

# 2021

## CASE STUDY

CUSTOMER JOURNEY MAPPING



## PROJECT SUMMARY

30

key areas identified and improved for customer experience

40+

Customer employees managed for this project across multiple divisions.

10

Programs looked at for the process improvement initiative

### THE SITUATION

In an effort to help improve a Leading Utility Company's Customer Experience interacting with their energy efficiency program, Greencastle supported a process improvement initiative with 10 programs coordinating with over 40 Marketing Managers, Program Managers and Contractors.

### THE SOLUTION

The small groups were challenged to review the process flow from the Customer's perspective for any weak points and potential areas of improvement. We evaluated each step in the process to determine questions such as:

- What are the potential failure points and causes?
- What current controls are in place for these known issues or potential issues?
- What is the likelihood and severity of the occurrence?

Detailed process flows were developed for each program and 30 key weak points or disconnects were highlighted for further review and resolution. It is key for the group to be small but include all key managers. It is common to hear participants explain that although they are very engaged in their part of the process, they really were not aware of all the steps required and potential gaps along the way. Having all key players together, allowed for quick identification of potential issues and the development of an initial action plan to address.

### RESULTS & BENEFITS

As a result of this initial assessment workshops and development of process maps, Utility Company's Energy Efficiency (EE) Leadership took the recommended improvements and developed a strategy to address these concerns and ultimately improved their customer's experience.

Detailed process maps were developed for 10 energy efficiency programs. 30 key areas for improvement were identified to allow Utility Company's EE Leadership to address and ultimately improve their customer experience.

# COMPANY PROFILE

**Greencastle Consulting is 100% Veteran-Owned and operated implementation consulting firm that is unique in its approach to mission-critical projects. We combine the best practices of change management, process improvement and project management with Greencastle's 6 rights of implementation into one methodology.**

**Using our implementation management methodology as the foundational approach to each project has enabled our clients to successfully meet the challenges of an ever-changing business landscape.**



**Military Precision:** Founded on a strong military background, Greencastle has been providing customized, metric-driven results to Fortune 500 companies for over 20 years.



**Data Driven:** We have completed well over 350 projects since 1997; most are large scale and complex—keeping people and the process top of mind. We consider every project a data project.



**We love challenges.** We turn our client's mission-critical strategic initiatives into outcome focused projects. The fun projects are the ones that have never been attempted.

