# 8 Best Practices for Implementing a Water Utility Customer Portal

## How to create a successful customer portal that engages, informs, and serves

**AquaHawk**
**ALERTING!**

It was a particularly cold week in the northwest mountains of Colorado, with temperatures dropping well below freezing. Two and a half feet of snow had blanketed the City of Steamboat Springs over the last couple weeks. Many of the homes in the City are used as vacation rentals so it wasn't uncommon for them to be vacant periodically.

Leaks and burst pipes were a regular occurrence in this resort town. So much so that one of the local water providers decided to launch a customer portal with leak detection and notification capabilities. Their goals included:

- Enable customers to see their water usage anytime
- Identify potential leaks faster
- Alert customers quickly
- Minimize unnecessary water losses.

The water utility had already installed a fixed base Advanced Metering Infrastructure (AMI) system that could record daily meter reads remotely. But customers had no visibility into their own usage except after they received their monthly water bills.

The portal would improve this situation by enabling customers to access and benefit from data and information in the AMI system. Customers would be able to login to a password-protected website, view their water consumption, see an estimate of their bill, set usage thresholds and more.

An analytics engine built into the portal evaluates water usage data looking for patterns that indicate water leaks or abnormal usage. When an issue is detected, the utility can alert customers by phone call, text, or e-mail using the system's notification capabilities.

During the cold spell, the utility's customer service team identified a property that had high water usage. A support representative called the customer only to learn he was traveling and not at his home. He asked his cleaning service to check out the situation. A
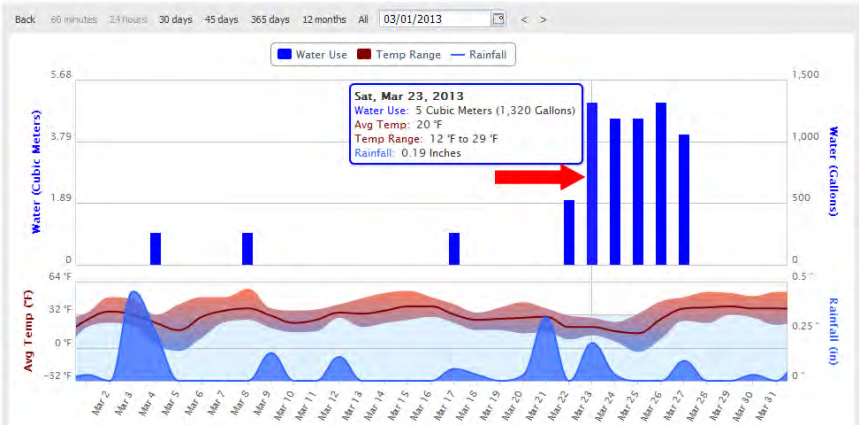
housekeeper walked around the home looking for signs of leaks and checking for running toilets. She didn't find anything and reported as much.

The next day, the customer service team flagged the property again for high consumption. They made a second call. This time the homeowner asked his maintenance man to investigate. He verified that there wasn't any water being used inside the home, but he did inspect the water meter and saw that it was recording usage.

A thorough check outside the house revealed something almost unbelievable. A hose bib on the side of the home had a large crack in it. Apparently, a heavy icicle had fallen from the roof and hit the pipe just right.

Because snow had piled up against the house, the hose bib damage and the resulting leak were concealed from view. In a couple days, nearly 7,000 gallons of water drained to the ground.

Without notification from the water provider, the leak probably would have run for days/weeks unnoticed. Until, of course, the owner received one memorable bill.

Customer portal software is an emerging technology for water utilities. Commonly referred to as consumer engagement, customer engagement, or Web presentment solutions, these systems are already widely used by gas and electric providers because they offer tools to help customers manage their utility usage, control costs, and conserve.

Water utilities are realizing that portal solutions can:

- Improve customer service
- Enable customers to answer their own questions and thereby reduce call center traffic
- Minimize high bill surprises and complaints
- Prevent unnecessary resource loss
- Enhance customer communications.

By helping clients manage their water consumption and notifying them when leaks may be occurring, water providers can deliver a better customer experience. In addition, these systems have a direct and positive impact on improving operational efficiencies and generating cost savings.

As with any new technology, there are proven best practices that will help a utility leverage these solutions effectively and achieve the desired results.

# 8 Best Practices for Water Utility Customer Portals

## 1. Plan your Portal Project

Time spent planning your customer portal project will pay valuable dividends over the long run. The more specific your organization is about why you're launching a portal and what you intend to accomplish, the more likely you are to succeed.

Answering the following questions will help:

1. What are our top three objectives for launching a customer portal? Examples:

   - Allow customers to use the consumption data collected by the AMI/AMR system

   - Enable customers to answer their own billing/usage questions

   - Reduce customer service calls

   - Eliminate leak forgiveness expenses

   - Reduce wasted water caused by leaks

   - Use water more efficiently and lower gallons per capita per day (GPCD).

2. What information do our customers want and need?

   - Consumption information

   - Billing data

   - Tips for conserving

   - Leak notifications and high bill alerts

   - Views showing how their usage compares to price tiers, budget allocations, and/or similar consumers.

3. When customers visit the portal, what actions do we want them to take?

   - Provide their e-mail address and up-to-date contact information

   - Subscribe to our notification service

   - Enroll in electronic billing

   - Pay their bills online.

## 2. Link Siloed Data & Services

It's likely that customers will want access to data that are "scattered" around your enterprise. Consumption data (recorded by the meter data management system (MDMS)), billing and payment information (stored in the accounting/Customer Information System (CIS)), online payment services, weather data, and more, are usually located on separate websites, databases or in assorted electronic files.

Portal solutions are designed to pull together online services and data from multiple sources and sensibly organize them. From the customer's perspective, however, information appears to come from a single system.

Keep these things in mind when planning how data should flow:

1. What systems/applications do we want to connect to?

2. How will data be transferred between the portal and other applications?
   - Web services, XML, import/export, other?

3. Can the data transfer processes be automated?

4. How frequently do data need to be exchanged?

5. If linking to other systems that require authentication – e.g. online payment services – how do we make the connection process invisible to customers?
   - Single sign-on, etc.
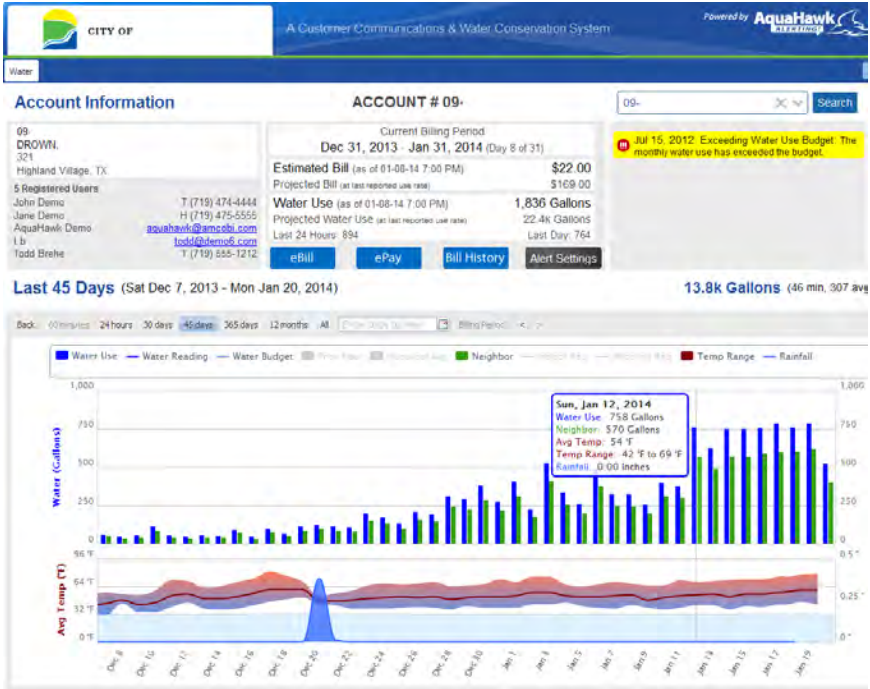
## 3. Present Actionable Information…not just Data

Slapping up a website with daily usage values and a simple bar chart does not a portal make. You want to bridge the gap between presenting meter data and providing actionable information that people can actually use.

This requires putting data into context. For example, many of your customers may not be concerned about the differ-

ence between 5,000 and 15,000 gallons of water. But they'll definitely understand when you show them how much that extra 10,000 gallons of water costs.

Customers may not realize they're overwatering their landscapes. If you show them, however, when it's happening and how they can reduce the length of time (or frequency) they irrigate – without affecting the health or appearance of their lawns – they'll probably be interested in those savings.

Here are some ideas to keep in mind when figuring out how to present information to customers:

1. Instead of just showing customers a date/time stamped usage graph, put data into context so that they're immediately understandable. Show customers:

   - The cost of the water they're using

   - Tools to compare their consumption to previous time periods, water budgets, rainfall, temperature, etc.

   - How their usage compares to similar users

   - How they can be more water efficient and what they would save in $ if they do so

   - How their usage compares to actual billing periods and billed amounts.

2. Enable customers to access various online services from within the portal

   - If you offer an online payment service, make it easy for them to link to that site

   - Allow customers to register for electronic billing.

3. Keep the information on your portal dynamic by updating it frequently

4. Your portal should be easy to navigate and use.

   - Remember you'll be servicing customers (ages 18-80) with varying degrees of technical ability

5. Allow customers to access multiple accounts from a single login

6. Show consumption data by meter(s) and by account

   - If multiple meters are associated with a single account, the account view should display the sum of all meter usage.

7. Show rebate and conservation programs that customers are eligible for

8. Keep a history of alerts, notifications, and other communications that customers can review

9. Enable customers to easily communicate with your team.

## 4. Mobile-friendly is a Must

Ensuring that features and information available on your customer portal are easily accessible via mobile devices – smartphones, iPads, and other tablets – is mandatory. Asymco, a consulting and statistical analysis firm, estimates that there are 140+ million people using smartphones in the U.S. That number is expected to reach 280 million by 2020.

Your portal should accommodate different sized displays. How information is presented on a large desktop monitor, is significantly different than what can be included on a cell phone screen.



This doesn't mean that your portal has to offer an iPhone or Android "app." A mobile-browser-friendly view is sufficient. When customers access your portal, most systems can detect the type of device being used and then route users to the appropriate display.

## 5. Proactive Communication Encourages Interaction

If you want customers to subscribe and use your portal, present relevant, useful, and timely content that they're interested in. In addition, communicate proactively to "remind them" about useful tools and functions that are available.

Leak detection and notification is a prime example. Many customers will subscribe to a utility's portal simply to be alerted if their water usage indicates a leak. These customers don't care to review their usage, see water efficiency suggestions, etc. They'll use the portal and its alerting capabilities as a form of low-cost "property insurance."

Even though these customers don't use all portal capabilities, they've provided current contact information. Utilities can use this information for a variety of new and unique communications applications.

Some ideas to keep in mind:

1.  Communicate proactively
    - "If you build it, they will come" does not apply to this type of technology. There are simply too

many competing online services and activities available

- Take the initiative and reach out to customers by sending e-mail, text, or making automated calls

- Allow customers to choose how they want to be contacted

- Allow customers to control the frequency of communications and even request not to be contacted.

2. Deliver new or time-sensitive information

- Send notices when your utility will be performing maintenance in a specific neighborhood, in advance, so customers can make accommodations

- Send public service announcements such as main break alerts, drinking water contamination notices, boil orders, etc.

## 6. A Quiet Portal Launch is Recommended

We always recommend an "off-Broadway," soft launch to introduce your customer portal. Identify a small group of employee-customers, board members, or other users, and encourage them to complete the enrollment process and provide feedback. Keep in mind:

1. The registration process should be simple

2. Information in the portal should be immediately understandable, intuitive, and user-friendly

3. Offer online documentation, user-guides, instructional videos, or context-sensitive help so users can get assistance when they need it

4. Provide a list of Frequently Asked Questions (FAQs)

5. Use the trial group's feedback to compile a list of fixes and/or enhancements to be made and prioritize them.

## 7. To Create Interest, Actively Market your Portal

When you're ready to introduce the portal to your customers, here are some ways to announce the offering and create buzz:

1. Market and communicate the portal service through multiple mediums:

   - Add information to your website, Facebook or LinkedIn pages, Twitter feed, etc.

   - Include bill inserts or highlight the program in your newsletter

   - Contact local media and send them a press release

   - Encourage local news affiliates to do a feature on the new service

   - Offer group training sessions for HOA, property management, commercial, or other groups that represent multiple customers.

2. Highlight the customer benefits of registering, e.g.:

   - Get a better understanding of how you're using water

   - Lower your water expenses

- Prevent property damage

- Learn ways to be more water efficient.

3. Make registration a prerequisite for leak forgiveness

4. Encourage support staff to tell customers about the service and even subscribe them when they call in for assistance.



## 8. Commit to the Ongoing Process of Enrolling Customers

Encouraging customers to register for your portal is an ongoing process…not an event. If your customer base is large, it will take consistent messaging over an extended period of time to inform customers that the portal service is available and to achieve high subscription rates.

Remember that with every subscriber, you're building a valuable asset. The long term communications capabilities of a customer portal are just now being discovered. For example, in the near future, you'll be able select a group of accounts in a geographic area, notify them that you're conducting fire hydrant flushes, and suggest that they postpone clothes washing for 1-2 days. You could even offer reverse 911 notification capabilities for emergency events.

## Summary

Customer portal solutions have the ability to transform the utility - customer relationship in numerous and positive ways. They enable customers to answer their own questions and manage their water use independently–without calling your customer service team.

They inform customers when leaks or other property-damaging and costly situations may be happening. They help shift the customer's perception from "my utility just sends me a bill every month" to "my utility actively works in my best interest."

Portals can deliver valuable public relations benefits that can be achieved by implementing the best practices outlined in this document. There really is no time like the present to start to take advantage of this technology. Best of luck!

# Glossary

Advanced Metering Infrastructure (AMI) - a meter reading system that records data, usually hourly, and communicates that information remotely, back to the water utility for billing and monitoring purposes, one or more times per day.

Analytics - Analytics offers the ability to analyze large datasets, identify meaningful patterns or trends, and then use that evaluation for some purpose. For water utilities, analyzing water consumption data involves incorporating software programs and mathematical algorithms to determine when a customer may be experiencing a leak, suffering abnormally high water usage, or exceeding price or usage thresholds.

These sophisticated analyses enable water providers to draw meaningful conclusions from a sea of data and then take action.

Automated Meter Reading (AMR) - a meter reading system that can be read using a handheld or mobile drive-by device, that doesn't require the operator to actually view the meter. AMR systems are usually read one time per month.

## About AmCoBi

AmCoBi develops a vendor-neutral, platform-independent customer portal solution for water utilities called **AquaHawk Alerting**. This application helps providers:

- Expand online services

- Improve customer engagement and promote self-service

- Reduce wasted water.

By presenting useful information and actionable guidance, utilities can assist customers in using water more intelligently. AquaHawk is helping water providers build stronger customer relationships and deliver a better customer experience.

To learn more, visit our website at: www.AquaHawkAlerting.com.



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