

Challenge scenario: Unified Power

Scenario overview

Unified Power is a retailer that provides energy supply contracts for homes nationwide.

Customers can choose a natural gas and electricity supply contract from the Unified Power lineup at a price and duration tailored to their individual circumstances. You can sign a contract for gas, electricity, or both. You can manage multiple homes in a single contract, or you can split them into multiple contracts if you wish.

The company was founded five years ago with the support of his largest DIY retailer in the country. By utilizing TV advertising and providing opportunities for over-the-counter applications, we have gained 1 million customers and gained a foothold in the market.

Unified Power's business plan includes increasing subscriptions to 5 million over the next four years, which must be achieved by leveraging the potential of consumer-directed digital sales and service channels.

Proposed system

The company has selected his Salesforce as their preferred technology provider, and the CEO wants to know what to do now to introduce new technology and what roadmap to support business growth. thinking about.

Required system

United Power recently reviewed the system and revealed a number of gaps and shortcomings that must be addressed to reach its full potential.

To meet your business requirements, you need the following new systems:

- Distributor portal where you can enter new customers directly
- Enhanced customer portal for self-service support
- Analysis / BI to check CRM and ERP data
- Digital marketing to prospects via email social media
- An online shop that provides energy efficiency and smart home products to energy customers

Business expansion

Recently, the company has been licensed to offer energy contracts to small retailers and light industry companies. We want to provide a complete digital experience that allows you to register, bill, and monitor usage of these corporate customers. The first contract can start within 6 months. The CEO wants recommendations on how technology can be used to support immediate marketing and demand creation to meet his first-year goal of 200,000 new corporate customers.

Current environment

Contract

Systems that have supported new contracts, contract renewals, and customer care are no longer efficient and effective enough to meet customer needs, hindering the failure to reach the customer count renewal goal. The CEO wants to replace these systems with his Salesforce solution and is seeking recommendations on how to do that.

ERP and CRM

The company uses his on-premises ERP system for customer meter reading and billing management, and also offers his current CRM, customer onboarding and case management capabilities. This system is retained for meter reading and billing processing, and customer-related data and processes are migrated to Salesforce. The ERP system provides an API for SOAP web services.

Invoice generation and delivery

Billing is done by an external printing and delivery company. The company receives monthly files from the ERP system via a web service integration. The shipping company produces a PDF copy of all customer invoices and stores the file in the company's digital archive for five years. Customers requesting a paper invoice will receive a printed copy, and other customers will receive her PDF invoice by email.

This printing and shipping company uses an existing web service to update her ERP with a list of invoice numbers and token information for each customer. The token is a unique value that can be used to retrieve invoices from the digital archive web portal.

Payment

Currently, customer payments are by bank debit and are processed by a third party provider. Payments are made at the end of each month, Unified Power generates accounts payable from the billing system and sends payment request files over secure FTP. The new system also allows customers to pay using credit or debit cards.

Customer portal

Customers can update their billing information and payment options through a web application that is hosted on-premises on the LAMP stack and works with the ERP system. All other customer support is handled by the sales team. The team is working to meet their needs, but their customer satisfaction scores are low.

Regulatory requirements

The supply of gas and electricity is regulated by government agencies, there is a centralized meter for all gas and electricity meters, and the gas and electricity meters are connected to the pipeline and energy networks, respectively. ... The regulatory system needs to be updated when a retailer accepts a claim for supply to a meter. Regulators should also be notified of events such as meter equipment changes, supply outages (due to unpaid payments), and supply terminations.

Pricing

Gas and electricity pricing and production will be negotiated with the supplier. Unified Power currently has one contract with a gas supplier and one with an electricity supplier, but expects to increase in the future to meet growing customer demand. Unified Power allows you to update customer numbers and expected consumption by leveraging the web portal provided by the supplier and various SOAP and REST APIs.

Environment

The on-premises infrastructure needed to run the ERP system is hosted as part of a managed services contract with United Power's parent company. The parent company also provides internet, telephone and desktop hardware and software. User information is stored in the Active Directory server in the data center. These systems will be retained for the time being.

Process flow

Sale

Current

Customers apply at an independent distributor within the DIY store. The agency scans a copy of the form, submits it to the administration team, and fills it into the CRM & ERP system. Last year he processed nearly 100,000 documents. The regional sales manager oversees the sales agent team to set goals and commission rates.

Proposal content

The distributor logs on to the agency portal, reviews the goal and fee information, and enters the new customer registration information. The regional sales manager monitors the registration process to ensure that there are no delays. The manager must be granted access to all home customer information.

A new role for Corporate Relations Manager is created to manage new corporate customers. This manager does not have permission to view home customer information.

Sales department

Current

The sales department's telephone sales team receives 150,000 new customer registration calls annually. Get the customer details and pass the order to the administrative department responsible for contract preparation.

The sales department is also the first customer contact for inquiries regarding billing, and inquiries must be recorded and processed in accordance with government regulations. We receive 5,000 monthly calls from existing customers requesting payments and changes to contract details.

Plan contents

1. Increase the use of self-service channels for administrative work
2. Allows customers to view past bills via her web and mobile and retrieve billing inquiries and issues as needed
3. Providing sales departments with tools to respond quickly to regulations and resolve billing inquiries
4. When a customer applies by phone, a contract PDF is automatically generated by the sales department and sent to the customer for digital signature.

Administrative department

Current

1. Manually fill in the new customer form based on the over-the-counter application
2. Customer contract creation is partly automated. After the document is created and saved in Word, it is emailed to the customer for printing and signing.
3. Keep track of pending customers with unsigned contracts
4. Upon receiving the signed contract, the administration department updates her CRM with the change information provided by the customer and activates the contract.
5. Send the application form filled out in the store channel to CRM as a PDF

Plan contents

1. Use mobile application and digital signature features at the agency
2. Add direct web application form
3. Automatically generate contracts
4. Manage phone channel contract creation in the sales department
5. Enables web creation by eliminating the need for customers to print and sign contracts
6. The administration department handles exceptional contract situations and automatically generates standard contracts.

client

Housing

1. Browse invoices for the last 3 years
2. See energy consumption charts and graphs
3. Pay using credit / debit card
4. Update payment method (card / bank account / counter payment)
5. Update meter reading results

Corporation

1. Same as home customers, except paperless
2. End-to-end digital for all interactions

ID and access management

Sales and administration users need access to all internal systems without having to hold a sign-in. Customers are allowed to log in using their Facebook or Google account.

Amount of data

- Current Residential Customers 1 Million
- Future Customers Target 5 Million (4 Million Residential, 1 Million Corporate)
- Average Electric Gas Services Per Residential Customer 1.5 (Gas / Electricity)
- Average Electric Gas Services Per Corporate Customer 2 (Multiple facilities, multiple combinations) On average, a corporate customer has one manager and one billing officer.