Customer Experience

August 24, 2010

Highlights of work done so far in 2010:

- Formed a cross-functional customer service group with representatives from all programs to help promote cross-program collaboration and tackle customer service issues that rise throughout Energy Trust
- Conducted a process mapping session—customer experience by phone—and implemented the following solutions to identified key variances:
    - More robust solar training for the call center
    - A new way of handling calls from business customers
    - Cross-program visibility in FastTrack
    - A SharePoint site used for shared resources across all programs, including an interactive FAQ database
- Implementing process improvements as appropriate based on customer feedback and complaints
- Beginning to reach out to utility customer service teams
- Examined redesign findings, conducted research and attended trainings to develop core customer experience values and trainings for Energy Trust

Customer Experience Core Values:

SIMPLIFY: Keep it simple and clear. Know your audience and address them appropriately. Avoid internal jargon, and help customers understand their process from start to finish.

ASSIST: Always be helpful—even if the person is not eligible for Energy Trust offers. Every customer should receive information, referrals or guidance. Always strive to answer questions, provide referrals to other organizations and above all, provide useful, accurate information.

PROVIDE EXPERTISE: Be aware of all the services Energy Trust offers. Determine what offerings are best for the customer. If you are not the expert on these offerings, or if a different program is supposed to serve this customer type, provide a quick and seamless referral to the appropriate person or program. Assist in providing a “one-stop shopping” experience for customer.

NAVIGATE: Listen to your customers—attentively and actively—target their options and navigate them through to action. Take the time to identify customer needs by asking questions and concentrating on what the customer is really saying. If we offer too much information or too many options, customers may be stopped in their tracks.

DELIVER: Follow through with what you promised or offered. For example, if you tell a customer you will get back to them within four hours, do it—even if you do not have an answer to their question yet. Ensure you close the deal.

Organizational Redesign Findings	Core Value	Enhancing Customer Experience & Boosting Program Results	Metric/Tool to be used to measure results
Continue to simplify messaging and be more accessible to customers. Simplify the customer experience by creating shorter forms and "user-friendly" procedures.	**SIMPLIFY: Keep it simple and clear.** Know your audience and address them appropriately. Avoid internal jargon, and help customers understand their process from start to finish.	Customers will experience less confusion and be quicker to act.	For homes, measure the amount of time from first contact with a customer to when they take action. For all programs measure rate of customers that complete projects once contacted by Energy Trust.
Energy Trust is ranked highly among national organizations and is considered a leader in energy efficiency and renewable power programs. To customers, Energy Trust is a trusted, independent third party offering professional advice about energy efficiency and renewable energy solutions.	**ASSIST: Always be helpful**—even if the person is not eligible for Energy Trust offers. Every customer should receive information, referrals or guidance. Always strive to answer questions, provide referrals to other organizations and above all, provide useful, accurate information.	Customers will feel that Energy Trust provided value. This creates positive word of mouth and return customers.	We see more word of mouth referrals. Can measure through surveys.
Capture opportunities to promote multiple programs to a single customer.	**PROVIDE EXPERTISE: Be aware of all the services Energy Trust offers.** Determine what offerings are best for the customer. If you are not the expert on these offerings, or if a different program is supposed to serve this customer type, provide a quick and seamless referral to the appropriate person or program. Assist in providing a "one-stop shopping" experience for customer.	Fewer customers will be frustrated by getting bounced around the organization. Savings will increase because customer will be more aware of the breadth of our offerings.	Front-line reps are more equipped and transfer rates go down. We see higher savings per customer.
Increase volume by capturing customers who seek information and do not act. A root cause for customer fall-off may be difficulty in identifying and deciding what actions to take.	**NAVIGATE: Listen to your customers—attentively and actively—target their options and navigate them through to action.** Take the time to identify customer needs by asking questions and concentrating on what the customer is really saying. If we offer too much information or too many options, customers may be stopped in their tracks.	Targeting options to fit a customer's true needs leads to higher customer satisfaction, and in many cases can lead to higher savings. Customers will be confident that they did the right thing. This creates positive word of mouth and return customers.	Customer satisfaction rises. More customers take action. Can measure through surveys.
A root cause for customer fall-off may be a lack of Energy Trust follow-up with a customer.	**DELIVER: Follow through with what you promised or offered.** For example, if you tell a customer you will get back to them within four hours, do it—even if you do not have an answer to their question yet. Ensure you close the deal.	Fewer customers will be frustrated and complain due to lack of follow up. Customers will feel important, which promotes repeat participation.	Complaint rate goes down. More projects get through the door with consistent follow up.