



# Directors' Strategic Council

January 20, 2022



# CONNECTING THE UTILITY INDUSTRY TO SOLUTIONS

FOR NEARLY 30 YEARS



Chartwell provides actionable insights, collaborative problem-solving opportunities and events to help utilities improve customer experience and operational efficiency.



For more information on Chartwell membership,  
please contact Suzanne Haggerty:  
[shaggerty@chartwellinc.com](mailto:shaggerty@chartwellinc.com)

# Directors' Strategic Council Chartwell Team



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# Directors' Strategic Council Members



Énergie NB Power



# Directors' Strategic Council AGENDA

- Directors web portal – Steve Waters
- Closing the loop on Strategic Roadmaps
  - NiSource Digital Transformation Roadmap – Jennie Maier
  - Black Hills Energy CX Roadmap – Max Carlson, Jeff Drahota
- Closing the loop on KPIs, C-sat, and Dashboards
  - Black Hills Energy CX Dashboard – Max Carlson, Jeff Drahota
  - Director's Strategic Council member's C-sat metrics – Jennie King
- Customer Affordability/O&M Reduction – Steve Brophy
- Extended Spring Meeting March 24, 2022



# DSC Member Portal

Chartwell members: If you already have a Chartwell login, please hover over the question mark and click "Forgot Password" to log into the website for the first time.  
If you don't have a Chartwell login, please click "New Account" to create your login.

LOGIN TO YOUR ACCOUNT:

 swaters@chartwellinc.com

 .....

LOGIN

NEW ACCOUNT

SITE FEEDBACK



ABOUT CHARTWELL

MEMBERSHIP

EVENTS

PARTNER GATEWAY

CONTACT



## Connecting the Utility Industry to Solutions

Exclusively focused on electric, gas, and water utilities, Chartwell provides actionable insights, collaborative problem-solving opportunities and events to help utilities improve customer experience and operational efficiency.

CREATE AN ACCOUNT



## Member Directory

Chartwell Directors' Strategic Council members are decision-makers and leaders from utilities across North America who come together to share knowledge, lessons learned, innovation, and insights. The member directory includes not only contact information but members' utility and other industry experience and areas of expertise.

[MEMBER  
DIRECTORY](#)

### LAST CALL: DIRECTORS' STRATEGIC COUNCIL INAUGURAL MEETING - STRATEGIC ROADMAPS AND KPI'S

10 Nov 2021 | 2:00 pm - 4:00 pm

The Inaugural call of the Directors' Strategic Council on November 10, 2021 featured a group discussion of members' plans for creating and refining strategic roadmaps, customer satisfaction, KPIs, and leveraging data. See "resources" to view a recording of the call and download the slides.

### NEXT CALL: JANUARY 20, 2022 - OPERATIONAL EFFICIENCIES AND O&M REDUCTIONS

20 Jan 2022 | 2:00 pm - 4:00 pm

Our next call will be from 2-4 p.m. ET on January 20. BHE and NISource will share sample roadmaps and KPI dashboards, and the group will discuss customer affordability and O&M reductions: strategies for labor, vendor vs. in-house, and channels.

## RESOURCES

[SEE ALL RESOURCES](#)

11 Jan 2022 | 2:00 PM ET

### DSC Member Directory

[Learn more →](#)

10 Nov 2021 | 2:00 PM ET

### Nov. 10, 2021 Presentation

[Learn more →](#)

10 Nov 2021 | 2:00 PM ET

### Nov. 10, 2021 Call Recording

[Learn more →](#)

**Steve Waters**  
Senior Consultant

Steve Waters joined Chartwell in 2021 as a Senior Consultant with more than 20 years of energy industry experience at CenterPoint Energy in its Corporate Communications and Marketing. Steve's responsibilities there included executive speechwriting, management of omni-channel communications.

# DSC Member Portal

# DSC Member Portal

CHARTWELL MEMBER PORTAL  
**WELCOME, STEVE**

**MY PROFILE**

INSIGHT CENTER | CUSTOMER EXPERIENCE COUNCIL | BILLING & PAYMENT COUNCIL | OUTAGE COMMUNICATIONS COUNCIL | **DIRECTORS' STRATEGIC COUNCIL**

DASHBOARD | **RESOURCES** | EVENTS

**SEARCH RESOURCES**

Search

**SEARCH**

11 Jan 2022 | 2:00 PM ET  
**DSC Member Directory**  
Directory of the Chartwell Directors' Strategic Council members.

10 Nov 2021 | 2:00 PM ET  
**CSAT Metrics**  
CSAT metrics from the Nov. 10, 2021 inaugural call of...

10 Nov 2021 | 2:00 PM ET  
**Nov. 10, 2021 Call Summary**  
Slides from the Nov. 10, 2021 inaugural call of the...

10 Nov 2021 | 2:00 PM ET  
**NiSource CX roadmap**  
NiSource Customer Transformation roadmap shared after the Nov. 10, 2021...

10 Nov 2021 | 2:00 PM ET  
**Black Hills Energy CX dashboard**  
CX dashboard shared by Black Hills Energy after the Nov....

10 Nov 2021 | 2:00 PM ET  
**Black Hills Energy CX roadmap**  
CX roadmap shared by Black Hills Energy after the Nov....



# DSC Member Portal

CHARTWELL MEMBER PORTAL  
**WELCOME, STEVE**

MY PROFILE

INSIGHT CENTER

CUSTOMER EXPERIENCE COUNCIL

BILLING & PAYMENT COUNCIL

OUTAGE COMMUNICATIONS COUNCIL

DIRECTORS' STRATEGIC COUNCIL

DASHBOARD

RESOURCES

EVENTS

## Upcoming Events

08  
JUN

PowerUp: Chartwell's Outage Conference

17  
OCT

EMACS - The Customer Experience Conference


## Current Surveys

**Communications Industry Benchmark Survey**

Chartwell's Communications Survey is in the field now! The survey includes questions on residential customer communication channels, messaging, performance measurement and internal communications. Go to [survey.chartwellinc.com](https://survey.chartwellinc.com) to take the survey, or contact Chris Hellmann for more information.

**Marketing Industry Benchmark Survey**

Chartwell's Marketing Survey is available now! The survey includes questions on marketing goals, metrics, channels, budget, market research and marketing through the contact center. Go to [survey.chartwellinc.com](https://survey.chartwellinc.com) to take the survey, or email Chris Hellmann for more information.

 **Chartwell**

# Closing the loop on Roadmaps

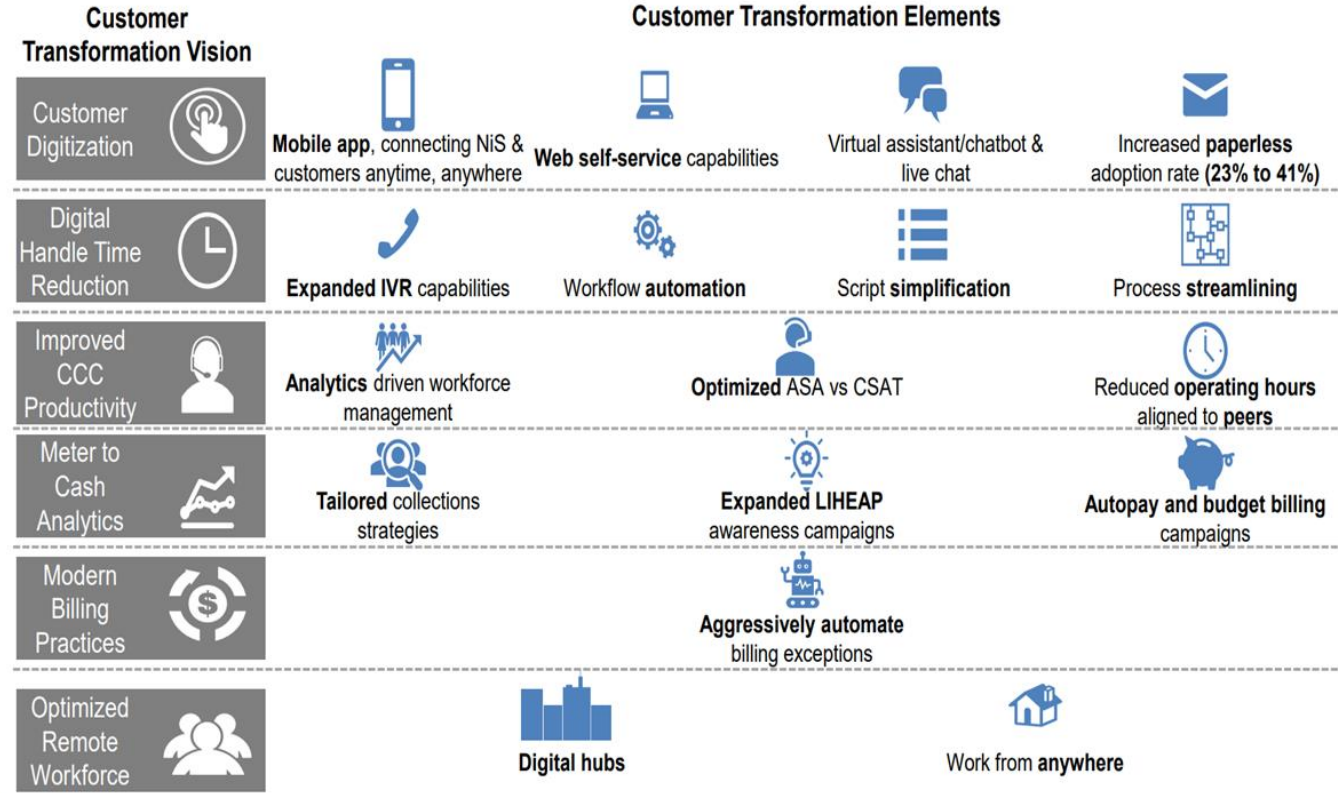


Black Hills Energy



# NiSource CX Transformation

The Connected Customer Experience Transformation will fundamentally reshape how NiSource interacts with our customers...



# NiSource CX Transformation

... and deliver significant customer experience, financial, and operational benefits over the next couple of years

## Outcomes Over ~2 Year Period



~20% calls eliminated



Reduce average handle time by ~15%



~75% call center agent productivity



~10% reduction in arrearages



~20 p.p. increase in paperless rate



~20% billing exceptions automated



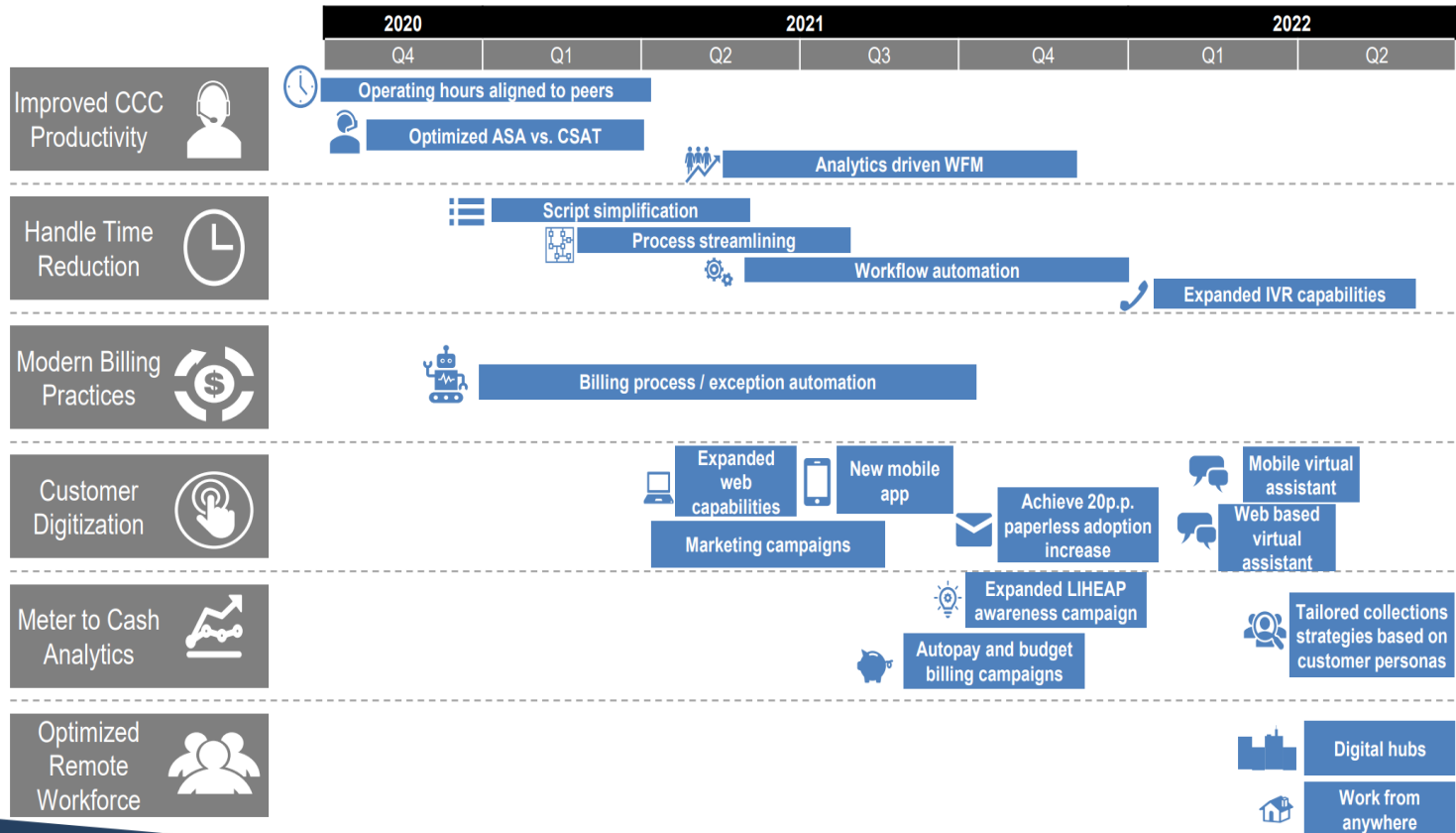
Digital hubs supporting 70% remote call center workforce

~16% of Customer Budget run rate savings and expected Customer Satisfaction boost (e.g., JD Power score)

# NiSource CX Transformation

The team is delivering these changes and outcomes over ~two years

NiSource Customer Transformation Timeline





# BHE CX Roadmap

## Future functionality list

### Customer help

Call center follow-up report  
Chat / Chatbots  
Natural language IVR  
Personalized agent recommendations  
Predictive / personalized IVR  
Predictive call routing  
Voice authentication  
✓ **Replace call center knowledge base system**

### Software, systems & processes

Address clean-up  
✓ **BOTS**  
C360 / Data warehouse projects  
Call authentication  
CRM  
✓ **Enterprise email system**  
✓ **No fee credit card**  
Recommended programs/products/rebates based on customer data

### Proactive notifications

Anniversary  
Extreme weather coming  
✓ **New equipment notifications**  
✓ **Payment arrangement reminder**  
Rate change notifications  
✓ **Real-time outage notifications and ETRs**  
Seasonal change  
Welcome customer  
✓ **Disconnect notices / alerts**

### Field experience

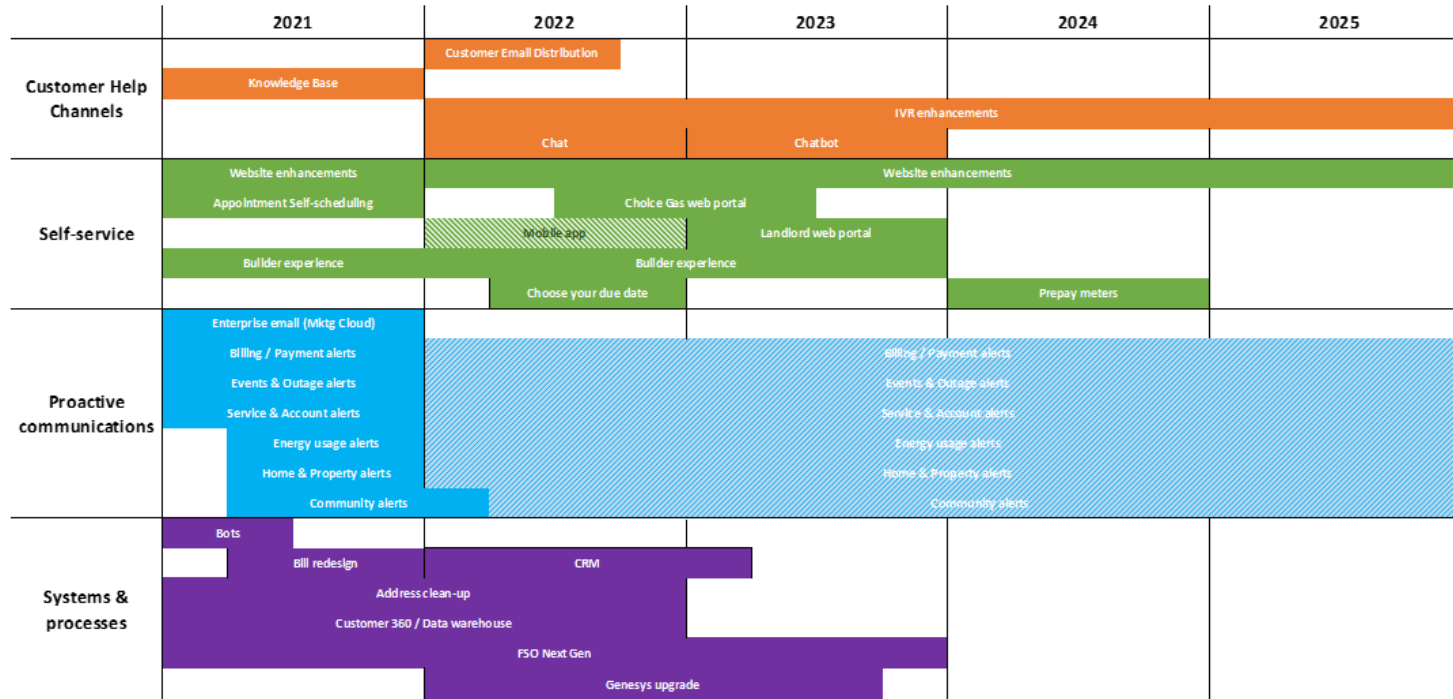
2-hour windows  
Identify service tech  
Scheduled appointment reminders (email/text)  
Text to meet  
Where's my tech  
Morning / evening shifts to allow appts outside 8:00-5:00

### Self-service

Bill charge vs energy source (heating, cooling, lighting)  
Builder portal  
Business customers (demand charges)  
Choose / recommended rate plan  
Choose your energy mix (green, coal, NG)  
Compare usage to your neighbors  
Construction in your area  
DER generation usage displayed  
Energy saving tips  
Estimate future bills  
✓ **Guest outage reporting**  
High bill / usage alert  
Landlord portal  
Manual Meter Read Entry  
Mobile App  
Bill charge attribution (transmission costs, service costs; taxes)  
Bill redesign  
IoT integration (Alexa, Sense)  
One-click payments  
✓ **Online payment arrangement**  
Personalized bill insights  
Ping your meter  
Pre-pay  
Real-time energy usage / mgmt  
Self-scheduling  
Usage in dollars (or other)  
Your reliability (%)  
Marketplace

# BHE CX Roadmap

## Roadmap



# BHE CX Roadmap – measuring successes



**Increase customer satisfaction**

PERCEPTION & BRAND

**J.D. POWER**  
AND ASSOCIATES®



**Relationship surveys**



**Brand favorability  
& awareness**

INTERACTIONS



**NPS = (%) Promoters - (%) Detractors**

**How easy was it to get the help you wanted today?**



# BHE CX Roadmap – measuring successes



## Reduce cost to serve

### Assisted service per customer



Calls

+



Emails

+



Social Media



Customers

Simple  
\$



Web



IVR



Social



Email



Agent

Complex  
\$\$\$

# BHE CX Roadmap – measuring successes

## JD Power top opportunities

### ELECTRIC ATTRIBUTES

CORPORATE  
CITIZENSHIP

Variety of energy  
efficiency  
programs offered

CORPORATE  
CITIZENSHIP

Efforts to develop  
energy supply  
plans for the  
future

CORPORATE  
CITIZENSHIP

Involvement in  
community / local  
charities &  
organizations

CORPORATE  
CITIZENSHIP

Actions to take  
care of the  
environment

PRICE

Total monthly cost  
of service

### NATURAL GAS ATTRIBUTES

CORPORATE  
CITIZENSHIP

Variety of energy  
efficiency  
programs offered

COMMUNICATIONS

Usefulness of  
suggestions on  
ways to reduce  
your usage and  
lower your bills

CORPORATE  
CITIZENSHIP

Involvement in  
community / local  
charities &  
organizations

CORPORATE  
CITIZENSHIP

Actions to take  
care of the  
environment

SAFETY &  
RELIABILITY

Clarity of  
information  
provided about  
gas safety



# BHE CX Roadmap – measuring successes

## JD Power enterprise plan

### CORPORATE CITIZENSHIP

Variety of energy  
efficiency  
programs offered

Ready Brand  
EE rebate programs  
Ways to save campaigns  
Energy assistance

### CORPORATE CITIZENSHIP

Involvement in  
community / local  
charities &  
organizations

Ready Brand  
Community giving /  
BHE foundation  
Black Hills Cares  
Donation prioritization  
Volunteerism

### CORPORATE CITIZENSHIP

Actions to take  
care of the  
environment

ESG comms  
Wildfire mitigation  
Renewable Ready  
Donation priority  
Energy saving trees  
Avian protection

### SAFETY & RELIABILITY

Clarity of information  
provided about gas  
safety

Safety comms  
Safe digging / 811  
Pro-gas campaign

# Closing the loop on KPIs - dashboards



# BHE – CX Dashboard sample

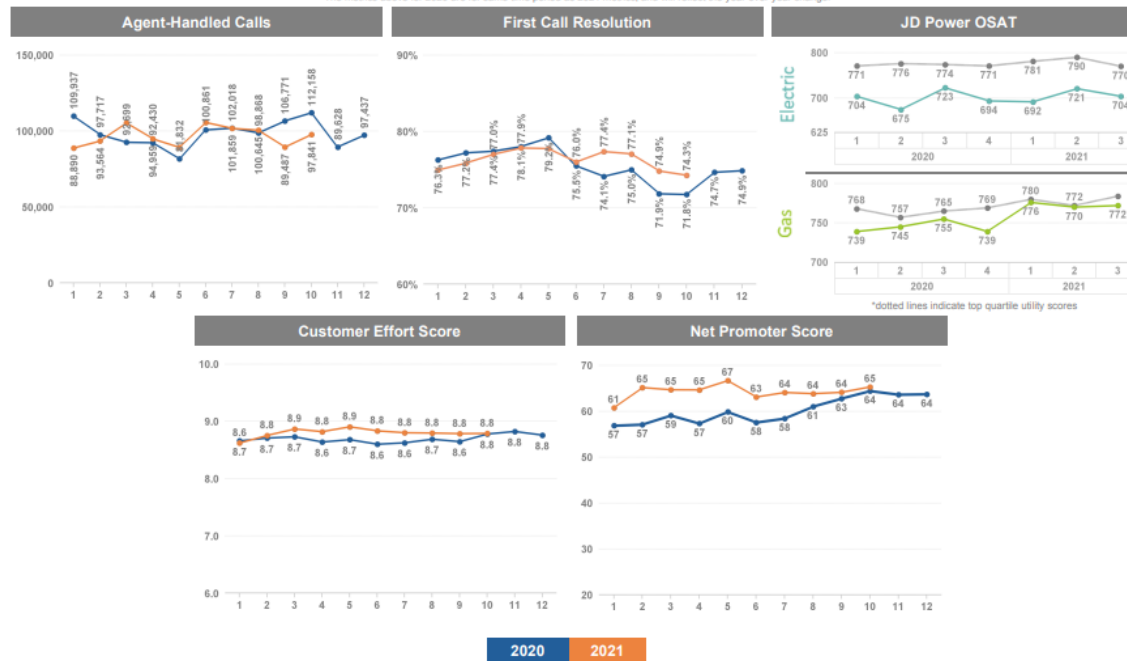
## ***Black Hills Corporation.***

### Customer Experience Dashboard - Enterprise

Data as of 10/31/21

	Agent-Handled Calls	First Call Resolution (FCR)	JD Power Gas OSAT	JD Power Elec OSAT	Customer Effort Score (CES)	Net Promoter Score (NPS)
2021	967,867	76.3%	773	706	8.8	64
2020	995,291	75.5%	746	700	8.7	59
	-2.8%	+1%	+27 pts	+6 pts	+1%	+8%

The metrics above for 2020 are for same time period as 2021 metrics, and will reflect the year-over-year change.



# BHE – CX Dashboard sample

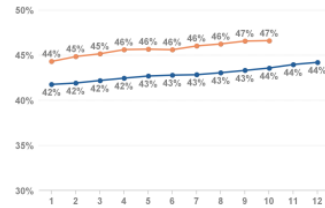
## Black Hills Corporation.

### Customer Experience Dashboard - Self-Serve

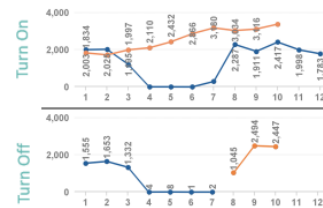
Data as of 10/31/21

	Accounts Logging into Web	eBill Enrollment	E-Mail Enrollments	IVR Containment	Electronic Payments	Web Turn-On and Turn-Off
2021	47%	33%	64%	49%	73%	31,661
2020 Year-End Metrics						
2020	44%	29%	55%	46%	70%	16,700
	+5%	+13%	+16%	+6%	+5%	+90%

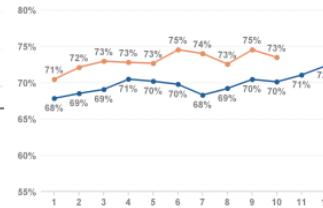
Accounts Logging into Web % (Rolling 12 mo)



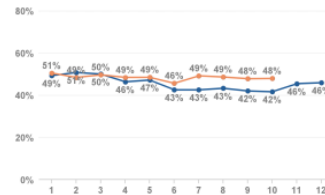
Web Turn-On and Turn-Off Completions



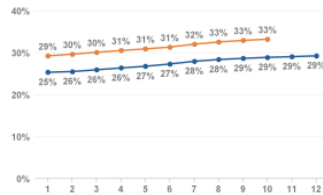
Electronic Payments



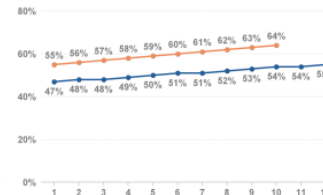
IVR Containment



eBill Enrollment



Accounts Notification Enrollments - Email



2020 2021

# BHE – CX Dashboard sample

## Black Hills Corporation.

### Customer Experience Dashboard - Contact Center

Data as of 10/31/21

	Total Inbound Calls	Agent-Handled Calls	IVR Containment	First Call Resolution	Net Promoter Score (CRS)	Customer Effort Score (CRS)
2021	1,956,016	967,867	49%	76.3%	58	8.6
2020	1,905,030	995,291	46%	75.5%	53	8.5
	+3%	-2.8%	+6%	+1%	+9%	+2%

The metrics above for 2020 are for same time period as 2021 metrics and will reflect the year-over-year change, with the exception of IVR containment.





# BREAK



# Customer Affordability / O&M Reductions

- **Labor**

- Moving O&M dollars to capital (digital projects, field operations support)
- Outsource/contract vs internal labor
- Centralized vs decentralized org structure
- Appropriate number of head count and management structure

# Customer Affordability / O&M Reductions

- **Partner with a vendor vs build and maintain in house?**
  - Digital platform cost
    - Technical debt
    - Cloud/SaaS models lead to increased license cost (O&M)

# Customer Affordability / O&M Reductions

- **Channel Strategy**

- Decommissioning vs adding new channels
  - Using VOC to drive channel selection and optimization
  - Regulatory i.e., pressure to serve all customers
  - Cost to serve by channel
  - Channel migration strategies to lower cost to serve

# DSC meeting March 24, 11a-5p ET

## March meeting will be virtual

- Guest speaker Neil Dempster on  
“Culture Transformation: Building & Sustaining a Customer-Centric Culture”
- General sessions –  
**VOTE NOW ON TOPICS**
- Breakouts – by topic & function  
**VOTE NOW ON TOPICS**
- Social hour
- Invitation to follow
- Agenda to follow

Neil Dempster



Clearview Performance Systems



# Chartwell Team



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