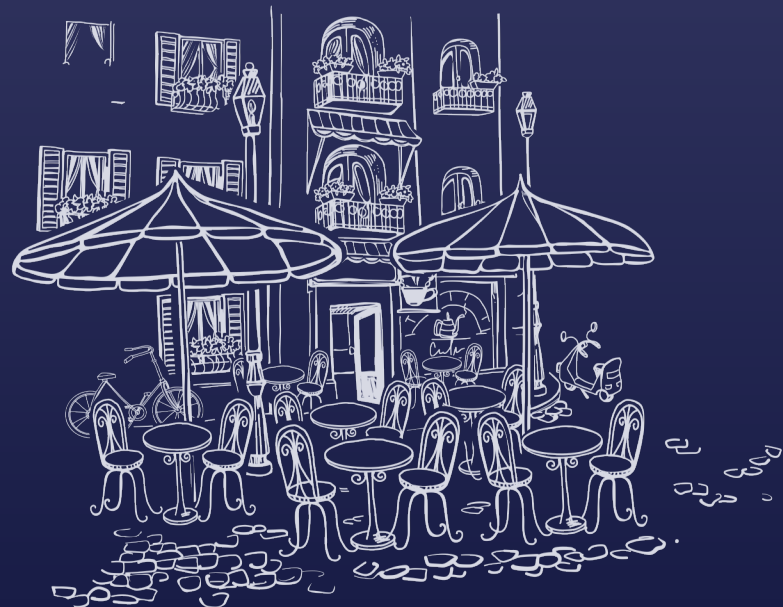


Let's Talk UX Round-Table Event

November 6-7, 2019 | CAL CCA Conference Redondo

By Julietta Musica, UX Research & Design



WHO?

The Calpine Energy Solutions UX department conducted an off-site usability session with attendees from the annual Cal CCA conference.

WHAT?

Two laptops, one pen and paper, three tables, 3 topics, and 5-8 questions for participants per table.

HOW?

A test administrator and observer were assigned to each of the three tables.

WHY?

The session captured participants' sentiments, comments, and feedback.



Purpose

The purpose of the round-table UX event was to encourage our users to engage in a fun activity, to help get to know them better, and to provide a platform for them to be heard. We wanted to:

- **determine** if users' needs are being met with the products and services Calpine Energy Solutions provides.
- **identify** areas within our products and services that may be frustrating, difficult, or meeting needs.
- **gain insights** into users' expectations of the product and services Calpine Energy Solutions provides.



Methodology

- **Participants** were recruited via email announcements prior to event and personal invitations made by members of the client services team at the conference.
- The **event** was open to all attendees of the event, but what we were **most interested in** included:
 - the opinions of Calpine Energy Solutions CCA clients.
 - products & services usage among our clients.
- Participants were given:
 - a **\$5 Starbucks gift card** for participating.
 - **5-8 specific questions** based on the tables' topic to answer.
 - a **raffle ticket** for every table they visit with a chance to win a prize from the drawing.
- Each session lasted approximately **5-minutes**.



Findings

We learned that users want (more):

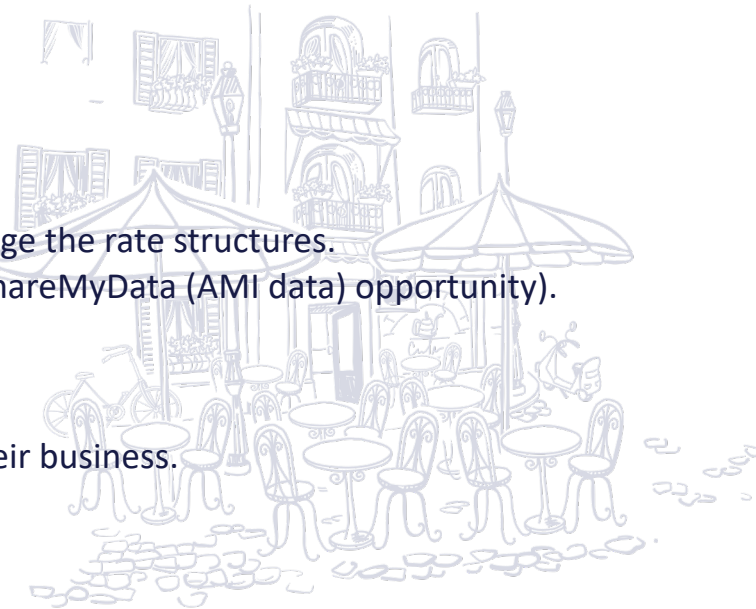
- Access, control, convenience, and customization, which includes:
 - Customizable dashboards for each department within a CCA.
 - Reports specific to needs.
 - Self-service option.
 - Single Sign On – one password to access all our products.

The event identified consistent issues among CCA, which include:

- Customers receiving the wrong information/data from what they originally requested.
- The lack of follow-up questions to CCA's requests.
- Long wait periods to receive requested data.
- Bulk data that then requires them to scrub and sort through the data.

Opportunities in which we identified:

- Monterey Bay Clean Energy
 - is currently doing uncoupled rate structure and wants an in-house data manager to manage the rate structures.
 - Is using energy points (aka: scada data) and the information they receive isn't reliable. (ShareMyData (AMI data) opportunity).
- South Bay Clean Power
 - is lacking technical know-how and resources.
 - have expressed having performance reporting in access database would be helpful for their business.



Findings for Topic 1: Know Your Customer (KYC)

Of the 20 participants, **13** (65%) participated in table/topic #1 questions.

When asked:

1. Do you use a PC or Mac?

PC 55%
MAC 10%

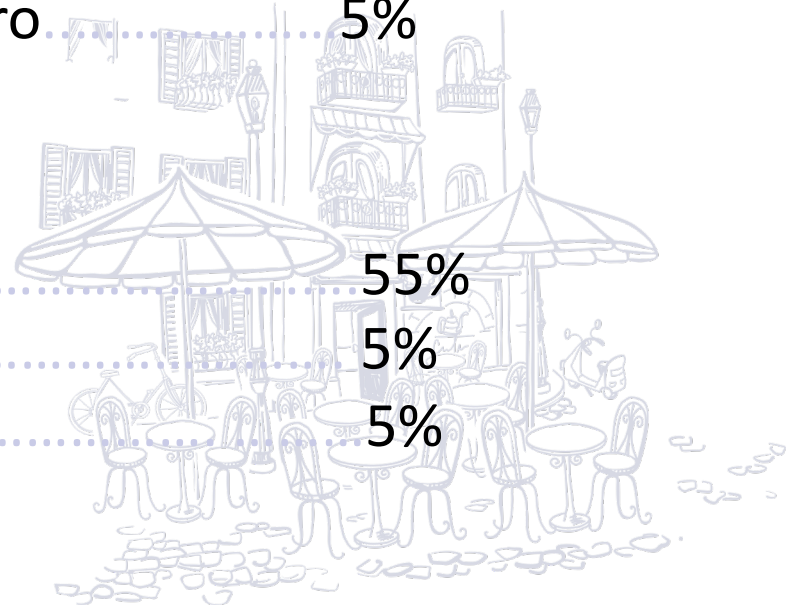
2. What kind of device do you use when using the application?

Desktop* 65%
Service Pro 5%

3. What browser do you most often use to view the application?

Chrome 55%
Firefox 5%
IE 5%

*Percentages based on the total amount of products used per participants. Note: most use multiple products and devices.



Findings for Topic 1: KYC cont.

4. How is the overall performance of the application?

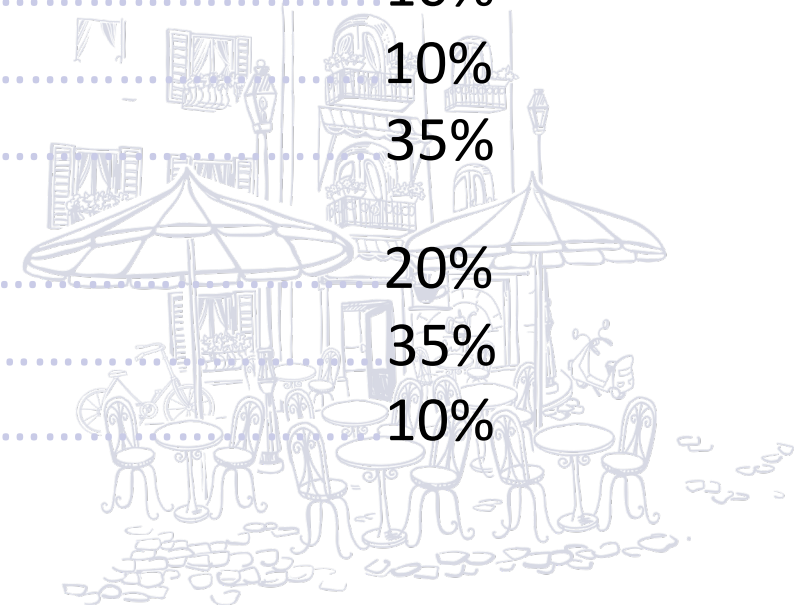
Very Good.....	10%
Good.....	20%
Not Good.....	10%
N/A.....	25%

5. How is the general load time on data?

Fast.....	10%
Normal.....	10%
Slow.....	10%
N/A.....	35%

6. Do you view the application in multiple locations?

Yes.....	20%
No.....	35%
N/A.....	10%



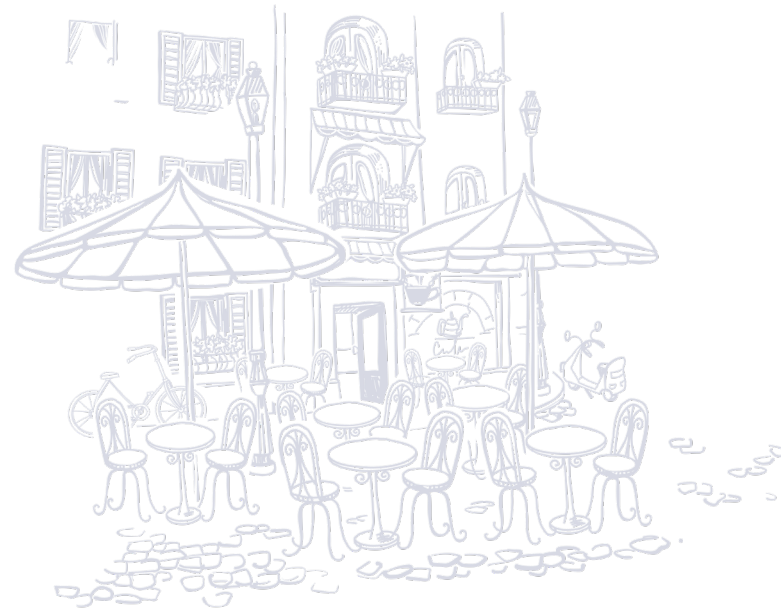
Findings for Topic 2: About Our Products & Service

13 (65%) conference members participated in the table/topic #2 questions.

Of the 13 participants:

45% (9) were Calpine clients and were able to provide feedback on our products and services.

20% (4) were non-Calpine clients and were able to share with us the products they do use and like.



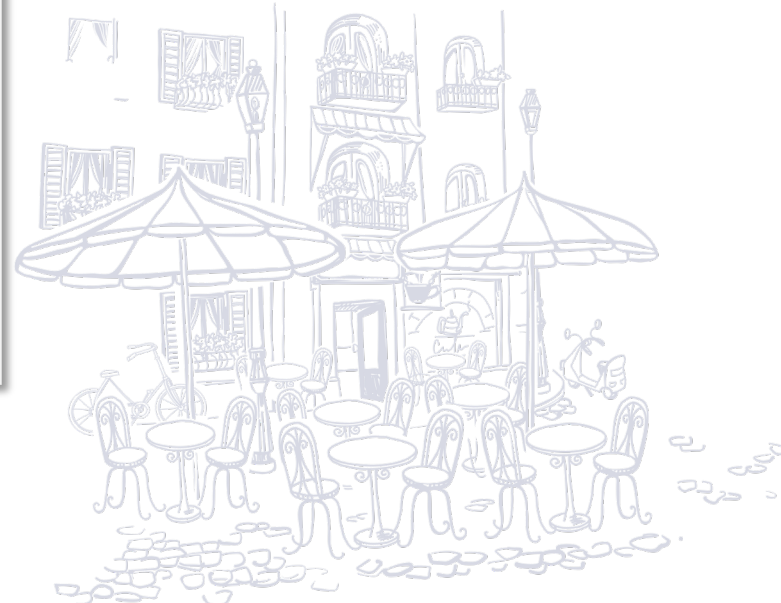
Findings for Topic 2: About Our Products & Service cont.

When asked:

1. What Calpine products or services do you use?

CRM	45%
SFTP	15%
JIRA	10%
Power BI	10%
N/A	10%

Note: Percentages based on the total amount of products used per participants.
Note: most use multiple products.



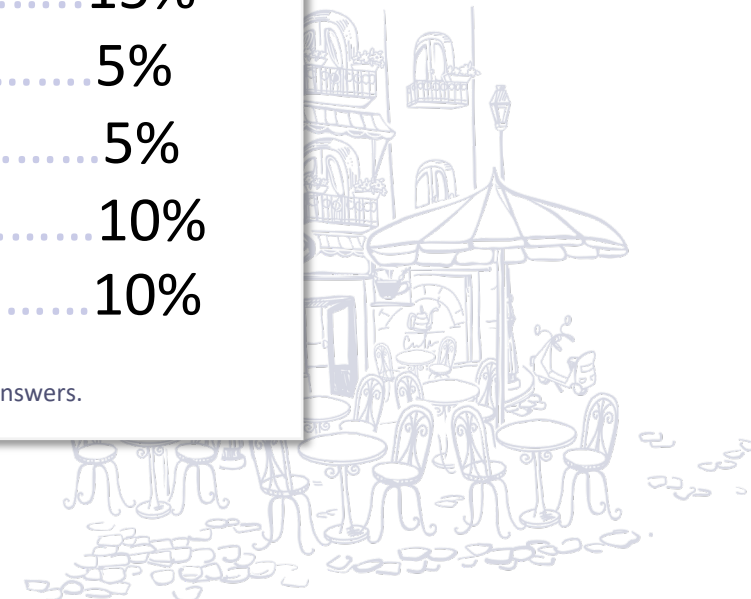
Findings for Topic 2: About Our Products & Service cont.

When asked:

2. Is there a new product or feature within our applications or services that would make your job easier? And why?

SSO.....	10%
Customizable Dashboard	15%
Cost Comparison Tool.....	5%
Vin and Census Tract w/in CRM.....	5%
An Improved CRM Search Feature.....	10%
Self-service Options.....	10%

Note: Percentages based on the total amount of products and features per participants. Note: most had multiple answers.



Findings for Topic 2: About Our Products & Service cont.

2. ...And why?

- **SSO (10%)**

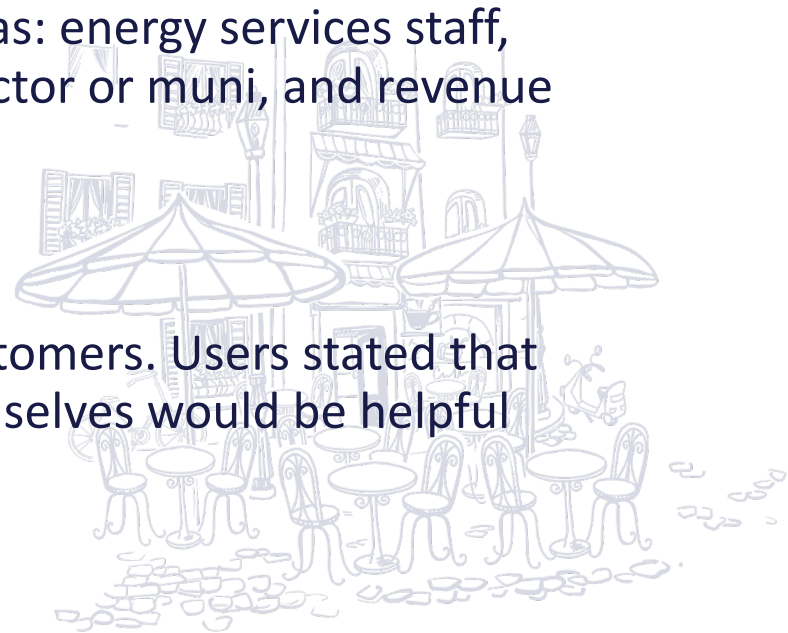
Users expressed frustration in using multiple passwords and would prefer one password for all Calpine products.

- **Customizable Dashboard (15%)**

Users would like to have dashboards for multiple use cases, such as: energy services staff, customer care staff, rates and finance staff. And, usage data by sector or muni, and revenue position.

- **Cost Comparison Tool (5%)**

According to our users, it is the #1 question they get from the customers. Users stated that having a tool where the customers could do the comparison themselves would be helpful because it would maximize trust.



Findings for Topic 2: About Our Products & Service cont.

2. ...And why?

- **Vin (Vehicle Identification Number) and Census Tract w/in CRM (5%)**

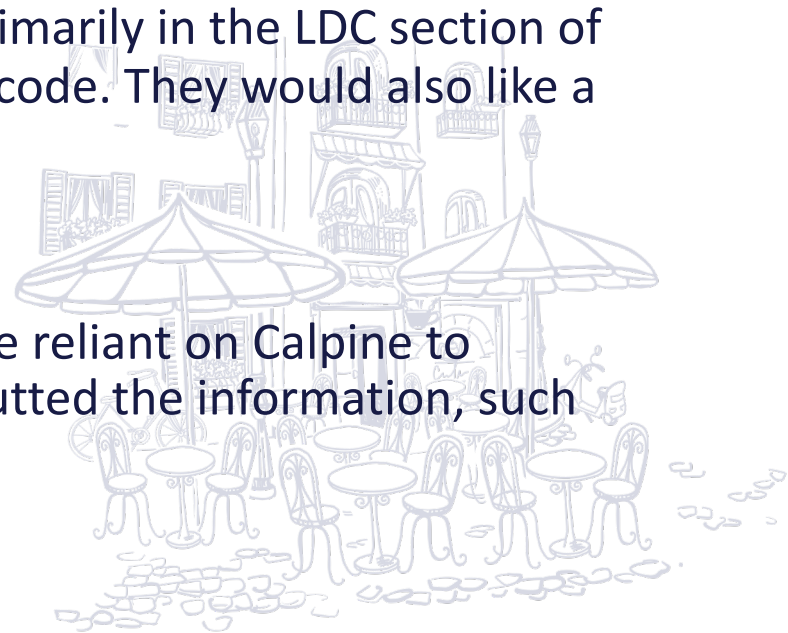
User say they would like a feature that Integrates vin and census tract to CRM. And, to have data for Low Carbon Fuel Standard reports.

- **An Improved CRM Search Feature (10%)**

User say they would like to see better search tool functionality, primarily in the LDC section of CRM. And, a feature that would allow them to search by area/zip code. They would also like a grouping tool to identify groups of people.

- **Self-service Options (10%)**

User say they would like to use CRM in greater capacity and not be reliant on Calpine to complete tasks. They would like to be able to distinguish who inputted the information, such as: CSRs input vs. staff @ CCA.



Findings for Topic 2: About Our Products & Service cont.

3. Tell us 3 things you like about our **products** and services? *Intuitive*

Fairly confident billing...Errors aren't from Calpine.

1. Captures customer needs (specifically reporting & continued blue bill interface).

2. Convenient, easy to access, and available information, history, and blue bills.

3. Self-service option.

Makes life easier

Love the responsive iframes!

useful tools



Findings for Topic 2: About Our Products & Service cont.

3. Tell us 3 things you like about our products and **services**?

Friendly...Knowledgeable...Reliable

1. High on the spectrum of customer satisfaction.

Professional

2. CSR training on software and processes.

Responsive to our request

3. Trustworthy company.

Acts in good faith.

Calpine is a fun group!

Staff is great!



Findings for Topic 2: About Our Products & Service cont.

4. Tell us what features you would change within our current product and services and why?
 - Single Sign On: one platform, one password, and one URL to access all products.
 - More communication
 - More onsite coordination and collaboration.
 - Improve on defining the problem before trying to solve the request.
 - Improvement on CRM reporting and search functionality.
 - Integrate Cost Comparison Tool.
 - Add Interval Usage.



Findings for Topic 3: Data Specific

Of the 20 participants, **11** (55%) participated in the table/topic #3 questions.

When asked:

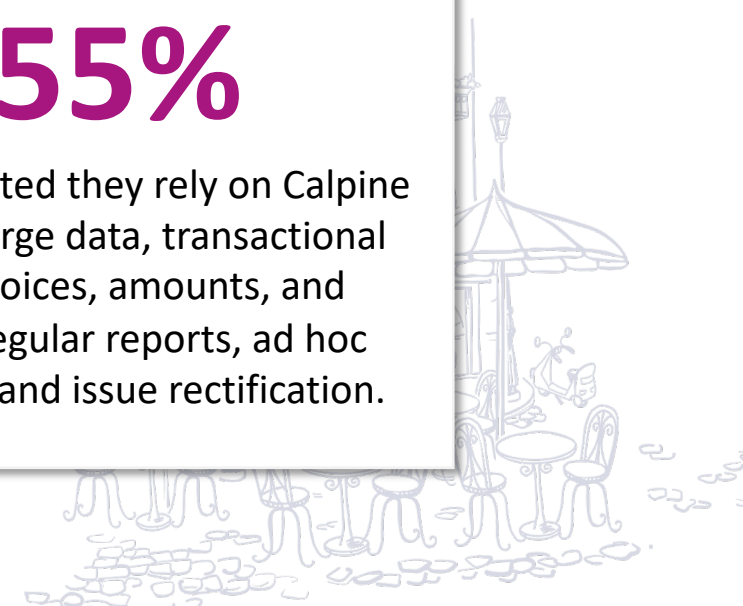
1. Do you rely on Calpine for data or analysis? If so, how do you request from Calpine? Can you share a use case with us?

YES.....	55%
NO.....	0%

Email/Phone.....	30%
Email/Jira.....	10%
Jira/Phone.....	5%
Email.....	10%

55%

All reported they rely on Calpine to pull large data, transactional data (invoices, amounts, and taxes), regular reports, ad hoc reports, and issue rectification.



Findings for Topic 3: Data Specific cont.

2. Does the data, analysis, and the way we provide them meet your needs? Which are the ones that have the most value to you and why?

YES.....	40%
NO.....	15%

Of the **40%**, users said the most valued information we provide are:

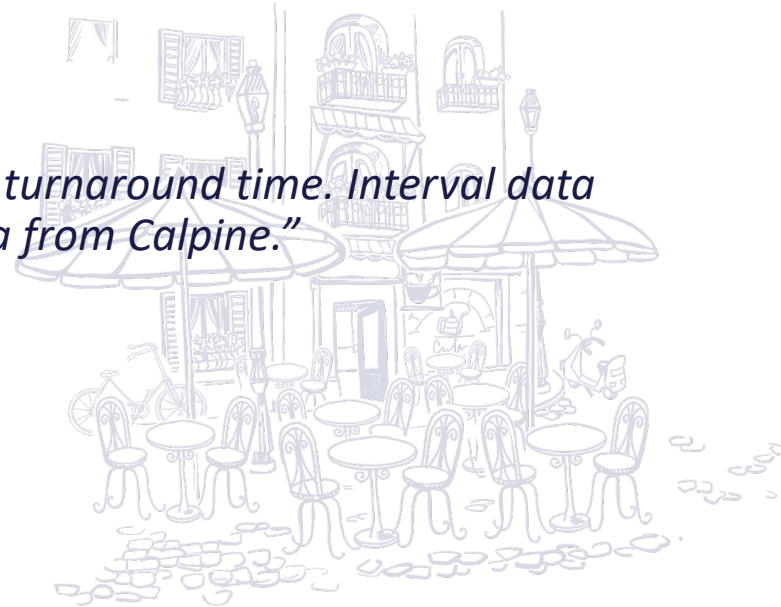
- The 4013 use to match accounts along with the Excel and SQL database.
- The daily, hourly, customer class, and geographical basis.
- Raw Data: aggregations and build canned reports to run every month.
- Usage data and history, 12-month summaries, and eco-100 estimation.



Findings for Topic 3: Data Specific cont.

15% of users said these needs are **not** being met:

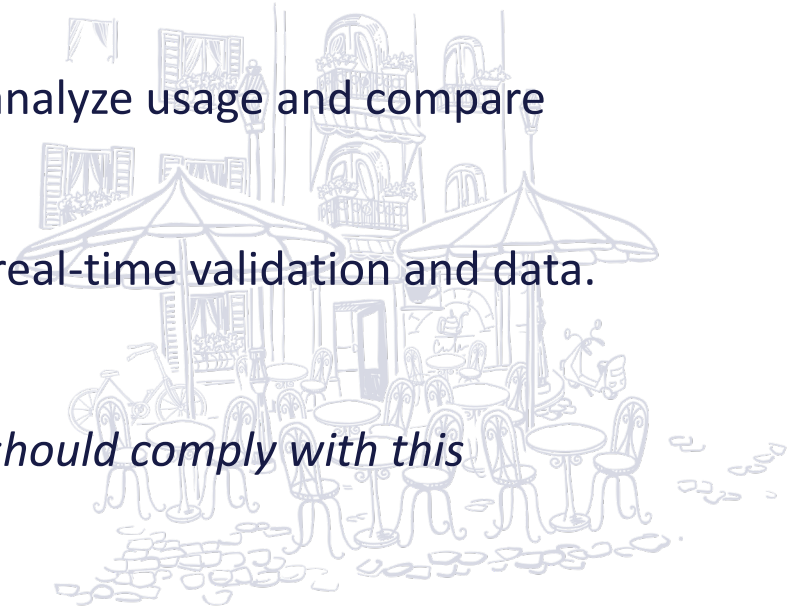
- Reports sent by Billing Specialist at Calpine to clients are at times inaccurate.
 - *“We need to check that data provided by Calpine before sending it to the customer.”*
- Data is not user-friendly (spreadsheets).
 - *“There are a lot of overlapping pieces among reports, if we can avoid it would be helpful. Days to pay show unbilled cumulative data, and sometimes it does not reflect accurate numbers.”*
- Unsatisfactory turnaround time on report requests.
 - *“I would love to see more access to interval data with a quicker turnaround time. Interval data for the customer and less than one to two weeks to receive data from Calpine.”*



Findings for Topic 3: Data Specific cont.

3. What other types of data and analysis do you wish Calpine would provide?

- **More relevant, regulated, query-able and user-friendly data**, such as:
 - Interval (hourly) data and smart meter information.
 - More query-able data within the CRM at the service point level.
 - Clear customizable dashboards specific to use case / user personas.
- **New tools and features**, such as:
 - Cost comparison tool: a better rate tool customers could use to analyze usage and compare different rates.
 - A tool that has features to build tables.
 - An API call to eliminate manual input into database and acquire real-time validation and data.
- **Incorporate industry standards**, such as:
 - Applying the 15-15 rule when generating reports. *“Every report should comply with this industry rule.”*



Findings for Topic 3: Data Specific cont.

4. What tools do you use to access, open, and consume data or files from Calpine? Do these meet your needs or what features would you like to see?

Tools Used to Access Data

SQL.....	5%
Excel.....	30%
CRM.....	25%
SFTP.....	15%
Power BI.....	5%
PDF.....	10%
Comparison Tool.....	5%

Note: Percentages based on the total tools used per participants. Note: most had multiple answers.

Meets Customer's Needs

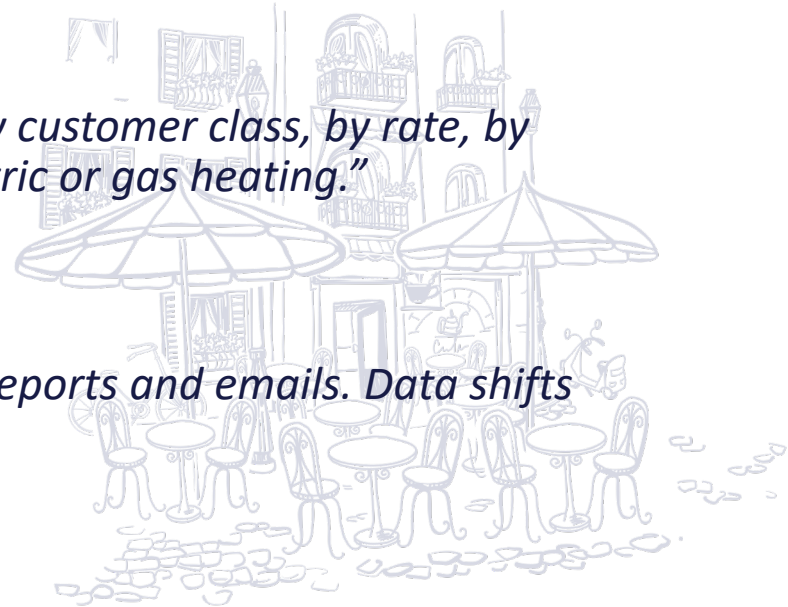
YES.....	25%
NO.....	25%
NOT SURE.....	5%



Findings for Topic 3: Data Specific cont.

Of the **25% who said no**, users said they would like to see:

- More access to their data and in a different format
 - *“PG&E charges not in PDF format. We want all data so that we can process it.”*
- Smaller files
 - *“The problems with the files we have are that they are too large, and we have to manually split-up files.”*
- Specific tools
 - *“Tools that lets us dig within usage data: geographically, pull by customer class, by rate, by PG&E program, by medical baseline, and by indicators like electric or gas heating.”*
- Fewer options to retrieve data
 - *“SFTP to download data, Excel files, and PDF data for monthly reports and emails. Data shifts sometimes. Data comes from multiple sources.”*



Findings for Topic 3: Data Specific cont.

5. If you could have any information, be it data, analysis, or other at your fingertips, what would it be to take your job or the CCA itself to the next level?

55%

All said more access, control, customization of their data with a faster and efficient delivery method.



Findings for Topic 3: Data Specific cont.

55% shared the following:

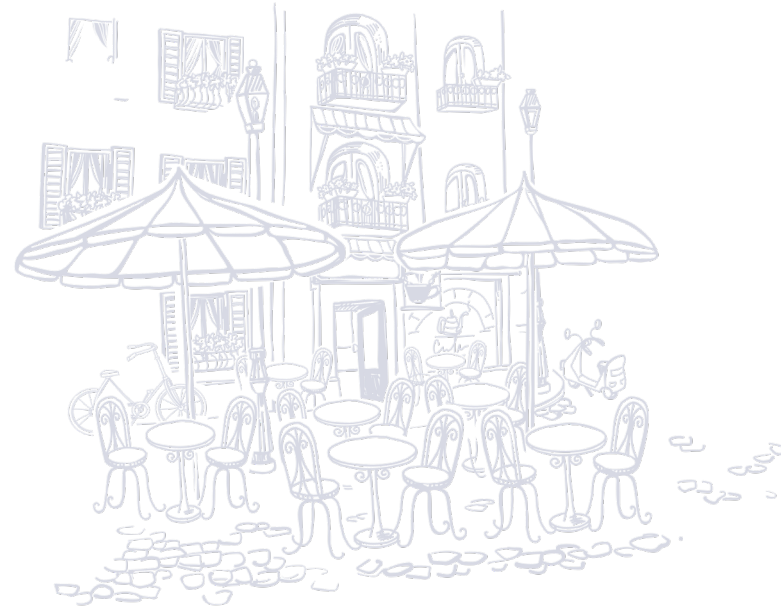
- More information in a more meaningful, faster, and more efficient way.
- Aggregate sales volumes, sales revenues, costs, payment patterns that can readily and easily provide analysis by customer class.
- To have the ability to ingest cost data, NCPA data from different source, financial info for different sources, and to bring them together. ERP solutions.
- Integration of Power BI and the ability to self-service.
- Better access to customer interaction data without having to go through call center.
- Dashboard with revenue, usage, and load forecasting.
- Be able to create graphs and charts among different datasets.
- Rate analysis and cost comparison tool.



Fun Fact

15%

Is the amount of time Tony's name was brought up/documentated during the UX event by our participants!



In conclusion

The UX event gave us a glimpse into how our customers feel about our services and products.

The willingness of the participants to openly share their experience has given us valuable insights into our customer's experience and their evolving needs. It has also provided us with an additional level of confidence to move forward in how we approach design decisions and how we can better serve our customers.

The Main Takeaway

We have learned that our customers are *largely* satisfied with the service we provide, and that our products are *still* one of the best out there today.

With our customers feedback, we can look forward to keeping it that way as we have a list of improvements to explore.

