Mass Market New Connect Journey Map

This customer journey map illustrates the target future state for a utility provider's mass market new connection requests. It details the process where customers receive a new service connection. By mapping out this journey, we aim to highlight the customer's actions, thoughts, and experience at each stage, as well as the corresponding business interactions. This comprehensive view helps us identify opportunities to enhance the customer experience and streamline internal processes. Enhancements include an improved digital experience with self-serve estimation tools, a detailed notification system to keep customers informed, specialized training for employees, and portals for customers and contractors to track tasks and statuses, fostering transparency and efficiency throughout the new connection process.

The Main Actor

Jim, Residential Customer
Jim, a residential customer, used to be uncertain about the process and timeline for establishing a new connection. However, with his utility provider's enhanced digital experience, Jim can now use self-serve estimation tools to get an initial idea of costs and timelines. Throughout the new connection process, Jim receives detailed notifications at every stage, keeping him informed and reassured. Additionally, specialized training for employees ensures that Jim's inquiries are handled efficiently and professionally. Once the connection is established, Jim can access a customer portal to track remaining tasks and provide feedback, ensuring his voice is heard and contributing to continuous improvement.

Ryan, Contractor
Ryan, a contractor working with Jim, used to find it challenging to track the progress of multiple client projects and obtain real-time updates. However, with the utility provider's new contractor portal, Ryan can now manage all his current clients, track statuses, view documents, and communicate efficiently through the portal. Customers have the ability to choose how much information Ryan has access to, ensuring privacy and control over their data. This enhanced digital experience increases Ryan's efficiency, improves client satisfaction, and ensures his inquiries are handled promptly and professionally.

The Secondary Actors

David, CSR
David plays a critical role in the CCC (Customer Contact Center), serving as the first point of contact for customers initiating new connection requests. With the introduction of specialized training programs and enhanced digital tools, David is now well-equipped to handle a wide range of customer needs. The new connection dashboard offers efficient navigation and centralizes key data, reducing manual effort. This ensures that customers receive timely and accurate information, feel informed and satisfied, and contributes to the utility provider's reputation for excellent customer service.

Alice, Demand LCSC
Alice, the Demand Lines Coordinating Service Coordinator (LCSC), is the main point of contact for customers once their new connection request has been sent. The role maintains direct communication with both the contractor and the customer, addressing any questions they may have about the status of work or the contract. With the introduction of customer and contractor portals, Alice's workload is expected to become less manual, as customers and contractors can access support and information directly through the portals. This allows Alice to focus more on overseeing the project from beginning to end, ensuring a smooth and efficient process. Her role is crucial in maintaining clear communication and providing timely updates, contributing to a positive customer experience and successful project completion.

Elena, ADET Scheduler
Elena, the ADET Scheduler, plays a crucial role in the new connection process. She is responsible for scheduling the ADET designer to visit customer sites and complete the necessary introductory work to gather information for the new connection setup. Elena ensures that the scheduling is efficient and aligns with the customer's availability. With the introduction of customer and contractor portals, some of Elena's tasks are streamlined, allowing her to focus more on coordinating and optimizing the scheduling process. Her role is vital in ensuring that the initial stages of the new connection are handled smoothly, setting the foundation for a successful project.

Joshua, Lines Scheduler
Joshua, the Lines Scheduler, is the key point of contact towards the end of the new connection process. He is responsible for scheduling the line crews to go out and complete the on-site work necessary for the new connection. This stage often involves many customer questions about exact timelines and connection dates, as customers are eager to know when they will be connected. Joshua works diligently to optimize scheduling and ensure that the work is completed in a timely manner. By coordinating effectively with the line crews and keeping customers informed, Joshua plays a crucial role in delivering a seamless and efficient connection experience, contributing to customer satisfaction and the overall success of the project.

Jamie, ADET
Jamie, the ADET, plays a pivotal role in the new connection process. He is responsible for going on-site initially to gather data and information necessary for crafting the design packages and offers for customers. Jamie's work ensures that the design is tailored to the specific needs and conditions of each project. By conducting thorough on-site visits and creating detailed design packages, Jamie helps set clear expectations for customers and contractors. His expertise and attention to detail are crucial in ensuring that the new connection process starts on the right foot and progresses smoothly. Jamie's role is essential in providing accurate and comprehensive designs that meet customer requirements and contribute to the overall success of the project.

Craig, DxL Regional Lines Maintainer
Craig, the Lines Maintainer, is the key person who goes on-site to complete the new connection work once it has been scheduled. His role involves physically connecting the lines and ensuring that the new connection is established correctly and safely. Craig's work is crucial in the final stages of the project, as he brings the plans and designs to life. By performing the on-site work with precision and care, Craig ensures that the new connection is completed to the highest standards, contributing to customer satisfaction and the overall success of the project.

Touchpoints

Mobile/App · Website · Email · Chat/Live Agent · CCC/FBC Agent · New Connect Portal · Field Crew

Experience Phases

Awareness · Contact · Design Coordination · Execution · Post-Execution · Training

Experience Stages

Research · Discovery · Initiate Connect Request · FBC Call Back · Schedule ADET · ADET On-Site Visit · Configure Design Package · Review & Accept Quote · Site Prep & Execution · Completion · Escalations · Skill Up for Success

Customer Thinking

- *I need to find out how to get a new connection for my property. Where do I start?*
- *What are the steps involved in getting a new connection? I hope it's not too complicated.*
- *What is the current wait time for a new connect?*
- *Can I get an estimate for the cost and timeline of a new connection? I need to plan my budget and schedule.*
- *I wonder how much information I need to have ready to give to the customer service rep concerning my new connection request.*
- *My contractor gave me some notes associated with my new connection. I hope I can voice these encumbrey to the utility provider.*
- *I've submitted my request for a new connection. When will someone get back to me?*
- *I hope the callback happens soon. I am going out of town and will not be available for a call.*
- *I was told someone needs to come onto my property, but when are they coming?*
- *Do I need to have anything prepared for the on-site visit?*
- *I wonder if I can get a time window for when the crew is coming to my property.*
- *I hope the visit goes smoothly and they understand my requirements.*
- *I hope the design package is clear and easy to understand. I don't want any surprises with the quote.*
- *I want to be able to discuss my design with my contractor so they catch any questions or follow up clarifications.*
- *I received the quote. Is this the final cost, or are there any hidden charges?*
- *Why is the quoted amount so much different than the estimation I received?*
- *The connection is done, but I have some feedback. How do I share it?*
- *I am all set up with my connection, but now what? Is there anything else I need to do on my end?*
- *There are some issues with the new connection. Who do I contact to get this resolved?*
- *I need to escalate a concern I have. What is the process for that?*
- *I need to initiate a new connection for a property I'm building, but have no idea where to start. Will a representative know the answers to my questions?*
- *There are a ton of tricky questions my contractor and I are discussing with my new connection. Can someone within the utility provider help me figure out my options?*

Customer Actions

Research
- **Need to Connect** — Customer is planning to build a new home and needs information on how to initiate a new power connection.
- **Online Research** — Review utility provider's website to research the new connection process and additional information.
- **Self-Serve Estimation Tool** — Customer uses online estimator tool and selects desired level of cost accuracy (instant, high-level or detailed) to receive an estimation.

Initiate Connect Request
- **New Connect Request via Online Form** — If customer prefers self-service, they can submit an online form to initiate a new connection request. When finished, they are prompted to schedule a callback appointment with an LCSC.
- **New Connect Request via Contact Center or Chat** — Customer can choose to call the Contact Center to initiate a new connection request. Customer also has the option to request a new connection through the chat feature.
- **Upfront Checklist** — Customer receives an email on new connections with a list of required forms and helpful information.
- **Confirm Details** — The LCSC contacts the customer at their scheduled time to confirm the new connection details.

FBC Call Back
- SURVEY CHECKPOINT — Customer receives notification to leave a quick review on their service during initiating a request.

Schedule ADET
- **Access Portal** — Customer accesses the new connect portal to track status of their new connection, view required tasks, and communicate with their contractor and the utility provider.
- **Photo & Video Upload** — Customer can easily upload photos/videos if ADET requests further visuals to verify site details and/or remotely assess.
- **Site Visit Notification** — Customer receives notification of planned date for an on-site visit through text, email, or push notification.

ADET On-Site Visit
- **Site Visit Status Notification** — Customer receives notification of the on-site ADET member(s) and an estimated time of arrival.
- **Online Scheduler** — If an on-site visit is cancelled and/or needs to be rebooked, customer can reschedule using the online scheduler.
- **ADET Arrival** — If customer prefers to be on-site, they can meet with ADET upon arrival and discusses any further questions.

Configure Design Package
- **Progress Update** — Customer views the status, obligations, and other information associated with their design package through the new connect portal.
- **Two-Way Communication** — Customer uses portal to communicate any questions or further information with contractor and/or employees.

Review & Accept Quote
- **Quote Reviewal** — Customer receives notification that their quote is ready and clicks into the the interactive design package
- **Accept Quote** — Customer accepts and signs the quote through DocuSign via their preferred channel.
- SURVEY CHECKPOINT — Customer receives notification to leave a quick review on their ADET visit and service during quote reviewal.

Site Prep & Execution
- **Connection Notification** — Customer receives notification of their connection date.
- **Status Notification** — Customer receives notification of the on-site lines member(s) and an estimated time of arrival.
- **Lines Crew Arrival** — If on-site, customer meets with lines crew upon arrival for connection execution.
- SURVEY CHECKPOINT — Customer receives notification after connection work is complete to review the crews' service.

Completion
- **Welcome Package** — Customer receives a welcome package notification and views new connect tips and support resources.

Escalations
- **Contact Representative** — If there is an issue with the new connection, a customer escalates their concern to a representative through their preferred channel.

Skill Up for Success
- *Customer is not engaged during this part of the process.*

Customer Touchpoints

Research: Mobile/App, Website, Email
Discovery: Mobile/App, Website, Email
Initiate Connect Request: Mobile/App, Website, Email, Chat/Live Agent, CCC/FBC Agent
FBC Call Back: Mobile/App, Website, Email, Chat/Live Agent, CCC/FBC Agent
Schedule ADET: Mobile/App, Website, Email, Chat/Live Agent, CCC/FBC Agent, New Connect Portal
ADET On-Site Visit: Mobile/App, Website, Email, Chat/Live Agent, CCC/FBC Agent, New Connect Portal
Configure Design Package: Mobile/App, Website, Email, Chat/Live Agent, CCC/FBC Agent, New Connect Portal
Review & Accept Quote: Mobile/App, Website, Email, Chat/Live Agent, CCC/FBC Agent, New Connect Portal
Site Prep & Execution: Mobile/App, Website, Email, Chat/Live Agent, CCC/FBC Agent
Completion: Mobile/App, Website, Email, Chat/Live Agent, CCC/FBC Agent
Escalations: Mobile/App, Website, Email, Chat/Live Agent, CCC/FBC Agent, Field Crew
Skill Up for Success: Mobile/App, Website, Email, Chat/Live Agent, CCC/FBC Agent

Employee Actions

- Research: Maintain the website with up-to-date and easy to find content around the new connection process.
- Discovery: Ensure the self-serve estimation tool is easy to find on the website.
- Discovery: Monitor customers requesting estimations.
- Initiate Connect Request: If a request form is submitted, a notification including business partner information is automatically sent to FBC.
- Initiate Connect Request: CSR takes the new connection request via phone or chat and schedules an appointment with an LCSC.
- Initiate Connect Request: A pre-populated email is automatically sent to customer with a checklist after connection is initiated.
- FBC Call Back: LCSC contacts customer during their scheduled appointment to confirm new connect details.
- Schedule ADET: Promote the new connect portal for customer to access helpful info about their new connection process.
- Schedule ADET: ADET scheduler schedules on-site visit and customer is automatically notified.
- ADET On-Site Visit: ADET is on-site and ready to confirm and/or gather data to prepare for the design phase.
- ADET On-Site Visit: ADET has a follow-up conversation with customer if they are available and needed.
- Configure Design Package: ADET creates the new connection design.
- Configure Design Package: FBC members attend to any customer questions through the new connect portal.
- Review & Accept Quote: Quote is uploaded through DocuSign and notification is automatically sent to customer.
- Review & Accept Quote: FBC notes customer's acceptance.
- Site Prep & Execution: Lines Scheduler ensures lines are prepped and schedules on-site execution, triggering a customer notification.
- Site Prep & Execution: Lines crew completes on-site connection work.
- Completion: Automated welcome package notification is sent to customer to ensure successful connection.
- Escalations: Monitor escalation inquiries through the new connect portal, chat, and contact center.
- Skill Up for Success: Engage in new connection tactics and enhancing efforts.

Customer Experience Outcomes

Research
Process Visibility and Clarity
- With an easy-to-find, dedicated section for Mass Market New Connections on the website, customers can easily access information on how to initiate a new connection.
- Customers view digestible information to understand the new connection process, free from confusing legal and technical jargon.
- Customers have clear insight into the new connection process including steps, estimated timelines, and necessary actions to move forward in the request.

Discovery
Customized Cost Estimates with Self-Serve Estimation Tool
- Customers can easily obtain an estimation for their project, without having to contact their utility provider, through the online estimation tool.
- Customers can select their desired level of accuracy to obtain an estimation that fits their needs ranging from instant, high-level to a more refined estimate that requires contractor assistance.
- The guided tool simplifies the process for customers, helping them choose the best options for their project.
- Customers can see an updated total estimated price as they make selections, providing immediate and transparent pricing information.

Initiate Connect Request
Various Points of Entry
- Customers can initiate a new connect request through various channels — online form, chat (website or app), or by calling the contact center and speaking with a CSR.
- Customers can choose how they want to do business with their utility provider.

Convenient Scheduling
- After initiating a new connection request, customers are provided with a convenient appointment scheduling option.
- This allows customers to schedule the callback with an LCSC that aligns best with their busy schedule.

FBC Call Back
Upfront Instruction
- After initiating a new connection, customers receive an automated email with process information, a checklist of action items, and required forms, so they always know their next steps in the connection process.
- After initiating a new connection, customers will also receive additional information, including access to the new connect portal, instructions for contractor consent, and FBC contact details.

Optimal Customer Service
- When customers are contacted by an LCSC, they are pleased with how much information the rep has concerning their request.
- Customers don't feel like they have to merely repeat every detail, but feel their needs are being met.

Schedule ADET
One-Stop Shop for New Connection Progress
- The new connect portal allows customers to view all info associated with their new connection in one centralized portal.
- Customers can view their request status, estimated timelines, and remaining tasks so they are never lost within the process.
- Customers can communicate with their utility provider through the portal to voice any questions or concerns they may have.

Seamless Contractor Portal
- A contractor view within the portal allows for customers to grant visibility to contractors so they can manage and support customers throughout the new connect process.

Enhanced Notifications
- Automatic notifications ensure customers are promptly updated and informed at key stages.

ADET On-Site Visit
Enhanced Notifications
- Proactive notifications for an ADET's on-site arrival keeps customers informed.
- Proactive communications also minimizes the need to contact a representative.

Easy Scheduling
- With the online scheduler tool, customers have the ease of rescheduling an on-site ADET visit if a cancellation occurs or a date change is needed.

Photo/Video Submission
- Customers can easily submit photos or videos, assisting the ADET in gathering necessary on-site information.

Configure Design Package
Progress Visibility
- The connect portal enables customers to monitor their entire new connection journey, including the design package phase. It provides visibility into obligations, timeline delays, and other relevant information, ensuring they stay informed throughout the process.

Simplified Communication
- Communication among all stakeholders is easy with the two-way communication feature found in the new connect portal.
- Customers can communicate any questions or concerns, at their convenience, directly to a representative.
- Contractors can also be brought into the conversations and provide their input through the contractor portal view.

Review & Accept Quote
Customer Confidence
- Customers can confidently accept their quote, knowing their contractor has access to easily review the design package and related documents through the contractor portal.

Eliminated Surprises
- The finalized quote includes an interactive design package, visually showing how the final construction will appear on a customer's property.
- Clickable images will allow customers to view further details throughout each portion of the quote.
- Customers will have a full picture of what their new connection will look like, eliminating any surprises post-execution.

Site Prep & Execution
Enhanced Notifications
- An automatic notification is sent in advance detailing customers' connection date.
- Customers can now enjoy peace of mind, knowing exactly when they will be connected thanks to advance notifications.
- Shared details of the crew and contact details reduces worry of who is coming to a customer's property.

Trust in the Company
- With continued communication and notifications throughout the process, customers have greater trust in their utility provider to effectively and efficiently complete the work.

Completion
Customer Satisfaction
- Customers have an increase in satisfaction due to enhanced customer service support, communication, and tools available to them throughout their entire new connect experience.
- Demonstrating a commitment to listening and responding to customer feedback ensures trust and loyalty, and drives a customer-centric approach.

Smooth Transition
- The welcome package sent upon connection ensures customers feel welcomed and supported.
- As customers transition into navigating their new connection, they have all the resources and tips needed.

Escalations
Escalated Support
- If a customer has any issues or concerns post-execution, they can easily obtain support through the new connect portal, chat, or contact center.
- Customers have peace of mind that their escalation will be handled promptly.

Skill Up for Success
Customer Satisfaction
- Customers feel their needs are met and their concerns are addressed promptly and effectively, thanks to well-trained and knowledgeable representatives.
- Customers trust the utility provider's Trusted Advisors as they prove to be knowledgeable and supportive in effectively supporting and managing a new connection process.

Employee Experience Outcomes

Research
Decreased Customer Inquiries
- With the improved digital experience providing clearer information, customers are better informed about the new connection process. As a result, CSRs can expect a decrease in inquiries, thanks to the clear steps and content available.

Discovery
Reduced Manual Effort
- With the self-serve estimation tool, the CCC and FBC staff have fewer new connect "ballpark" estimate inquiries to handle.

Reduction in "Tire Kickers"
- Customers can use the estimation tool to obtain an estimate before contacting a representative, reducing the amount of tire kickers moving further down the new connection process and then backing out.

Improved Efficiency
- Employees can focus on more complex and value-added tasks rather than repetitive estimate inquiries.

Improved Data Collection
- The tool can collect data on customer interactions and preferences, providing valuable insights for employees to improve service offerings and tailor customer experiences.

Initiate Connect Request
Call Reduction
- With customers using the self-serve form or chat, there will be a significant reduction in the number of calls to initiate new connect requests.

Reduced Manual Effort
- The self-serve form and chat option will automatically create a business partner and include necessary data, allowing customers to bypass a CSR and be directed straight to the FBC.

Improved Scheduling Efficiency
- Customers using the form or chat are prompted to schedule a callback appointment with an LCSC, ensuring better scheduling efficiency.
- CSRs can also use the callback scheduler for customers who call in, maintaining a consistent and organized scheduling process.

FBC Call Back
360° Customer View
- LCSCs will have a complete view of the customer's information, reducing the need for customers to repeat details and speeding up the process.
- Any data/information from the online form, will be inputted into the customer's data for the LCSC to view, speeding up callback times.

Increased Process Efficiency
- Providing customers with an upfront checklist via automated email reduces the need for follow-up calls to clarify information.
- Customers are better informed from the start, which minimizes additional inquiries and streamlines the overall process.

Schedule ADET
Reduced Status Inquiries
- The customer and contractor portals provide real-time updates on the status and timelines, significantly reducing the number of callbacks from customers inquiring about their new connection.
- Customers receive automatic notifications about any unforeseen changes, which alleviates the burden on employees to manage and address these issues manually.

Increased Process Efficiency
- Automation of notifications and scheduling reduces the need for manual intervention, allowing employees to focus on more critical tasks.

Improved Scheduling Efficiency
- The online scheduler tool allows employees to easily reschedule appointments with customers if needed, ensuring a smooth and efficient scheduling process.

ADET On-Site Visit
Enhanced Virtual Assessments
- ADET's can request photos from customers to verify site details, potentially allowing them to complete the design virtually and reducing the need for on-site visits.
- Photos submitted by customers beforehand can still aid ADET's in their on-site work with enhanced visual clarity.
- Leveraging drone technology to remotely verify site characteristics can speed up the design process and potentially eliminate the need for a truck roll altogether.

Proactive Communication
- With customers informed in advance about ADET visits, the on-site process is more organized and efficient, reducing potential delays and miscommunications.

Configure Design Package
Enhanced Communication
- The new connect portal facilitates seamless communication between customers, contractors, and the utility provider, ensuring that any questions or concerns are addressed promptly.
- Any obligations (like easements, forestry, etc.) or other needs that arise and alter the projected timeline or design package can be easily seen by customers and contractors through the portal, reducing the burden of ADET's to communicate these changes.

Review & Accept Quote
Efficient Package Handoff
- ADET's can easily upload the design package to the portal or app, in addition to automated email delivery, making it accessible to both contractors and customers.
- Interactive design package offers a clearer handoff to customers as they have a better understanding of the design, pricing, and items within the quote, reducing inquiries pushed to ADET's.

Automated Notifications
- Automatic notifications for when a design package is ready for review eliminates the need for FBC members to reach out to customers.

Site Prep & Execution
Enhanced Trust and Morale
- Continued communication and notifications build customer trust, which positively impacts employee morale as they see the value of their work being recognized.
- Consistent communication with customers about the crew's arrival helps avoid misunderstandings and ensures everyone is on the same page.
- Proactive notifications and updates reduce the number of customer inquiries and complaints, leading to a less stressful work environment for the lines crew.

Completion
Optimal Customer Service
- The automated welcome package ensures that customers receive all necessary resources and tips, reducing the need for follow-up support and inquiries.

Company Culture
- Demonstrating a commitment to listening feedback fosters a customer-centric culture, making employees feel valued and aligned with the company's mission.

Escalations
Enhanced Employee Experience
- Positive customer interactions and successful issue resolutions contribute to higher job satisfaction for employees.

Effective Escalation Resolution
- The new connect portal, chat, and contact center provide multiple channels for customers to escalate issues, making it easier for employees to manage and resolve escalations promptly.
- Clear and timely communication helps employees resolve issues more effectively, leading to higher customer satisfaction and fewer repeat inquiries.

Skill Up for Success
Employee Confidence
- Employees feel equipped with essential new connection process knowledge ensuring they are well-prepared to handle inquiries and provide exceptional service.
- Resources provided to CSRs to assist during new connection calls build them to effectively support customers.

Connection Advisors Branding
- Utilizing the name "Connection Advisors" for all employees assisting with new connections gives a sense of pride in their work.
- Connection Advisors ensures customers feel they are in trusted hands as they go through the new connection process.

Who It Benefits...

- Research: CSR
- Discovery: CSR, Demand LCSC, ADET Scheduler, ADET
- Initiate Connect Request: CSR, Demand LCSC
- FBC Call Back: Demand LCSC
- Schedule ADET: ADET Scheduler, ADET, Demand LCSC
- ADET On-Site Visit: ADET, ADET Scheduler
- Configure Design Package: Demand LCSC, ADET
- Review & Accept Quote: Demand LCSC, ADET
- Site Prep & Execution: Lines Scheduler, Lines Maintainer
- Completion: CSR, Demand LCSC, ADET Scheduler, ADET, Lines Scheduler, Lines Maintainer
- Escalations: (Demo) LCSC
- Skill Up for Success: CSR, Demand LCSC, ADET Scheduler, ADET, Lines Scheduler, Lines Maintainer

Concepts

Upfront Checklist · Elevated Digital Experience · Self-Serve Estimation Tool · New Connect & Contractor Portal · 1st Touch Notification · Survey Checkpoints · 360° Customer View · Visual Interaction · Interactive Design Package · Online Scheduler · Welcome Package · Call Back Appointment · New Connect Tooltips · Value Identification · Adopt Connection Advisors

KPIs

- **Research — Increased New Connection Understanding**: Enhanced website content and visibility improve customer comprehension of the new connect process.
- **Discovery — Reduction in "Tire Kickers"**: Easily attainable estimations reduce the amount of "tire kickers" contacting the utility provider.
- **Initiate Connect Request — Call Reduction**: Reduction in the number of new connect request calls with other self-service tools.
- **FBC Call Back — Increased Resource Allocation**: Improvement in resource allocation by efficiently managing work and call volumes through scheduled callback appointments.
- **Schedule ADET — Reduced Customer Inquiries**: Providing up to date statuses through the new connect portal, reduces the need for customers to call into the contact center for timeline updates.
- **ADET On-Site Visit — Reduced Truck Rolls**: Photo submission and further drone technology enables remote site verification, ultimately reducing the amount of truck rolls.
- **Configure Design Package — Decreased Package Completion Time**: Reduction in the average time taken to complete and finalize the design package with optimized status tracking.
- **Review & Accept Quote — Increased Quote Acceptance**: Customer confidence throughout the quote reviewal will lead to an increased quote acceptance rate.
- **Site Prep & Execution — Enhanced Process Efficiency**: Automated notifications and clear communication streamline processes and reduce delays, ensuring timely completion of connection work.
- **Completion — Increased Customer Satisfaction**: Enhanced support, communication, and tools, including the welcome package, throughout the new connect journey boosts customer satisfaction.
- **Escalations — Reduced + Quicker Escalation Resolution**: Improved escalation channels and streamlined processes enable faster resolution of customer issues.
- **Skill Up for Success — Increased Confidence**: Better equipping employees with enhanced training, resources, and feedback channels increases confidence.

Opportunity

Research
Elevated Digital Experience
- Elevate the **website** experience by ensuring new connections information for mass market customers is optimized, strategically placed, and distributed for easy access to improve visibility and ease of use.
- Craft clear, concise, and engaging content that demystifies the new connections process, making it accessible and easy to understand for all customers.
- Implement an **AI chatbot** to summarize complex documents and information related to new connections in simple, clear language, helping customers understand key pieces like conditions of service.
- Extend the optimized new connections information to the **mobile app**, **email communications**, and **chat support**, providing a consistent and seamless experience across all customer touchpoints.

Discovery
Self-Serve Estimation Tool
Customized Cost Estimates
- Customers can choose from an instant high-level estimate or a more refined estimate that requires contractor assistance based on their specific needs and project requirements.
- As customers make selections, the tool dynamically updates the total estimated price, providing immediate and transparent pricing information.
- The refined estimate involves more technical questions that necessitate guidance from a contractor.

Simplified Customer Experience
- The tool guides customers through the estimation process, helping them select the best options for their project with ease.
- Customers can obtain cost estimates at their convenience without needing to contact a representative, reducing the potentials for tire kickers moving further down the new connect process.

Visual Integration
- Customers also have the option to upload imagery to provide further on-site details, helping increase estimation accuracy.

Initiate Connect Request
Customer Choice and Flexibility
- Customers can fill out an **online new connect form** that automatically creates a business partner with the necessary data, allowing direct contact by the FBC.
- Integration of **chat** (website or app) provides another convenient way for customers to initiate a new connect request.
- Customers who prefer direct communication can call the **contact center** and speak with a CSR to initiate a new connect request.
- Customers can choose how they want to do business with their utility provider, whether through digital channels or direct phone contact.

Convenient Callback Scheduling
- After initiating a new connection request through the online form or chat, customers are prompted to schedule a callback appointment with an LCSC that fits their schedule, as opposed to calling into the contact center first.
- CSRs can also use the callback scheduler for customers who call in, maintaining a consistent and organized scheduling process.

FBC Call Back
Upfront Checklist
- Customers receive an **automated email** detailing the new connection process, including a checklist of required forms and helpful information.

The checklist includes:
- Instructions on **accessing the new connect portal**, where they can view their connection status, required tasks, and timelines
- Details **for contractor consent**, allowing contractors to view information and new connection details specific to the customer
- The **FBC phone number**, ensuring they can easily reach out if needed
- Any **tasks or required documents** prior to the on-site visit, ensuring they are well-prepared

360° Customer View
- Any data from the online new connect form, chat, or CSR conversation is inputted into the customer's profile, providing LCSCs with a complete 360° view of the customer's information.
- LCSCs have access to all relevant customer details, reducing the need for customers to repeat information and speeding up the process.
- The integrated data provides valuable insights for employees to tailor their service offerings and improve customer experiences.

Schedule ADET
New Connect Portal
- The new connect portal serves as a **centralized hub** where customers can view all information related to their new connection request.
- Customers can track the **status** of their request, view **estimated timelines**, and manage **remaining tasks**, ensuring they are never lost in the process.
- **Two-way communication** empowers customers to choose who they want to chat with to voice any questions or concerns directly with representatives.

Contractor Portal
- Contractors can manage all their current clients, track statuses, view documents, and communication through the contractor portal.
- Customers have the ability to choose how much information the contractor has access to, ensuring privacy and control over their data.

First Touch Notification* for New Connection Requests
- When a new connection request is initiated, customers are continually kept in the loop through automated notifications sent when an on-site visit has been scheduled on their property.
- Customers are contacted through their preferred communication channel and there is customer engagement from the beginning of a new connect request to keep them informed.

**First Touch was first introduced with the Forestry customer experience journey.*

ADET On-Site Visit
Visual Interaction
- ADET's can request photos or videos from customers to verify site details, allowing for enhanced on-site preparation or even virtual completion of the design.
- Customers can easily submit photos or videos, assisting the ADET in gathering necessary information.
- Leveraging drone technology to remotely verify site characteristics can speed up the design process and potentially eliminate the need for on-site visits.

Online Scheduling Tool
- Allow customers to reschedule ADET visits and other new connection appointments through an online tool in case of cancellations or rescheduling from either the utility provider or the customer's end.

ADET Status Notifications
- Customers receive a text/push or email update when the ADET is en route to their property, as well as the ability to track the ADET's estimated time of arrival.
- Customers are also provided a main contact's image to ensure peace of mind for who is arriving on their property.

Configure Design Package
Real-Time Status Timelines
- Provide customers with a real-time tracking timeline to monitor the progress of the design package phase within the new connect portal.
- Keeps customers informed about changes to the original estimated timeline due to delays like weather, obligations, easements, forestry needs, etc.
- Provide insight into projected timeline variances due to a customer's specific geographical location.
- Provide transparency and proactive communication, reducing uncertainty and the need to contact a representative.

Review & Accept Quote
Interactive Design Package
- Customers receive an interactive design package with images demonstrating how the final construction will appear on their property, including clickable elements that provide additional information and pricing details.
- This format for the design package/quote alleviates confusion and reduces the number of questions directed to employees.
- The interactive design package enhances transparency and customer satisfaction by providing clear, detailed visualizations and information.

Confidence in Quote Approval
- Customers and contractors are notified when the quote is ready for review within the portal, email, or app notification, ensuring timely awareness and action.
- The quote is uploaded directly into both the contractor and new connect portals as well as by email if preferred, ensuring easy visibility for both parties.
- The portals facilitate seamless communication between the customer and contractor, allowing them to discuss the quote and address any questions or concerns.
- This transparency builds trust and allows customers to proceed with accepting the quote with confidence.

Site Prep & Execution
Better Informed
- Implement automatic notifications to inform customers of their connection date well in advance, ensuring they are prepared and reducing uncertainty.
- Share detailed information about the crew and contact details to enhance transparency and customer confidence.
- Provide clear and timely updates to keep customers informed about the progress and any changes.

Completion
Welcome Package
- Send a welcome package notification via text, email, or push notification, ensuring customers receive the information through their preferred communication channel.
- The messaging will ensure customers feel valued and connected.
- Provide practical tips and guidelines to help customers navigate their new connection smoothly.
- Offer a comprehensive list of support resources, including contact information for customer service, links to FAQs, and troubleshooting guides.

Escalations
Multi-Channel Support
- Access to support through the new connect portal, chat, or contact center, provides customers with various options to address their issues or concerns.

Proactive Problem Solving
- Automated survey checkpoints via email, text, or push notifications throughout the new connection process help identify and resolve customer confusion early in the process, preventing issues from escalating.
- Minimize high-level escalations by resolving issues as they arise, leading to a more efficient and effective process.
- Use feedback to improve each stage of the journey, ensuring a smoother and more satisfying experience.

Skill Up for Success
Transition to Connection Advisors
- Brand and position LCSCs as Connection Advisors ensuring customers feel well-supported and confident throughout the new connection process.
- Highlight the role of LCSCs in providing valuable insights into costs, timelines, and considerations for new connections.
- Foster customer confidence by ensuring they have access to trusted advisors who can guide them through the new connection process.
- Empower LCSCs with the tools and knowledge to act as trusted advisors, enhancing their job satisfaction and effectiveness.

New Connect Tooltips
- Provide CSRs with integrated tips and resources within their current tools to quickly reference new connection information, ensuring accurate and reliable support.
- These resources help centralize new connect info and standardize knowledge and customer support across the business, making it accessible to FBC members as well.

Process Optimization
- Implement comprehensive tracking of LCSC click pathways to monitor process adherence and identify areas where additional value can be created for customers.
- Utilize tracked data to pinpoint inefficiencies and streamline LCSC process execution, enhancing overall workflow.