Achieving customer satisfaction goals with a deliberate approach to customer experience investments

Consulting case study
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Key takeaways

- A large multicommodity utility wished to significantly increase its customer satisfaction (CSAT) benchmark within three years. With an IT transformation and multiple rate increases looming, the utility needed help achieving its challenging goal.
- E Source used its proprietary model to help the utility forecast CSAT results based on its prioritized technology and process improvement projects.
- Thanks to the customized customer experience (CX) tool created by E Source, the utility determined which investments would deliver the biggest improvement to CSAT across multiple business units, channels, and customer segments.

The challenge

A large multicommodity utility, serving customers in 12 states, had a goal to significantly increase its CSAT benchmark score within a three-year time frame—a considerable jump from the utility's most recent third-quartile performance. A looming IT transformation and multiple rate increases added to the challenge.

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Not wanting these hurdles to hold it back, the utility sought help developing a high-impact CX roadmap and a multiyear forecasting model to quantify the impacts of its CX efforts on improving CSAT.

The solution

The utility partnered with E Source on this challenging project. Working alongside the utility, E Source used its proprietary model to forecast CSAT benchmark results based on the CX investments the utility was considering.

The E Source solution combined gathering and understanding customer needs with expertise at the utility to develop a realistic forecast and holistic view of the landscape facing the utility. A baseline survey created by E Source asked customers, Where should we focus first? Employee feedback was also integral to the project. This feedback was gathered through interviews and analysis of related documentation addressing the question, What should we do to improve?

CSAT forecast and improvement framework

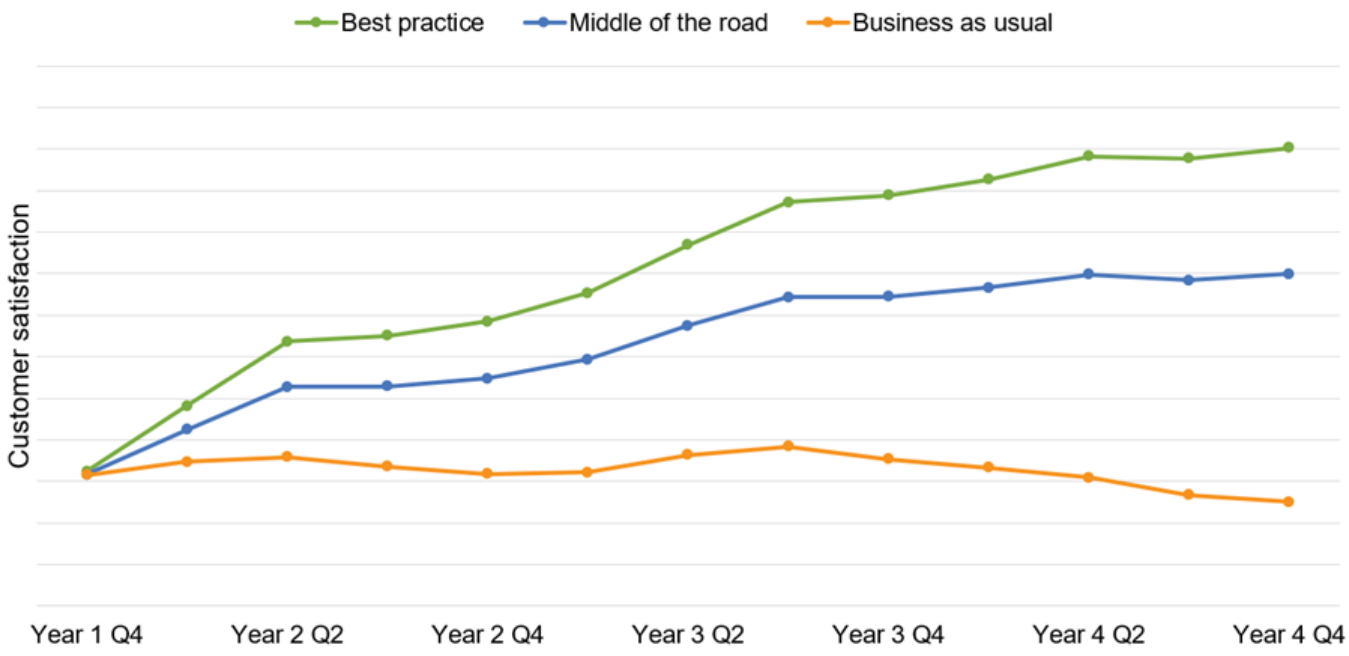
Task	Data modeling	E Source roadmap development
Baseline	Customer survey	In-depth interviews
Analysis	Analysis of key drivers of CSAT	Current-state assessments and gap analysis
Recommendations	Identification of leading indicators of CSAT	Impact modeling for all planned and proposed customer initiatives (including external headwinds and tailwinds)
Outcomes	CSAT benchmark forecast	Prioritized roadmap of actionable CX improvements

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This framework aligned the utility’s benchmark metrics to measure and improve CSAT across channels and customer segments. E Source quantified the drivers of CSAT through customer-specific research, using the findings to identify leading indicators of satisfaction.

From there, E Source used its proprietary model to predict the impacts of the utility’s CX initiatives and created a plan for monitoring and improving the performance of leading indicators shown to be statistical drivers of CSAT. E Source also provided the utility with a multiyear roadmap, prioritized by CX need and impact.

Three-year CSAT forecast based on CX investment



© E Source. **Note:** Business as usual doesn't include best practices and assumes low process maturity and weak change management. Middle of the road includes best practices and assumes low process maturity but strong change management. Best practice includes best practices and assumes high process maturity and strong change management.

The results

Using the model, E Source helped the utility measure and improve CSAT across multiple business units, channels, and customer segments. E Source identified leading indicators of satisfaction that would have the greatest impact and helped the utility create an actionable plan to monitor and improve ongoing performance of CSAT-focused activities.

The project resulted in a roadmap that accelerated the utility's ability to prioritize the CX investments needed to achieve its CSAT goals. Priorities included specific actions related to:

- Change management and employee adoption of new technology
- Rate-change communications
- Outage management processes
- Governance and incorporating customer input

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