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Title: Going Beyond Customer Experience Improvements: Leveraging Journey Mapping to Deliver Added Evaluation Results

Abstract: Customer journey maps and journey mapping research have gained traction in the utility industry. Yet, a persistent criticism of this methodology is that it is just a more elaborate process map. In this presentation, we will directly address this critique and share how a Midwest utility has used journey mapping research as a fundamental part of its three-year process evaluation. Specifically, the authors will describe how journey mapping research is being leveraged to: Understand program ecosystems and develop internally-facing training and goal-setting tools. For its Business Custom program, this Midwestern utility used journey maps to detail the complex market ecosystem its Custom program operates in to clarify program expectations and set goals for key program stakeholders. For example, once the utility named and defined the many ways customers engage with the program, they created an ideal journey for customers. Going forward, the utility will use this journey to track customer leads and the customer pipeline to set clear expectations for engagement and reduce participation losses. Develop customer-facing communication and marketing tools. Highlighting work for this Midwestern utility's thermostat program (which includes direct install, do-it-yourself [DIY], and bring-your-own options) the authors will illustrate how to use journey maps for communication and marketing strategy. The authors will share how social listening and customer interviews uncovered a variety of issues that prevented customers from installing and activating their thermostats. For example, a portion of DIY customers opted for that journey because they thought it would be the most convenient path for them. However, some did not end up activating their thermostats due to questions about their HVAC systems or a low proclivity for technology. As a result, this utility is considering a variety of modifications to their online customer thermostat portal. By asking customers a series of screening questions, they can direct them to their ideal program design and reduce barriers to thermostat activation. During this presentation, participants will learn that journey maps are not just elaborate, process-oriented maps, and the many ways to leverage them as strategic evaluation tools.