

# CASE STUDY

Energy service provider

CEX transformation

# Case summary

A large North American energy services provider planned to radically transform customer experience across several business units

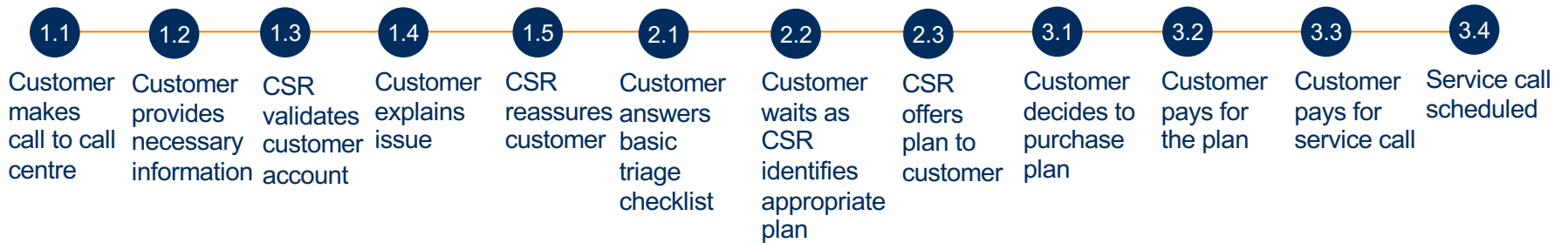
Customers often purchased multiple services across various business units, requiring harmonized experience and life cycle management

SATOV was engaged to work alongside business and technology leaders to map the current customer journeys and design the future state

We identified multiple ways to drive the customer experience, improve marketing, and drive revenue while generating savings from activities customers did not value

# We developed journey maps for all major customer interactions

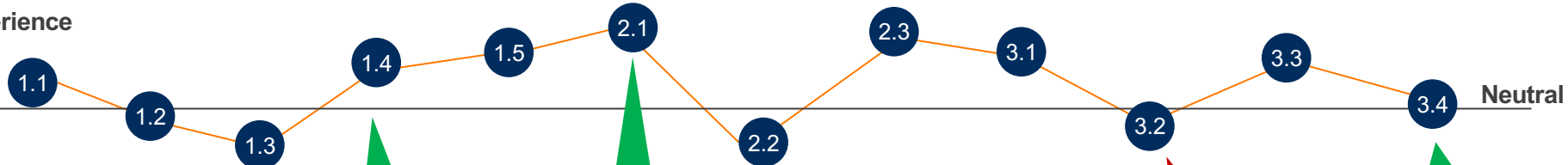
## SAMPLE JOURNEY MAP: Resolving a mechanical issue



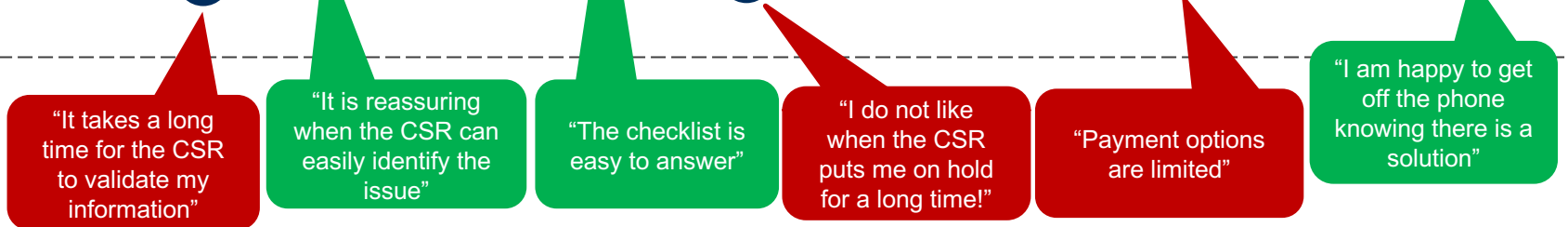
### Benefit



### Experience



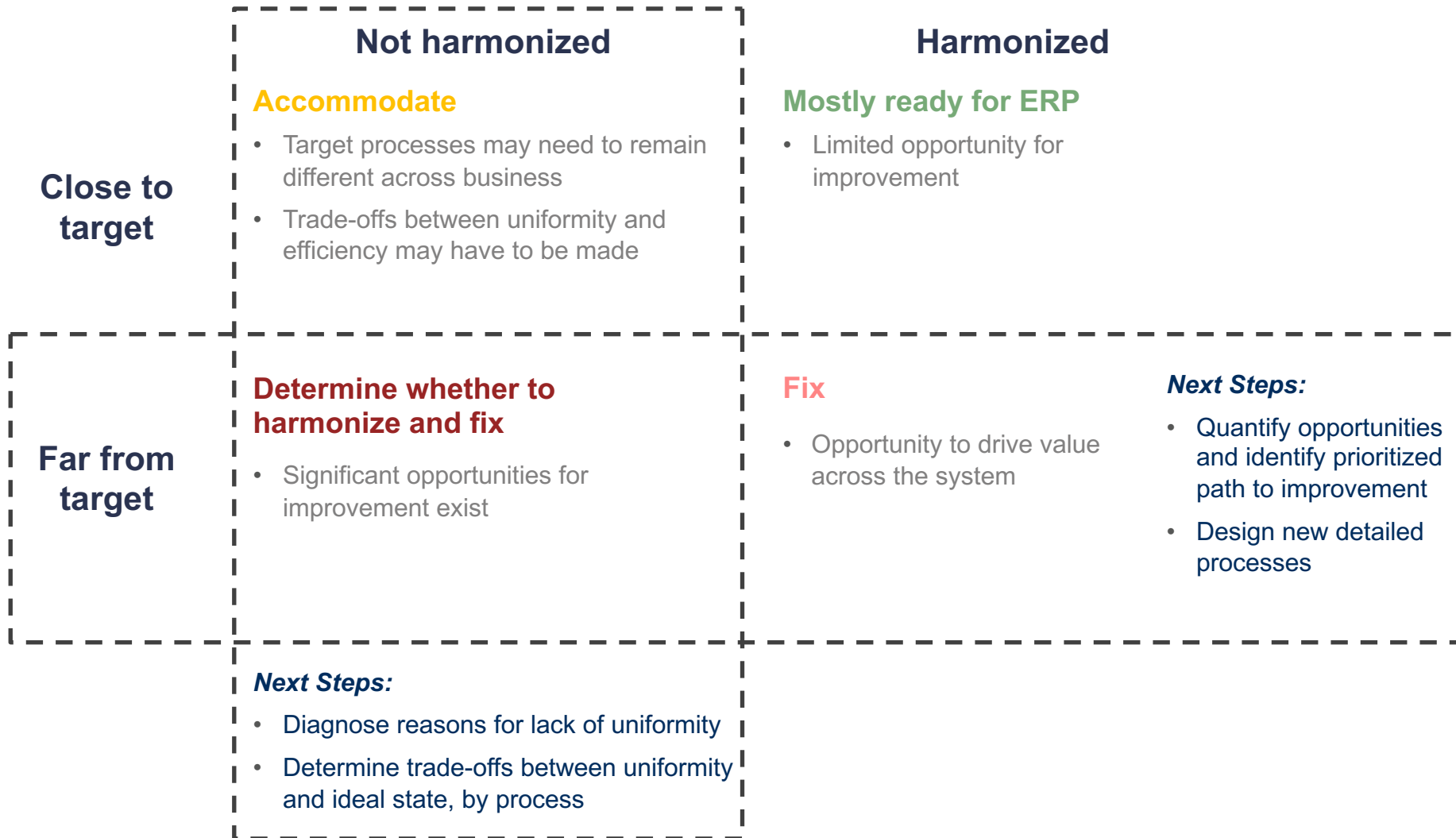
### Moments of truth and pain points



### Method

7 onsite visits  
 >1,000+ hours of management and process owner meetings

# We categorized current processes into actionable buckets



# We identified and evaluated opportunities through several filters



Filter	<p>By integrated experience across processes</p> <ul style="list-style-type: none"> <li>E.g.: Repair call, purchasing equipment</li> </ul>	<p>By functional area:</p> <ul style="list-style-type: none"> <li>E.g.: Call centre, dispatch, field automation</li> </ul>	<p>By benefit type</p> <ul style="list-style-type: none"> <li>E.g.: Reduced truck rolls</li> </ul>	<p>By initiative</p> <ul style="list-style-type: none"> <li>Interdependencies among initiatives</li> <li>Value, certainty, ease of implementation</li> </ul>
Question	Does it match our target customer journey?	Can we do this?	How much is this worth to us?	What comes first?
Stakeholder involvement	Business leaders	Functional process leads	Process leads and project team	Project team

# We set up the analytical framework for each opportunity

## Illustrative example

Opportunity	Customer event	How benefit is realized for the customer	Need to believe	Analytical approach (quantification of benefit)
Eliminate tech pre-inspections	Buying new equipment	Less disruption in the home  Faster call to service	Most pre-inspections can be eliminated by taking pictures during sales process  The current number of pre-inspections and the resulting cost is material	Quantify the number of pre-inspections per year (by business)  Establish the time required for a pre-inspection  Establish total cost by applying fully loaded costs <b>and / or</b> evaluate potential opportunity costs

### Initiatives required to support opportunity

ERP	Centralized call centre	Centralized dispatch	Handheld technology	Shared service consolidation	Web self service	Product portfolio complexity reduction	Logistics centralization
✓			✓				

# We identified the benefit of new processes

## Reducing phone calls

### Process gaps

A lack of information on the website causes substantial low/no revenue phone calls from customers to the call centre

#### *Examples:*

Appointment status updates, billing questions, part order updates, maintenance appointment booking

### Solution

Improving data availability on the website will enable customer self service

### Benefit to customer

Immediate answers

Ease of use

Less wasted time

# We quantified the opportunity

## Transformation benefits by process owner

\$000'S OF TOTAL YEARLY BENEFIT

■ Cost  
■ Revenue

