
THE POWER OF CUSTOMER ENGAGEMENT **CAN** **BRIGHTEN OUR FUTURE.**

Board of Directors Update

Presented by: Heather Siebken

June 17, 2021





ENGAGEMENT IS ELECTRIC

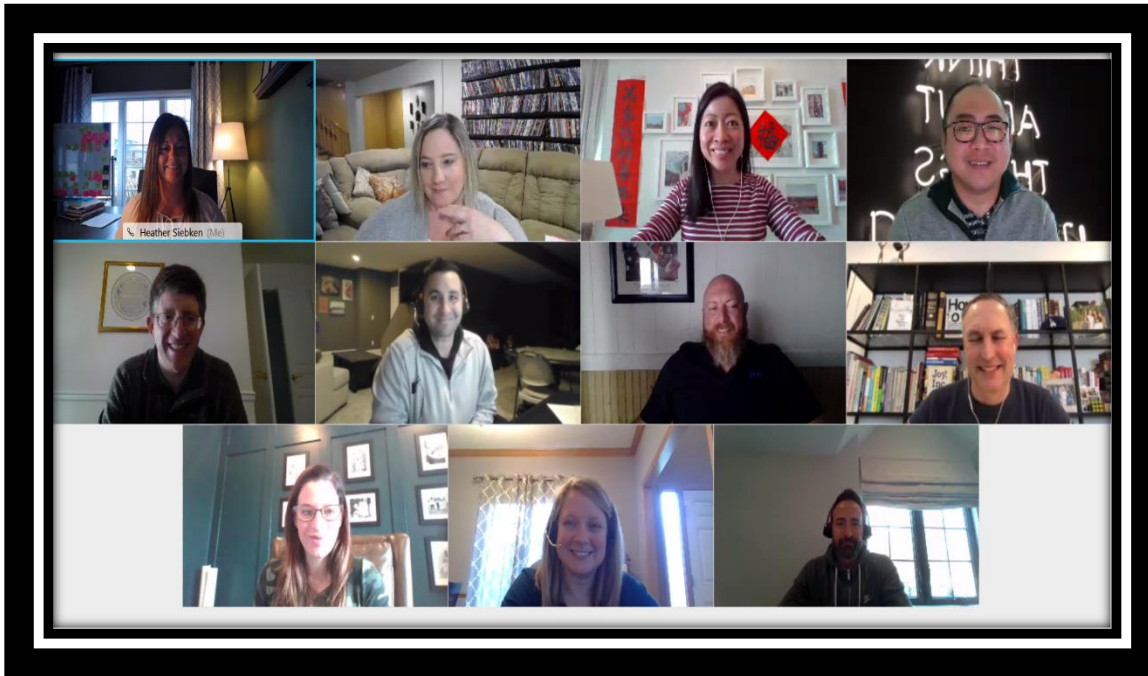
What is customer engagement? It's simple really. It's the direct and indirect interactions with a brand over time: before, during or after a transaction by phone, online or in person. It also includes likes, shares, tweets and posts on social or comments on review sites.

Customer engagement is an ongoing relationship with a brand as opposed to a singular customer experience. And it's proactive. Brands can reach out to customers to inspire purchases, build brand recognition, solicit feedback and gather information. The idea is to build an ongoing dialogue with customers that creates an emotional attachment. ***Make them want you.***

PROJECT APPROACH

PRE-ENGAGEMENT	PHASE 1 – ALIGNMENT AND VISION	★ PHASE 2 – SCAN THE ENVIRONMENT	PHASE 3 – DEFINE THE FUTURE	PHASE 4 – ROADMAP AND RESOURCES	PHASE 5 – DEVELOP	PHASE 6 – IMPLEMENT, INTEGRATE, RECOMMEND
March 2019	March 2020	April 2021	June 2021	Sept 2021	Sept 2021	Jan 2022
<ul style="list-style-type: none"> ➢ Define high-level scope ➢ Identify strategic resources ➢ Prepare Logistics 	<ul style="list-style-type: none"> ➢ Team selection, onboard, role clarity and education ➢ RFP, vendor workshops, onboard vendor ➢ Baseline customer insights and engagement interest ➢ Strategic initiative (SI) objectives and plans ➢ Prioritize our efforts and identify our capabilities to be assessed ➢ Align with other on-going initiatives ➢ Brainstorm potential capabilities and needs 	<ul style="list-style-type: none"> ➢ Internal capabilities and gap analysis ➢ External market analysis ➢ Identify benchmarking sets ➢ Gather historical customer engagement data ➢ Heuristics assessment ➢ Stakeholder outreach ➢ Review youth engagement opportunities 	<ul style="list-style-type: none"> ➢ Future roles & responsibilities ➢ Future operating model & organizational alignment ➢ Future integration and cross-functional processes ➢ Future tools, technologies and processes, assess how others can use too to build RFP ➢ Future interactions, touchpoints, surveys, workshops and more ➢ Alignment workshop ➢ Stakeholder outreach 	<ul style="list-style-type: none"> ➢ Development & implementation timeline ➢ Additional SME & resource needed ➢ Quick wins ➢ Vendor and/or Technology, etc. RFP process 	<ul style="list-style-type: none"> ➢ Engagement Playbook ➢ Segmentation models and personas ➢ Transactional surveys ➢ Integrate existing customer engagement data ➢ Review SD's and recommend modifications ➢ Non-digital engagement process/plans ➢ Modify current state engagement channels ➢ Website, mobile app 	<ul style="list-style-type: none"> ➢ CX/CE enterprise-wide training ➢ Integrate learnings, tools and more into current state projects ➢ Technology solutions & necessary training ➢ Hire and orchestrate role and responsibility changes ➢ Targeted, humanized, personalized messaging and interactions ➢ Engagement events ➢ Success reporting

VIRTUAL BEGINNINGS



THIS IS US

LEADERSHIP TEAM

- Juli Comstock, Strategic Initiative Sponsor
- Heather Siebken, Strategic Initiative Director

SUPPORT TEAM

- Mindy Wells, Project Coordinator
- Adam Haynes, Change Management
- Mary Oswald, Communications
- Bob Kaminski, Strategic Initiative Coordination

ADVISORS

LEAD

Nina Swanson
Kate Thomas

**ORGANIZATIONAL
READINESS**

Austin Martinez

Tim McAreavey

**ADVANCED
ANALYTICS/TOOLS**

Sara Biodrowski

Aaron Smith
Laurie Zagurski

**CUSTOMER
INSIGHTS/OUTPUTS**

Corey DeJong

CORE TEAM

Dustin Axtell, Business Technology
Christene Bywater, Energy Production
Angela Carter, Human Capital
Denton Cushing, Customer Service
Nitty Gambhir, Customer Service
Alyssa Kidd, Customer Service
Gina Langel, Corporate Strategy & Governance

Michael Leary, Public Affairs
Nicole Luna, Customer Service
Matt Neal, Customer Service
Shelby Reeker, Energy Delivery
Sam Shehata, Financial Services
Jennifer Skupa, Human Capital
Laura Strode, Customer Service
Jamie Wagner, Public Affairs
Wyndle Young, Customer Service

REQUEST FOR PROPOSAL (RFP)



PRICEWATERHOUSECOOPERS



WHO WE ARE

PwC is the **largest professional services network** in the world with 44,980+ professionals in the US, supporting a diverse range of clients through a broad range of services.

Our Power & Utility (P&U) practitioners has deep industry knowledge in helping utilities achieve business value and outcomes in this unique sector.

1,400+

Professionals focusing on serving **Utilities** in the US, with 4,500 utility practitioners worldwide

65%

Of **Investor Owned Utilities** are served by PwC

4,700+

Professionals specializing in delivering **customer transformation** initiatives

250+

Power & Utility companies served globally

HOW WE HELP

Our **purpose** is to build trust in society and solve important problems. Our advisory, tax, and assurance services address today's business imperatives.

Simulate innovation	Align costs with business strategy	Transform human capital
Accelerate digital and technology impact	Grow and create competitive advantage	Navigate risk and regulatory complexity
Optimize deals	Create unique customer experiences	Strengthen trust and transparency
Reimagine analytics possibilities	Unlock data possibilities	Secure assets



UTILITY EXPERIENCE



This is a representation of some of our long-standing utility clients. We serve nearly all of the utilities within the Fortune 1,000, and more than 250+ utilities globally.

Non audit – Investor-Owned Utilities



Public-Owned Utilities



Audit



REQUEST FOR PROPOSAL PLAN



Build the Foundation

Develop a holistic strategy that puts the customer at the center, and build an organization and operations that focus on generating value for them — and for OPPD. Pilot the operational model and use early Voice of the District (VoD) insights to refine.

Operationalize

Increase maturity of turning insights to tailored customer engagement initiatives.

Evolve

Continuously improve, based on customer and internal feedback, track outcomes, and success measures.

Customer Engagement Strategy

Organization Design

360 Customer View and VoD Insights

Technology and Data Roadmap

Experience Design and Orchestration

Digital Media and Marketing

Measurement and Continuous Improvement

Agile, Iterative Approach

Outcome-driven, People-centric System of Change

Customer Research and Personas

Capability Maturity Assessment

Organization Design, Training Plan

Customer Engagement Playbook

Voice of the District and Insights

Prioritized Roadmap (Process, Org, Tech/Data)

Technology Enablement

Drip-Feed Training and Culture Change

Marketing and Content

Execute Customer Engagement Activities

Enhanced Analytics and Reporting

BASELINE

CURRENT STATE

- Sponsor and/or participate in community events
- Conduct outreach events on proposed utility actions through multiple channels
- Utilize standard customer persona's to help tailor insights
- Survey customers, periodically, for insights, plus conduct more regular transactional surveys for feedback on contact center support
- Coordinate focus groups to review content/material for feedback
- Empower account executives to support business clients
- Respond to requests for involvement

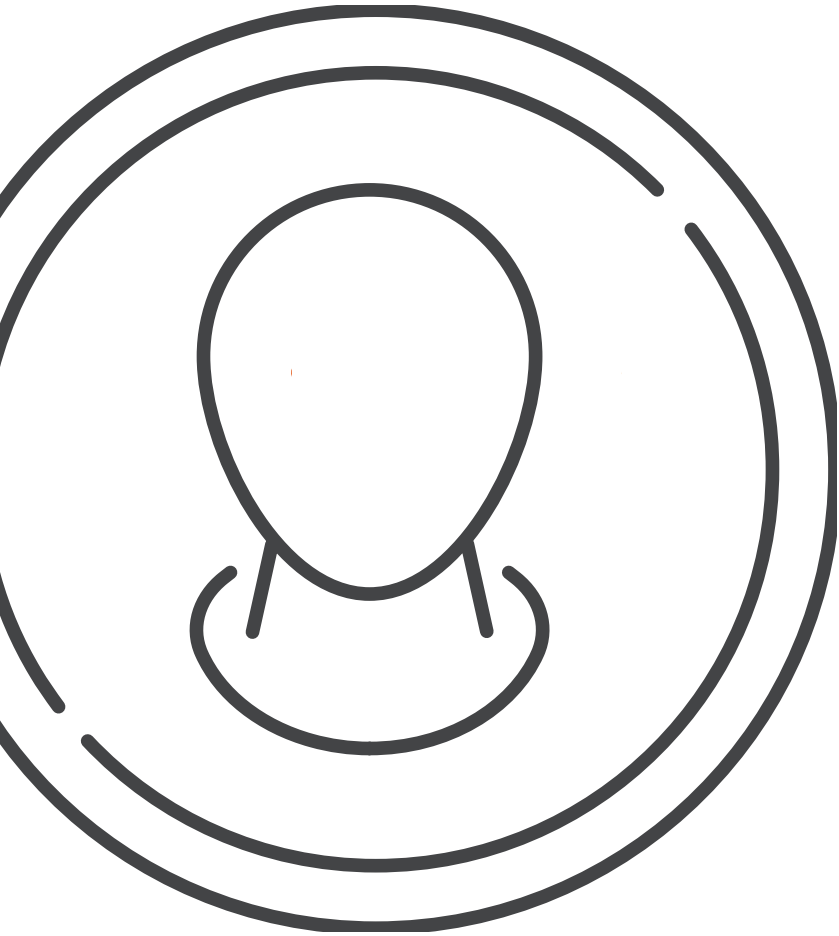
RECENT ENGAGEMENT SURVEYS

- Respondents view OPPD and its efforts to engage favorably
- Preference for interactive engagement channels/methods is relatively low and traditional media channels (direct mail, traditional media and digital) are preferred
- Indicated lack of desire for engagement seems to be driven primarily by trust in OPPD to be the expert decision-maker
- Often feel we are communicating reactively or not inside their journey
- Don't think about OPPD until it is time to pay their bill or their power is out

We are making strides, but we have opportunities to help our customers see us as more than a “transactional utility”.

CONNECTING OUR EFFORTS





**ADVOCACY IS THE
ULTIMATE GOAL**

HOW WE GET THERE

Data Convergence & Repository



HOW WE GET THERE

Data Convergence & Repository

Voice of the Customer

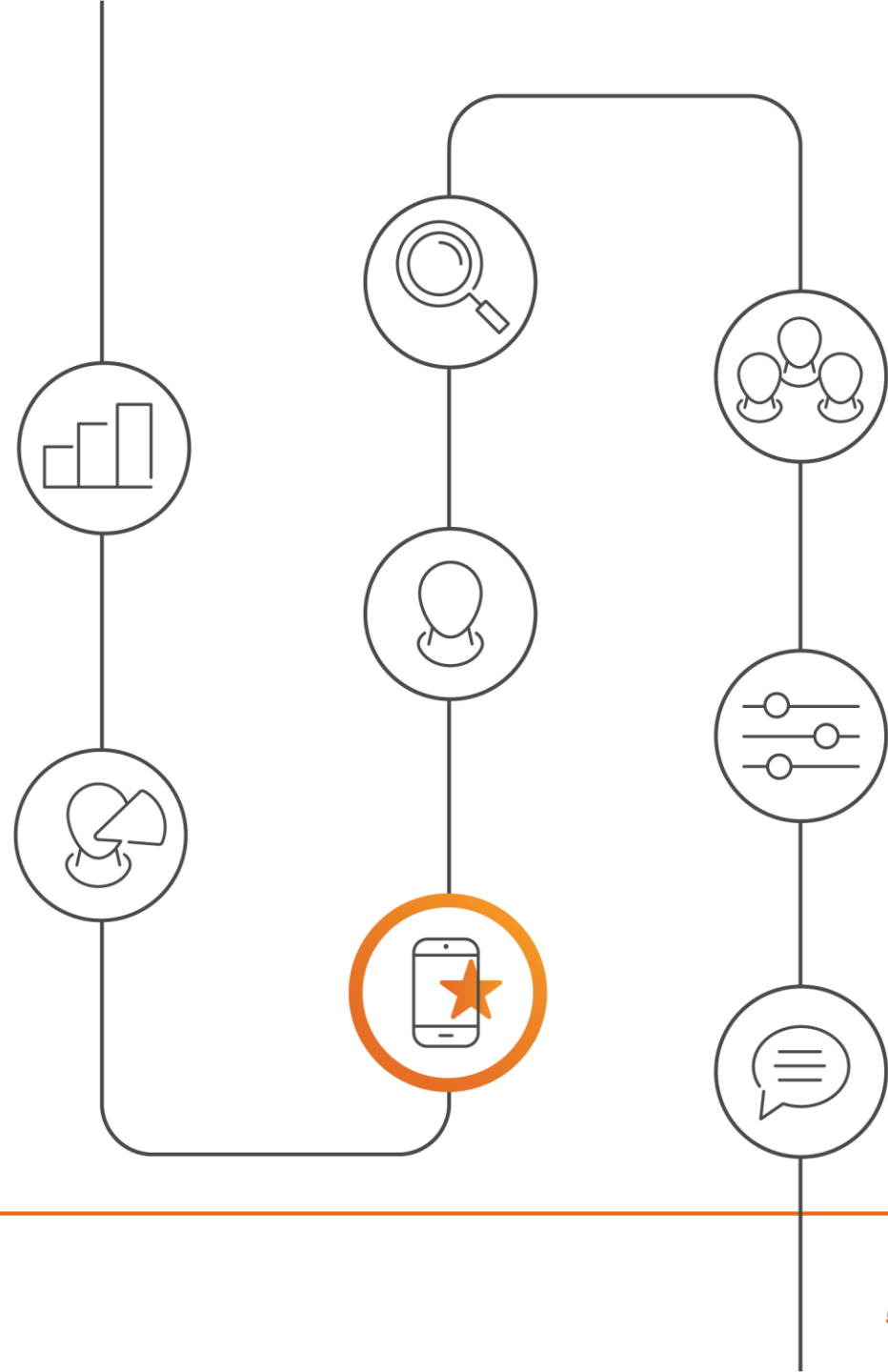


HOW WE GET THERE

Data Convergence & Repository

Voice of the Customer

Transactional Experiences



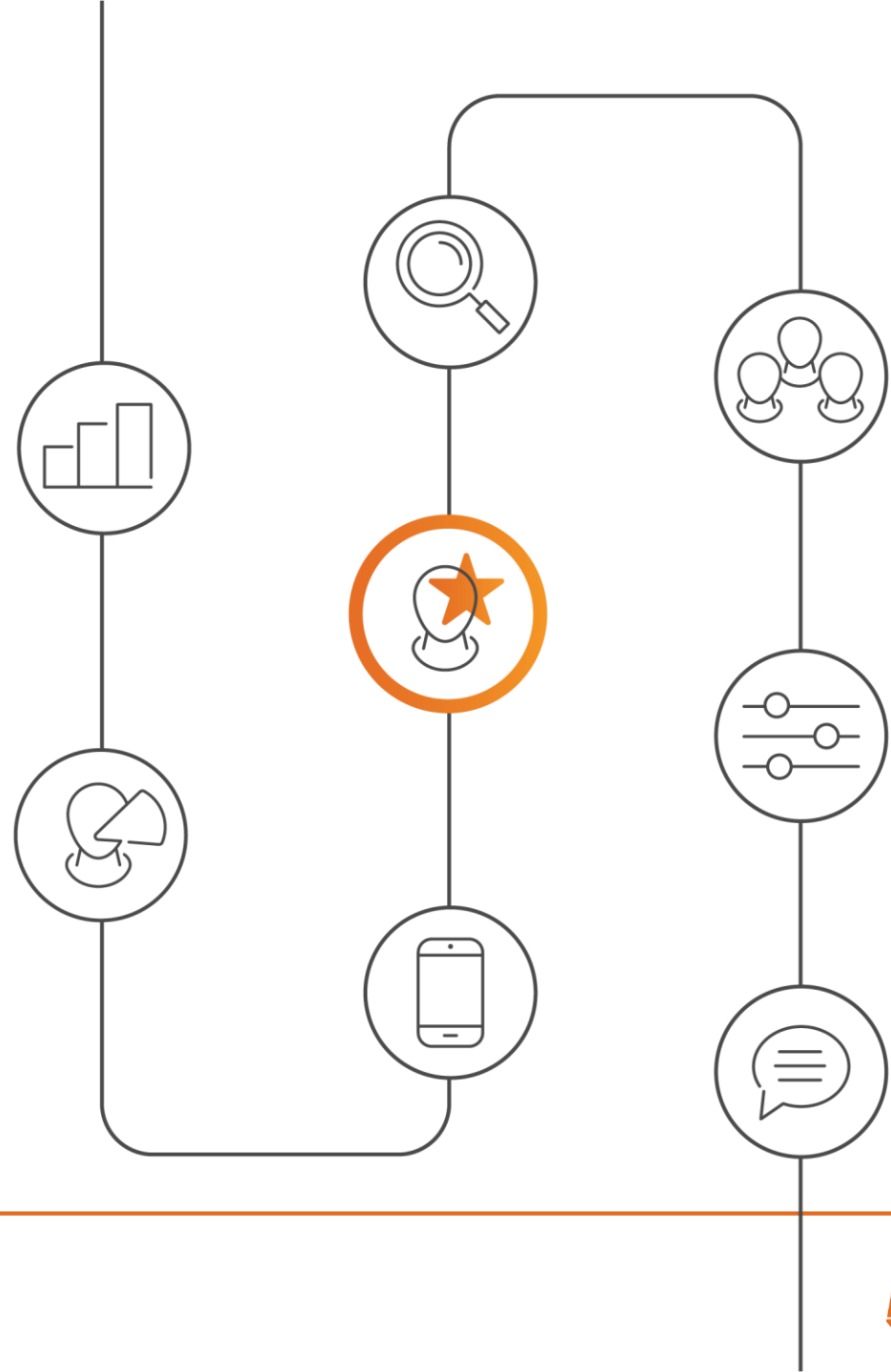
HOW WE GET THERE

Data Convergence & Repository

Voice of the Customer

Transactional Experiences

Segmentation & Personas



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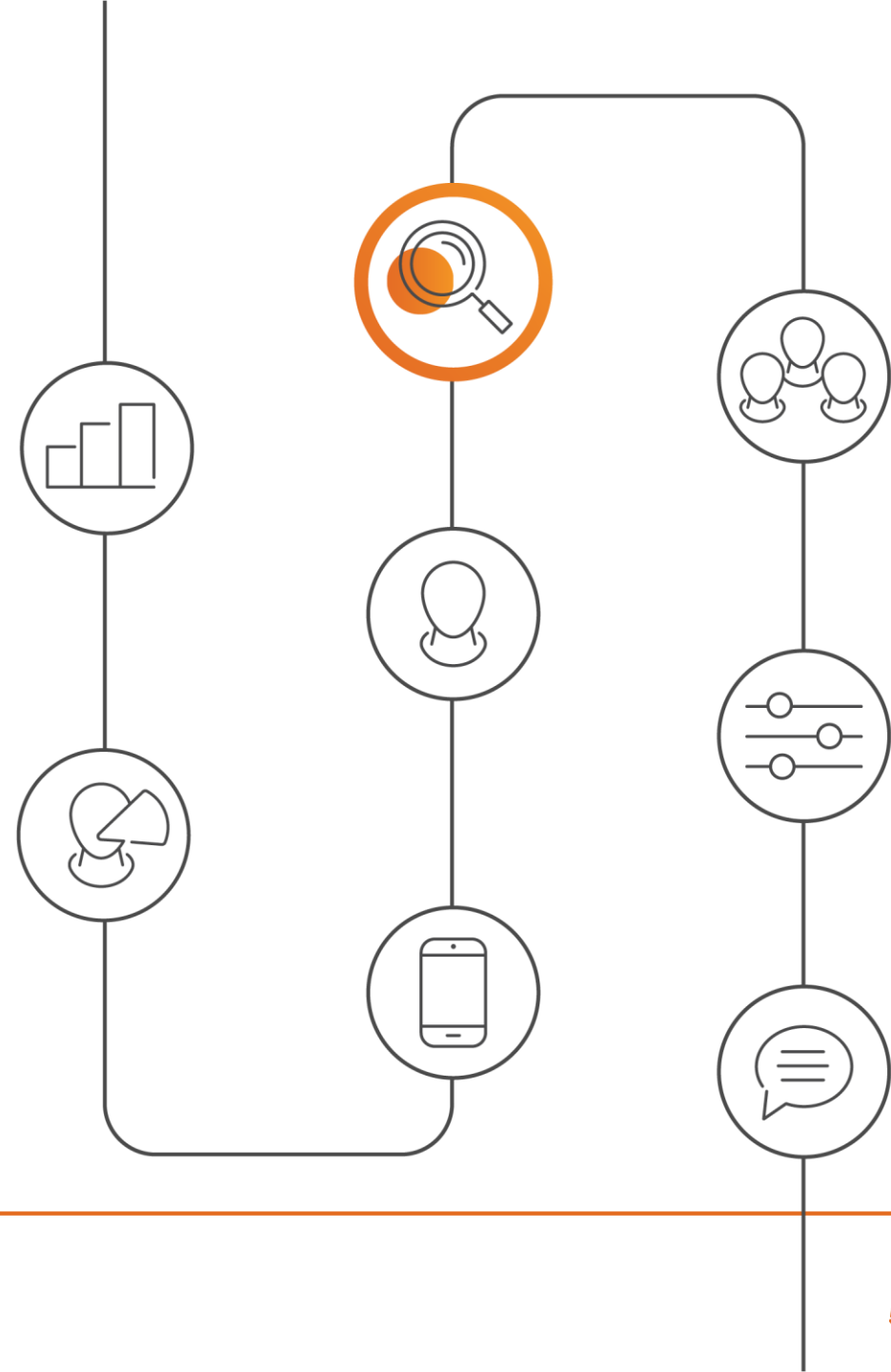
Data Convergence & Repository

Voice of the Customer

Transactional Experiences

Segmentation & Personas

Customer Research Framework



HOW WE GET THERE

Data Convergence & Repository

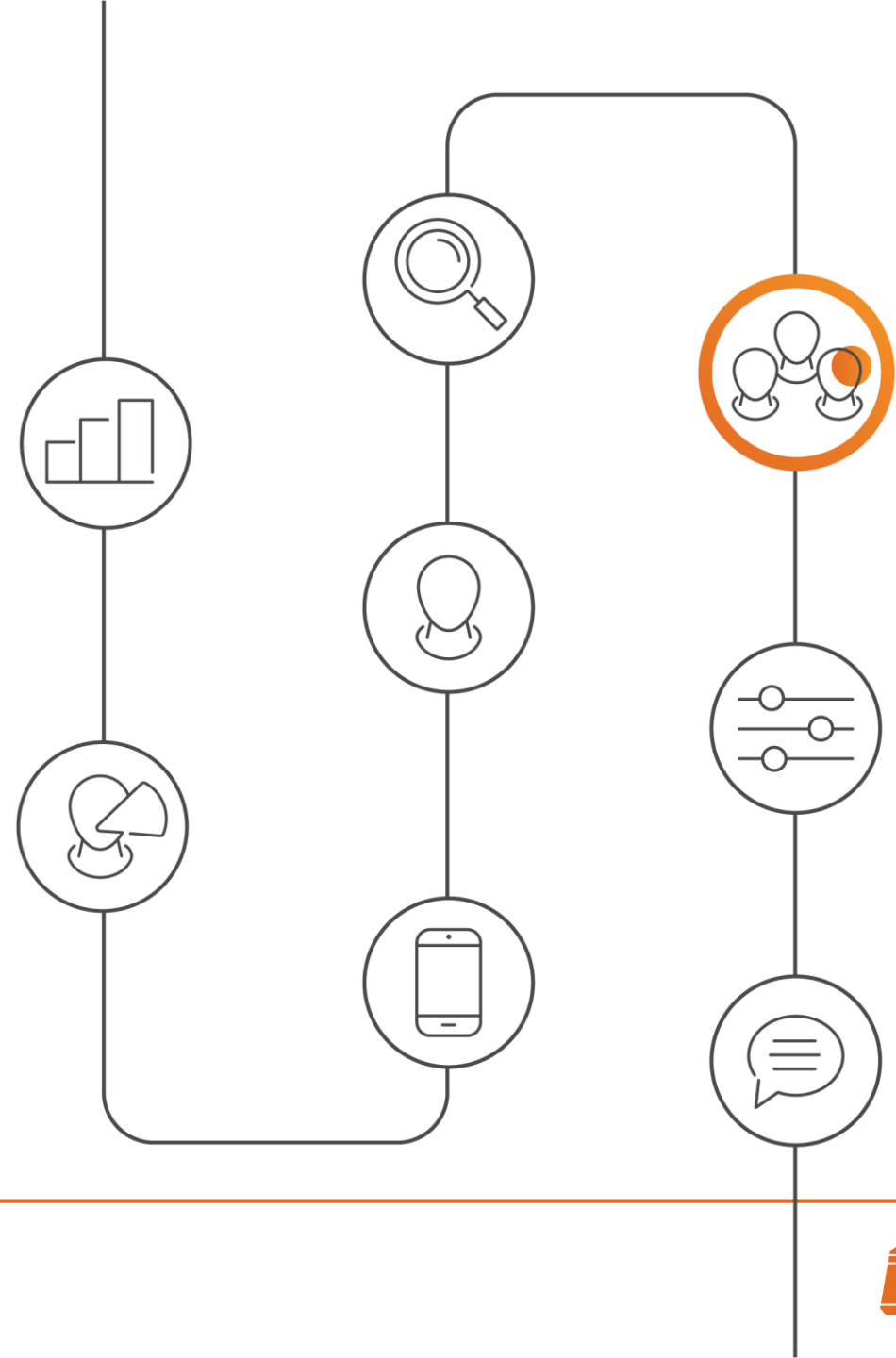
Voice of the Customer

Transactional Experiences

Segmentation & Personas

Customer Research Framework

People & Organization



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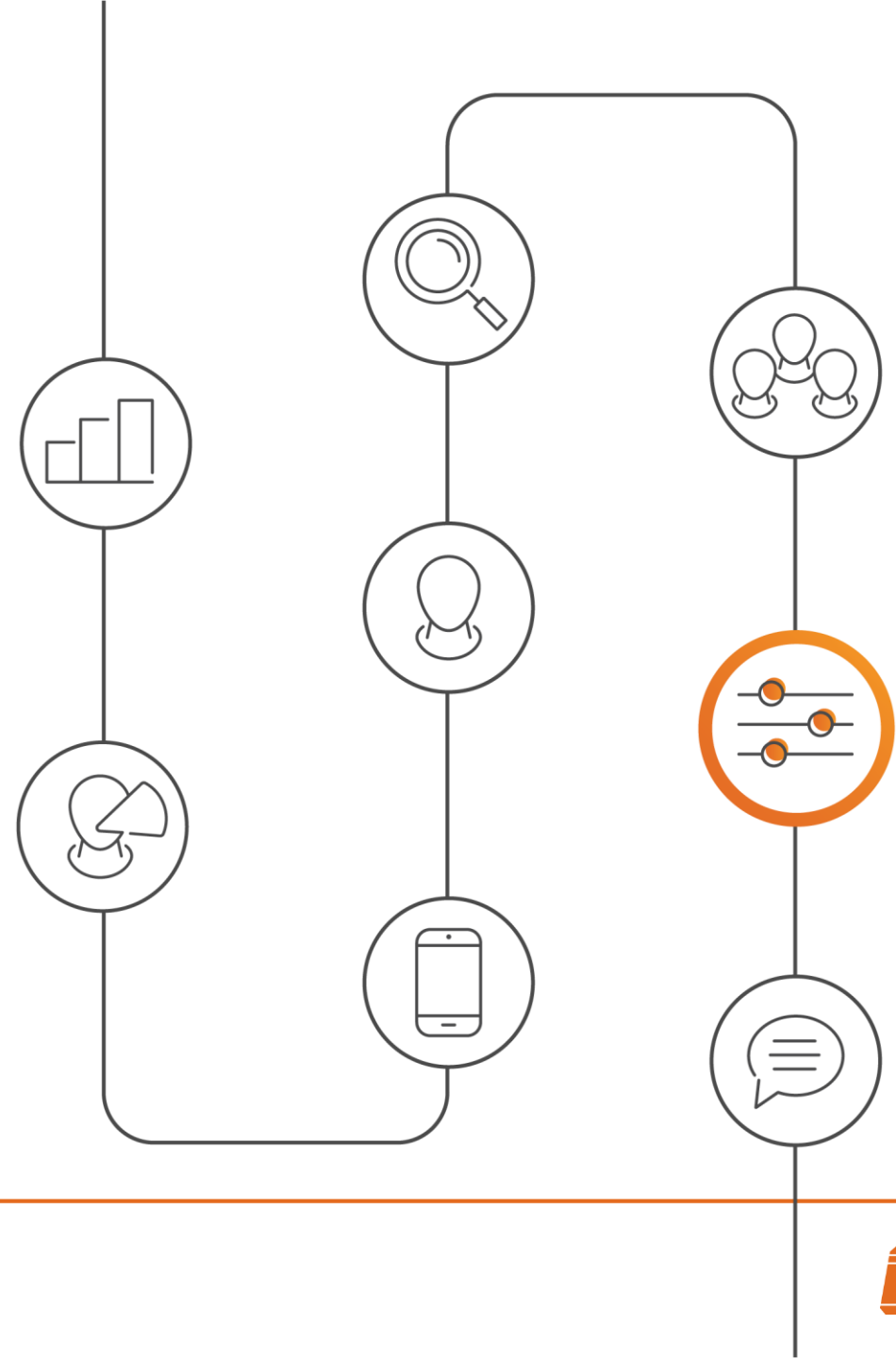
Transactional Experiences

Segmentation & Personas

Customer Research Framework

People & Organization

Marketing & Data Technology



HOW WE GET THERE

Data Convergence & Repository

Voice of the Customer

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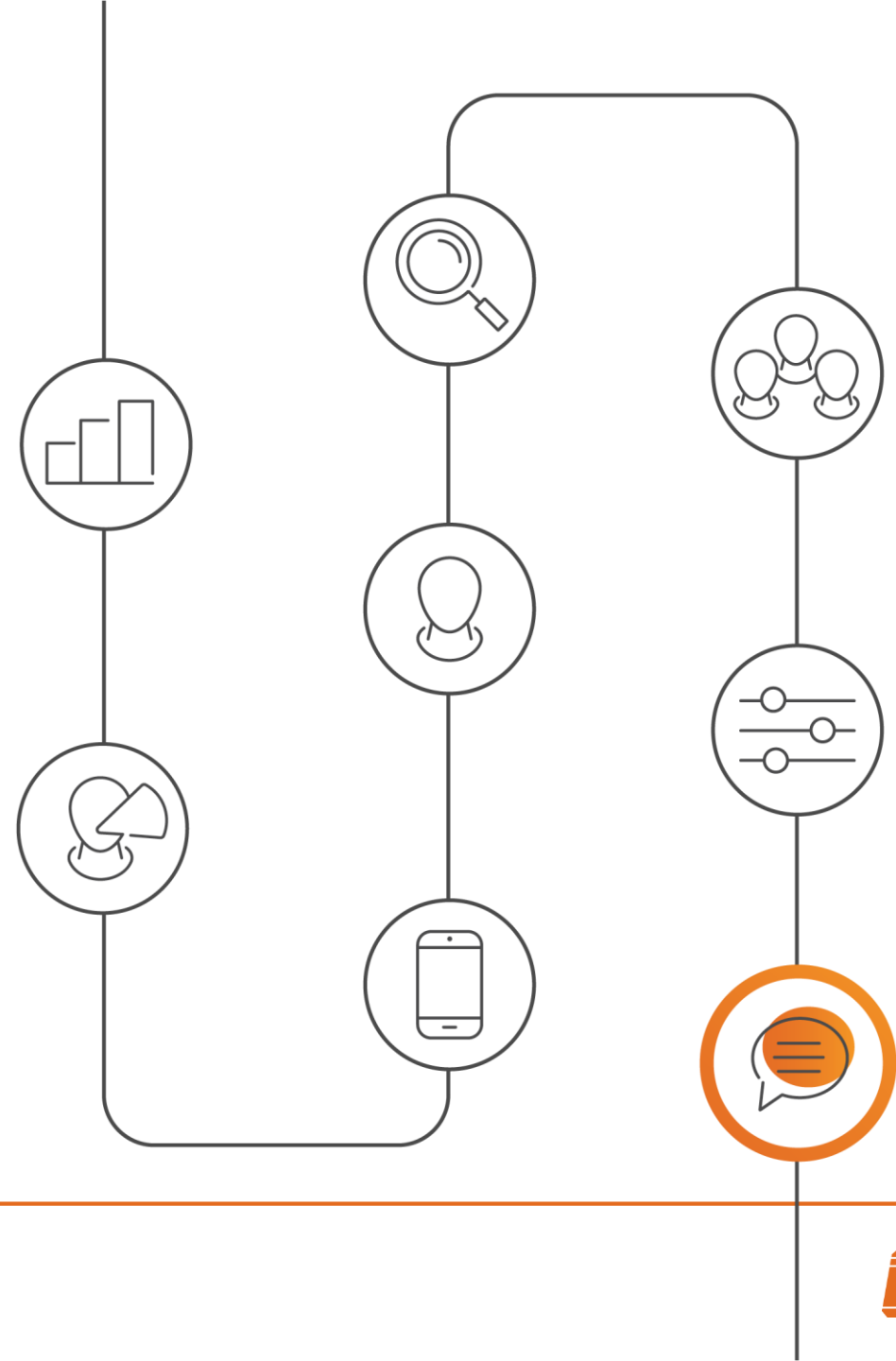
Segmentation & Personas

Customer Research Framework

People & Organization

Marketing & Data Technology

Materials & Messaging



HOW WE GET THERE

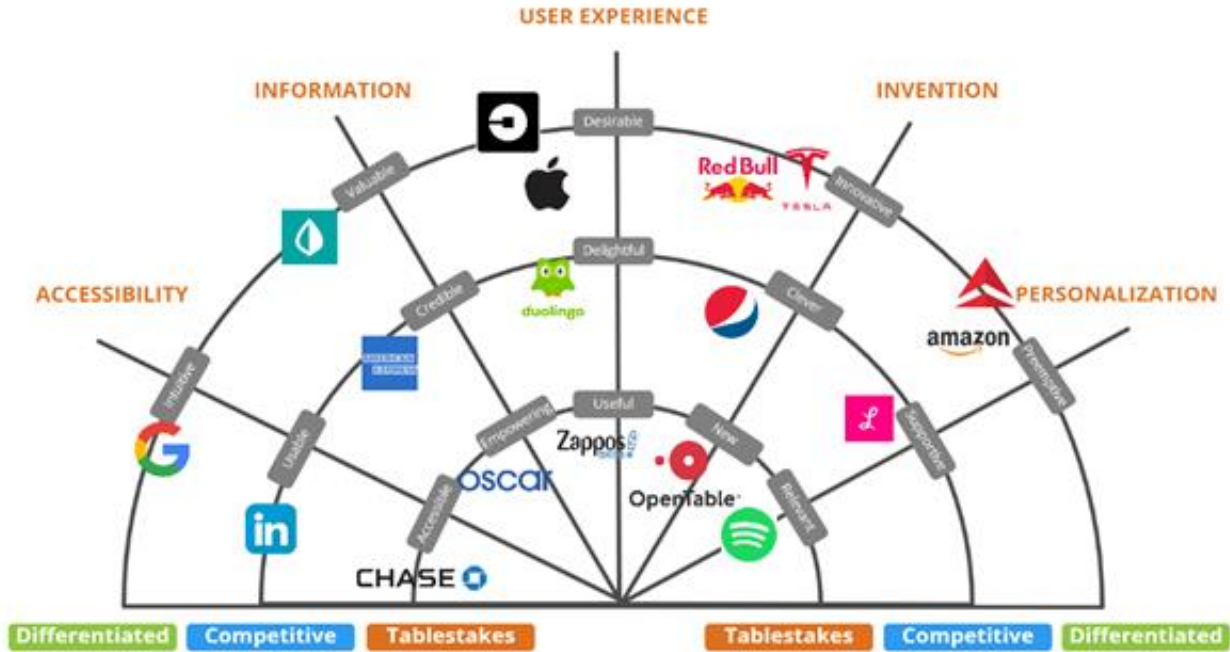
The Future

Although we have identified these eight areas of interest, we are keeping our minds and process flow open for what may arise as part of our initiative.

Anything is possible.



BRAND ENGAGEMENT DIMENSIONS



Dimension Prioritization
 What dimensions do we focus on to achieve our aspiration?

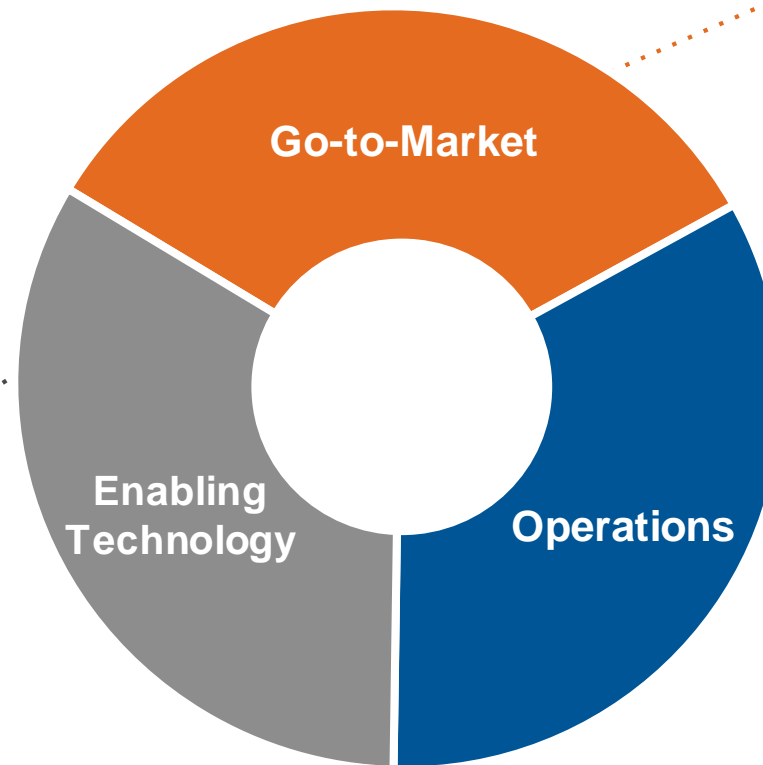
<i>Differentiated</i>	Information
	User Experience
<i>Competitive</i>	Personalization
	Accessibility
<i>Tablestakes</i>	Invention



CAPABILITIES ASSESSMENT



Effective customer engagement requires capabilities spanning the areas of go-to-market, operations, and technology. This is the “The What”—foundational capabilities OPPD needs to have in order to achieve the North Star.



Capabilities focused on establishing and growing the business

- Marketing
- Measurement
- Sales & Account Management
- Product & Services

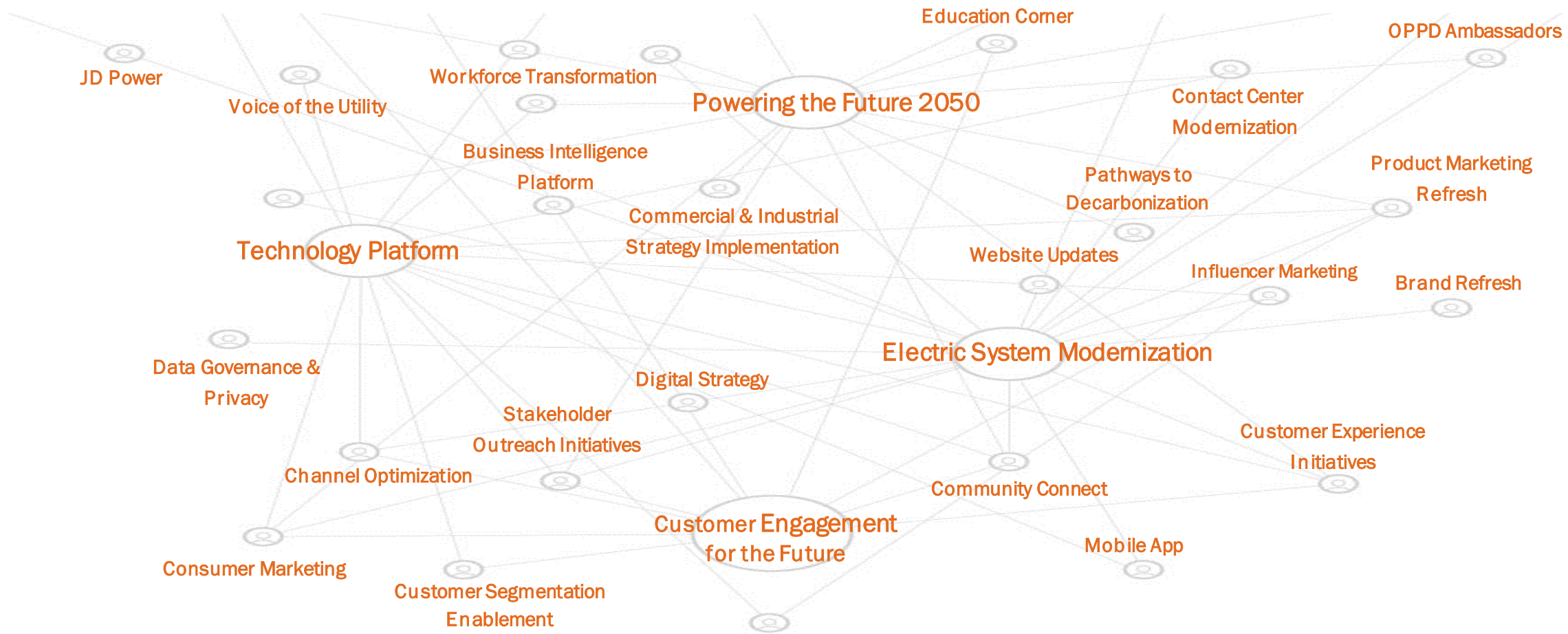
Capabilities focused on driving the development and maintenance of the enabling technology platform

- Information Technology
- Digital Experience Technology
- Data

Capabilities focused on operating and supporting the business

- Human Resources
- Revenue Management
- Regulatory
- Deliver Services
- Operations

CONNECTING WORK



ONLINE AND OFFLINE ENGAGEMENT

- Treat our employees as our first customer
- Build an emotional connection with customers
- Get real (time) about feedback
- Focus furiously on individual customer needs
- Practice social listening
- Use AI (artificial intelligence) to your advantage
- Prove that we really, really appreciate our customers
- Freshen things up with live chat
- Speak human
- Encourage engagement
- Build a customer-first culture
- Think different, think ahead
- Harness hand-held technology
- Grow up socially
- Get our UX (user experience) on
- Gamify it
- Get physical with digital
- Personalize it
- Show, don't tell (with video)
- Make it happen with events

INVESTMENTS IN TECHNOLOGY

- Customer Relationship Management (CRM)
- Content Management
- Omni-Channel Marketing
- Customer Data Platform (CDP)
- Marketing Automation
- Digital Asset Management (DAM)
- Consent and Preference Management
- Digital Ethics
- Work and Inventory Management
- Personalization
- Enterprise Listening
- Descriptive & Predictive Analytics
- Artificial Intelligence (AI)
- Data Visualization
- Customer Notifications
- Cross-Channel Customer Identity
- Digital Experience (DX) Channels
- Text, Chat, Blog
- Live Reviews

NEXT STEPS: SCAN THE ENVIRONMENT

PRE-ENGAGEMENT

PHASE 1 – ALIGNMENT
AND VISION

PHASE 2 – SCAN
THE ENVIRONMENT

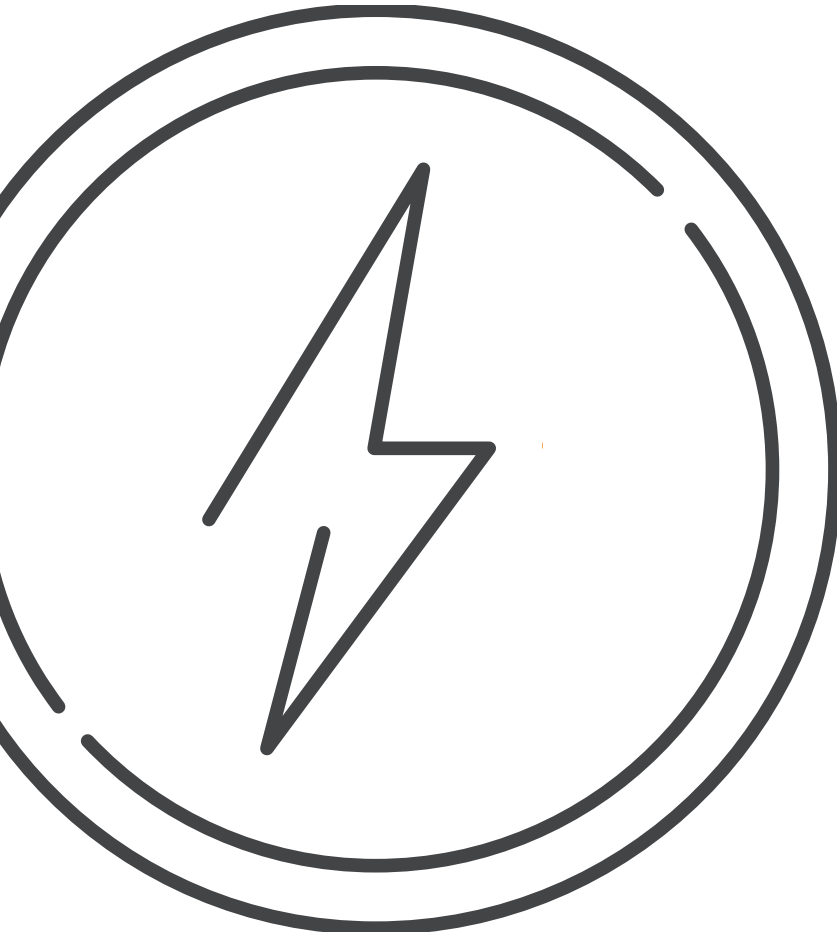
PHASE 3 – DEFINE
THE FUTURE

PHASE 4 – ROADMAP
AND RESOURCES

PHASE 5 – DEVELOP

PHASE 6 – IMPLEMENT,
INTEGRATE, RECOMMEND

- Internal interviews
- External interviews and outreach
- Voice of the District engagement survey
- Gap analysis, heuristics assessment
- Research best practices, industry benchmarking
- Conversations with leaders of customer engagement (local and national)
- Synthesize insights from existing surveys and materials
- Begin to explore youth engagement
- Begin discussions around customer engagement metrics
- Continue alignment with other Strategic and District-level initiatives



ENERGIZED FOR POSITIVE CHANGE

There's no question — customer engagement will power our future and result in OPPD becoming a trusted energy provider to our thousands of customers. Thank you for your unconditional support of this initiative.

Now go forth and engage...



APPENDIX



OUR STORY, OUR GUIDING STAR

To transform customers into **loyal advocates**, every touchpoint – every communication – must be **authentic, focused and relevant**. This is the essence of Customer Engagement and the heart of our strategic initiative. Our focus on the future is to establish an **ongoing dialogue** with our customers. Direct feedback gives us the data and insights to make **informed, timely decisions**—decisions that transform into long-term strategic plans. It’s all about **relationships** and a determination to make life better for our customers, and ultimately, our communities.

Over the next 10 years, we will transform the way we do business. We will educate on the value of **personalized customer relationships**. We will develop processes and tools and will harness—more aggressively than ever before—technology, data, customer insights and **two-way conversations** to bring us and our customers together. We will actively and proactively work to solidify our position in their **hearts and minds** for years to come.

This will lead to a **district-wide understanding** of customer engagement, complete with customer segmentation models, personalized interactions, and the ability to turn customer **insights into action**. But most importantly, this will lead to **life-long customer advocates** who feel valued and taken care of as a part of our community.