

# The demand-side management customer journey for income-qualified customers: an E Source multi-client study

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We know utilities.

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# Agenda

- Overview
- Low-to-moderate (LMI) demand-side management (DSM) customer research
- Customer journey mapping
- The LMI DSM customer journey mapping multi-client study

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E Source provides **research, data science,** and **consulting** to utility companies across the US and Canada.

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# E Source market research



We gather and analyze feedback from electric and gas utilities and thousands of their customers every year. Our insights help utilities better understand and interact with their customers.

**Voice-of-the-customer (VOC)**

**Voice-of-the-utility (VOU)**

**Voice-of-the-employee (VOE)**

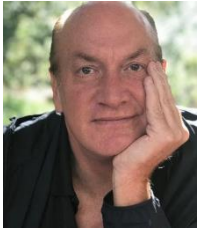
**Quantitative**

**Qualitative**

**Ethnographic**

**User experience and journey-mapping**

# E Source Team



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# Overview

# Background

Many utility customers struggle to pay their utility bills and increasingly rely on energy assistance. But assistance can be considered a “band-aid”: not solving the root causes of unaffordable energy consumption.

These customers can reduce their household energy use and costs through demand-side management (DSM) programs: home energy efficiency and weatherization upgrades that reduce energy consumption and costs.

However, the current customer experience around DSM program processes is often frustrating, time-consuming, and costly for customers, utilities, and their partners.

# Why now?

We must optimize this process to enhance customer experience and improve DSM program performance. We believe there is a clear business case, regulatory driver, and customer need to get this process right.

E Source is launching a new multi-client study that aims to help utilities understand and improve the DSM customer journey and create stronger outcomes for all stakeholders.

Let's explore how you can participate in, and benefit from, this multi-client study.



# LMI DSM customer research

# Energy burden and insecurity

- **Over 60%** of low-income households in the U.S. face high energy burdens, with some paying **more than 20%** of income on utility bills.<sup>1</sup>
- **27% of all households** report energy insecurity.<sup>1</sup>
- **Over half** of LMI customers struggle to pay electric bills; **nearly one-third** face disconnection or utility debt.<sup>2</sup>

1 [Energy Efficiency Impact Report](#)

2 [LMI customer perspectives: Findings from the LIEIF DSM survey](#) (E Source)

# Utility affordability solutions are lagging

- **80% of LMI customers** want to learn how to reduce their utility bills, but **over half** don't participate in assistance programs.<sup>1</sup>
- **Millions of eligible households** receive no assistance; most states have less than 20% LIHEAP participation.<sup>2</sup>
- Demand-side management (DSM) programs for LMI customers are reaching **5% of households** that need assistance.<sup>3</sup>

1 [LMI customer perspectives: Findings from the LIEIF DSM survey](#) (E Source)

2 [Rocky Mountain Institute](#)

3 [American Council for an Energy-Efficient Economy \(ACEEE\)](#)

# LMI DSM customer survey findings

- **One third** of LMI customers surveyed are **not aware of energy savings programs**, with awareness increasing as household income increases.
- LMI customers surveyed are **most likely to trust their energy utility**, and to a lesser extent, their friends/family/coworkers for this type of information.
- **Half of LMI customers** surveyed **do not know how to apply** for an energy savings program from their utility company.
- **One third of LMI customers** surveyed **don't know if they would be eligible** to participate in an energy savings program. The **oldest** customers are significantly more likely to feel they are **not eligible**.

From E Source survey research, conducted via the internet among 1,014 customers with household incomes of less than \$50k from February 7-10, 2025.

# Customer journey mapping

# What's customer journey mapping?

## Current-state journey mapping

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Current-state journey mapping reveals what customers are going through during an interaction with the utility or its partners.

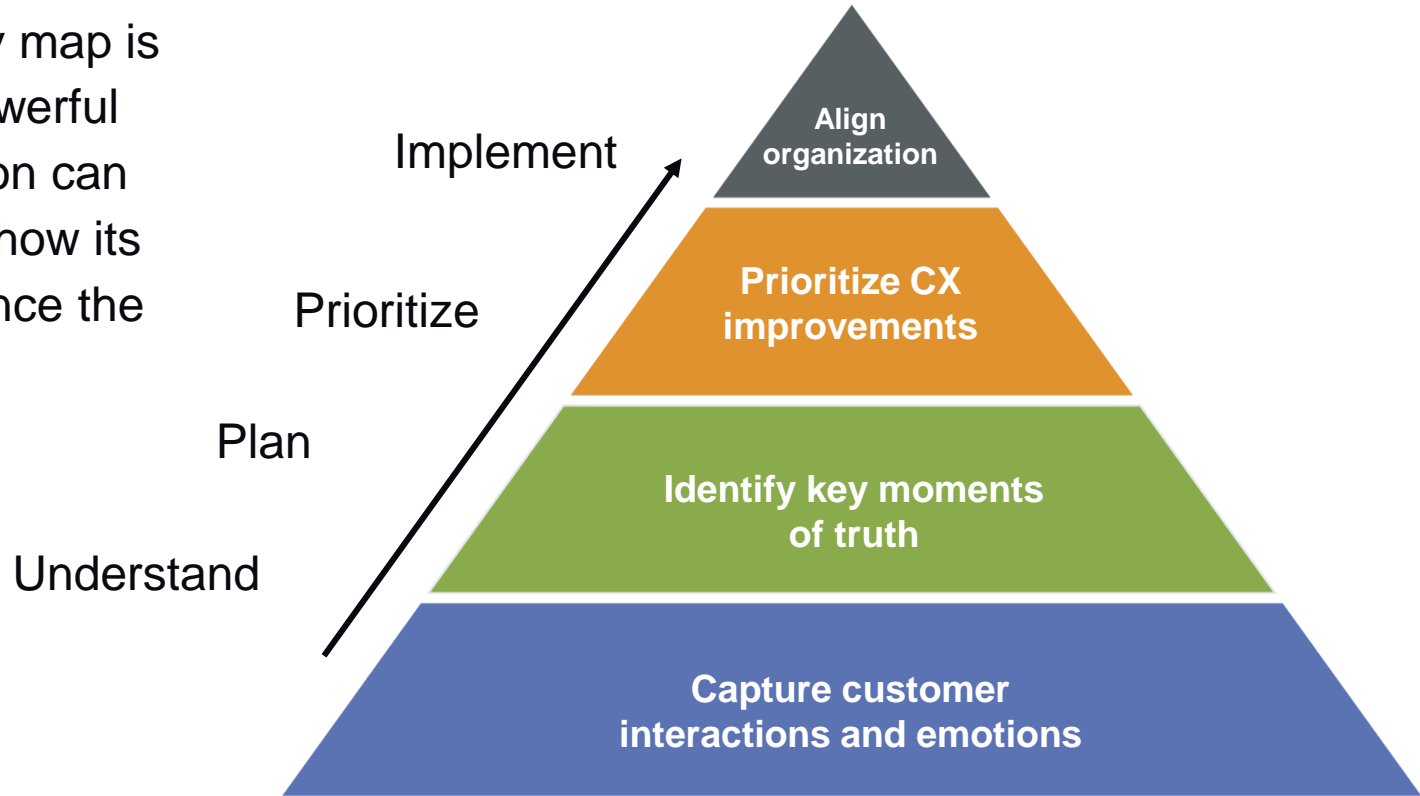
## Future-state journey mapping

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Future-state journey mapping establishes what the ideal experience could be.

# Why do this?

A customer journey map is one of the most powerful tools an organization can use to understand how its customers experience the organization.



# Purpose for customer journey mapping

**E Source wants to help utilities understand what their customers think and feel during utility interactions. We are planning to:**

- Conduct discovery interviews with utility, agency partners, 3<sup>rd</sup> party program implementers, and contractors to understand the current state.
- Hear direct feedback from utility customers who enroll in DSM programs and take a critical look at program processes from a customer's perspective.
- Identify key points in an income-qualified DSM customer journey and common elements of the current customer experience when accessing DSM programs.
- Inform utility teams with a shared vision for the customer journey and prepare a process improvement roadmap.



# Inexperienced LMI Assistance Journey



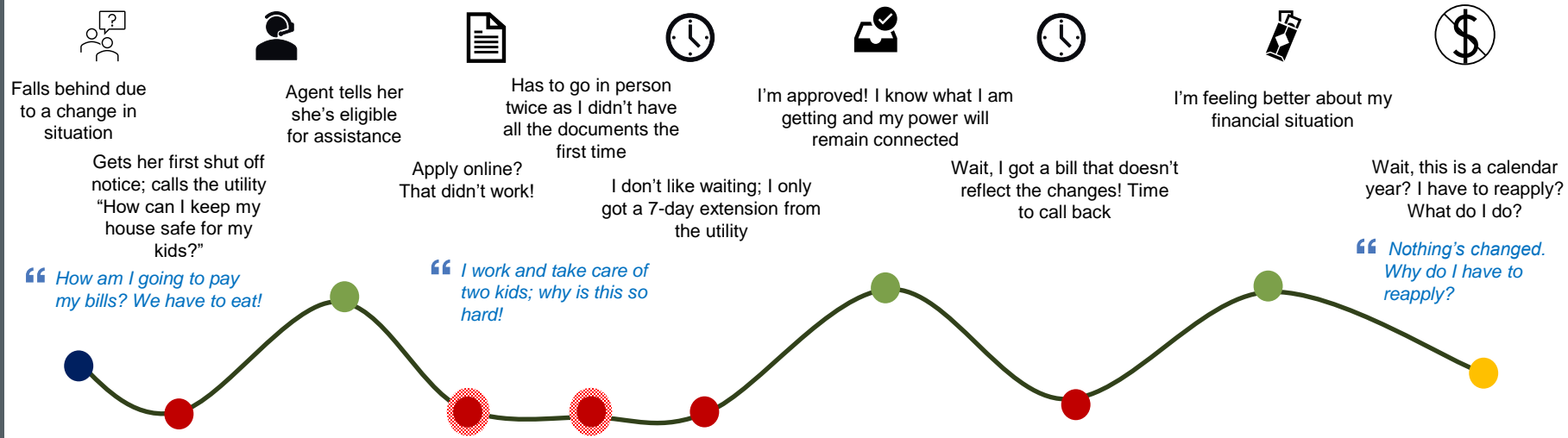
- Brenda
- Age: 36
- Busy, considerate, practical, straightforward

My biggest frustration was that I just didn't know what my next step was going to be.

Brenda has never applied for assistance before; her shut off triggers her trying to navigate a complex set of assistance programs



Inexperienced LMI Assistance Journey



<b>FEELING ANXIOUS AND STRESSED</b>	<b>FEELING ANXIOUS AND FRUSTRATED</b>	<b>FEELING RELIEF AND CONFUSION</b>	<b>FEELING GRATEFUL YET CONCERNED</b>
<ul style="list-style-type: none"> <li>• Inexperienced customers are often triggered by sudden changes (medical, repair, job change, etc.)</li> </ul>	<ul style="list-style-type: none"> <li>• Verification for assistance takes time and potentially money as customers have to take time away from work to provide all of their information</li> </ul>	<ul style="list-style-type: none"> <li>• Receiving the approval notice sometimes conflicts with billing dates; when a customer doesn't know their status, they call back to the utility!</li> </ul>	<ul style="list-style-type: none"> <li>• Depending on when the customer applies for assistance, they may need to reapply immediately; Brenda didn't know what she was supposed to do</li> </ul>

# Who would benefit from LMI DSM customer journey mapping?

- DSM program leads looking to hit performance targets and enhance program design to ensure more LMI benefits and enrollments
- LMI customer experience (CX) leads working on customer journey mapping
- LMI/affordability-focused portfolio managers looking to deliver more LMI benefits and better integrate affordability offerings
- Resource analysts focused on integrated resource planning (IRPs), strategic decisions affecting capital budgets, and resource adequacy

# Why customers would benefit from LMI DSM customer journey mapping

- Better customer experience throughout the DSM process
- Managing affordability over the long term by reducing energy consumption and costs
- Improved health, safety, and comfort through home upgrades
- Less frustration around the DSM program intake process
- Connecting the right customers to the right DSM programs

# Unique considerations around LMI DSM customer journeys

- Energy/monetary savings and health, safety, and comfort benefits
- Renting vs. homeownership customers
- Long lag time of whole home assessments
- Many stakeholders: customers, utilities, 3<sup>rd</sup>-party program implementers, state and local agencies, contractors
- Many energy efficiency interventions, technologies, and program types

# Poll: How interested are you in LMI customer journey mapping around DSM?

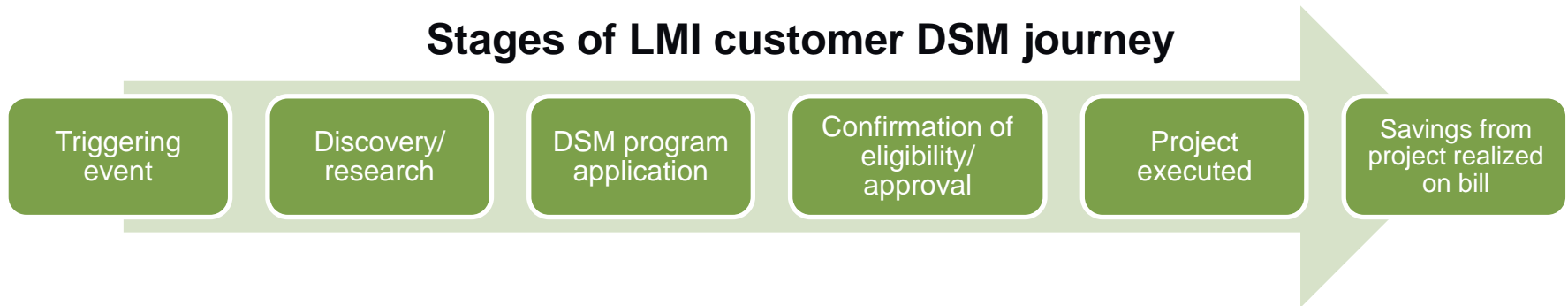
- Very interested
- Somewhat interested
- Indifferent
- Uninterested
- Not at all interested

# The LMI DSM customer journey mapping multi- client study

# Research objectives

- Utilities and 3<sup>rd</sup> party program implementers want to better understand how LMI customers work with utility employees, agency partners, program implementers, and contractors to implement DSM projects.
- The focus of the research will be on the customer experience around applying for and completing DSM projects through these actors.
- The goal is to create stronger outcomes for all these stakeholders.

## Stages of LMI customer DSM journey



# Building from a research foundation

**The sponsors of the 2025 multi-client study will have access to:**

- ✓ Prior customer journey maps on LMI CX
- ✓ Materials and recommendations from customer journey mapping of energy assistance
- ✓ Hypothetical mapping and recommendations focused on DSM from CX leadership council
- ✓ Recent LMI customer survey findings



# 2025 LMI DSM customer journey mapping

We will be conducting LMI customer journey mapping to improve awareness and enrollments in DSM programs.

The research will be conducted from **Q2 to Q4 2025**.

1

Discovery

2

Customer  
immersion

3

Action

# Our process

<b>Discovery</b> Uncovering what stakeholders know today about LMI DSM journey	<b>Customer Immersion</b> Survey and ethnographic research with customers seeking DSM	<b>Action</b> Action planning and mapping to improve the journey
<ul style="list-style-type: none"><li>• Kickoff</li><li>• Foundational research</li><li>• LMI-DSM evaluation scan</li><li>• Stakeholder interviews of employees, agency partners, 3<sup>rd</sup> party program implementers and contractors</li></ul>	<ul style="list-style-type: none"><li>• Short pulse survey</li><li>• Mobile ethnographic research</li><li>• Mobile in-depth interviews</li></ul>	<ul style="list-style-type: none"><li>• Detailed customer journey maps for different personas</li><li>• Action planning workshop</li><li>• Final report</li><li>• Focus groups</li><li>• Video and narrative</li></ul>

# Research methodology details

- Research

- Existing foundational research
- Interviews with utility employees, agency partners, 3<sup>rd</sup> party program implementers, and contractors
- Customer pulse survey
- Mobile ethnographic customer research
- Mobile in-depth customer interviews

- Sponsor participation

- Identify utility employees, agency partners, 3<sup>rd</sup> party program implementers, and contractors for stakeholder interviews
- Stakeholder participation in interviews
- Customer list (for those choosing the full research package)



# General participation – without service

## territory-specific market research: \$25,000

- **Foundational materials:** prior LMI CX research, customer journey maps and recommendations
- **Current landscape review:** presentation deck and webinar
- **Summary of stakeholder interviews:** spreadsheet and summary
- **Pulse survey findings:** survey report, findings and tabs
- **Ethnographic Research:** summary and findings
- **Customer interviews:** summary and findings
- **Customer journey maps**
- **Design workshop**
- **Focus groups:** test new ideas and concepts
- **Final report:** presentation and webinar

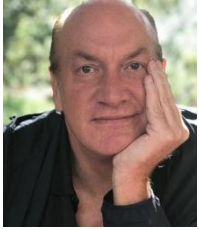
# Full participation – with service territory-specific market research: \$40,000

- All general participation level deliverables **PLUS:**
- **Custom ethnographic research:** detailed findings and data
- **Custom interviews:** detailed findings and transcripts
- **Comparative analysis:** custom vs general
- **Custom report:** individual utility or vendor report and readout

# Next steps

- Distribute prospectus
- Outreach to gauge interest
- Scheduling calls with interested utilities and vendors
- Kickoff in June 2025

# For more information and next steps



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