Scenario for The Challenge: Unified Power

Scenario Overview

Unified Power is an energy retailer offering supply contracts to residential properties across the county.

Customers are able to select supply contracts for natural gas and electricity from Unified Power's portfolio at a tariff and duration which suits their situation. Customers can have a contract for gas, electricity or both. They may also manage multiple properties as part of a single contract, of have multiple contracts if they prefer.

The company was formed 5 years ago with the backing of the country's largest DIY retailer and has secured a foothold in the market with 1 million customer subscriptions by leveraging TV advertising and in-store signup opportunities.

Unified Power has a business plan to grow to 5 million subscribers over the next 4 years and needs to access the potential of direct to consumer digital sales and service channels in order to achieve this.

Proposed System

The company has selected Salesforce as its preferred technology provider and the CEO wants to know the immediate actions which they should take to deploy the new technology, and then what the roadmap is to support business growth.

Systems Required

A recent review of the company's systems has identified a number of gaps and shortcomings which must be addressed in order to put United Power in a position that it can achieve its potential.

The following new systems as required to meet business requirements:

- Sales agent portal for direct entry of new customers
- Enhanced customer portal to support self service support
- Analytics/BI to review CRM and ERP data
- Digital marketing to prospective customers through email social media
- Webshop to offer energy efficiency and smarthome products for energy customers

Product Expansion

The company has recently been granted a license to offer energy contracts to small retail business and light manufacturing companies and wishes to offer them a fully digital experience for sign-up and billing as well as usage monitoring for these business customers. The first contracts can commence in 6 months time. The CEO is seeking recommendations on how technology can be used to support immediate marketing and demand generation to meet the target of 200K new business customers in the first year.

Current Landscape

Contracts

Systems supporting new contract production, contract renewals processing and customer care are no longer efficient or effective in serving customer needs and are contributing a below target number of customer renewals. The CEO would like these replaced with a Salesforce solution and wants recommendations on how to achieve this.

ERP & CRM

The company makes use of an on-premise ERP system to manage the metering and billing of customers as well as providing current CRM, customer on-boarding and case management features. This system will be retained for metering and billing and the customer related data and process will be migrated to Salesforce. The ERP system offers an API of SOAP web services.

Bill production & delivery

Billing is fulfilled by an external printing and delivery company who receive a monthly file via a web service integration from the ERP system. The delivery company generate PDF copies of every customer bill and store the files in their digital archive for a period of 5 years. Customers requesting paper bills will receive a printed copy, remaining customers are emailed their PDF bill.

The printing and delivery company use an existing web service to update the ERP with a list of each customer bill number and a unique token which can be used to retrieve the bill from the digital archive web portal.

Payments

Customer payments are currently collected via bank debit which is handled by a third party provider. Payment runs happen at the end of each month and Unified Power generate accounts payable from the billing system send a payment request file via secure FTP. In the new system customers will also be able to pay using a credit or debit card.

Customer Portal

Customers can update their billing information and payment options via a web application which is hosted on-premise on a LAMP stack and integrated with the ERP system. All other customer support is processed by the Front Office team, which is struggling to keep pace with demand, resulting in low customer satisfaction scores.

Regulatory Requirements

The delivery of gas and electricity is regulated by a government agency and a central register exists for all gas and electricity meters which are connected to the pipeline network and energy grid respectively. The regulators system must be updated when the retailer takes over the billing of supply to a meter. They must also advise the regulator for such events as change of meter equipment, suspension of supply (for non-payment) and termination of supply.

Pricing

Pricing and capacity of gas and electricity is negotiated with distribution companies. Unified Power currently has agreements with 1 gas and 1 electrical distributor, but this is expected to grow in order to meet growing customer demand. The distributors provide web portal and a variety of SOAP and REST APIs through which Unified Power can update customer numbers and anticipated consumption

Environment

The on-premise infrastructure needed to run the ERP system is hosted as part of a managed services deal with United Power's parent company. They also provide internet, telephone and desktop hardware and software for Unified Power. User information is stored within an Active Directory server within the data centre. These systems will be retained for the foreseeable future.

Process Flows

Sales

Current
Independent sales agents in the DIY stores sign up customers and send scanned copies of the form to the back office team for entry into the CRM & ERP systems, last year this was almost 100K documents.

Regional sales managers supervise the sales agent teams to set targets and commission rates.

Proposed

Sales agents will logon to the agent portal to see their target and commission information and to enter new customer signup information.
Regional sales managers will monitor the signup process to ensure there are no delays. They should have access to all residential customers information.
A new role of Business Relationship Manager will be created to manage the new business customers. They will not be permitted to see residential customer information.

Front Office

Current

The front office telephone sales team receives 150K calls per year for new customer signups, they capture the customer details and pass the order to the Back Office for contract preparation.

The front office is also the first point of contact for customer bill queries which must be recorded and processed in accordance with government regulation.   They receive 5,000 calls per month from existing customers requesting changes to their payment or contract details.

Planned

- Increase the use of self-service channels for administrative tasks
- Allow customers to review their past bills via web and mobile, and if required capture billing queries or challenges.
- Provide front office with tools to quickly respond and resolve billing queries in accordance with the regulations.
- Front office will automatically generate and send contract PDF for customer to e-sign when signing up via phone.

Back Office

Current

- Manual entry of new customer forms from in-store signups
- Semi-manual production on contract for customer, created in Word, saved and emailed to the customer for printing and signing.

- Chasing customers with pending unsigned contracts
- On receipt of the signed contract the back office update the CRM with any changes indicated by the customer and activate the contract.
- Processing pdf signup forms from in-store channel into the CRM

Planned

- Agents use mobile signup and e-sign functionality
- Additional of direct web signup form
- Automatic generation of contract documents
- Front office will manage telephone channel contract creation
- Customer no longer required to print and sign contract for web creation
- Back office agents detail with exceptional contract situations, standard contracts automatically generated

Customers

Residential

- View last 3 years bills
- View charts & graphs of their energy consumption
- Pay by credit/debit card
- Update payment method (card/bank account/counter payment)
- Update meter readings

Business

- Same as residential except zero paper!
- End-to-end digital for all interactions

Identity & Access Management

Front office and back office users should be able to access all internal systems without needing to keep singing in.

Customers will be allowed to login using Facebook or Google accounts.

Data Volumes

Current residential customers 1M

Future customer target 5M (4M residential, 1M business)

Average utility services per residential customer 1.5 (gas/electric)

Average utility services per business customer, 2 (multi premises, multi combination)

Business customers have on average 1 administrative and 1 billing contact.

-END OF SCENARIO-