4 ways to put the customer first in your CIS implementation strategy

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A customer information system (CIS) implementation will affect nearly every employee and business area in your utility. It's not just a technology project; it's also a time to work toward company-wide goals like improving internal processes, increasing customer engagement, and enhancing the customer experience (CX). A successful CIS implementation manages the organizational and individual change experienced by customers and employees.

A customer-first CIS implementation strategy puts people at the center, focusing on two areas:

- Understanding the changes customers will experience and anticipating their needs and expectations
- Enabling employees by giving them the knowledge, skills, and tools they'll use to deliver the desired customer experience

Here are four ways to make sure your utility is putting the customer first in your CIS and other mission-critical system implementation strategies.

Create a CX intent statement

Set the focus on the customer from the start with an intent statement. A CX intent statement (or customer promise) is a clear articulation of what customers will feel throughout their relationship with their utility, crafted from their perspective. This statement can be used across the CIS implementation to keep the customer at the center, reminding staff that the implementation is more than a technology replacement.

We recommend including these four components when developing your CX intent statement.

Customer research and insights. Create your CX intent statement from the customers' perspective. As you begin the process of crafting your statement, you'll need to use the voice of the customer to determine what customers need and expect from your utility.

Utility brand promise and pillars. Your brand is who you are; it's your customers' collective perception of you. Your brand team and your CX team should work together to make sure your CX intent statement and brand image align with each other.

Employee input. A single CX strategist formulating a clever CX intent statement alone in their office will get a limited set of results. But a CX strategist who involves employees across the company will get support throughout the organization, increasing clarity, buy-in, and commitment to the CX vision.

Your utility's strategic priorities and capabilities. Customer research and insights, utility brand promise and pillars, and employee input are essential ingredients to your CX intent statement. But you also need to align these with your strategic priorities and capabilities—what's important to your organization and what your organization can do.

Develop a clear set of CX requirements

Every project needs a set of requirements to ensure the project scope and direction are aligned with the organization's objectives. For a successful CIS implementation, it's critical to gather specific CX requirements that articulate the needs and expectations of employees and customers.

While there will be technology details in the CX requirements, remember that the technology is a tool that enables employees to deliver the desired customer experience. So be sure to document the needs of customers, employees, and the process. But avoid designing how the new CIS tool will be configured during requirement gathering. That is, don't let the technology capabilities rule this process of setting CX requirements.

Let an expert be your guide

We know utility employees wear many hats, juggling a variety of priorities every day. It can be challenging to tackle a comprehensive project such as a CIS implementation on top of your current workload. If you're overwhelmed and don't know where to start or how to make sure the implementation process is as smooth as possible, let an expert be your guide.

E Source Software Planning and Implementation Consulting works as an extension of your team, advocating for your needs so your implementation is within scope and budget and on time. Using the proven E Source NavigateOne™ methodology, we've helped utilities:

- Determine the strategic direction for mission-critical systems such as CISs
- Evaluate current software solutions
- Select vendors and system integrators
- Negotiate great contracts and statements of work
- Provide implementation leadership, tools, and software

Case study: Modernizing the CIS to facilitate a small utility's big dream to improve the customer experience

A West Coast utility wished to move from an outdated CIS to a modern technology platform to improve internal processes, enhance customer engagement, and provide an excellent customer experience. E Source provided thorough project management and leadership services using its NavigateOne

methodology, helping the utility evaluate vendors, procure a software-as-a-service solution, and implement it.

With its new CIS and meter data management solution in place, the utility launched a fully integrated customer portal, giving customers more ways to access their accounts and self-serve.

Read more

Create a dedicated CX leadership implementation role

A CIS implementation will undoubtedly touch every employee and functional area of your organization. Typically, each functional area will assign a project lead for their area.

Given the cross-functionality of customer experience, it's difficult to monitor the customer and employee impacts of the process and technology changes. To focus, prioritize, and consistently promote CX throughout the project, it's helpful to have someone dedicated to keeping track of CX issues during a CIS implementation.

Create a CX business lead or similar role that's in line with other lead project roles like those in billing, customer service, or field service. This does a few things:

- It shows that CX is a priority for the utility
- It creates a centralized point of contact for CX concerns or issues that may arise in any business area
- It creates broad, cross-functional visibility into the future state that customers and employees will experience by including the CX lead throughout the program tasks and activities

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