Orchestrating an end-to-end Customer Journey at a retail Utility  
Customer Experience Management with Salesforce.com

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Agenda

Customer Experience at Utilities

E.ON Context

Salesforce.com implementation @E.On - Overview

The Deloitte Process Orchestrator
Customer Experience at Utilities
Utilities are increasingly adopting models and tools tested in other B2C industries for a better Customer Experience

• Utilities continue to cope with deregulation, seeking ways to boost revenue while controlling costs in a world where informed customers have the power of choice

• The Customer Experience maturity is less developed than other B2C industries even if the customers are requesting increasingly more

• What the leading agencies are pursuing:
  – Capacity to deliver superior service across all channels. Empower agents and representatives with a dynamic, unified desktop and front-to-back office integration that provides transparency across all lines of business and channels
  – Reduce service costs. Automated processes guide self-service users to the right answer, deflecting costly calls to the contact center, while enterprise case management and easy integration with current CRM and enterprise systems provide comprehensive front-to-back office automation
  – Reduce time to market. Quick and flexible introduction of new products and services according to market demand
E.On Context
E.On is a major energy supplier with facilities across Europe, Russia and North America that generated approx. EUR122.5 billion in sales in 2013

- **E.ON’s** diversified **business consists of** renewables, conventional and decentralized power generation, natural gas, energy trading, retail and distribution

- The E.ON Group is segmented into **global units (by function)** and **regional units (by country)**:
  - **Five global units** manage generation portfolio, renewables business, global commodities, new-build projects and innovative technology and exploration and production business
  - **Eleven regional units** manage sales operations, regional energy networks, and distributed-generation businesses in their respective countries in Europe
  - **E.ON is also engaged** in power generation and wholesale power marketing **in Russia**, classified as a special-focus country, **and recently created a new unit**, E.ON International Energy, **to expand their business outside Europe**

- **Group-wide entities** deliver **support functions** like IT and procurement (even if locally managed)

* including 9 million customers from JV Enerjisa in Turkey
** Brazil, Turkey and India
E.ON’s Italian arm is one of the leading energy players in the country, with a market share of approximately 14.7% and more than 800k customers.

- **800k Customers**
- **Balanced Production Mix**
  - Conventional: 5 GW
  - Hydro: 531 MW
  - Solar: 50.4 MW
  - Aeolian: 328.1 MW
- **15 branches**
- **~6,0 GW of generation capacity**
- **~20 TWh Power and Gas sales**
- **50 indirect sales agencies**
Salesforce.com implementation @E.On - Overview
E.On Italy engaged Deloitte to address a number of business issues

1. **POWER AND GAS PROCESSES MANAGED ON DIFFERENT SYSTEMS**
   - Disaggregated Customer base
   - Processes not homogenous

2. **HIGH COST-TO-SERVE**
   - Significant back office involvement due to lack of information availability at the front line as well as appropriate support systems
   - Service Requests required lots of follow up activities

3. **LACK OF PROCESS TRACKING AND MONITORING**
   - Processes not fully covered by IT systems (lot of manual work)
   - Lack of real-time operative reporting

4. **COMMUNICATIONS WITH CUSTOMERS OFTEN NOT EFFECTIVE**
   - Most of customer communication manually sent via Outlook
   - Lack of control on regulated communications
Deloitte provided a solution based on Salesforce.com to support the E.ON Smooth Evolution Program and the realization of a Convergent CRM system.

**WHY SALESFORCE.COM**
The legacy solution led E.ON to evaluate a radical change in their IT ecosystem. Salesforce.com was identified as the best solution to support this change.

- **COST**
  An analysis of the TCO over a period of 5 years showed economic opportunities adopting Salesforce.com compared to other CRM solutions.

- **INFRASTRUCTURE**
  The model of E.ON IT Italy was based on the entire management of application & infrastructure operations by a third-party with limited skills on the former CRM platform, was exposing E.ON to a business continuity risk that could have been significantly reduced relying on a partner bringing a solution in the cloud.

- **AGILITY**
  The expectations of E.ON business (agile and “by prototype” approach) were compatible with the characteristics of Salesforce.com projects.

- **USABILITY**
  The usability offered by Salesforce.com is an accelerator for the adoption of the platform, also for business partners.
Deloitte has been recognized as the right partner for E.ON given the industry expertise, as well the Salesforce.com experience

- **Deloitte led the entire transformation journey** for the New CRM System, including the design of the Target Operating Model, the SW selection, the implementation, the data migration, and the Change Management

- **Deloitte was selected due to process and operating models knowledge**, as a result of several CRM projects in the industry, and number of quals in B2C complex environments

* JAD – Joint Application Design is a Deloitte’s proprietary methodology
We have created a New CRM System to manage the processes of the customer lifecycle for ALL power and gas customer segments...
…to support 500+ CRM users working 280k+ cross-channel customer requests per month

- **150k** Inbound phone calls
- **150k** Web + **15k** MobApp accesses
- **5k** Requests via Web & MobApp
- **50k** Mails, emails e faxes
- **30k** Direct contacts with Sales Partner, DSF e Branches

Monthly metrics:

- **200** Contact Center agents
- **2** Outsourcers for Teleselling
- **70** Sales Partner e DSF
- **15** Point of Sales
- **50** POS Agents
- **180** Back Office users
The new E.On CRM is now the core system that manages all the complex end-to-end customer journey (except for Marketing processes)

51 dual fuel processes across all segments and all channels
E.On can now monitor users’ performances, measure key processes’ lead times and optimize the customer interactions.

**Control**
- 10 average MARKERS for process

**Measurability**
- 6 Average Key LEAD TIMES for process

**Customer Interactions**
- 10 FIRST CALL RESOLUTION processes
- 39 ONE CALL COLLECTION processes

**First Call Resolution**

**One Call Collection**
Each key transaction along the process is ‘marked’ and each customer interaction is logged enabling fine performances and quality analysis.

Example of a mid-complexity process...

- Each significant transaction across processes generates a new ‘MARKER’.
- MARKERS allow a thorough monitoring of the process lead times.
- CUSTOMER INTERACTION moments are logged to enrich the customer’s contact history.
- CONTACT HISTORY track all the customer interactions across all channels.

...that requires ~60 steps to be completed.
The New Unified CRM System based on Salesforce.com serves all the customer segments and orchestrates E2E processes.
The components we built on Salesforce.com address typical B2C industries complexity and are reusable by Utilities, Media and Telco

**What clients need...**

- Support complex end-to-end customer service processes typical of B2C companies like Utilities, Media and Telco
- Lead users through optimized process pattern to maximize efficiency, accelerate the adoption and reduce task processing mistakes

**...how we support them**

- **Enable ‘tailored’ process orchestration even for industries with very complex end-to-end customer service processes**, bypassing some critical limit of Salesforce.com (e.g. max number of Workflow rule per entity)
- **Maximize the system support to the end users** that simply have to wait for the next suggested task. This imply a significant reduction of training activities necessary to enable the users
- **Provide a wide library of prebuild elements** accelerating the process configuration (Job Type: communication, integration, UI, etc.)

**PROCESS ORCHESTRATOR**

- Render the user interface to support the end users’ work on assigned tasks:
  - Different type of user interactions pages (e.g. multiple selection or data collection)
  - Guided wizards

**USER INTERACTION BUILDER**

- Address customer communications to external delivery systems:
  - Evaluate the most appropriate delivery channel
  - Identify the right communication template and the dynamic customer data to be used

**COMMUNICATION ENGINE**

- Manage regulated communication flows with local distributors:
  - Normed dialog flows
  - Data set to be exchanged regulated by Energy and Gas authority

**LOCAL DIS.CO ENGINE**

- Equip a configurable registry of customer communication that have to be send out via external delivery systems
- Support business rule configuration for delivery channels, communication templates and dynamic placeholder mapping
- Streamline the configuration of normed ‘dialog’ between energy traders and local distributors
- Automate the flows sequence and exchanged data set packaging
- Tool up an extensible library of regulated flows

* Vertical reusable component specific for Utilities
The implementation project went through a 21-month ‘journey’ with two main releases to smoothly enable the new CRM functionalities to the users.

1° Golive (Sales)
- Order Taking (10 types for mass market)
- Product catalogue
- Process Orchestration module:
  - 10 acquisition processes for mass market
  - Info and Claim Management Processes
- Partner Portal enablement
- Core integration (25 external systems, excl. billing)
- Dis.co communication layer
- Customer Communication Engine
- Business and technical data model (~50 SFDC Objects)
- Master data management
- User Profile and Role Hierarchy
- Change Management

2° Golive (After sales)
- + 6 Order Taking types for industrial customers
- + 6 acquisition processes for industrial customers
- + 31 customer service processes (cross segment and dual-fuel)
- Gas & Power Billing system integration
- Customer data migration (around 1M customer; 25M of record across 26 SFDC objects)
- Change Management
The Deloitte Process Orchestrator
The Process Orchestrator decouples the process meta-configuration (centrally managed) from the instances to fulfill customers’ requests.

**Process administration**

- **Easy to configure** (no code) and **graphically rendered**
- **Describe which steps** are to be instantiated, in which **sequence** and which are the **trigger conditions**
- Both custom or standard SFDC objects can be used for process instances (e.g. cases)
- Possibility to specify **several job types to differentiate the process steps behavior**: user task, system integrations, customer interaction, local distribution communication
- **Custom Assignment Engine** allows to **assign tasks to group** of users
- **Task queue** page available for designed for back office users that need to **quickly identify the tasks** to be processed with high priority

**Process execution**

- **Standard Case**
- **Process User Task + Automatic Activities**
- **User Task Queue**
With the process orchestrator we were able to configure complex business processes, with 100+ steps and up to 8-levels of parallelism between tasks

- A standard process configured for E.On (one of the 16 different customer acquisition processes) presents 87 orchestrated tasks, grouped into 4 categories:
  - 6 External Integrations
  - 13 External Communications
  - 14 User Interactions
  - 54 Automatic Operations

- We have implemented 51 sales and customer service processes
Process Definition and associated Job Type/Definition allow to tailor the behaviour of each steps of your business processes

The PROCESS DEFINITION is the logical container of all the process steps.

The PROCESS JOBS correspond to single steps of the process.

JOB DEFINITION and JOB TYPE regulate the behavior of each process job.

This example use ‘Automatic Operation’ job def. that use an APEX class for case closure.
The appropriate mix of orchestrator basic elements (job types) allows the implementation of infinite use cases.