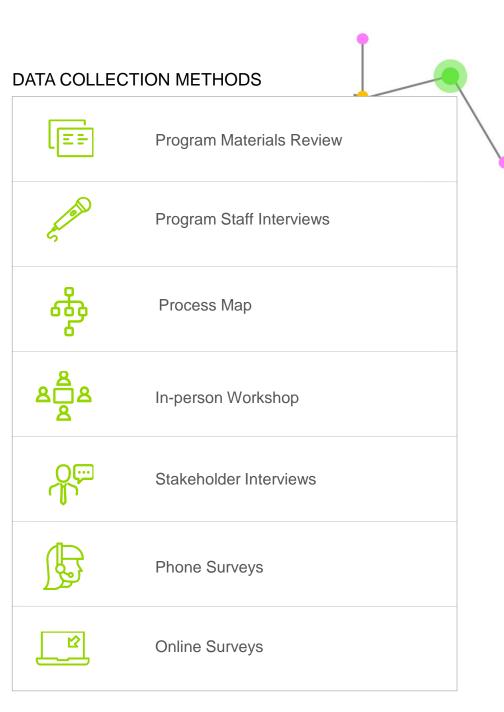
# Where to Start? Determine your Planning Approach

### COMPREHENSIVE RESEARCH PLANNING APPROACH

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### Case Study 1 **Essential Journey Map**

#### **RESEARCH METHOD**

**Essential Planning Approach** 

#### Overall 4.3 Satisfaction NEW CONSTRUCTION PARTICIPANTS (n=12) with Solution ... the time ... the ... the ... the rebate ... the it took to rebate for requirements for ENERGY application? receive your Code Plus of program? **STAR®** rebate? Homes?\*\* Homes? 4.1 3.1 83% of builders 75% of builders administration is a "We have expressed high never applied satisfaction with satisfaction with structure and for [Code Plus to receive [the **ENERGY STAR** the rebate ncentives are a 2 Homes]." Homes rebates. \* compared to [other] utility programs.' \* 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. **⇒ PECO.** NAVIGANT / @2018 NAVIGANT CONSULTING, INC. ALL RIGHTS RESERVED

### **DATA COLLECTION**

Online Survey

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

"Extremely Dissatisfied,"...?

Great

(4.5+)

Good

Needs

Very Good

(4.0 - 4.4)

(3.5 - 3.9)

Improvement

(below 3.5)

#### **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

# Standard Journey Map

Home Energy Consultation (HEC) Program

Customer Journ	e <b>y Map</b>				DIE
	Customer Learns about the Program and Schedules an Appointment	Customer Receives Free Home Visit with an Energy Specialist	Customer Receives Direct Install Measures	Customer Receives a Home Energy Profile (HEP) and Learns About Other DTE Programs	Customer Receives a Quality Check and a Follow-Up Call
STAGES	INITIAL CONTACT	IN-HOME CONSULTATION	DIRECT INSTALL MEASURES	HOME ENERGY PROFILE	QUALITY ASSURANCE AND QUALITY CHECK
PROGRAM INTENTION	Learns about the program through a DTE email, word of mouth, social media, and various marketing collated.     Easily schedules a HEC appointment via Call Center, online, or outreach event     Receives five appointment reminder calls from 2 weeks before appointment to call from Energy Specialist in-route	Conducted by a qualified and professional technician     Identifies home energy savings opportunities for customers through various energy assessments     Educates customer on how to further save energy	Offers direct installation of free energy efficiency products     Services delivered by a trained technician in a courteous manner	Receives personalized HEP detailing products installed and potential energy and cost savings     Receives recommendations and energy tips to improve home's energy use Introduced to other DTE programs through HEC Assessment tool a receives customer referral code	Receives quality check from Quality Specialist to ensure proper installation of measures Ride-along visit from a Quality Specialist during the consultation
CUSTOMER Experience	Introduced to the program through word of mouth, outheach events, and diverse marketing collateral such as bit inserts and flyers     Quick and easy scheduling in-home appointment via Call Centler, online, or outheach event     Receives a triendly reminder call of day and time of appointment	Conducts energy consultation in a professional manner and is respectful to customer's home     Expect to learn more about energy savings	Most customers expected to receive free energy efficiency products while some were pleasantly surprised     Did not expect the large quantity of free products installed in home.     Satisfied with length of time for consultation and install     Appreciated replacement of old equipment with better quality products.	Customers were pleased with program overall and recognized energy savings associated with participation     Energy lips and recommendations were useful to some and not to others     Most customers were not aware of other DTE program offerings	Receives follow-up call from Energy Specialist inquiring customer satisfaction Ride-along quality check during the in-home consultation (n=1)
ACTION, DECISIONS, AND EMOTIONAL RESPONSE	Pleased with the ease of scheduling an appointment  Frusthated with long wait time to schedule an appointment *  Happy to receive free services and energy efficiency products  Interested in learning about ways to save energy  Pleased with knowledge of outreach events representative  Happy to receive appointment reminder calls	Pleased with the professionalism and courteousness of Energy Specialist  Fell comfortable and self with Energy Specialist visiting home  Happy to receive free energy efficient measures and advice on how to conserve energy	Happy to receive free energy efficiency measures  Pleased with the quantity and breadth of energy efficient products installed  Expressed limited program offerings for electric customers  Setafied with quality of energy efficiency measures  Displeased with quality of pipe wrap insulation*	Pleased with participation in the program  Happy to recommend program to family and friends  Noticed reduced monthly energy bits  Some found HEP useful white others noted limited value in report and energy tps  Upset Energy Specialist was not able to answer questions about other programs  Not aware of other DTE program offerings	Pleased with follow-up call to assess energy efficiency product quality and oustoner satisfaction  No issues with ride-along quality check
PLEASED SATISFIED UPSET	0 0 0 0	0 0 0	0 0 0	0 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0	<del>0</del>
AVERAGE Satisfaction	9.2/10 Scheduling	9.6/10 Comfort with Energy Specialist 9.4/10 Consultation	9.6/10 Direct Install	9.6/10 Program Overall	8.0/10 Quality Check (n=1)

Consider adding Advanced Power Strips to the

HEC measure mix (already being evaluated).

#### **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

Ensure wait-listed customers receive timely and

accurate communication about appointments by

Provide opportunity for quick and instant feedback from customers to quickly resolve customer

issues (phone app or web tool).

Use follow-up call as an opportunity to promote other

DTE program offenings.

Simplify HEP report layout and content to better engage customers with tips to save energy.

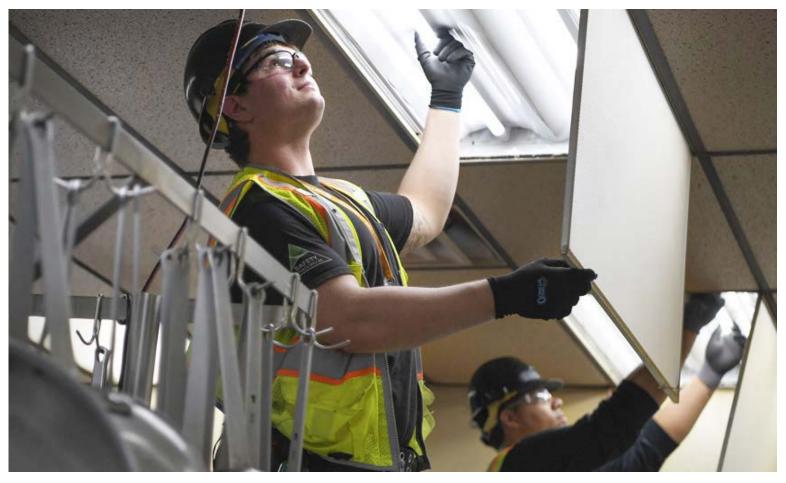
Post HEP report to customer's DTE online account.
 Update Energy Specialist training to include basic

answers to common questions about DTE programs

Send report via email a week after the visit.

and resources to provide customers onsite. Consider digital marketing on Insight and OM platforms that recommends customers interest energy efficiency sign up for an HEC.

### 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

### **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

#### **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

Source: Con Edison in-person workshop

# Con Edison's Journey Mapping Takeaways.

#### **PAIN POINTS**

### **OPPORTUNITIES**

Lead generation

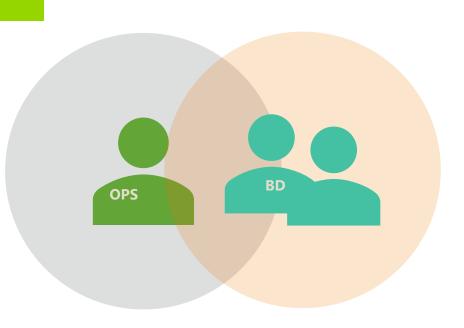
Develop marketing collateral specific to industry verticals

Project implementation

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

Project timeline

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
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EAST COAST UTILITY	DTE ENERGY	CON EDISON, INC.
Utility need: Fast feedback to provide suggestions for timely program improvements	Utility need: Understand customer's experience to support continuous improvement opportunities	Utility need: Identify areas for improvement shortly after undertaking implementation of C&I program in-house

**EFFORT** 

TIME

COST

**CASE STUDIES** 

### Thank You

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For more information on journey mapping, please visit:

**IEPEC 2017** 

Baltimore, MD