

PG&E

SMB SITE REDESIGN

USER EXPERIENCE BRIEF

AUG 3, 2012

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Introduction

The My Business section on pge.com has the potential to be a touchpoint for exceptional SMB customer service. However, rich content and valuable tools are lost in confusing navigation, non-intuitive content organization and irrelevant and outdated pages. All too often, SMB users can't easily find the answers they need on their own. And they leave less than satisfied.

Over the last five weeks, Razorfish has been engaged to conduct an analysis of SMB customer needs and how those needs are (or are not) currently addressed on the flat site specifically. We also considered the context of current business and industry expectations for an exceptional customer experience.

Through a set of guiding principles, key findings, and a high-level roadmap, this document summarizes our discoveries and recommendations for both the immediate SMB user needs and a broader vision for the revitalization of customer satisfaction with pge.com.

This document is intended to:

- Serve as a North Star to guide content prioritization for the SMB target audience
- Identify best practices for deep content, multi-audience digital experiences
- Recommend both immediately-actionable and future improvements for the SMB experience

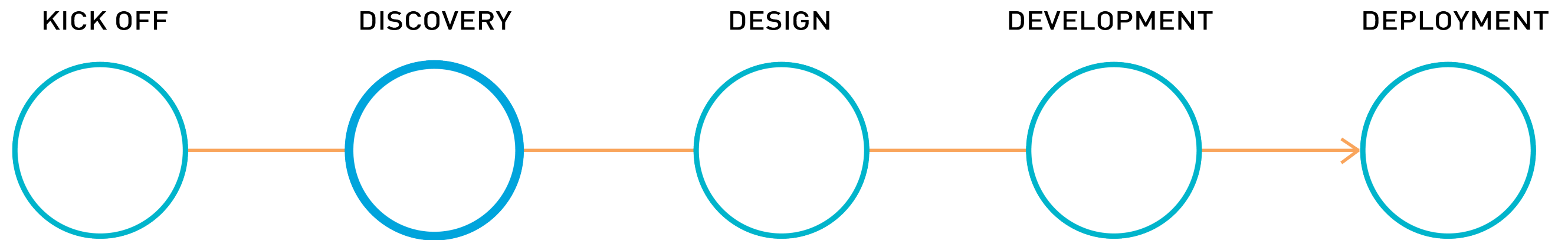
This document is not intended to:

- Present a final UX strategy or design
- Represent a detailed technology assessment or specific systems recommendations
- Illustrate a complete information architecture model

All of these steps are important parts of the process, but are not conducted in this conceptual discovery phase.

Where We Are Now

Where We Are in the Process

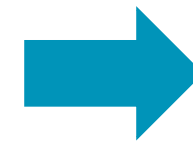


Organizational Goals for SMB Customers

Provide a streamlined, intuitive site experience that enables SMBs to quickly and easily accomplish core transactions

Support SMBs with rich, relevant content, tools and programs to save money, and guide and optimize their energy usage

Leverage existing and new touch points to establish an ongoing dialog with SMBs on critical topics that will impact their business and how they can take action



Exceptional customer service: Establish PG&E as a trusted advisor for SMBs

Project Goals

What we are here to accomplish

PG&E is well aware that there are opportunities to improve the SMB customer experience for measurable success. In this discovery period, Razorfish focused on gaining a deep understanding of the known and hidden issues which result in customer dissatisfaction with their digital experience in order to make actionable recommendations on how PG&E can meet project goals, in support of organizational goals.

PRIMARY GOALS

Ensure that SMBs can successfully complete the six core activities:

- Pay Bill
- View Usage
- Pay Plan
- Start/Stop Service
- Rate / TVP
- Rebates and Energy Savings

Improve customer satisfaction scores (CSAT) of SMB users by delivering an improved user experience.

SECONDARY GOALS

Reduce call volume to PG&E call centers.

Increase My Energy registrations and participation.

Methodology

High-level Methodology



Detailed Methodology

Audience Research

We reviewed a broad span of PG&E and PG&E-commissioned user research, including previous Razorfish SMB research

- Foresee's Feb 2012 PG&E Satisfaction Insight Review
- Skeleton Web SMB Actions report v.3
- PG&E's Customer Insights & Strategy's 8/2010 report "SMB Customers' Unmet Needs: An Ethnographic Approach"
- SMB PI Results 6/19/2012
- Razorfish's PG&E SMB User Experience Web Research 5/2012 report

Site Analytics Review

We reviewed the analytics data provided in the audience research reports above as well as the SMB multi-account report dated 5/25/12

- Total transaction by transaction type
- Transaction Type By Customer of Record
- MTD May by Transaction Type
- Multiple Order Requests Through 5/25

Stakeholder Interviews

We conducted three one-hour interviews with stakeholders representing a cross-section of customer service and communications departments:

- Program Marketing Manager, TVP
- Business Customer Advisor/Customer Relationship Manager, Energy Savings
- Sr. Business Project Manager, Call Center Ops, Start/Stop Service

Comparative Review

To get a better picture of the future of energy services online, we reviewed 21 experiences illustrating web and cross-channel technology trends. Close attention was paid to:

- Multi-audience channels within deep content sites
- Innovative experiences for SMB customers
- Industry sector and like-minded product and service providers

Content Review

We conducted a content review of the My Business section and related content areas.

- Reviewed all level 1, 2 and 3 pages
- Discovered and accounted for hidden pages linked from the level pages
- Accounted for residential- and B2B-focused content areas for comparison
- Accounted for PDF content
- Catalogued video content

We assessed the following attributes:

- Consistency
- Clarity
- Tone and voice
- Formatting
- Effectiveness of communication
- Relevance to SMBs
- Overall content strategy

Site Structure and Navigation Review

We assessed the site structure of the My Business section, with a focus on the SMB areas but also including level 1 My Energy pages.

- Reviewed all level 1, 2 and 3 pages in detail
- Discovered and assessed hidden pages linked from the level pages
- Accounted for residential- and B2B-focused content areas for comparison
- Assessed global, section, sub-section, and contextual navigation

We assessed the following attributes:

- **Discrete content categorization:** Were sub-sections clearly distinguishable from one another? Did categories support the SMB wayfinding experience?
- **Nomenclature:** Were section, sub-section and links understood? Was there congruity between links and page titles?
- **Context:** Were contextual nav links appropriately placed? Did all nav link labels properly set user expectations of where they

Key Findings

Key Findings Summary

Key Stakeholder Findings:

1. Universal desire for a simpler, more streamlined site
2. Sincere dedication to providing excellent customer service (despite the current site)
3. Site editing/publishing process is unclear, frustrating, and time-consuming
4. Some services are simply best handled with a conversation, but may be initiated online
5. Coordination is lacking between outreach efforts and the call centers they affect
6. Live Chat was largely endorsed.
7. Everyone sees the potential of mobile and social support for their efforts

Key Audience Research Findings:

1. Digital experience does not meet the standard of excellence set by in-person and call center customer service
2. User paths to desired features and content are non-intuitive, unnecessarily long, and result in high attrition rates
3. Many SMB users feel a lack of control around their energy costs and management
4. SMB users are time-strapped and unable to spend much time puzzling out solutions or answers online
6. Users want to see themselves, or other users like them, represented in the context of tools and programs
7. SMB users credit positive program experiences to third party partners, and do not recognize PG&E's role
8. The SMB is often both a business and a residential customer; each experience informs and creates expectations for the other

Key Content and Site Structure Findings:

1. There is simply too much content in the My Business section
2. A number of different types of content inconsistencies throughout the experience is disorienting and frustrating for customers
3. The overall site structure is organization-oriented, rather than user-oriented, impeding users' ability to find what they need
4. Entire and partial subsections are duplicated in other areas of the flat site
5. Key information is difficult to find, sometimes hidden below Level 3 or in PDFs
6. There is no central repository for help content and FAQs
7. Site search is largely ineffective

Key Comparative Findings:

1. No best-in-class web experience leader currently exists in the utilities sector
2. User expectations for current experiences are set by the other digital experiences and applications in their personal and professional lives
3. Deep-content sites which successfully guide multiple audiences often employ filtering options to narrow content offerings and user paths to relevant items only
4. More and more sites offer flat site experiences informed by cookies in order to guide users to key information and messaging.

Current High-Level Site Map (w/Content Details)

SITE STRUCTURE

The structure of My Business is organized along topics, leaving different types of business users to hunt on their own for information that is relevant to them specifically.

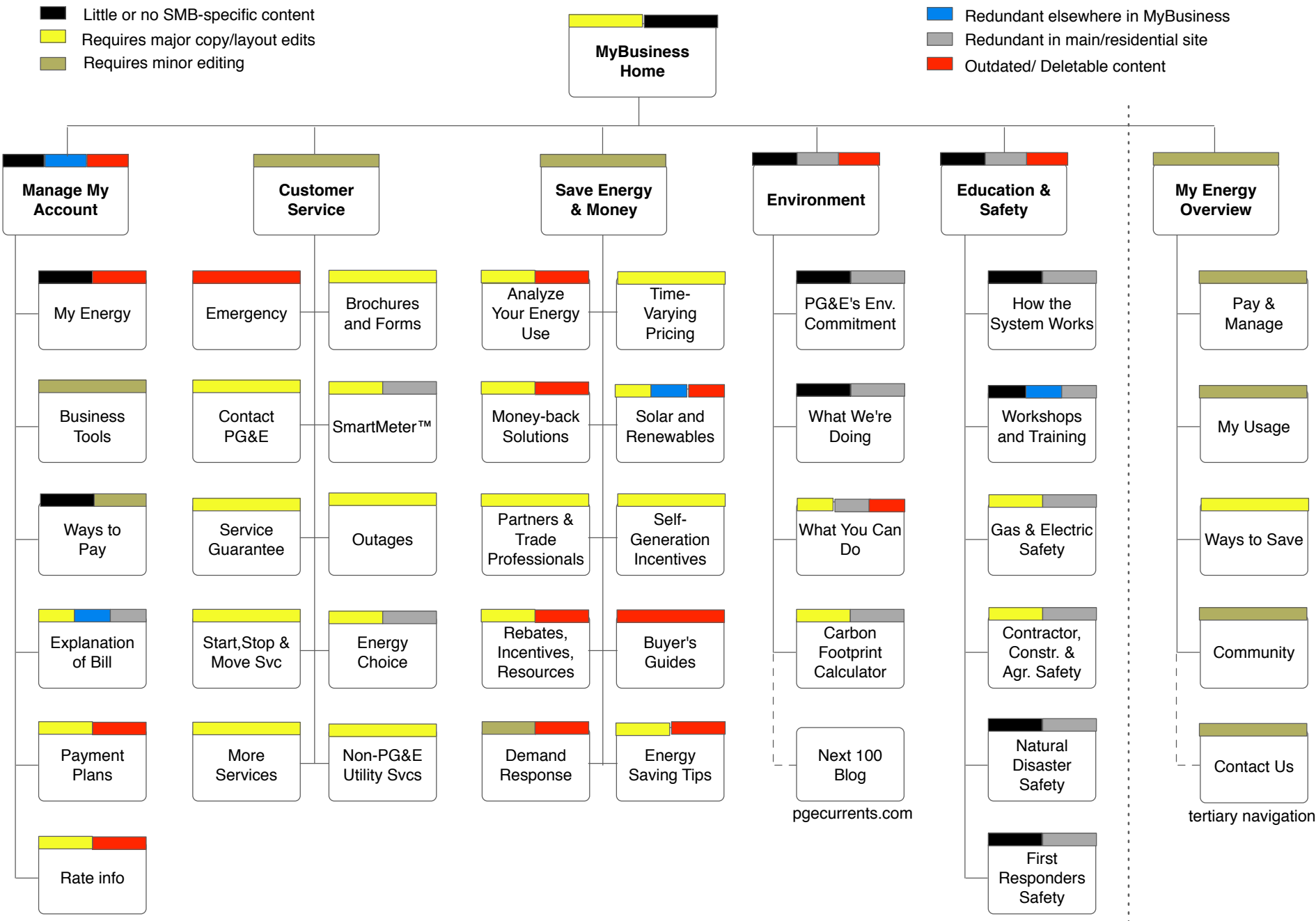
A significant portion of call center inquiries are for assistance finding information, tools, and forms which they can't find on their own.

CONTENT KEY

The color key indicates the types of content issues each subsection is currently facing.

DUPLICATION WITH RESIDENTIAL

The Manage My Account, Environment and Education sub-sections have a significant amount of navigation and content which is duplicated in the For My Home.



Current Page Template Example: My Business Section Landing Page

The section landing page ideally functions as a guide for users to orient themselves and to find the information, or complete the task, they came for.

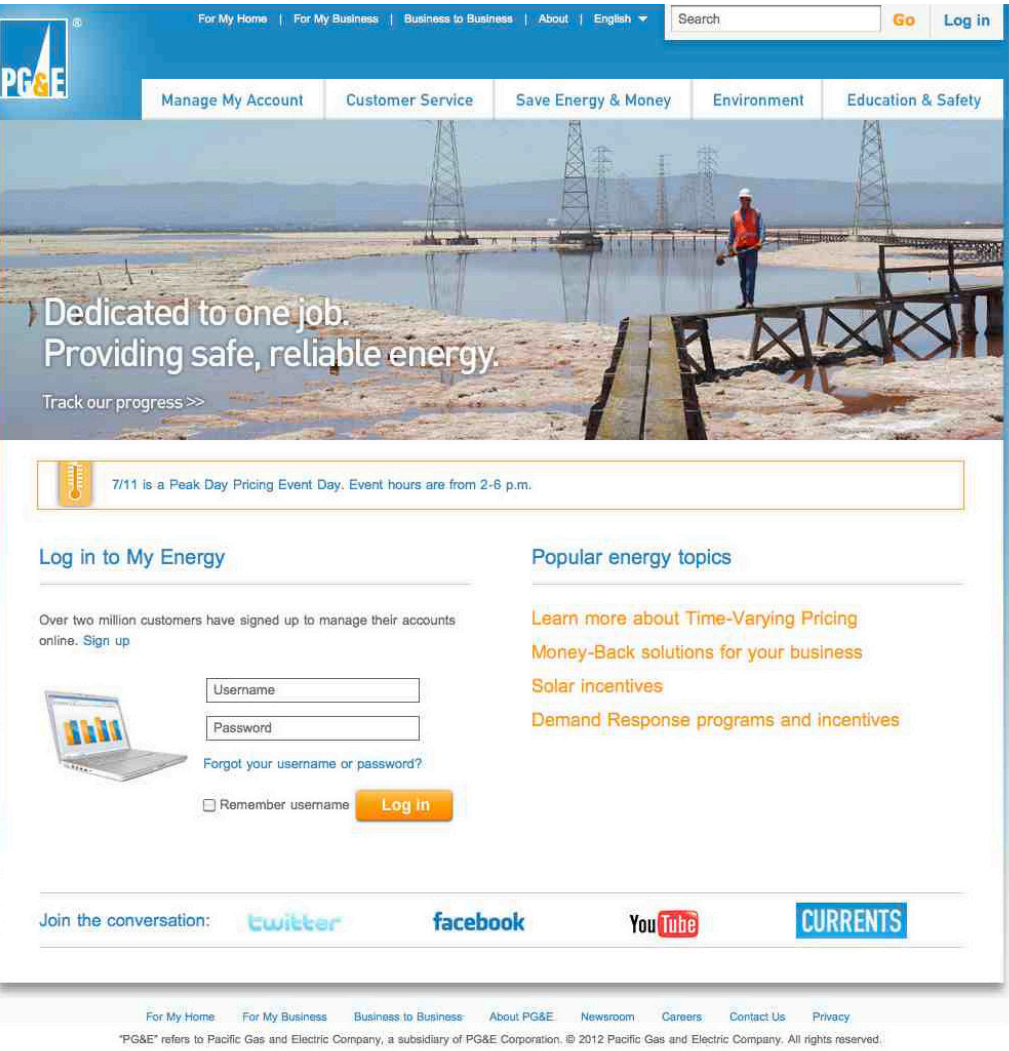
This is often accomplished by offering some or all of the following:

- Discrete messaging and activity areas for both new and returning users
- Shortcuts to the most common user tasks for all user types
- Contextualized critical information
- Calls to action for time-critical issues
- SEO language and links
- A cohesive, cognitively harmonious page layout

This page neither addresses key user needs, nor prioritize the most important PG&E messaging to users.

Nothing on this page confirms that the user is in the My Business section.

There are no visual indicators to confirm that the user is in the My Business section. The lack of SEO language relevant to SMB searchers is another missed opportunity.



KEY ISSUES

1. Misuse of most valuable real estate

The most valuable page real estate—between the section navigation and the fold—is dominated by a promo that is not relevant to core SMB user tasks and leads users away from the My Business section.

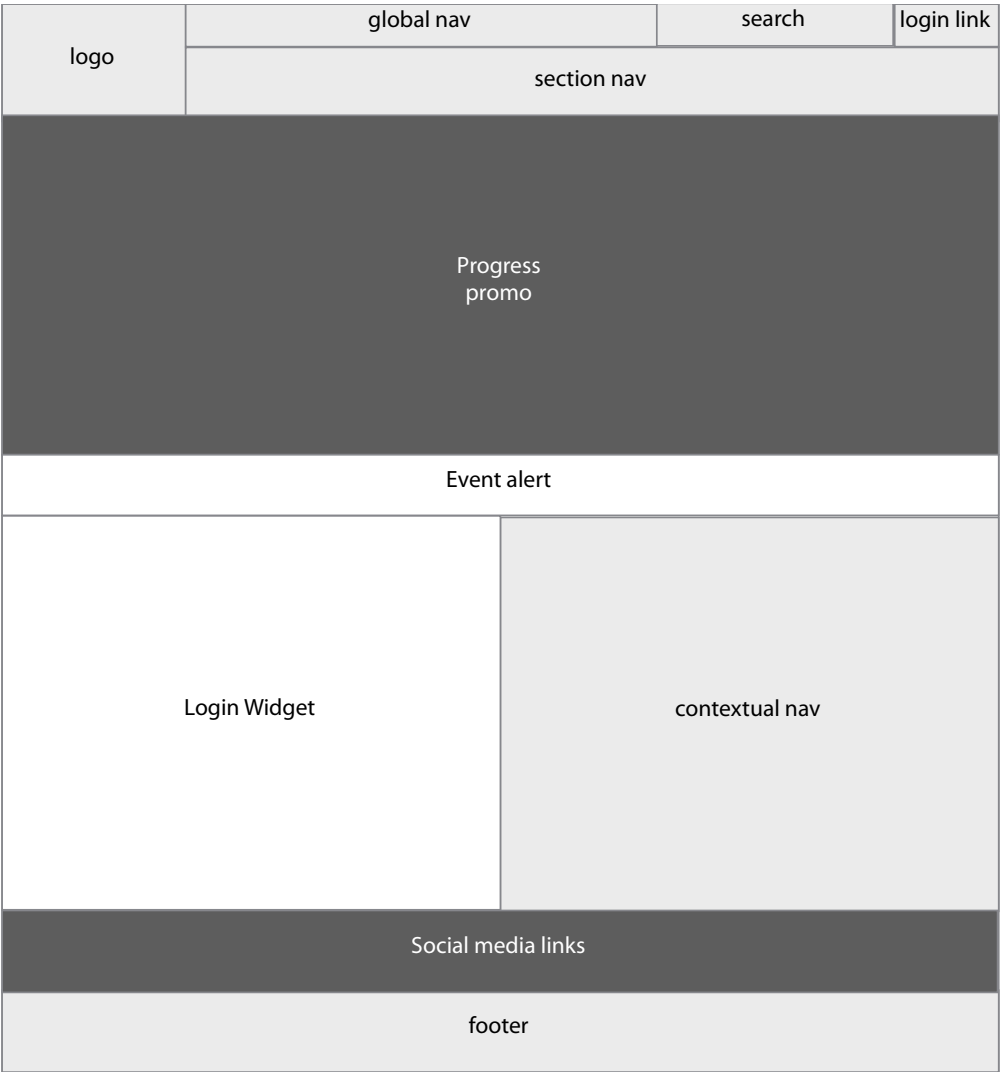
2. Content breakdown does not support page goals

40% of this page is navigation of some kind, 30% is promotion, and 30% is action/info, (but limited to two items).

- navigation
- promotion
- action/info

3. Lack of targeted messaging and next steps

There is no starting point for new or prospective customers. The Peak Day Alert area provides no context, is too small for an important message, and is awkwardly placed across the entire center of the screen. Social media options are not relevant and take up more space than necessary.

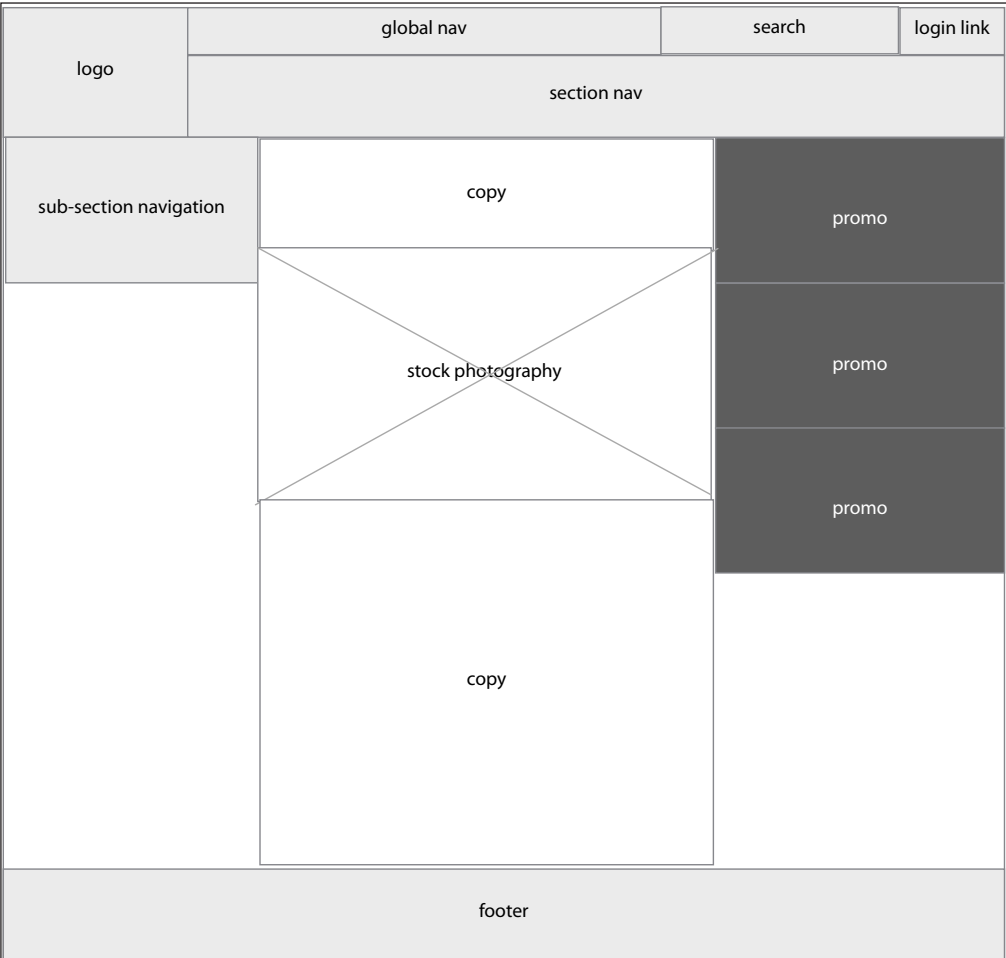


Current Page Template Example: My Energy Program Landing Page

The program landing page should have a singular focus—to engage users in the program.

Voluntary participation engagement requires strong positive motivators:

- All information needs to be framed in terms of benefits to the participant and show knowledge of and sympathy for the user problem it solves—show you know and care about your users
- Benefits should be brief and to the point, with access to deeper information if desired
- Concerns can be allayed and customer confidence in the program increased by including peer-level endorsements via testimonials, reviews, and rating by similar or relatable customers
- The sign-up process should be as quick as possible and provide an immediate benefit to the user—ensuring that their first emotional takeaway is a positive one



This page is indistinguishable from any other impersonal flat content page and the most compelling benefits are not present.

The missed opportunity here is that the benefits are hidden from the potential participant

KEY ISSUES

1. No visual excitement = no engagement

The My Energy experience offers a variety of compelling visual elements—like the usage charts we know customers love when they see them—but none of them are shared here.

The choice of stock photography as the primary visual element immediately disengages users, who see it as visual clutter to be dismissed. So they might dismiss the login and sign-up buttons placed within it.

2. Scattered focus

The second-most eye-catching elements are the promos on the right, which lead users away from this page into areas which may or may not include an easy path back.

The other clear action is to Sign up for Business Tools, which is not what they came to do.

3. Unnecessary click

While having an information page about the My Energy program is necessary and helpful, there is no reason why the sign-up form itself should not be included here, given that a minimum amount of information—only a few entry fields—is required. Showing users immediately that there is a low barrier to entry will reduce attrition for those, who, fear a long online registration process, won't click a "sign up" link.

Current Page Template Example: Start, Stop and Move Service Page

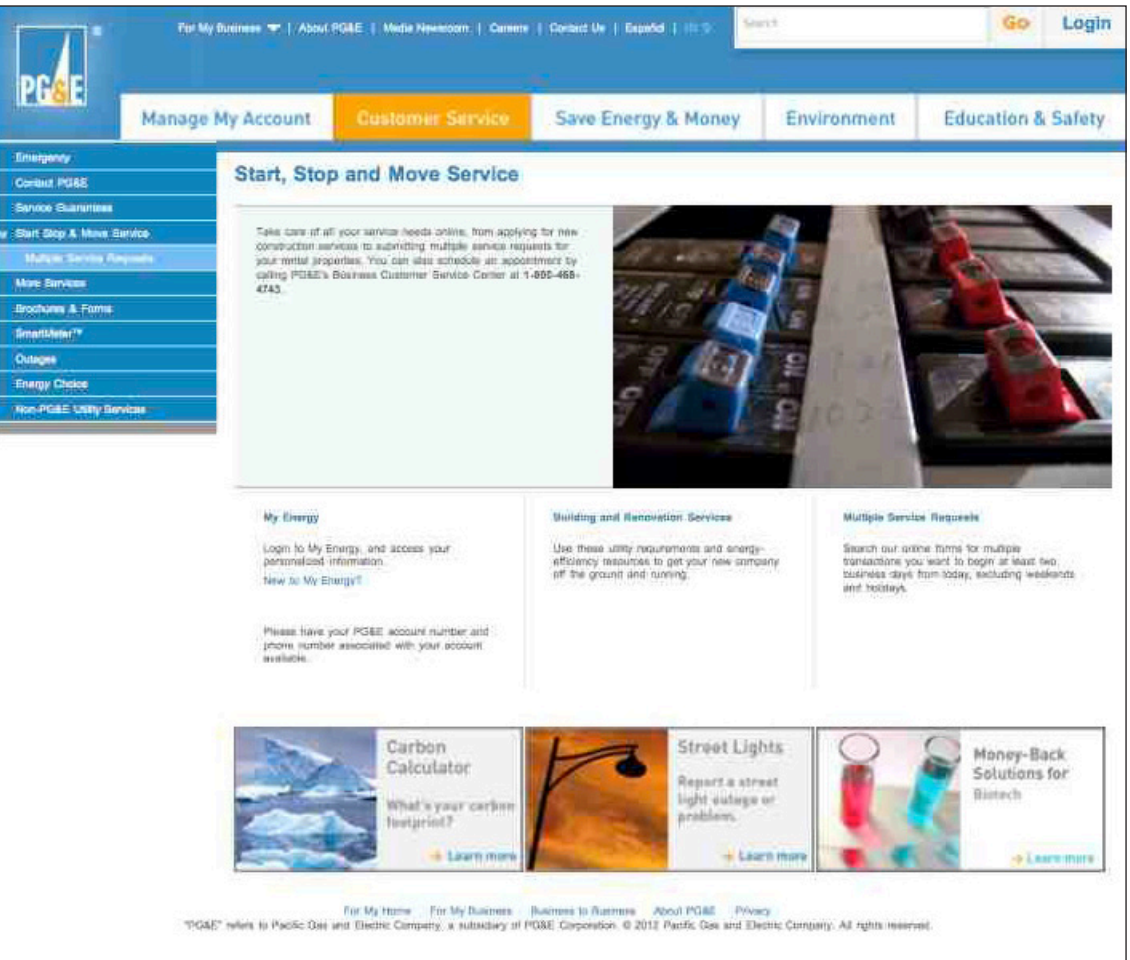
Service pages are one stop in the user's path to completing some activity or transaction, so its content and focus should be oriented towards task completion.

The key to task orientation is to demonstrate knowledge of the desired actions and outcomes, then provide a clear path to the next step:

- Tasks should be named and visually linked with their next steps
- If more information from the user is needed to complete the task, that should be communicated up front, and filtering options to get the right task/action should be offered
- Task options e.g. online vs. call center initiation should be prioritized according to the provider's business objectives

The title of this page sets an expectation that is not met

From the title, users would expect to see clear options and information about what it takes to start, stop, or move service, which are not present.



logo	global nav		search	login link
	section nav			
sub-section navigation	page title			
	copy		stock photography	
	contextual nav		contextual nav	contextual nav
		promo	promo	promo
footer				

KEY ISSUES

1. Extraneous content

This page is 75% irrelevant information, from the stock photography image to the contextual nav to the promos. The only clear action—an instruction to call customer service—is a small, flat copy element which is far too easy to overlook while scanning.

2. Instructions do not provide a clear path

If the user even sees the instructions in the middle, they reference an online task that is not immediately apparent, so the user defaults to the call center.

The actual path is to log into My Energy, but that is not explicitly stated. There is an option for multiple start/stop requests, but it is visually indistinguishable from the unrelated contextual nav.

3. Misleading nomenclature

The terms “start” and “stop” indicate you can begin and end service here, when what is actually available is to “pause” and “re-start” service. A new customer cannot actually start a new service—all actions require an existing account number. Yet no instructions are offered to help them here or anywhere else in My Business, so again the customer will default to calling customer service.

Best Practices

Best Practices

To get a better picture of the future of energy services online, we reviewed 21 experiences illustrating web and cross-channel technology trends. Here we showcase those which exemplify a specific best-practice feature, aspect, or experience relevant to the SMB redesign.

BEST-PRACTICE LEADERS

- **FedEx:** Small business center offering services
- **Verizon:** Solutions by industry, services and resources
- **AT&T:** Recommendation tool to filter your services
- **Mint:** Data driven information design
- **Amex (Small business Saturday):** Social integration
- **Apple:** Usability, simplicity and support
- **IBM:** Solutions for analytics, social and commerce
- **Square:** User friendly dashboard
- **Scottish Power:** Self identification methodology
- **British Gas:** Web-based monitor and usage tool

ALL SITES REVIEWED

- Georgia Power
- Southern California Edison
- Commonwealth Edison
- Ausgrid
- Aurora Energy
- British Gas
- eDF Energy
- Scottish Power
- FedEx
- IBM
- Intuit
- My Fico
- Verizon
- AT&T
- Mint
- Amex (Small business Saturday)
- Bank of America
- UPS
- San Francisco Water Power Sewer
- PayPal
- Apple

Comparative Feature chart

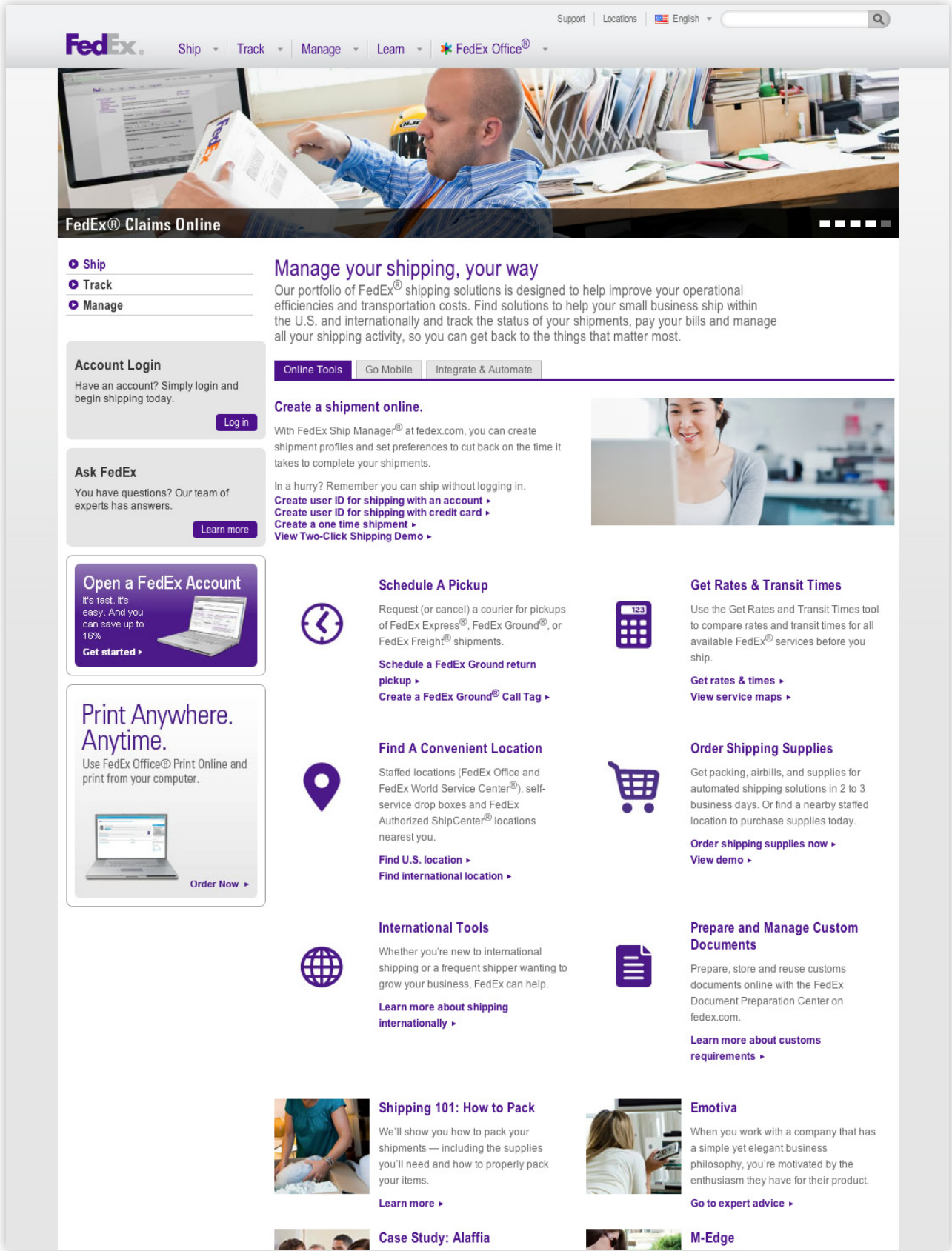
This chart indicates which of the core six activities are also available in the comparative sites we audited.

	FedEx	Verizon	AT&T	Mint	Amex (Small business Saturday)	Apple	IBM	Square	Scottish Power	British Gas	Georgia Power	Southern California Edison	Commonwealth Edison	Ausgrid	Aurora Energy	British Gas	eDF Energy	Scottish Power	Intuit	My Fico	Bank of America
Mandatories																					
Pay Bill																					
View Usage																					
Pay Plan																					
Start/Stop Service																					
Rate/TVP																					
Rebates and Energy Savings																					
Score	5	6	6	5	2	5	4	3	4	5	5	6	4	5	3	5	3	4	3	2	2
X = most useful	X	X	X	X	X	X	X		X	X						X		X			

Small business center offering services FedEx

<http://www.fedex.com/us/small-business/>

- Online resource for advice, insight and setting goals
- Small business center offering services
- Solutions for shipping, tracking and managing
- Not an exact model but there are resources and tools for SMBs



Solutions by industry, services and resources
Verizon

<http://business.verizonwireless.com/content/b2b/en/wireless-small-business.html>

- Offers solutions by industry, products/ services and resources
- Support for your account, plan, bill and apps
- Small business Advisor has resources and solutions to grow your business

RESIDENTIALBUSINESSWIRELESS


Store LocatorContact UsAbout UsSign In / Register

verizonwirelessExploreShopMy BusinessSupport

Search

Small Business Advisor

Looking for Medium Business and Enterprise Solutions?SHARE



Small Business Solutions Made Easy.

This tool is designed to help you find Verizon Wireless small business solutions that can support your goals, boost productivity and protect your information—so you can grow your business with confidence.

Verizon Wireless received the Small Business Influencer Champion for 2011 award from Small Business Trends and SmallBizTechnology.com for its continued support of small businesses and their owners. [Read the news release.](#)

Step 1
Company Information

Step 2
Platforms & Mobile Tasks

Step 3
Business Needs


Tell us a little bit about your business so the advisor tool can suggest small business solutions tailored to your industry.


Next


Select Number of Employees.


☐ 1 - 4☐ 5 - 49☐ 50 - 99


Select which industry best describes your company.


Construction


Distribution


Financial Services


Health Care


Insurance


Legal


Manufacturing


Media


Pharmaceutical


Professional Services


Real Estate

Food & Beverage

Retail

Transportation

Utilities

General

Contact a Rep

Your Choices

Reset

- Number of Employees
- Industry
- Platform
- Mobile Tasks
- Business Needs

Recommendation tool to filter your services
AT&T

<http://www.att.com/gen/landing-pages?pid=9213>

- Hero image promotes 24/7 support for your business
- Ability to contact via email or Live chat (phone # not visibly shown)
- Recommendation tool is great to filter what services you do or do not need
- Intuitive and easy to understand
- Simple but structured architecture
- Visually appealing imagery

Residential | **Small Business** | Enterprise | Wireless

Help and Support

California: [Change](#)

BUNDLES

INTERNET

LOCAL

LONG DISTANCE

ADDITIONAL

SPECIAL OFFERS

AT&T Account Management Log In

Need **HELP?** Talk with a Representative, call **1-888-944-0447**

Recommendation Tool

Not sure what services you need? We can help. Our **Recommendation Tool** determines the perfect mix of services for your business.

How many employees does your business have?

0-5 6-20 **21-50** >50

Does your business have a physical location such as an office, retail or commercial space?

☐ YES ☐ NO ☒ **MULTIPLE LOCATIONS**

BACK NEXT 1 of 3

Quick Links

[Compare Local Plans](#)
[View Special Offers](#)

For new customers:
[Order new phone service](#)
[Switch to AT&T](#)

For existing customers:
[View or pay bill](#) or [Check order status](#)
[Move service](#)
[Troubleshoot or report/check problem](#)

AT&T Business Local Calling
\$35.00 per month

Includes:

- ✓ Fully featured lines as low as \$35 per line
- ✓ Options available to fit your needs
- ✓ Flexible features and usage

[Learn more](#)

All for Less
Starting at **\$75.00** per month

Unlimited local, nationwide long distance, broadband and more!

3 new package options:

- ✓ Basic
- ✓ Standard
- ✓ Premium

[Learn more](#)

Recommendation Tool

- Tell us about your business needs and we will recommend the perfect solution.
- Based on your needs, we can recommend a single service, a featured bundle or a custom bundle.

More Local Services

- ☒ **Local Services**
A wide range of plans perfect for your business
- ☒ **Phone Features**
Variety of calling features for businesses of any size
- ☒ **Jacks and Maintenance**
AT&T's quality maintenance solutions

Quick Links

For new customers
[Order new phone service](#)
[Switch to AT&T](#)

For existing customers
[View or pay bill](#)
[Move service](#)
[Troubleshoot or report/check problem](#)
[Check order status](#)

Recommendation Tool
Not sure what service you need? [Let us make a recommendation.](#)

Special Offers
Take advantage of [special offers](#) and save on your services.


Small Business InSite
Get the insight that you need to [manage and grow your business.](#)

*Issued in the form of a bill credit or VISA® Rewards

Affiliate Programs | Terms Of Use | Privacy Policy | Advertising Choices | Broadband Information

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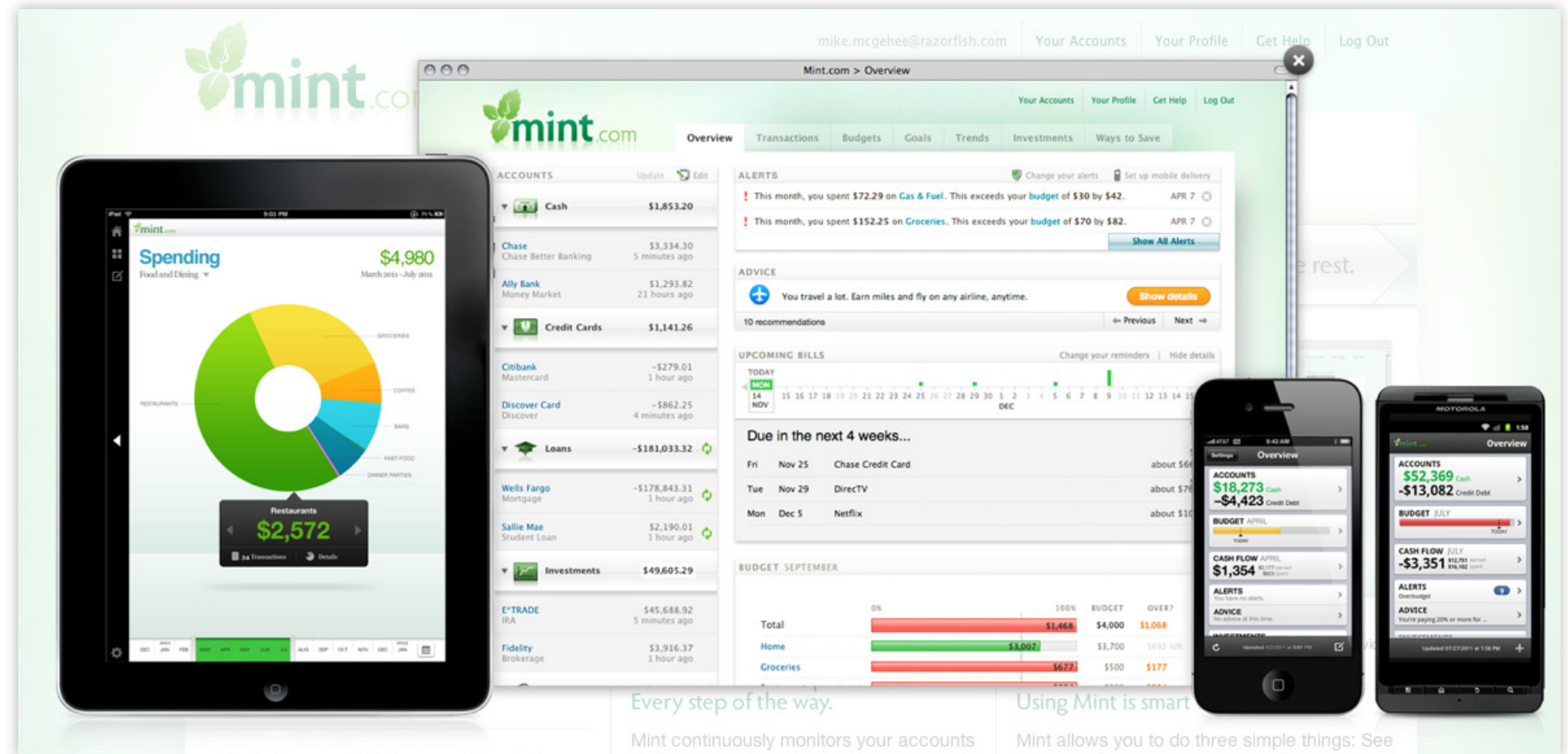
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Data driven information design Mint

<https://www.mint.com/>

- Data/information driven visuals
- Monitor expenditures
- Ability to set up alerts and reminders
- Easy to set up goals and plans
- Intuitive and easy to understand
- Simple but structured architecture
- Visually appealing imagery



Social integration
Amex (Small business Saturday)
<http://smallbusinesssaturday.com/>

- Easy to use page/tool that has done all the heavy lifting, provides links and all the necessary information to allow users to take steps to improve their business
- Simple and straight forward

LET'S
SHOP SMALL®
ALL YEAR LONG.

Small Business Saturday® sits between Black Friday and Cyber Monday and is dedicated to driving sales to small businesses on one of the busiest holiday shopping weekends of the year. It is the day we celebrate the Shop Small® movement and support the small businesses that help fuel the economy and invigorate communities.

f

2,836,108

LIKE THE SMALL BUSINESS SATURDAY® PAGE ON FACEBOOK TO SHOW YOUR SUPPORT.



▶ Transcript

INVITE CUSTOMERS TO SHOP SMALL ALL YEAR LONG

Last year, American Express, the founding partner of Small Business Saturday®, launched a toolkit to help small business owners reach more customers. Now, we've relaunched it with even more free tools and offers.

Find these tools, offers and more by visiting the toolkit on facebook.com/shopsmall.

GET THE FREE TOOLS NOW

★ SPECIAL OFFER ★



\$100 IN FREE TWITTER ADS
Use Twitter's new advertising solution for your small business. American Express will give \$100 in free ads to the first 10,000 eligible American Express® Cardmembers and Merchants who enroll. Terms apply.

🕒 5 MIN

★ BUILD AN ONLINE PRESENCE ★



Easily **create a business page**.

🕒 5 MIN



Enhance your Facebook business page with customizable professional templates.

🕒 15 MIN



Create a customized website with Yola.

🕒 30 MIN

★ ENGAGE CUSTOMERS AND FANS ★



Download signage and marketing materials to keep customers coming to your door throughout the year.

🕒 5 MIN



Create a video to market your business with My Business Story.

🕒 30 MIN



Get a Twitter button for your website.

🕒 5 MIN



Create an offer for your customers and **share** them with Go Social.

🕒 5 MIN

Clocks represent minimum estimated time required to take advantage of these tools.

GET THE FREE TOOLS NOW

 The American Express OPEN® Independent Retail Index

2011
PRESS &
ARTICLES (29)

Four Holidays That Out-Glitter Xmas by \$36 Billion
Forbes - December 14, 2011

Here's How Successful Small Business Saturday Actually Was
Business Insider - December 9, 2011

Small Business Saturday Was a 100 Million Shopper Success
Business News Daily - December 8, 2011

Small Business Strategies: Shop 'small' this holiday season
USA Today - December 8, 2011

Shop 'til you drop
Forbes - November 25, 2011

Why You Should Skip Black Friday And Shop On Small Business Saturday
OPEN Forum - November 23, 2011

5 Benefits To Shopping On Small Business Saturday
Forbes - November 22, 2011

Make The Most Of 'Small Business Saturday' With Social Media
Forbes - November 16, 2011

Contest: Tell Your Story On YouTube To Google and AmEx
Business Insider - November 16, 2011

Sustaining "Small Business Saturday" Spirit
OPEN Forum - November 14, 2011

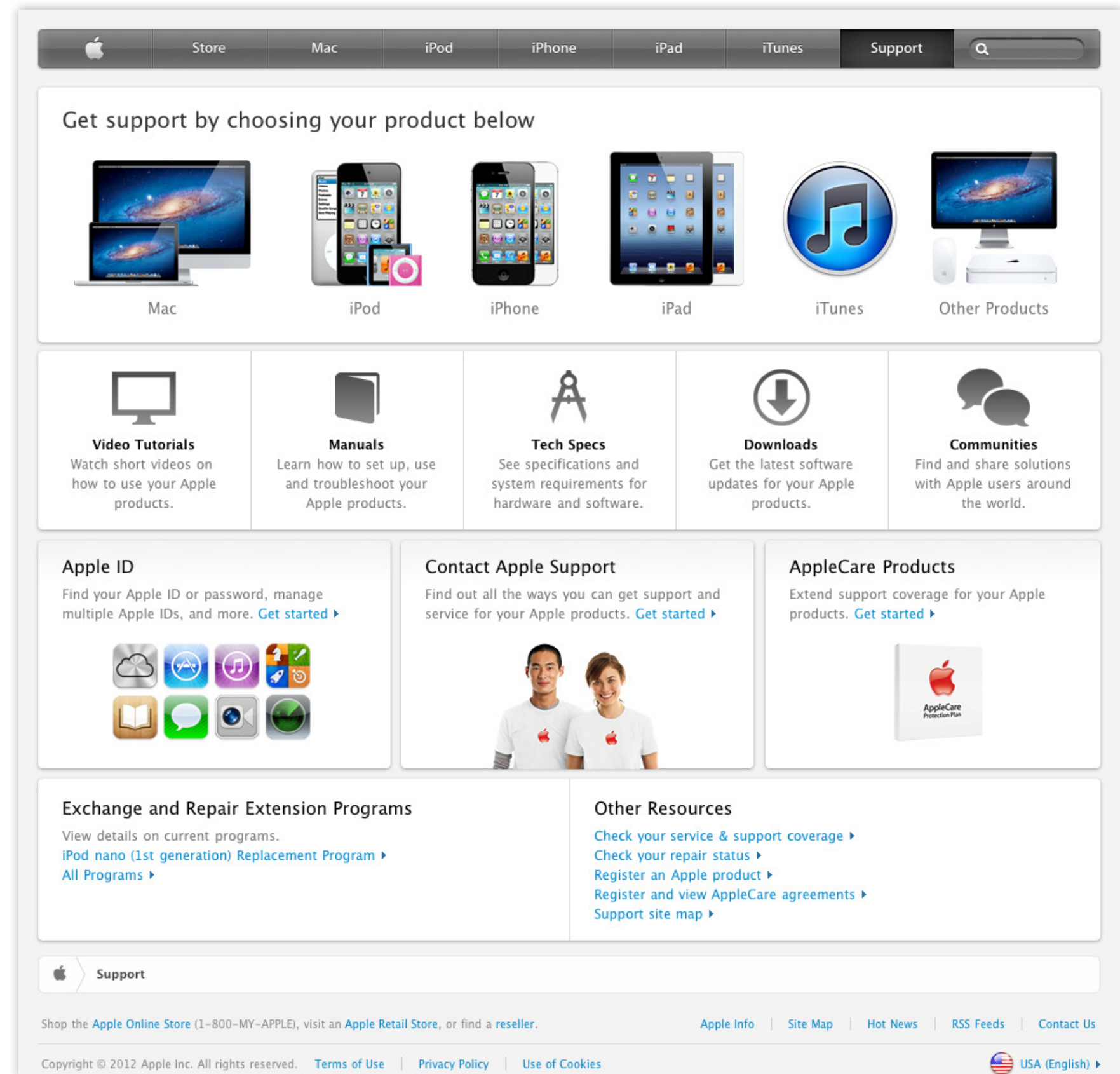
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Usability, simplicity and support Apple

<http://www.apple.com/support/>

- Support section is easily navigable
- Different methods to search for support: by product, videos, tech specs, communities, etc.




Solutions for analytics, social and commerce
IBM

<http://www.ibm.com/midmarket/us/en/smallbusiness.html>

- Solutions for analytics, social collaboration and commerce
- Services for business consulting, application and tech support
- Hardware and software
- Lacking self service or dashboard type tools

United States

Welcome | [IBM Sign in](#) / [Register](#) |

 Industries & solutions Services Products Support My IBM

Midsize Business Solutions

Enabling midsize companies to realize their potential

We're here to help

Email

1-877-426-2223

Mention priority code 600BY17W

Solutions

Services

Hardware & Software


Small business solutions

Hardware, software, and services for companies under 100 employees

IBM small business solutions offer companies with less than 100 employees appropriate products, services and resources appropriate for their business. Let us help you achieve growth and efficiency for your small business.

→ Special offers on products and services

Check here for featured products and promotions on hardware, software, services and IBM certified pre-owned equipment.



Hardware:

→ [BladeCenter S Chassis](#)

Offers a broad range of storage and networking options to simplify infrastructure complexity and manageability while helping lower total cost of ownership.

→ [IBM System x servers](#)

An excellent choice for smaller businesses, easy to install and affordable.

→ [IBM Power servers](#)

Faster, more efficient and easier to deploy for all of your UNIX, Linux and IBM i applications.

→ [IBM BladeCenter servers](#)

Reduce complexity, improve systems management, increase efficiency and lower the cost of ownership.

→ [IBM Certified Pre-owned Equipment](#)

Performance and quality at an affordable price,

Software:

→ [LotusLive](#) (link resides outside of ibm.com)

Integrated social networking and online collaboration services in an easy-to-use environment.

→ [Lotus Foundations Start](#)

All-in-one software appliance that includes e-mail, security, backup and recovery features.

→ [Lotus Quickr](#)

Team collaboration software that allows content sharing, collaboration and increased online work performance - inside or outside the firewall.

→ [Lotus Sametime UNYTE](#) (link resides outside of ibm.com)

An affordable, easy-to-use option for online meetings, allowing people to work together across the country as if in the same room.

→ [Lotus Symphony](#) (link resides outside of ibm.com)

Services:

→ [Save with Recovery Express](#)


Targeted, cost-effective data center recovery services for small and midsize businesses.

→ [Maintenance Support Options](#)

Make the most of your server or storage hardware investment.

→ [Express penetration testing services](#)

Safely identify network vulnerabilities before they are exploited.



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User friendly dashboard
Square

<http://www.ibm.com/midmarket/us/en/smallbusiness.html>

- Small and large business owner testimonials, interesting content in a simple layout
- Dashboard and analytics are clean and user friendly



Self-identification methodology Scottish Power

<http://www.scottishpower.co.uk/your-business/small-business/business-home.aspx>

- Filtering at the first landing (Modal) (new customer? Yes/No) Clean and analogous graphics
- Under your business it asks you the size of your business (modal) and filters you again
- Cookie is set and recognizes your small business
- Print and cut out reminders you can place on appliances, equipment and doors
- Information and links for energy efficiency
- Unifi web/mobile app and outlet device to control your business/residence electricity

SCOTTISHPOWER
The Energy People

ARE YOU A LARGE BUSINESS?

YOUR HOME | **YOUR BUSINESS** | ENERGY EFFICIENCY | CANCER RESEARCH UK | MY ACCOUNT | NEED HELP?

Business Home | Why ScottishPower | Online Energy | Energy Efficiency | Quote and Apply | Web Shop

You are in: Business Energy

£500*

Apply
Apply Online today ▶
0800 22 44 00

Customer Services
Speak to a customer advisor
0845 272 7000

Register
Manage your account at a time that suits you with our Online Energy Service.
Register ▶

Fixed Price Electricity Contracts
Act today and fix your prices until 31st May 2015
Fix Your Costs ▶

Pay by Direct Debit
Pay by monthly Direct Debit and save upto £400*
Switch & Save ▶

Online Energy
Save time and money with our online energy service
Find out more ▶

Energy Efficiency for your business
Our small business energy advisers could help you save energy and money
Find out more ▶

Business Electricity from ScottishPower
Business Electricity from ScottishPower can save your business up to £500*. Get the cheapest energy rates for your small to medium sized enterprise by choosing a fixed rate electricity contract. Changing your business energy supplier is a simple process – get a quote online, pay by Direct Debit, and start saving today!

Web-based monitor & usage tool British Gas

<http://www.britishgas.co.uk/business/energy-efficiency.html?BGBHomeid=bgbblink024>

- Energy Services and Efficiency
 - Smart Metering
 - Maintenance and Repair
 - Building Management Systems
- Energy Insight is a web based service that uses data from smart meters for you to monitor and control usage
- Energy made simple is a Quick and easy guide for understanding the energy that is used to run your business

The screenshot shows the British Gas website's 'Energy Services and Efficiency' page. The header includes the British Gas logo, navigation links for 'At Home', 'For Business', and 'For Corporate', and a search bar. A secondary navigation bar highlights 'Energy Efficiency' among other options like 'Home', 'Products & Services', 'Get a Quote', 'Help & Advice', 'Manage Account', and 'Energy Made Simple'. The main content area features a breadcrumb trail 'You are here: British Gas Business Home > Energy Services and Efficiency' and a left-hand menu with links to 'Back to Home', 'Electricity', 'Gas', 'Products & Services', 'Get A Quote', 'What We Do', 'Energy Services and Efficiency' (with sub-links for Smart Metering, Business Energy Insight, Climate Change Levy, Building Management Systems, and Our Green Credentials), 'Manage Account', and 'Help & Advice'. The main heading is 'Energy Services and Efficiency', followed by the text 'We have a range of efficiency measures that can help reduce your energy consumption.' Below this is a grid of six service tiles: 'Smart Metering' (with a smart meter image), 'Business Energy Insight™' (with a laptop and bar chart), 'Climate Change Levy' (with a clipboard), 'Building Management Systems' (with a hand holding a tablet), 'Our Green Credentials' (with a green checkmark), and 'Maintenance and Repair' (with a red toolbox). Each tile includes a brief description and a 'Find out more' link. The footer contains five columns of links: 'Products & Services' (Business Electricity), 'Get A Quote' (Electricity, Quote), 'Energy Efficiency' (Energy, Management), 'Manage Account' (Submit, Electricity, Meter, Reading), and 'British Gas - At Home' (Electricity).

Recommendations

Opportunity

Exceptional customer service: Establish PG&E as a trusted advisor for SMBs

SET A NEW BAR

To truly win the hearts and minds of SMB customers means we must deliver more than energy. We must deliver exceptional customer service. To do that requires service that exceeds expectations for the energy industry. We can go above and beyond to provide an experience on par with the best brands serving the SMB market today.

IT'S ACHIEVABLE NOW

PG&E has the capability and competency to provide this level of service and does so currently. However, it only does so offline, through a live representative.

THE CUSTOMER WINS

My Business must seize the opportunity now to provide an exceptional online customer experience for SMBs. We must match and even surpass the level of excellence provided offline. Delivering a level of customer service online that fundamentally shifts PG&E's relationship with SMBs is needed.

To deliver on the promise as a trusted advisor.

To achieve world-class customer satisfaction.

Recommendations: Meeting Organizational Goals

Provide a streamlined, intuitive site experience that enables SMBs to quickly and easily accomplish core transactions



Provide a filtered and cookied section landing page experience that allows for Residential, Small, Medium, and Large business to self-identify themselves by usage size and industry to serve up relevant options and messaging on the current and subsequent visits

Clarify activities which absolutely require customer service calls

Prepare users at the beginning of any activity by informing them of any information they will need to provide up front

Support SMBs with rich, relevant content, tools and programs to save money, and guide and optimize their energy usage



Provide benefits descriptions for My Energy registration and the SMB newsletter both on the site and via other touchpoints

Provide reviews, testimonials, and/or ratings from other SMBs on tools and programs in images and copy as well as video

Frame all participation in simple terms describing the benefits for the user, using real examples whenever possible

Leverage existing and new touch points to establish an ongoing dialog with SMBs on critical topics that will impact their business and how they can take action



Create a text alert system for time-critical events like Peak Day Usage and energy emergencies

Develop mobile features for common tasks which require movement, such as finding out what equipment an SMB customer has in order to apply for a rebate

Employ social media channels like Facebook to broadcast SMB-specific announcements, seasonal reminders, and targeted marketing campaigns

Promote PG&Es involvement in third-party programs more aggressively, including co-branding when possible, using social media channels

Recommendations: Meeting Project Goals

Employing a thoughtful content strategy is key to the successful SMB redesign. By reorganizing, revising and deleting pages to hone in on relevant, actionable content, PG&E can facilitate SMB customers' learning and decision-making process:

- **Refocus the My Business content structure and navigation to serve the needs of Small, Medium, and Large Businesses** - separately from each other and from the residential and "everyone" content
- **Delete any content/pages that don't support key SMB actions/transactions.**
Get customers where they need to go—increase accessibility. For example, if tips and advice cannot be contextualized to a key SMB function, then we'd recommend stripping them from the section.
- **Reorganize/streamline content at the page level**—long scrolls of copy appear across a large number of the SMB pages, effectively creating road blocks for the customer between him/her and the end goal; these should get edited down heavily. In all cases, create consistency in formatting of content across the same page types or levels. Create content for section landing pages that surface access to the core activities and information.
- **Make content scannable/readable by employing shorter paragraphs, bolded subheads, bullet points, lists and unique images.** Make it easy for customers to access your information.
- **Develop a tone/voice style guide that will ensure consistency** in the delivery of content across the For My Business area. A consistent tone and voice that uses natural language instead of "PG&E-speak" will engage and build trust with SMB customers and thus should deepen the relationship with customers.
- **Migrate content to appropriate sections of pge.com.** Consolidate and rework content as needed. For example Service FAQs should move into the Service area of the site with links to relevant FAQs included on appropriate pages within SMB.

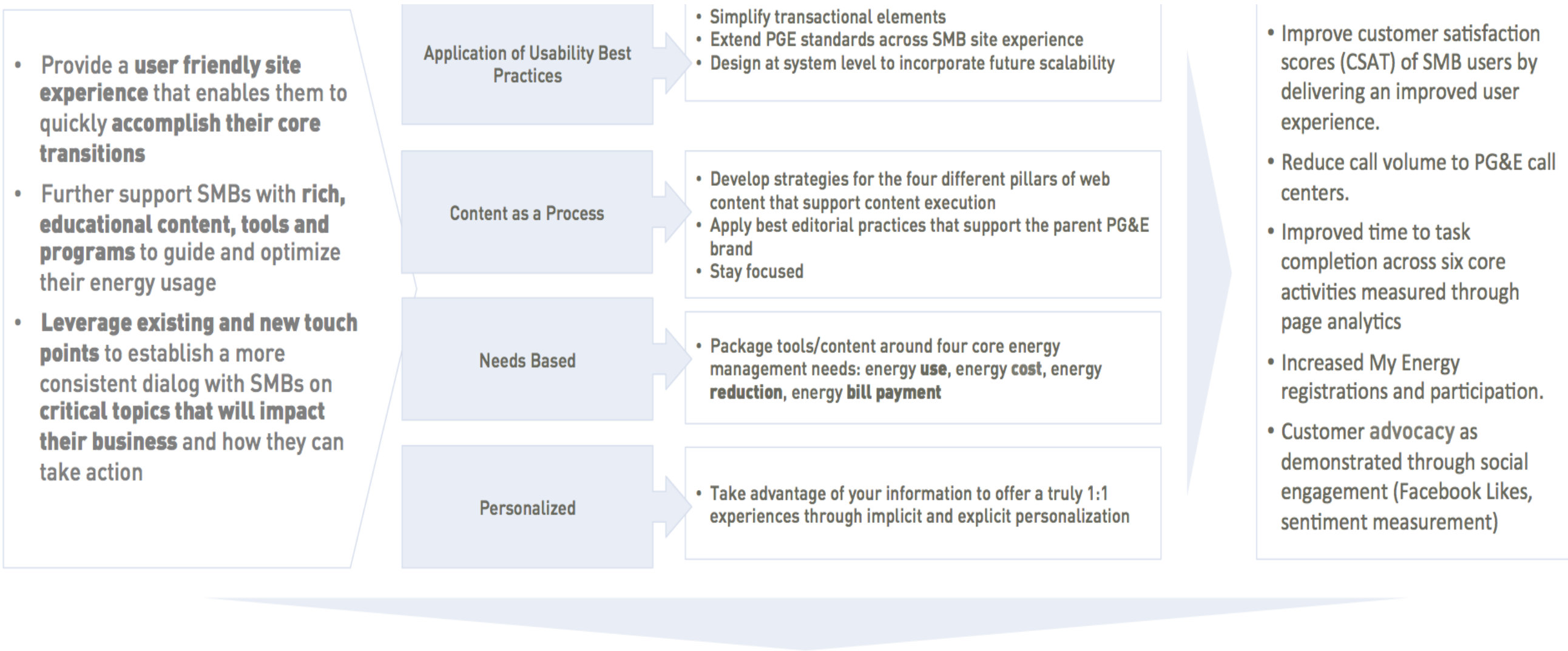
The success of the content strategy will depend on the implementation of a detailed workflow and governance.

- Workflow includes the processes, tools and human resources required to rework and maintain SMB content.
- Governance involves what key decisions are made around content and content strategy, as well as how they're initiated and communicated to the team.

Both of these components require:

- Defining ownership and roles
- Designing content processes
- Documenting the processes
- Implementing the processes (including planning, creation, revision, approvals, adding metadata, testing, publishing, etc.)

Executive Summary



ALL OF THIS DESIGNED TO...

Establish PG&E as a trusted advisor for SMBs

Next Steps

- PG&E to provide feedback to Experience brief – 8/6 M
- Razorfish to provide revised Experience brief for approval – 8/8 W
- PG&E to provide approval of Experience brief – 8/8 W
- Razorfish to kick-off IA/UX design – 8/9 Th

Appendix

Detailed Stakeholder Findings

1. Universal desire for a simpler, more streamlined site

Each of the stakeholders repeatedly expressed that there was “too much”, “outdated”, and “confusing” content.

They often had to talk their customers through the pages or email links to specific content.

There was a common call to stay away from “PG&E-speak” that is confusing to their customers.

2. Sincere dedication to providing excellent customer service (despite the current site)

Of course, positive customer feedback is important as a metric. But the stakeholders also proudly view themselves as service providers, and sincerely want customers to *be* happier and well-served.

Both Cindy and Lindsey stated that their highest hopes for this project were that customers would be happy and give positive feedback. Kevin also noted that the best outcomes for customers were when they understood the options and knew they could make their own decisions.

This experience is supported at most customer service levels – when customers have contact with a real person, they generally walk away feeling appreciated and well-served, and are grateful for the experience. This is an important aspect of the PG&E culture that is not represented in their current online communications/experience.

3. Editing/publishing process is unclear, frustrating and time-consuming

Content owners requesting changes or asking to add new pages may not understand what is possible or appropriate based on the existing templates, front-end technology, and branding and style constraints. They most likely are not well-versed in usability best practices, or understand the differences between web and print content presentation. Requests are submitted only via written instructions, so Online Comms is often left to do their best to interpret a technically or stylistically unfeasible desired outcome with inadequate direction.

The final changes may not be what was originally desired, because the team sometimes has to devise workarounds to the best of their abilities and constraints without review or approval with the requestor. Requestors are often siloed and don’t understand the priorities Online Comms has to juggle to meet other time-critical requests. Without a publishing calendar, or proactive status updates from Online Comms to the original requestors, it is difficult to set expectations appropriately —the requests can take days, weeks or even months to fulfill, and the requestors may not understand why.

4. Some services are simply best handled with a conversation, but may be initiated online

For Cindy and Kevin in particular, there are a number of cases that probably should continue to be handled by the call centers such as reporting emergencies, fulfilling complex rebate processes involving third-party partners, establishing a brand-new service account or identifying an appropriate rate plan, especially for average customers, etc.

Detailed Stakeholder Findings, cont'd

Certain sub-segments, like gas station and corner store owners, don't have ready access to computers so would never use online services.

5. Coordination is lacking between outreach efforts and the call centers they affect

Cindy described a scenario where her team was unexpectedly deluged with calls—they looked into it and found out that there was a planned outreach effort to go after a particular segment of underserved customers. Had she been informed, she could have informed her team better and generally been more prepared for the high call volume.

In other cases, her team worked off of documents that were not consistent with what was published on the site or contained in the outreach. In some cases her information was the most up to date, other times it wasn't. It was up to her team to determine when to refer customers to the site for information and when to avoid it.

6. Live Chat was largely endorsed

In fact, Kevin noted that his department actually employed Live Chat with customers some years ago but that it was discontinued, perhaps for lack of funding.

Cindy expressed the benefit for small business customers to multitask while using Live Chat. They are often alone in their place

of business and so busy that they conduct transactions with real-life customers at the same time they are on the phone with a rep.

7. Everyone sees the potential of mobile and social support for their efforts

Kevin noted that it's important to be able to be in contact with customers through any channels that they may prefer. He also acknowledged that addressing issues involving sensitive account information via social media is a major challenge.

Currently, none of the stakeholders have any solid plans and don't foresee any immediate efforts in social or mobile. They aren't knowledgeable enough about these capabilities to advocate for or plan mobile or social media projects.

Detailed Audience Findings

1. Digital experience does not meet the standard of excellence set by in-person and call center customer service

It is well-documented that PG&E customer satisfaction is very high when a human representative is involved. This is partly due to the sincere sense of concern and attention customers receive—many customers report how pleased they are to be listened to, that the reps seem to really care about helping them, that they act proactively to ensure their safety, and provide helpful advice and guidance in language they understand.

High satisfaction ratings are also boosted because those reps successfully resolve customers' problems, meeting or exceeding their stated needs. The end result is that they feel like someone is looking out for them—a simple, yet deeply emotional connection.

The digital experience does not yet provide any of these easily discernible and gratitude-inducing benefits.

2. User Paths to desired features and content are non-intuitive, unnecessarily long and result in high attrition rates

The concept of “too many clicks” has an underlying issue—the clicks are not getting them to where they need. User behavior has evolved beyond the “three click rule” but only so long as each click is an easy, logical choice and clearly moves them closer to their target.

Current user paths require an excessive number of clicks, even with a working knowledge of “PG&E-speak”. A promising link will lead to a page with nothing but mildly related copy and another link, or will lead SMBs into the Residential area of the flat site without realizing

it. A lack of orientation can make it difficult to start over, and many customers find it easier to call customer service than to keep trying. For non-critical tasks, they will simply give up.

3. Many SMB users feel a lack of control around their energy costs and management

This issue is two-fold:

a) They may believe that there is nothing more they personally can do to affect energy efficiency (and indeed, may not be aware of the concept)

b) They are unaware that PG&E can assist them, or do not understand why they would

The underlying issues are that they lack energy education and they lack knowledge or trust in PG&E as a helpful partner.

4. SMB users are time-strapped and unable to spend much time puzzling out solutions or answers online

While My Business offers easy transactions, enlightening educational content, and many helpful tools, a customer has to be motivated and proactive to find it. And very patient and dedicated to understand it, far beyond the vast majority of customers' time and enthusiasm.

Detailed Audience Findings, cont'd

5. Users want to see themselves, or other users like them, represented in the context of tools and programs

SMB customers, especially, are wary of making the effort to apply for a rebate or explore their rate options without someone like them to “vouch” for its value. While some case studies exist in the form of videos, they are not easily found. Peer experiences to help build trust are otherwise non-existent.

Tips and other helpful information, whether communicated through the site or other channels, feel too general, and are infact often not speficially targeted enough to an SMB customer’s usage and industry to be relevant. This further widens the gap between themselves and seeing PG&E as a partner there to help them.

6. SMB users credit positive program experiences to third party partners, and do not recognize PG&E’s role

When customers do an audit over the phone with a PG&E customer service rep they are often referred to a helpful third party resource. However, customers may not recognize how much value PG&E has contributed to make that process happen. They are far more likely to forget the call and focus on the rebate check or installation partner.

7. An SMB customer is often both a business and a residential customer; each experience informs and creates expectations for the other

It can be confusing for customers, especially SMB customers, to wear two different hats, and be offered two very different site experiences. The residential section of the site is better at conveying a “human” approach, where the business side is colder and more technical.

Some options and functionality have no reason to be different from the SMB user’s perspective, and it may create the impression of an oversight or snub. For instance, if they can use a great feature on the Residential side they may not understand why it isn’t offered for their business account. This results in a sense that their business account is given lower value,.

Detailed Content and Site Structure Findings

1. Too much content; too many clicks

From long blocks of copy on pages relevant to SMBs to outdated rebate information to entire sub-sections that are duplicated in other areas of the flat site, extraneous content makes completing both casual browsing and accomplishing the six core task a very time-consuming and too often unsuccessful effort.

2. A number of different types of content inconsistencies throughout the experience is disorienting and frustrating for customers

Several aesthetic and editorial factors affect users' ability to orient themselves, scan for what interests them, recognize what they need to pay attention to, and understand digital content with the emotional effect the content provider intends. Consistency is extremely important for ease of use and comprehension, especially for deep content sites like pge.com.

Ubiquitous inconsistencies in My Business include:

Page templates: Despite the fact that pages live on the same level in the For My Business section, pages toggle back and forth between topic, landing or article layout page templates, creating a confusing user experience. Several page templates are misapplied and so the page content is inappropriately prioritized in the layout.

Page-level copy formatting: Page titles, headings, and subheadings are used for some pages and not for others in the same sections. Copy length varies from one paragraph to long scrolling pages.

Copy tone and voice: Tone and voice are the brand experiences for the written word—they are how an organization distinguishes itself from others and contributes to the “personality” of an experience.

As well, it is an effective means by which a company builds rapport and trust with its customers. The copy in My Business lacks a single tone and voice, making the experience from one page to another disorienting and impersonal. SMB content employs a liberal use of the passive vs. active voice. As well, a formal, official voice is mixed in with a friendlier, accessible one, giving an unintended sense of importance or weight to some content pieces over others.

Actionable vs. non-actionable content: Users only read content if they think it is valuable to them, and that decision is made while scanning it, first. These two very different types of content are sometimes presented distinctly, and sometimes presented in the same manner. This makes it difficult to perform one of the most common web interactions: scanning a page for a desirable link to click or action to perform.

3. The overall site structure is organization-oriented, rather than user-oriented, impeding users' ability to find what they need

The current breakdown of Manage Account, Customer Service, Save Energy & Money, Environment, and Education and Safety are indicative of how PG&E sees its content, not necessarily how customers do. Customers primarily care about what is specific to themselves, and will not spend any more energy than is absolutely needed to learn your organizational view.

The current structure attempts to parse out content by user type with Business and Residential division, which are not granular enough to help customers get to the content that affects them.

Further categorization by topic in the section navigation seems a reasonable next step, but the common content gets duplicated in part or in entirety in both Business and Residential areas, and both

Detailed Content and Site Structure Findings, cont'd

of those contain content that is specific to neither, which further obfuscates their desired information, tools, and tasks.

4. Entire and partial subsections are duplicated in other areas of the flat site.

Rebates and Incentives content appears in multiple places in the Save Energy and Money section. Environment contains a lot of shared content between For My Home and For My Business, of which a great deal is not directly actionable for the Small and Medium Business customer.

5. Key information is difficult to find and is sometimes hidden below Level 3 or in PDFs

The over-abundance of content is only one of the reasons why key information is hard to find. Another is that the information itself, or links to it, are not surfaced at a high enough level to be easily accessible. Information hidden in PDFs is not searchable, so unless customers know the title of the document they need, they can rarely find it on their own.

A lot of sections have multiple pages forcing SMB customers to work hard to access key information. A number of sublevel pages linked in the body copy aren't surfaced in the left-hand nav. As well, landing pages don't provide valuable options, but instead stand in the way of customers and their solution.

Often, an SMB may not even be aware they need or would benefit from information or a tool on the site, and there are few upper-level or compelling links to it. For example, despite the clear directive to increase My Energy participation, the link to it on the My Business

section landing page is displayed without any context or benefit description.

6. There is no central repository for help content or FAQs

Help sections are a standard of self-service sites. Lacking one, the best option for SMBs is to go to Customer Service, where they are immediately given a phone number and instructions to the call center.

Likewise, FAQs are sprinkled throughout My Business with no single reference page. If a customer is lucky to stumble across an FAQ relevant to their need they may have difficulty finding it again.

7. Site search is largely ineffective

Repeated attempts at searching for information to help complete the core six activities were met with unhelpful results. For instance, search for "new service," returns the following three results at the top "Media Room News Releases," "High Performance Window Panes," and "Get Money Back on Home Appliances"—and all display "100%" relevance.

A search for "start service" returns the Start, Stop, Move page at the top, but with expectations for fuzzy logic search functionality set by Google, Bing, etc., users most likely do not expect to have to know the exact "PG&E-speak" search term to find what they need, and may not try to. All it takes is one unhelpful set of search results for a user to give up on it altogether.

Detailed Comparative Findings

1. No best-in-class web experience leader has emerged in the utilities sector

a) No competition

There is an enormous opportunity for PG&E to fill this gap in the marketplace. US utility companies tend to lack usability and ease of finding information for the customer. Most sites exhibit the same core problems PG&E currently faces:

- Sub-sites and pages were created in an ad-hoc fashion, making relevant content difficult to find.
- Sites lack focus on actionable items or value to the end user
- Content is often written in industry jargon that does not resonate with the target users; no one in this industry sector hits the “sweet spot” of specificity, clarity, and relevance to the user
- Publishing schedules do not appear to be well-coordinated with other marketing efforts, so key messaging opportunities are missed

Non-US utilities fared a bit better in some areas, but none of the providers we audited offered a complete solution for usability.

b) Little evidence of utilities embracing the overall business trend toward user experience

Most large utility companies’ digital offerings indicate that they have either not yet recognized or simply not addressed the need to holistically improve their customers’ online and mobile experiences in order to meet their internal organizational goals to reduce usage, increase energy efficiency, and increase participation in native and third-party savings programs.

c) Contained markets have hindered both provider and customer engagement and innovation

There is a notable lack of motivation for both energy providers and customers:

- Without comparable providers driving competition, utilities are not forced to continually refine and hone their offerings from the users’ perspectives to drive market share.
- Customers, without a choice of provider, do not bother re-evaluating their own needs or actively trying to find guidance for a “better deal”, like a better rate option, but rather simply assume that there is none to be found and use what they know. They avoid providing constructive feedback, thinking it will fall on deaf ears.

2. User expectations for current experiences are set by the other digital experiences in their personal and professional lives

INCREASING LEVELS OF SOPHISTICATED INTERACTIONS ACROSS ALL SECTORS

Users come across a wide variety of user experiences in a day, and their perceptions and expectations are not necessarily differentiated between personal and business tasks. Every satisfying experience sets the bar a little higher for the next one the user will have.

While not necessarily a conscious assessment, users can not help but at least subconsciously compare. Everything from their aesthetic impression, to their ease of wayfinding, to the time they have to wait between page loads. When a user has a successful interaction with a feature in one place—for instance, a helpful area with links relevant to their user type—they notice the lack of them in other places.

INCREASING USE OF MOBILE AND SOCIAL MEDIA

The digital experience is simply no longer limited to web sites or one-way communications like newsletters. The growing usage of

Detailed Comparative Findings, cont'd

tablets as primary digital devices and the ubiquity of smart phones means that users are becoming more demanding about mobile access. Businesses from car manufacturers to public transportation to movie theaters are actively accommodating a variety of mobile experiences through responsive design and mobile applications as they see users becoming less willing to divide their tasks between stationary and mobile. Greater commercial presence in social media has created strong outlets for content distribution and calls-to-action, but are also increasingly used for customer service and user feedback.

3) Deep-content sites which successfully guide multiple audiences use filtering options to narrow content offerings and user paths to relevant items only

4) More and more sites offer flat site experiences informed by cookies in order to guide users to key information and messaging

These related findings have two key implications:

SMB IS BECOMING A MORE ACTIVELY ACCOMMODATED TARGET GROUP ACROSS ALL SECTORS

SMB users, and their sub-segmented groups of small and medium users, each have specific tasks and needs which require some of the same and some different information and activities online. The digital experiences aimed at these groups are beginning to reflect the value they represent in the marketplace—Scottish Power, American Express' Small Business Saturday, and UPS are all strong

examples of this SMB-focused zeitgeist.

THE DEEP CONTENT ISSUE MUST BE ADDRESSED BY A VARIETY OF SOLUTIONS

While it is natural to start with thoughtful navigation and content categorization, they are only two of several approaches we can use to help users maneuver through large content sites.

You can also:

- Allow users to "favorite" or suggest they bookmark screens that are especially useful
- Offer downloadable versions of content you know will be useful away from a digital interface
- Offer flat-site dashboard experiences with cookies

When you have multiple target user groups with discrete content and interaction needs, you can avoid much confusion by allowing users to bypass content that is clearly not intended for them.

This is often successfully accomplished by the use of:

- Strategic landing pages which offer explicit areas for different user types, allowing users to begin their session
- Filtering options like self-identification upon first landing. If they identify as small business, focus the content offerings on small business content and activities while allowing them to browse the other content as a tertiary activity. These can be cookie'd to remember user site preferences.