

# The Workflow Evolution

(The Learning Curve)

The Client...

The CAA...

The Utility

# The Workflow Evolution (CAA Focus)

## Original LSM Program Goals:

- “Intake” Automation (IVR to set calendar)
- Reduce clogged phone lines
- Free up staff time from answering phones or returning messages for simple questions
- Reduce no-shows
- Decrease duplicate appointments
- Centralize staff calendars and client database

# The Workflow Evolution (CAA Focus)

## CAA's Requested Potential Enhancements:

- Multiple appointment types
- Track and report multiple awards for customers
- Automate customer inquiries & call back lists
- More sophisticated IVR logic
- Web services for data exchange with Utilities

# The Workflow Evolution (Data Sharing)

## Paper-pushing, Phone Calls and Inefficiencies:

- We learned that many tasks are done manually
- CAA staff not typically technical and resources are often limited
- Much of the data exchange is with Utilities (via paper, spreadsheet, fax or phone call)
- LIHEAP program administration is surprisingly low-tech and could be improved (at both CAA and Utilities)

# The Workflow Evolution (Utility Focus)

**Utilities could benefit significantly from Energy Assistance Program automation, too:**

- Standardized, automated and timely customer account notations
- Utility CSRs informed of customer activity in real-time
- Reduces premature/unnecessary disconnects
- Significantly decrease calls into call center

# Energy Assistance and the Customer Experience

## Reducing Bottlenecks

## Enhances the Customer Experience

- CAA 'Clients' are Utilities 'Customers'
- Timely information = better account-related decisions
- Reduced disconnections and better payment scores
- Reduced need for customers to contact utility

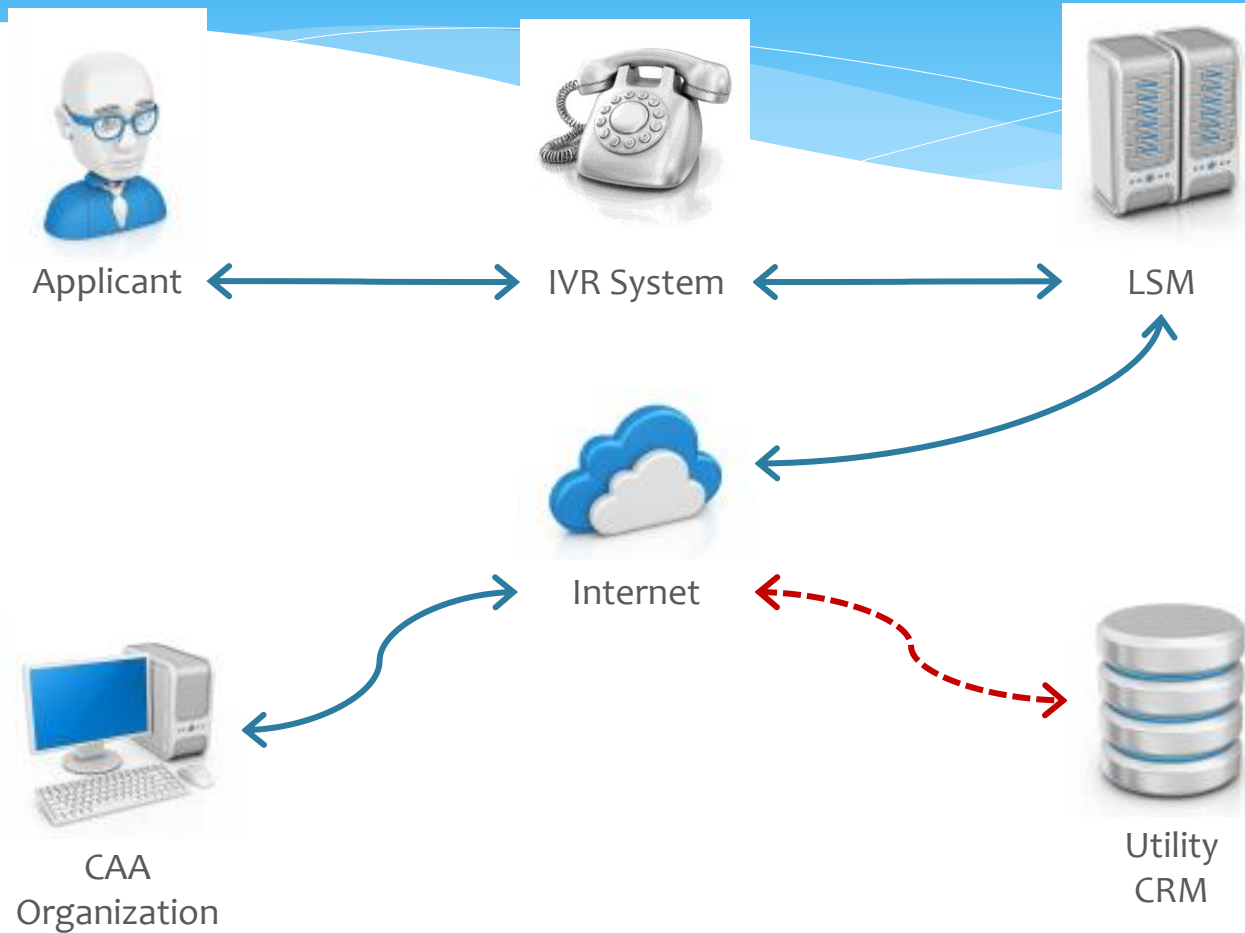
# Opportunities to Automate

The Client...

The CAA...

The Utility

# Automated Data Exchange





# Customer Information

[111-11-1112] Terry Smith

 Create Appointment |  Edit Customer |  Print

<b>Customer ID:</b>	
<b>Primary Fuel Type:</b>	Electric
<b>Utility account #:</b>	007-000-003
<b>First name:</b>	Terry
<b>Middle initial:</b>	S
<b>Last name:</b>	Smith
<b>SSN:</b>	111-11-1112
<b>Monthly Household Income:</b>	
<b>Self employed:</b>	no
<b>Address:</b>	1010 260th Ave Ct E
<b>City:</b>	Buckley
<b>State:</b>	WA
<b>ZIP:</b>	98321
<b>Phone:</b>	360-897-0000
<b>Callback Phone:</b>	360-897-0000
<b>Tribal Member?:</b>	
<b>Primary applicant:</b>	yes
<b>Number in household:</b>	4

## Appointment Details


 Edit |  Delete


**Date:** Thursday, December 22, 2011  
**Time:** 10:15 am  
**Location:** PSE Group  
**Appointment Type:** PSE Group  
**Confirmation #:** 1283

## Search for Household members

Customer ID

## Household members

(  = primary applicant)

Candace Smith  Remove  
□

 New Household Member

## Assistance Programs Information

Assistance Program: **PSE** -- Created: 12/22/2011  
Initial contact date: 12/22/2011  
Application received date: 12/22/2011  
Certification date: 01/24/2012  
Amount pledged: \$975.00  
Amount received: \$975.00

Assistance Program: **LIHEAP** -- Created: 12/22/2011  
Initial contact date: 12/22/2011  
Application received date: 12/22/2011  
Certification date: 01/24/2012  
Amount pledged: \$502.00  
Amount received: \$502.00


## Notes

## Customer Information

Customer ID:	<input type="text" value="03-97942"/>
Primary Fuel Type	<input type="text" value="Gas"/>
<b>Account Numbers</b>	
Primary Utility Account #:	<input type="text" value="5275338008"/>
Clark County Public Utility Account #:	<input type="text"/> <a href="#">Remote Lookup</a> ➔
NW Natural Account #:	<input type="text" value="5275338008"/> <a href="#">Remote Lookup</a> ➔
First name:	<input type="text" value="Machelle"/>
Middle initial:	<input type="text" value="A"/>
Last name:	<input type="text" value="HERRERA"/>
SSN:	<input type="text" value="111-11-8987"/>

## Assistance Programs Information

Assistance Program:	<input type="text" value="LIHEAP"/>
Initial Application Date:	<input type="text" value="March 04, 2013"/>
Application Rec'd Date:	<input type="text" value="March 12, 2013"/>
Certification Date:	<input type="text" value="March 20, 2013"/>
Amount Pledged:	<input type="text" value="436.00"/>
Amount Received:	<input type="text" value="436.00"/>
Denied:	<input type="text"/>
Closed Account?:	<input type="checkbox"/>



[+ Add Assistance Information](#)

## Notes

[+ Add a note](#)

# Energy Assistance and the Customer Experience

## Enhanced and Automated Processes

(That help CAA's, the Customer & Utilities)

- Crisis-eligible = Preferred appointment slots
- Updated Utility accounts with appt. and award data
- Reduce staff time at CAA and Utility

**Reduced Effort • Lower Costs • Happier Customers!**

# Energy Assistance and the Customer Experience



*PUGET  
SOUND  
ENERGY*

**PSE Pilot Program**

**2012-13 Heating Season**

Updates from LSM to the PSE CLX

# HELP and LIHEAP Account Notation

<u>Total customers</u>	<u>LSM-placed Disconnect Hold</u> <i>(Customers did not call PSE)</i>
Nov – 252	153
Dec – 135	69
Jan – 319	194
Feb – <u>306</u>	<u>119</u>
<b>Total – 1012</b>	<b>535*</b>

**\* Reduced unnecessary disconnects**

# Unnecessary Calls into Call Center

Nov – 62

Dec – 48

Jan – 81

Feb – 128

**Total 319**

*(Customers called PSE to confirm appointment)*

LSM – IVR would inform customer that their utility has been notified of their appointment – no need to call !!

# Clark PUD Case Study



- Pre-LIHEAP fund crisis-only appointments
- Set appointment calendars openings
- Customer-entered Utility Account Number
- Only eligible customers given appointment
- Non-qualified told to call back after Dec 10<sup>th</sup>

# Reduced Calls into Call Center

**Appointments by Location** Print

◀ Previous Day      Appointment on Wednesday: **11/28/2012**      Next Day ▶

Location:       Legend: scheduled/available unavailable reserved      Next ▶

	Lisa George	Kelly Knutsen	Amber Hall	Erica Waite	Tanya Washington
7AM					
8AM	Unavailable	Unavailable	Unavailable	Unavailable	
9AM	KEVIN DAVIDSON (Gas)		MARK CALDWELL (Oil)	MIKE DAY (Electric)	
10AM	****owh****	Admin support	LUCIO MYERS (Electric)	Phone system	
11AM			JENNIFER RICE (Electric)		
12PM	Lunch	Lunch	Lunch	Lunch	
1PM	Training	Phone system	Training	ELWAINE PALMER (Electric)	

**Appointment Details** ✕

Customer: MIKE DAY  
 Account #: 5387250011  
 Appointment Type: Crisis Appointment  
 Phone:  
 Confirmation #: 125963606  
[view customer](#)



# Reduced Calls into Call Center

## Clark Public Utilities

- Crisis-only appointments (pre LIHEAP funding)
- Estimated reduction of ~ 5000 calls for the center
- 60 calls/CSR/day x 21 days = 1260 calls/month/FTE
- Approximate savings:
  - 4 FTEs @ \$4,000/mo (\$16,000) or
  - 5,000 calls x \$4.00/call (\$20,000)

# What the CAA's Would Like to Have

## Automation and Streamlining Data Exchange

### CAA's Examples and Feedback:

- Account Balance (total amount due, breakdown by fuel type)
- Amount needed to prevent disconnect
- Amount needed to reconnect
- Disconnect date
- Active payment plan in place
- Co-customers
- Payment history & usage data

# Doing More with Less

The Client...

The CAA...

The Utility

## *Questions and Discussion*

# Thank You!

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*(Come visit us at our exhibit table)*