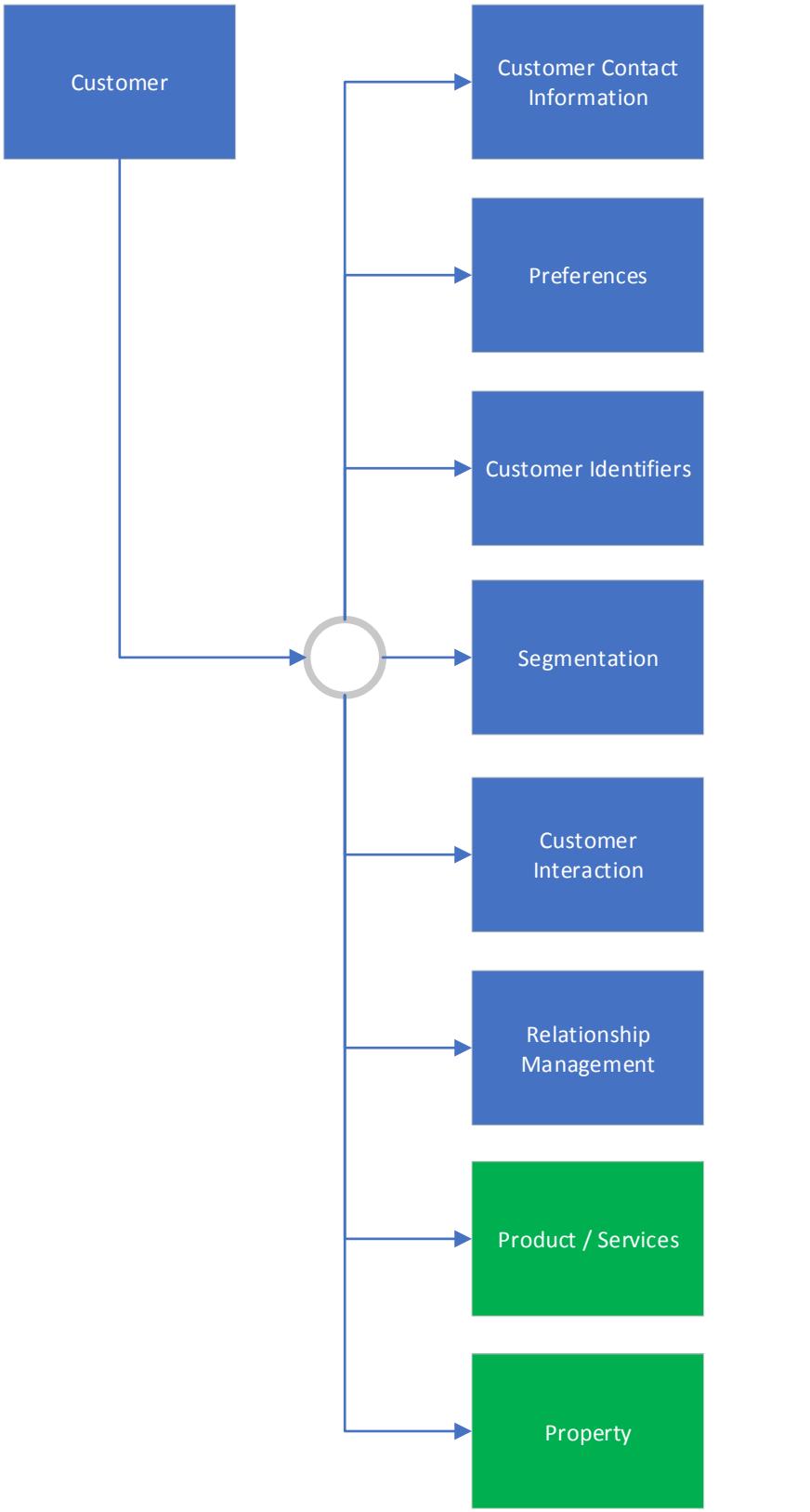
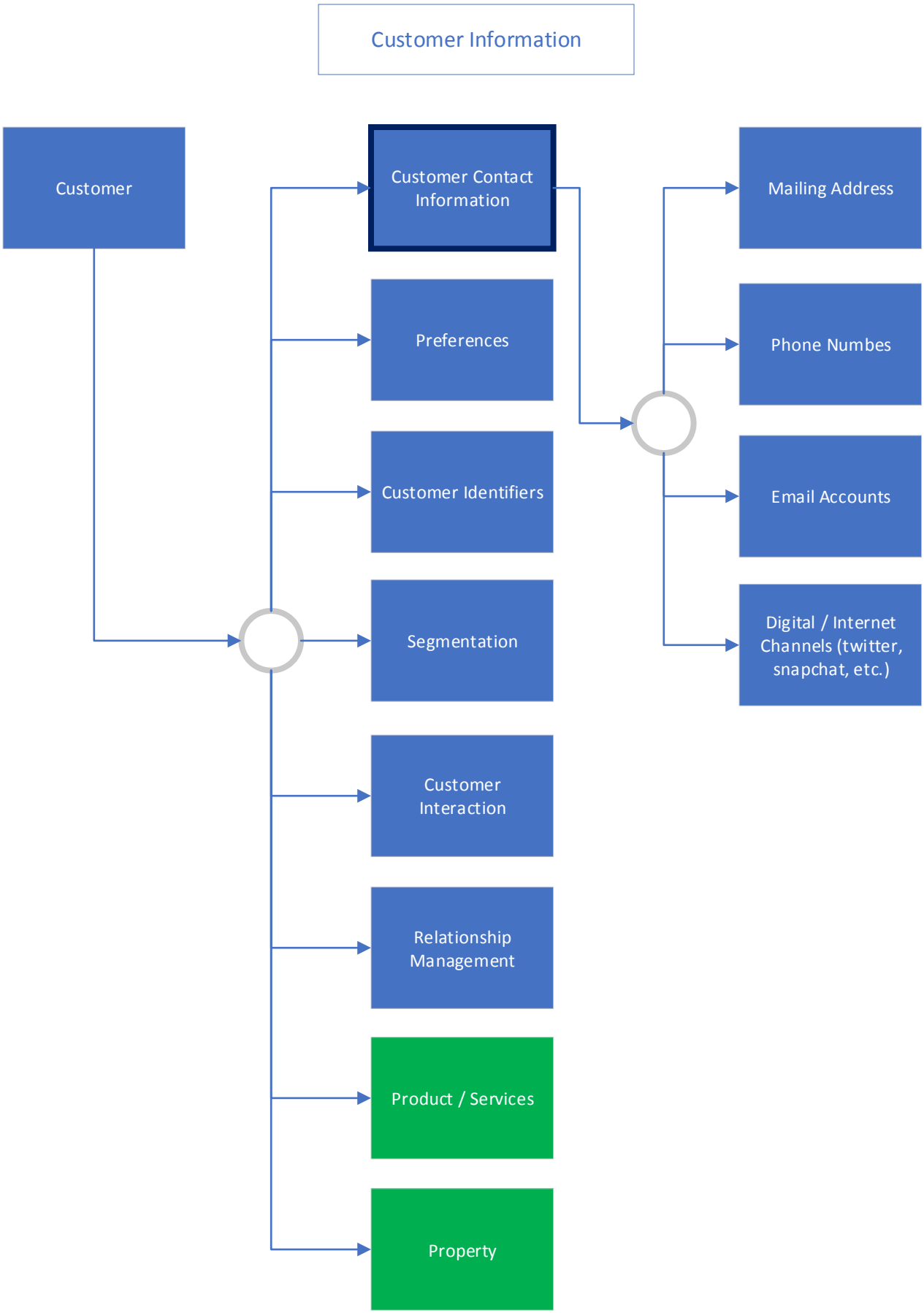
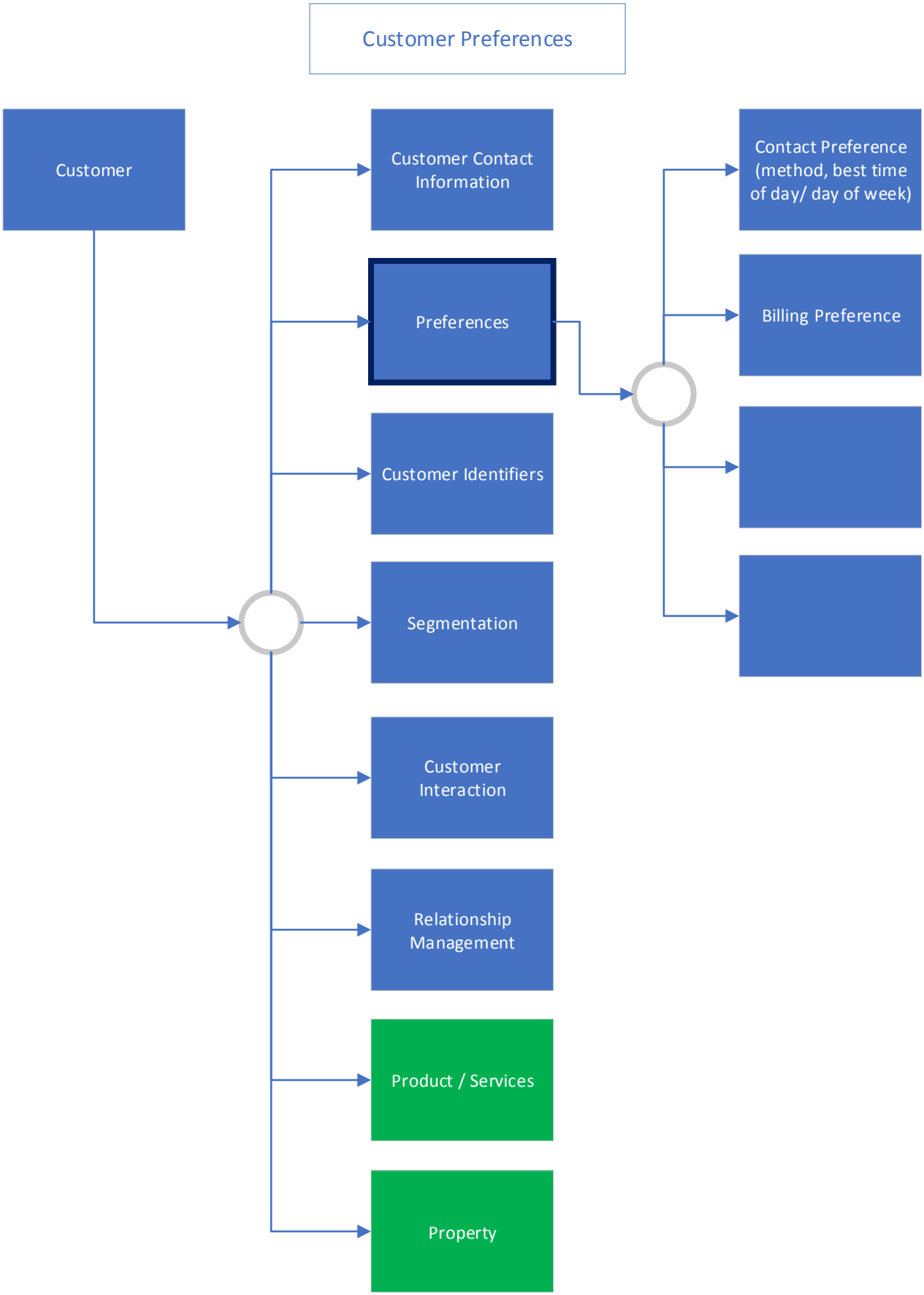
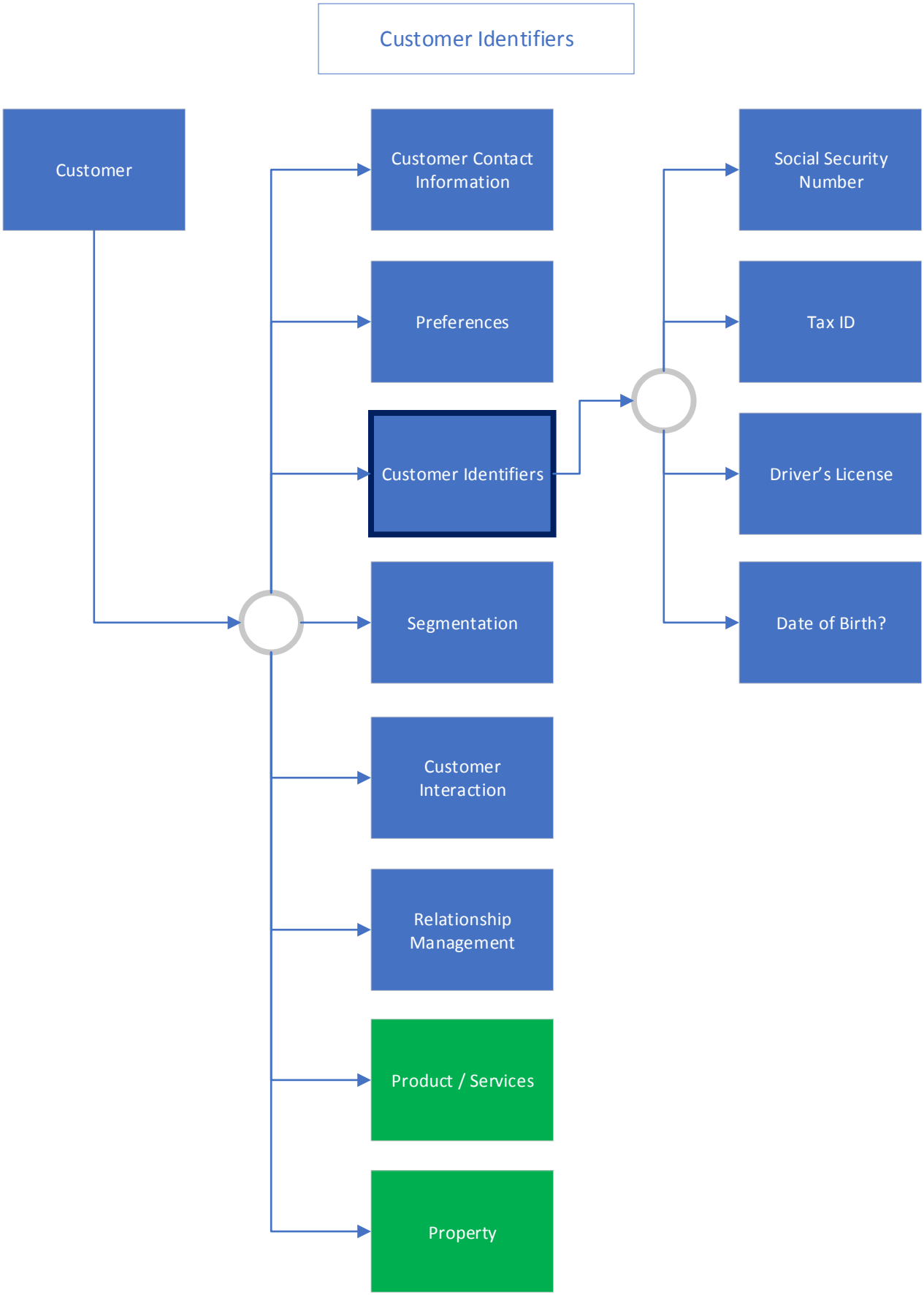
Overview

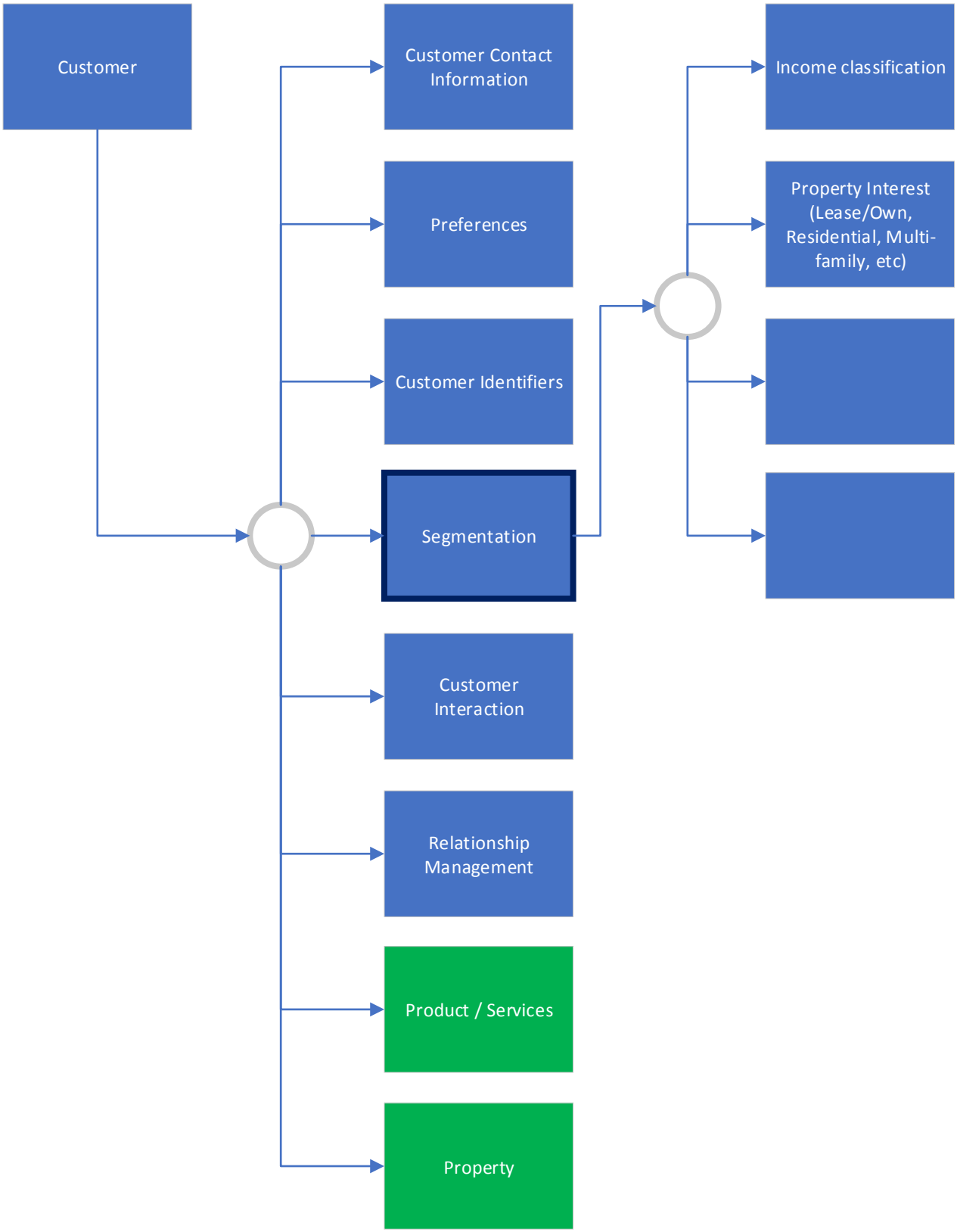

Customer
Customer Contact Information
Preferences
Customer Identifiers
Segmentation
Customer Interaction
Relationship Management
Product / Services
Property

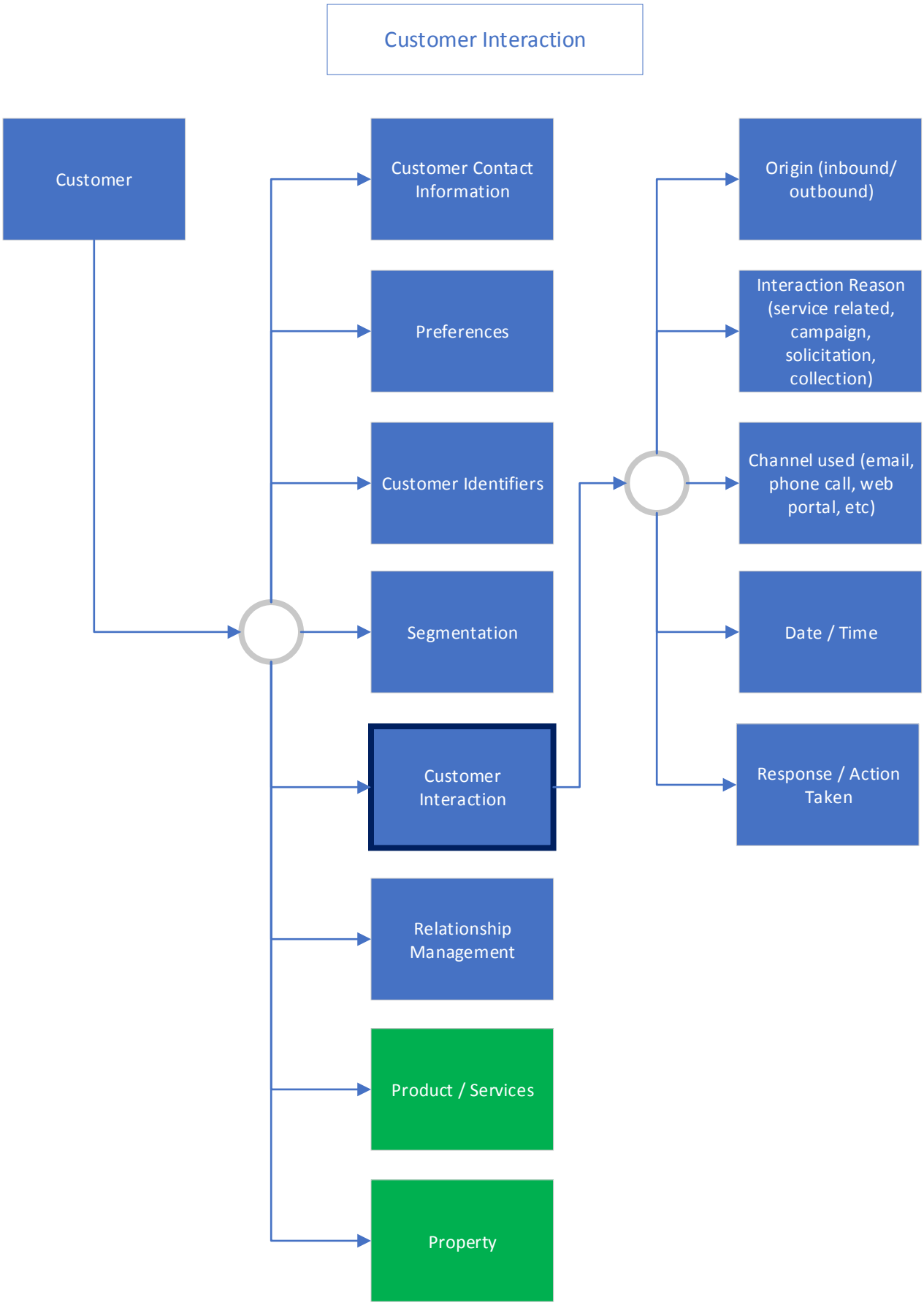

Customer Information
Customer
Customer Contact Information
Preferences
Customer Identifiers
Segmentation
Customer Interaction
Relationship Management
Product / Services
Property
Mailing Address
Phone Numbes
Email Accounts
Digital / Internet Channels (twitter, snapchat, etc.)


Customer Preferences
Customer
Customer Contact Information
Preferences
Customer Identifiers
Segmentation
Customer Interaction
Relationship Management
Product / Services
Property
Contact Preference (method, best time of day/ day of week)
Billing Preference

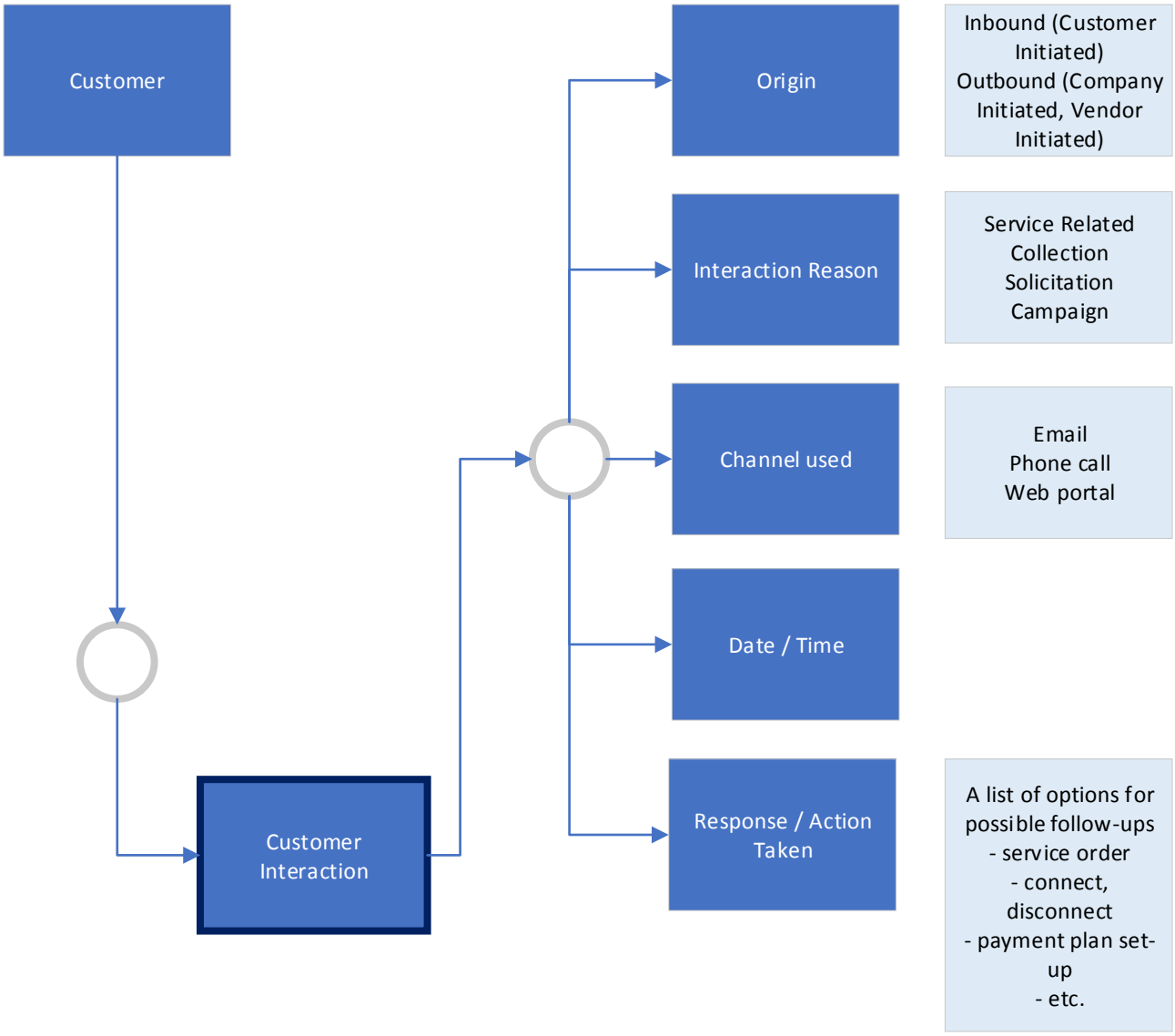

Customer Identifiers
Customer
Customer Contact Information
Preferences
Customer Identifiers
Segmentation
Customer Interaction
Relationship Management
Product / Services
Property
Social Security Number
Tax ID
Driver's License
Date of Birth?

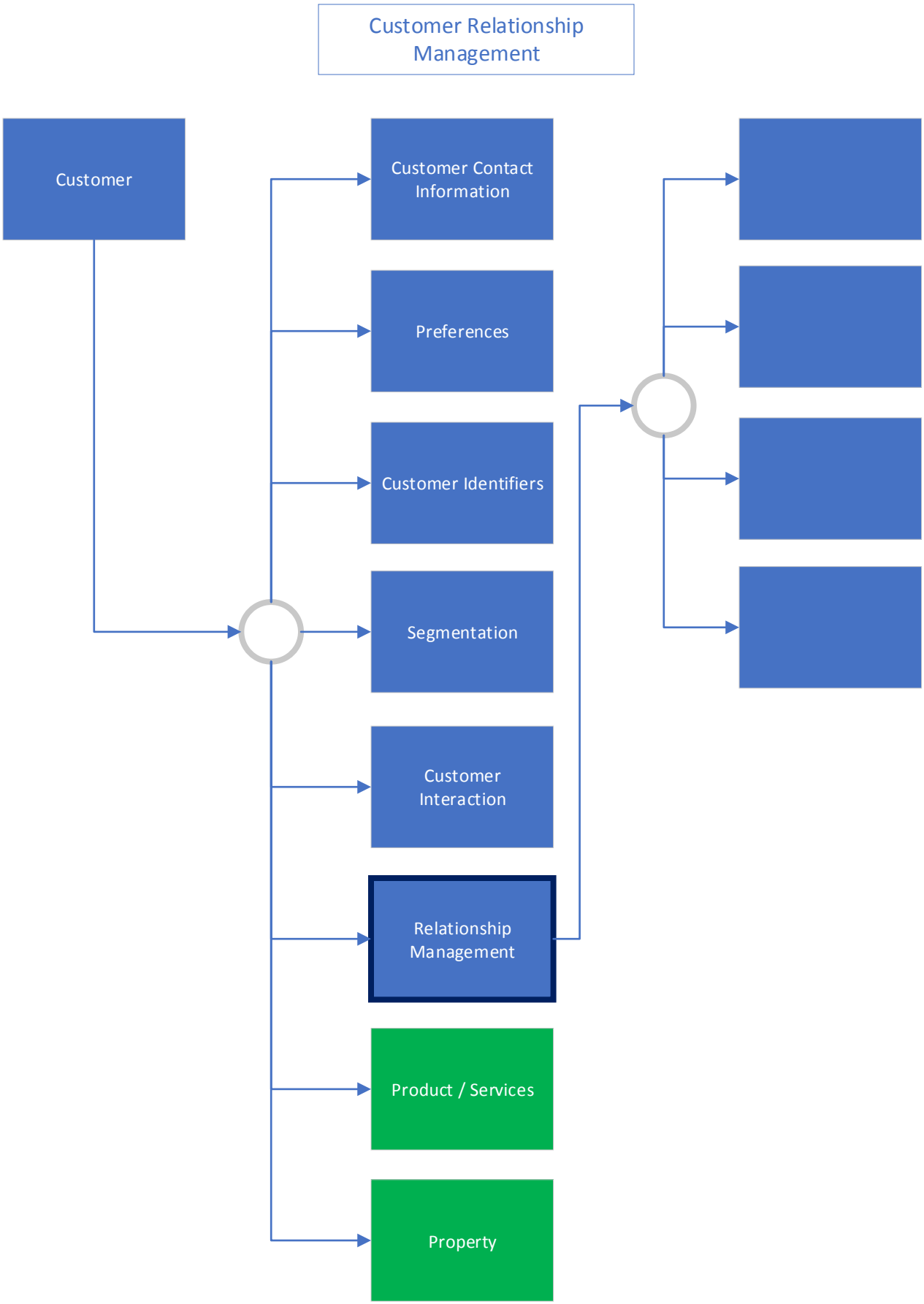
Customer Segmentation

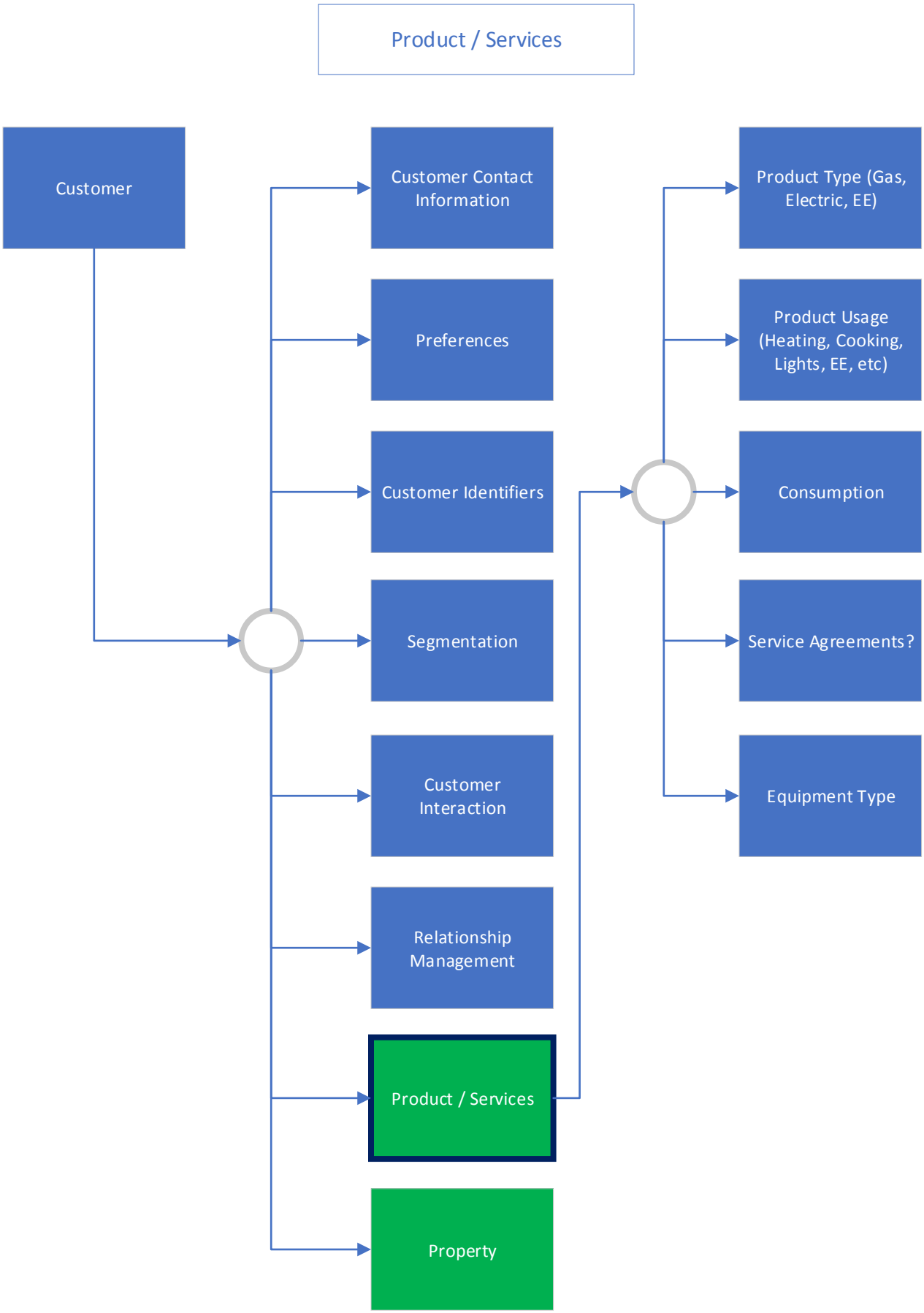


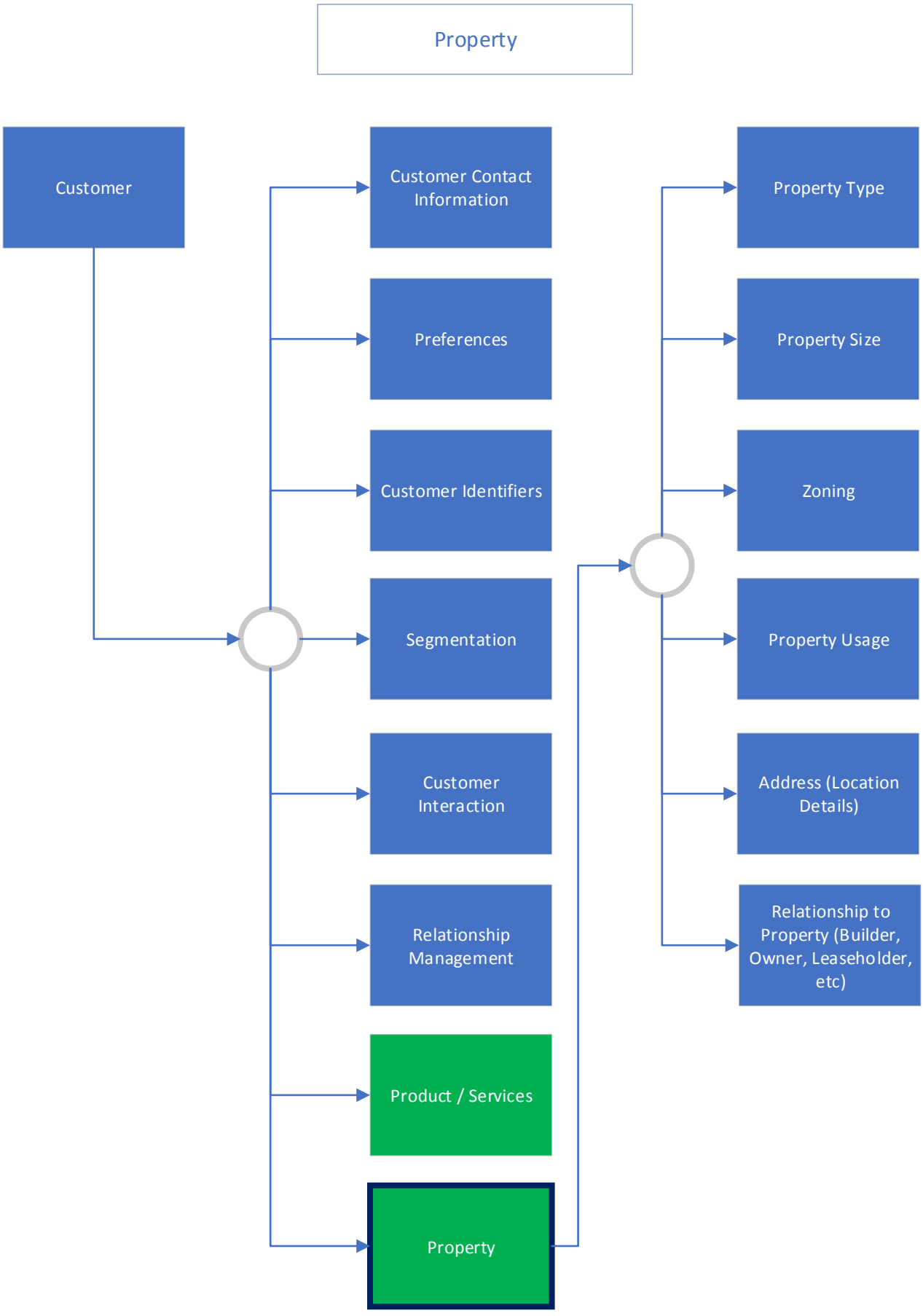

Customer Interaction
Customer
Customer Contact Information
Preferences
Customer Identifiers
Segmentation
Customer Interaction
Relationship Management
Product / Services
Property
Origin (inbound/ outbound)
Interaction Reason (service related, campaign, solicitation, collection)
Channel used (email, phone call, web portal, etc)
Date / Time
Response / Action Taken

Customer Interaction




Customer Relationship Management
Customer
Customer Contact Information
Preferences
Customer Identifiers
Segmentation
Customer Interaction
Relationship Management
Product / Services
Property


Product / Services
Customer
Customer Contact Information
Preferences
Customer Identifiers
Segmentation
Customer Interaction
Relationship Management
Product / Services
Property
Product Type (Gas, Electric, EE)
Product Usage (Heating, Cooking, Lights, EE, etc)
Consumption
Service Agreements?
Equipment Type


Property
Customer
Customer Contact Information
Preferences
Customer Identifiers
Segmentation
Customer Interaction
Relationship Management
Product / Services
Property
Property Type
Property Size
Zoning
Property Usage
Address (Location Details)
Relationship to Property (Builder, Owner, Leaseholder, etc)