



# Initiative #1: Improving Customer Service

## INITIATIVE INFORMATION

<b>Business Unit/Division</b>	Customer Care Division						
<b>Initiative Executive Sponsor</b>	Kelly Enright						
<b>Initiative Project Manager</b>	Sandi Fukumoto						
<b>Legally mandated/Required?</b>	No						
<b>City policy mandate?</b>	No						
<b>(\$000's)</b>	<b>2019</b>	<b>2020</b>	<b>2021</b>	<b>2022</b>	<b>2023</b>	<b>2024</b>	<b>Total</b>
<b>O&amp;M \$ Amount</b>	1.6M	1.6M	1.6M	1.6M	1.6M	1.6M	<b>9.6M</b>
<b>CIP \$ Amount</b>							
<b>Total \$ (Existing Budget)</b>	1.6M	1.6M	1.6M	1.6M	1.6M	1.6M	<b>9.6M</b>
<b>FTEs assigned (Existing Staff)</b>	8	8	8	8	8	8	<b>8</b>

## INITIATIVE SUMMARY

**A. Description:** This initiative focuses on the creation of a full-service customer relationship hub by integrating four programs/projects that will provide multi-channel opportunities for our customers, as well as full access to information and support. Customers don't just want great customer service, they demand it. Providing customers the great service they expect anytime they want in the manner in which they want will be at the forefront of the new customer service strategy. Based on best practice research including well respected industry leaders like JD Power and Associates and Electric Power Research Institute (EPRI), City Light must transform its customer service from transactional- focused to relationship- focused service through the use of digital technology.

Evolving trends in customer service include:

- Social Media is an avenue for customer service
- Web chat will become an increasingly popular customer service channel
- Customer service will become the key differentiator between competing services
- Mobile technology is the future for customer service agents and customers
- Channel preferences will change—and change again. Customers need to be assured they have options

City Light needs systems and services in place to stay on pace with trends and customer expectations. With the installation of advanced metering, the customer billing system and the Outage Management System (OMS) upgrade, City Light has the tools in place to improve customer satisfaction.

- B. Context:** Customer Care currently provides some customer contact activity (budget billing, credit and collections, street light response, etc.) Staff uses phone, email, web chat and social media to resolve customer inquiries. City Light intends to enhance its current the capability through the programs described below.
- C. Component(s) of initiative:**
- a) Multi-channel, full service after-hours and weekend Customer Contact team  
This program will establish a multi-channel, full service after-hours and weekend Seattle City Light Customer Contact team. This functionality would be staffed by existing Customer Care employees who would change and rotate shifts to provide this desired extended support. This represents an essential change in operations made necessary by our desire to improve customer service and stay current with the range of new services we will be providing our customers.
  - b) Enhanced Digital Customer Experience  
This program will establish City Light as a leader in customer service by providing a customer portal that is convenient, interactive and personalized. The enhanced digital customer experience will provide centralized management of all customer experience projects and programs as well as a cohesive and unified vision for the customer.
  - c) Commercial Customer Service Center  
This program will establish a specialized relationship hub for our midsize commercial customers. Commercial customers are a large segment of the customer base in terms of numbers, energy use, and growth. They have disproportionately large customer-service needs because of the diversity and complexity of their accounts, and the importance of energy to their businesses. These needs are not currently being met. This initiative will allow us to better support this customer base and improve relationships. This program will improve customer satisfaction, reduce calls to the general call center, enable quicker resolution of issues, increase participation in energy-efficiency programs, and ultimately obtain better business intelligence to reduce operating and support costs.
  - d) Customer Relationship Software Implementation  
This project will secure a comprehensive Customer Relationship Management (CRM) solution that will allow customers to engage with us more easily and effectively by tracking all customer touch points including new services. The CRM will be utilized across the utility to ensure customer information, communication, analytics and reporting are available for multiple teams, for more efficient and accurate customer service.

**D. Business Value:**

The implementation of this initiative would allow City Light to reduce calls to the SPU Contact Center and therefore would re-focus those resources on the City Light Relationship Hub, utilizing the dollars to support the four programs which will allow us to achieve the objectives of the initiative.

Further, City Light would be able to benefit from efficiencies and service improvements through direct management of services for our customers. Integrated resources will be key to realizing efficiencies. These include:

- a. Improved internal and external customer experience by providing a cohesive and unified approach to customer service.
- b. Improvement in the customer experience by approaching customer service from the customer's perspective; giving them personalized and convenient access to their accounts, data and status updates on projects.
- c. Support by internal subject matter experts to resolve complex issues after hours.
- d. The digital services can be readily integrated with other customer service functions, including the Commercial Customer Service Center.
- e. The choice of digital services such as webchat are more efficient than traditional single channel methods.
- f. Continued improvement of the customer portal will provide the utility with opportunities to provided value added and/or revenue generating services.
- g. Information sharing across the CRM will improve work process and customer service efficiencies.

**E. Opportunity for increased revenues and/or decreased costs**

With several technology projects in process: Advanced Metering Infrastructure (AMI), Customer Self Service Portal and Outage Management System upgrade, there will be significant automation and self- service options for customers. Customer Care personnel familiar with City Light accounts can provide the direct contact to customers during non- business hours without additional staff.

City Light anticipates significant savings through implementation of this initiative. The labor dollars required to staff this initiative are already built into the customer care division budget, as are management costs needed to supervise and manage the components of this initiative.

**2019 - 2024 INITIATIVE MILESTONES AND DELIVERABLES**

The milestones and deliverables are established in phases to minimize business disruption, ensure a smooth transition of staff, and yield some early and recognizable results. The development of the Customer Relationship Hub and its associated projects are roughly organized around 4 phases:

- Design

- Infrastructure Development
- Training and staff preparation
- Implementation

Milestone	Due Date	Deliverables and Comments
<b>Initiative Start</b>	Q2 2018	Establishing an after-hours City Light Customer Service team to be managed by City Light.
	Q2 2018	Launch pilot commercial customer service center launch
	Q4 2018	Establish organizational structure for Relationship Hub and non-business hours support Contact team; staffing plan using CL validation, credit & collections staff; set up transitional manager
	Q1 2019	Develop and staff web chat/email response team
	Q1 2019	Establish Digital Metrics
	Q1 2019	Upgrade existing or acquire new Interactive Voice Response (IVR) in partnership with SPU and Seattle IT.
	Q2 2019	Phase 1 of the City Light Customer Portal goes live, laying the foundation for a unified (non-fragmented) customer experience.
	Q2 2019	Establishment of necessary tools for independent operations and performance standards, including IVR, performance dashboard, and reporting, as well as initial work on the CRM.
	Q2 2019	Employees participate in City Light training program, including modules on City Light programs and services and job shadowing of subject matter experts, engineers and conservation (modeled on training currently being developed for the Commercial Customer Service Center)
	Q4 2019	Report out on preliminary metrics of full relationship hub, utilizing final analysis and recommendations based on data and market research gathered through commercial contact center pilot
	Q1 2020	City Light and SPU make appropriate changes to budget and FTE allocations for 2019-2020 budget based on reduced staffing required because of the non-business hours work and increased use of digital communication at City Light

	Q1 2020	Phase 2 of the City Light Customer Portal goes live, integrating all of City Light's online presence into the portal, providing the single point of entry to the full suite of digital services, requested by customers and service providers.
	Q2 2020	Launch CRM
<b>Initiative Complete</b>	Ongoing	Continuous improvement and adaptability as customer expectations and technologies evolve

### **SOCIAL EQUITY**

The expanded, full-service independent Customer Relationship Hub promotes equity in several meaningful ways:

- Gives customers 24/7 access which benefits customers whose schedule does not allow for contact during the work day
- Provides a broad platform of channels which allows customers greater choice
- Will access the language bank to provide services in a range of language
- Gives focused customer service to small and medium commercial businesses which are currently underserved by the utility's customer service

### **METRICS FOR SUCCESS AND METHOD FOR MEASUREMENT**

The success of this initiative will be measured by improving scores customer service performance, including:

- Increase in digital customer traffic
- Increase in customer service ratings for such organizations as JD Power and Associates
- Decrease in calls to City Light and the Customer Contact Center

Additionally, we will be monitoring factors such as the number of incoming calls, wrap codes for calls, web and self-service traffic, time of contact (day, evening, night), tracking and completion of customer projects as well as elimination of backlogs.

Customer feedback will be solicited through independent customer surveys and journey mapping. JD Power rankings and feedback from their surveys will also be tracked and reported.

### **STAKEHOLDER OR CUSTOMER IMPACT**

The potential impacts of this initiative to stakeholders and customers is overwhelmingly positive. These include:

- Customer service across all customer groups will be greatly improved by approaching customer service from the customer's perspective. Customer will be provided equitable, personalized and convenient access to their accounts, data and status updates on projects.
- Efficiencies in processes and services realized, which will benefit internal work groups and ultimately better serve the customers.
- Reduced customer calls to the Mayor's Office and Council.