Omnichannel Mastery: How to Optimize Billing Communications and Maximize Customer Engagement

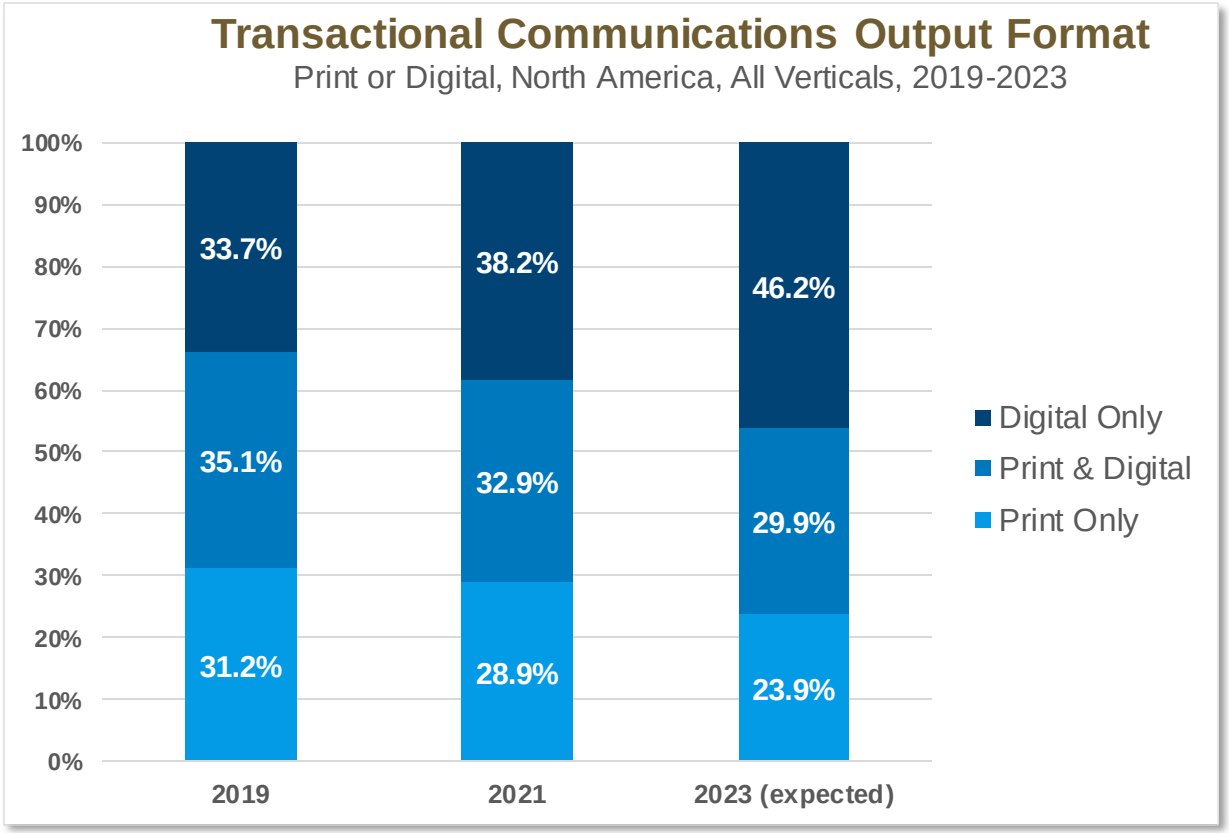
Josh Ciccia & Mitch Anderson, Doxim

Today's Agenda

- Introductions
- Maximizing Customer Engagement
- Optimizing Billing Communications
- Panel Discussion with Greenville & Fayetteville
- Q&A

Maximizing Customer Engagement

The Shift to Digital Billing Accelerates



13.5%

Growth in % of Customers with Digital Only

*Source: Aspire 2019 - 2022

© Aspire, 2023

Billing is an Ideal Opportunity for Engagement

doxim®

Your customers receive hundreds of marketing messages every day, but bills get their attention

Limited in number…

- On average, consumers receive fewer than 12 statements and bills per month

Consumers actually read them…

- 95% of consumers read their statements and bills
- 85% read them more than once!
- Transactional emails have an open rate of **80-85%** compared to only 20-25% for marketing emails

Data-driven personalization increases engagement…

- Use data to include personalized messages or promotions
- Includes messages that are relevant and compelling to each customer

We’re on a mission to create a frictionless billing and payment experience that offers choice and convenience for the end user, while delivering savings and efficiencies for our clients.

Personalized, Omnichannel Engagement in Your Customers' Channel of Choice

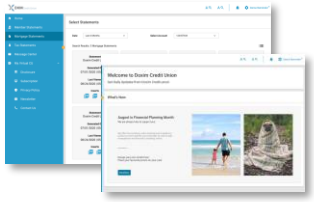
doxim®

Print & Mail Fulfillment

Digital Presentment

PDF + Letters

HTML



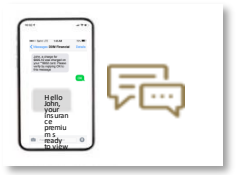
Web Portal ePresentment

1-Way Acct Notifications by Email/Text ('your statement is ready')

Secure Document Delivery (Email, SMS)

Interactive Engagement

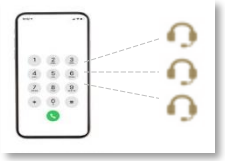
2-Way Digital Business Messaging



In-Portal Customer Messaging

Orchestrated Email Campaigns

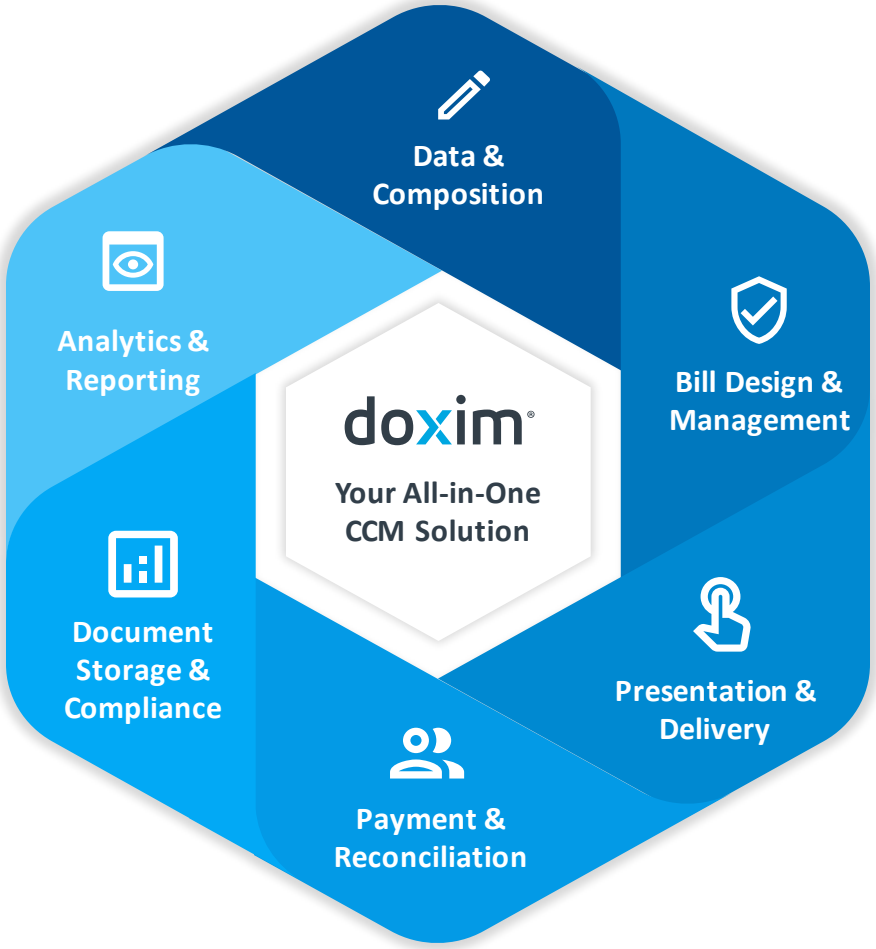
Interactive Video



IVR

Interactive Documents

All-in-One, End-to-End Presentment to Payment



Leverage Your Regulated Data
Any Data, Any Format | Any Platform, Any Application | Historical & Real-Time

Present & Deliver Personalized Communications
Any Format, Any Channel | Regulatory Documents & CX Engagement | Omnichannel Experience

Store & Protect Data & Documents
Single View of the Customer with Security & Compliance at the Core

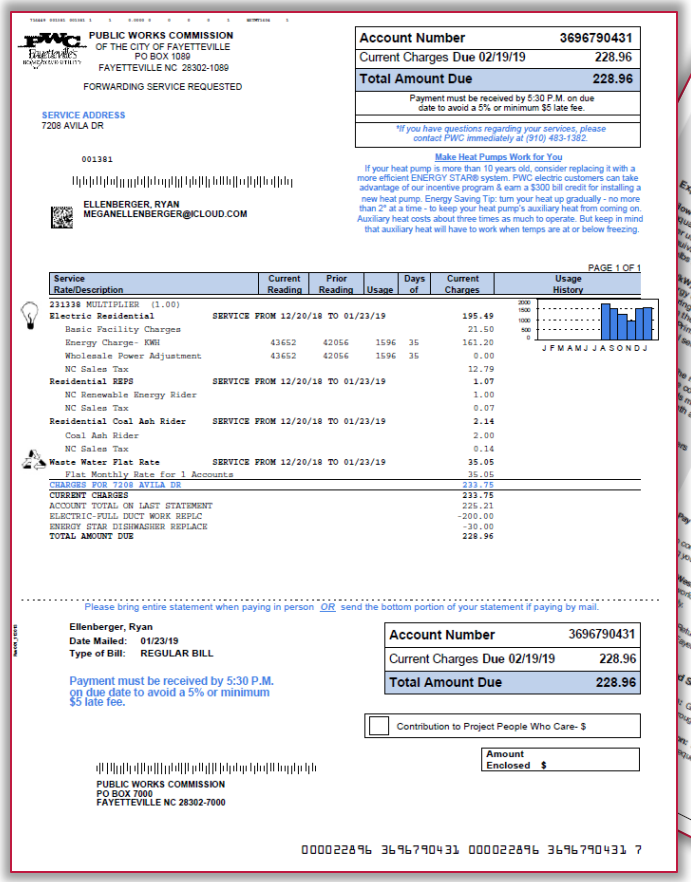
Streamlined Collections & Reconciliation Omnichannel payments | Real-time Payments Posting

Insight For Better CX
Tracking Omnichannel Interactions & Engagement to Power Decision Making

Make Your Bills Clear and Easy to Read

doxim

Before



PUBLIC WORKS COMMISSION
OF THE CITY OF FAYETTEVILLE
PO BOX 1089
FAYETTEVILLE NC 28302-1089

FORWARDING SERVICE REQUESTED

Account Number	3696790431
Current Charges Due 02/19/19	228.96
Total Amount Due	228.96

Payment must be received by 5:30 P.M. on due date to avoid a 5% or minimum $5 late fee.

If you have questions regarding your services, please contact PWC immediately at (910) 483-1382.

SERVICE ADDRESS
7208 AVILA DR

001381

ELLENBERGER, RYAN
MEGANELLENBERGER@ICLOUD.COM

Make Heat Pumps Work for You

If your heat pump is more than 10 years old, consider replacing it with a more efficient ENERGY STAR® system. PWC electric customers can take advantage of our incentive program & earn a $300 bill credit for installing a new heat pump. Energy Saving Tip: turn your heat up gradually - no more than 2° at a time - to keep your heat pump's auxiliary heat from coming on. Auxiliary heat costs about three times as much to operate. But keep in mind that auxiliary heat will have to work when temps are at or below freezing.

PAGE 1 OF 1

Service Rate/Description	Current Reading	Prior Reading	Usage	Days of	Current Charges
231330 MULTIPLIER (1.00)					
Electric Residential	SERVICE FROM 12/20/18 TO 01/23/19				195.49
Basic Facility Charges					21.50
Energy Charge- KWH	43652	42056	1596	35	161.20
Wholesale Power Adjustment	43652	42056	1596	35	0.00
NC Sales Tax					12.79
Residential REPS	SERVICE FROM 12/20/18 TO 01/23/19				1.07
NC Renewable Energy Rider					1.00
NC Sales Tax					0.07
Residential Coal Ash Rider	SERVICE FROM 12/20/18 TO 01/23/19				2.14
Coal Ash Rider					2.00
NC Sales Tax					0.14
Waste Water Flat Rate	SERVICE FROM 12/20/18 TO 01/23/19				35.05
Flat Monthly Rate for 1 Accounts					35.05
CHARGES FOR 7208 AVILA DR					233.75
CURRENT CHARGES					233.75
ACCOUNT TOTAL ON LAST STATEMENT					226.21
ELECTRIC-PULL DUCT WORK REPLC					-200.00
ENERGY STAR DISHWASHER REPLACE					-30.00
TOTAL AMOUNT DUE					228.96

Usage History: J F M A M J J A S O N D J

Please bring entire statement when paying in person OR send the bottom portion of your statement if paying by mail.

Ellenberger, Ryan
Date Mailed: 01/23/19
Type of Bill: REGULAR BILL

Payment must be received by 5:30 P.M. on due date to avoid a 5% or minimum $5 late fee.

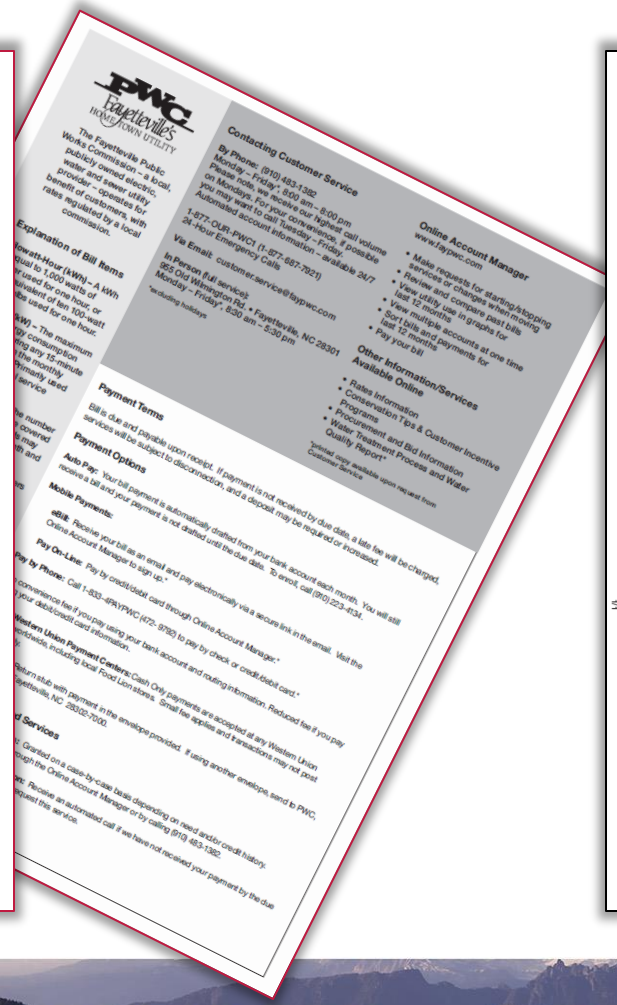
Account Number	3696790431
Current Charges Due 02/19/19	228.96
Total Amount Due	228.96

☐ Contribution to Project People Who Care- $

Amount Enclosed $

PUBLIC WORKS COMMISSION
PO BOX 7000
FAYETTEVILLE NC 28302-7000

000022896 3696790431 000022896 3696790431 7



Contacting Customer Service

By Phone: (910) 483-1382
Monday – Friday: 8:00 am – 8:00 pm
Please note, we receive our highest call volume on Mondays. For your convenience, if possible you may want to call Tuesday – Friday.
Automated account information – available 24/7

1-877-OUR-PWCT (1-877-687-7921)
24-Hour Emergency Calls

Via Email: customer.service@faypwc.com

In Person (full service):
955 Old Wilmington Rd. • Fayetteville, NC 28301
Monday – Friday*: 8:30 am - 5:30 pm
*excluding holidays

Online Account Manager
www.faypwc.com
- Make requests for starting/stopping services or changes when moving
- Review and compare past bills
- View utility use in graphs for past 12 months
- Sort bills and payments for past 12 months
- Pay your bill

Other Information/Services Available Online
- Rates Information
- Conservation Tips & Customer Incentive Programs
- Procurement and Bid Information
- Water Treatment Process and Water Quality Report*

*printed copies available upon request from Customer Service

Payment Terms

Bill is due and payable upon receipt. If payment is not received by due date, a late fee will be charged, service will be subject to disconnection, and a deposit may be required or increased.

Payment Options

Auto Pay: Your bill payment is automatically drafted from your bank account each month. You will still receive a bill and your payment is not drafted until the due date. To enroll, call (910) 223-4134.

Mobile Payments:

eBill: Receive your bill as an email and pay electronically via a secure link in the email. Visit the Online Account Manager to sign up.*

Pay On-Line: Pay by credit/debit card through Online Account Manager.*

Pay by Phone: Call 1-833-4PAYPWC (472-9792) to pay by check or credit/debit card.*

*convenience fee if you're using your bank account and routing information. Reduced fee if you pay by your debit/credit card information.

Western Union Payment Centers: Cash Only payments are accepted at any Western Union agent locations, including local Food Lion stores. Small fee applies and transactions may not post immediately.

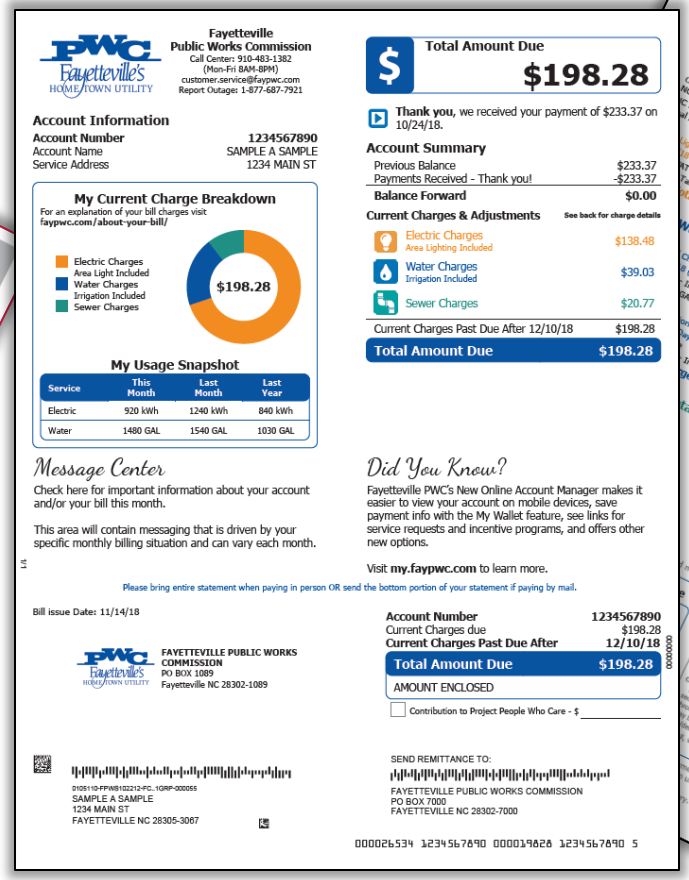
Return stub with payment in the envelope provided. If using another envelope, send to: PWC, PO Box 7000, Fayetteville, NC 28302-7000.

Additional Services

Cut-Off Services: Granted on a case-by-case basis depending on need and/or credit history. Request through the Online Account Manager or by calling (910) 483-1382.

Reconnect: Receive an automated call if we have not received your payment by the due date. Request this service.

After



Fayetteville Public Works Commission
Call Center: 910-483-1382
(Mon-Fri 8AM-8PM)
customer.service@faypwc.com
Report Outages: 1-877-687-7921

Account Information

Account Number	1234567890
Account Name	SAMPLE A SAMPLE
Service Address	1234 MAIN ST

My Current Charge Breakdown
For an explanation of your bill charges visit faypwc.com/about-your-bill/

Electric Charges
Area Light Included
Water Charges
Irrigation Included
Sewer Charges

My Usage Snapshot

Service	This Month	Last Month	Last Year
Electric	920 kWh	1240 kWh	840 kWh
Water	1480 GAL	1540 GAL	1030 GAL

Total Amount Due
$198.28

Thank you, we received your payment of $233.37 on 10/24/18.

Account Summary

Previous Balance	$233.37
Payments Received - Thank you!	-$233.37
Balance Forward	$0.00

Current Charges & Adjustments — See back for charge details

Electric Charges (Area Lighting Included)	$138.48
Water Charges (Irrigation Included)	$39.03
Sewer Charges	$20.77
Current Charges Past Due After 12/10/18	$198.28
Total Amount Due	**$198.28**

Message Center

Check here for important information about your account and/or your bill this month.

This area will contain messaging that is driven by your specific monthly billing situation and can vary each month.

Did You Know?

Fayetteville PWC's New Online Account Manager makes it easier to view your account on mobile devices, save payment info with the My Wallet feature, see links for service requests and incentive programs, and offers other new options.

Visit **my.faypwc.com** to learn more.

Please bring entire statement when paying in person OR send the bottom portion of your statement if paying by mail.

Bill issue Date: 11/14/18

FAYETTEVILLE PUBLIC WORKS COMMISSION
PO BOX 1089
Fayetteville NC 28302-1089

Account Number	1234567890
Current Charges due	$198.28
Current Charges Past Due After	12/10/18
Total Amount Due	**$198.28**
AMOUNT ENCLOSED	

☐ Contribution to Project People Who Care - $

0105110-FPWB102212-FC, 1GRP-000055
SAMPLE A SAMPLE
1234 MAIN ST
FAYETTEVILLE NC 28305-3067

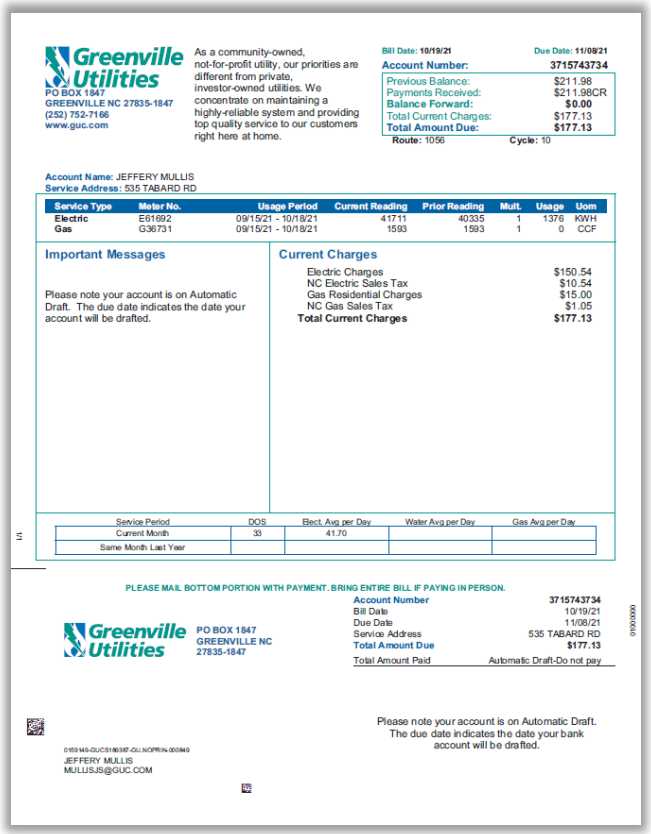
SEND REMITTANCE TO:
FAYETTEVILLE PUBLIC WORKS COMMISSION
PO BOX 7000
FAYETTEVILLE NC 28302-7000

000026534 1234567890 000019828 1234567890 5

Make Your Bills Clear and Easy to Read

doxim

Before



Greenville Utilities
PO BOX 1847
GREENVILLE NC 27835-1847
(252) 752-7166
www.guc.com

As a community-owned, not-for-profit utility, our priorities are different from private, investor-owned utilities. We concentrate on maintaining a highly-reliable system and providing top quality service to our customers right here at home.

Bill Date: 10/19/21 Due Date: 11/08/21
Account Number: 3715743734

Previous Balance:	$211.98
Payments Received:	$211.98CR
Balance Forward:	$0.00
Total Current Charges:	$177.13
Total Amount Due:	$177.13

Route: 1056 Cycle: 10

Account Name: JEFFERY MULLIS
Service Address: 535 TABARD RD

Service Type	Meter No.	Usage Period	Current Reading	Prior Reading	Mult.	Usage	Uom
Electric	E61692	09/15/21 - 10/18/21	41711	40335	1	1376	KWH
Gas	G36731	09/15/21 - 10/18/21	1593	1593	1	0	CCF

Important Messages

Please note your account is on Automatic Draft. The due date indicates the date your account will be drafted.

Current Charges

Electric Charges	$150.54
NC Electric Sales Tax	$10.54
Gas Residential Charges	$15.00
NC Gas Sales Tax	$1.05
Total Current Charges	**$177.13**

Service Period	DOS	Elect. Avg per Day	Water Avg per Day	Gas Avg per Day
Current Month	33	41.70		
Same Month Last Year				

PLEASE MAIL BOTTOM PORTION WITH PAYMENT. BRING ENTIRE BILL IF PAYING IN PERSON.

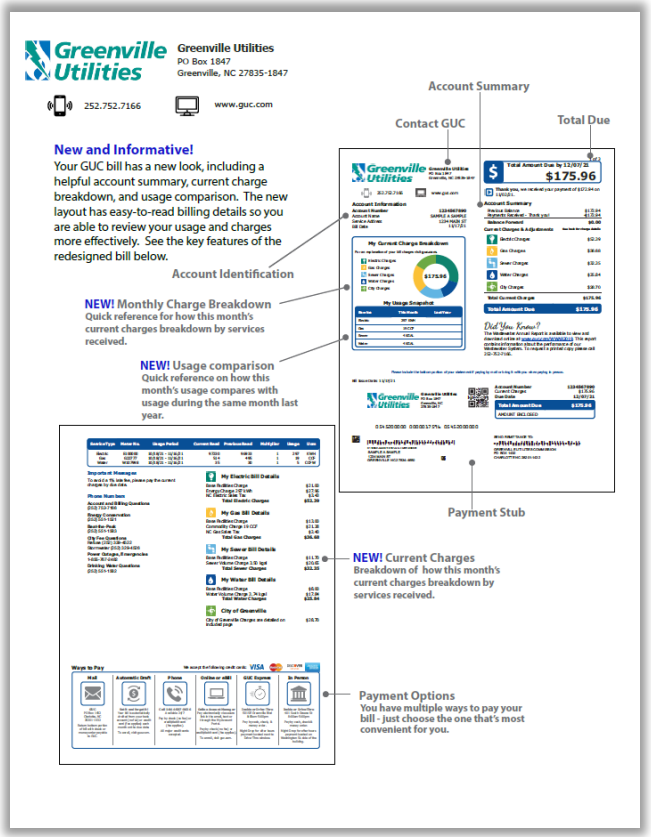
Greenville Utilities
PO BOX 1847
GREENVILLE NC
27835-1847

Account Number	3715743734
Bill Date	10/19/21
Due Date	11/08/21
Service Address	535 TABARD RD
Total Amount Due	$177.13
Total Amount Paid	Automatic Draft-Do not pay

Please note your account is on Automatic Draft. The due date indicates the date your bank account will be drafted.

JEFFERY MULLIS
MULLISJS@GUC.COM

After



Greenville Utilities
Greenville Utilities
PO Box 1847
Greenville, NC 27835-1847
252.752.7166
www.guc.com

Account Summary
Contact GUC
Total Due

New and Informative!
Your GUC bill has a new look, including a helpful account summary, current charge breakdown, and usage comparison. The new layout has easy-to-read billing details so you are able to review your usage and charges more effectively. See the key features of the redesigned bill below.

Account Identification

NEW! Monthly Charge Breakdown
Quick reference for how this month's current charges breakdown by services received.

NEW! Usage comparison
Quick reference on how this month's usage compares with usage during the same month last year.

Payment Stub

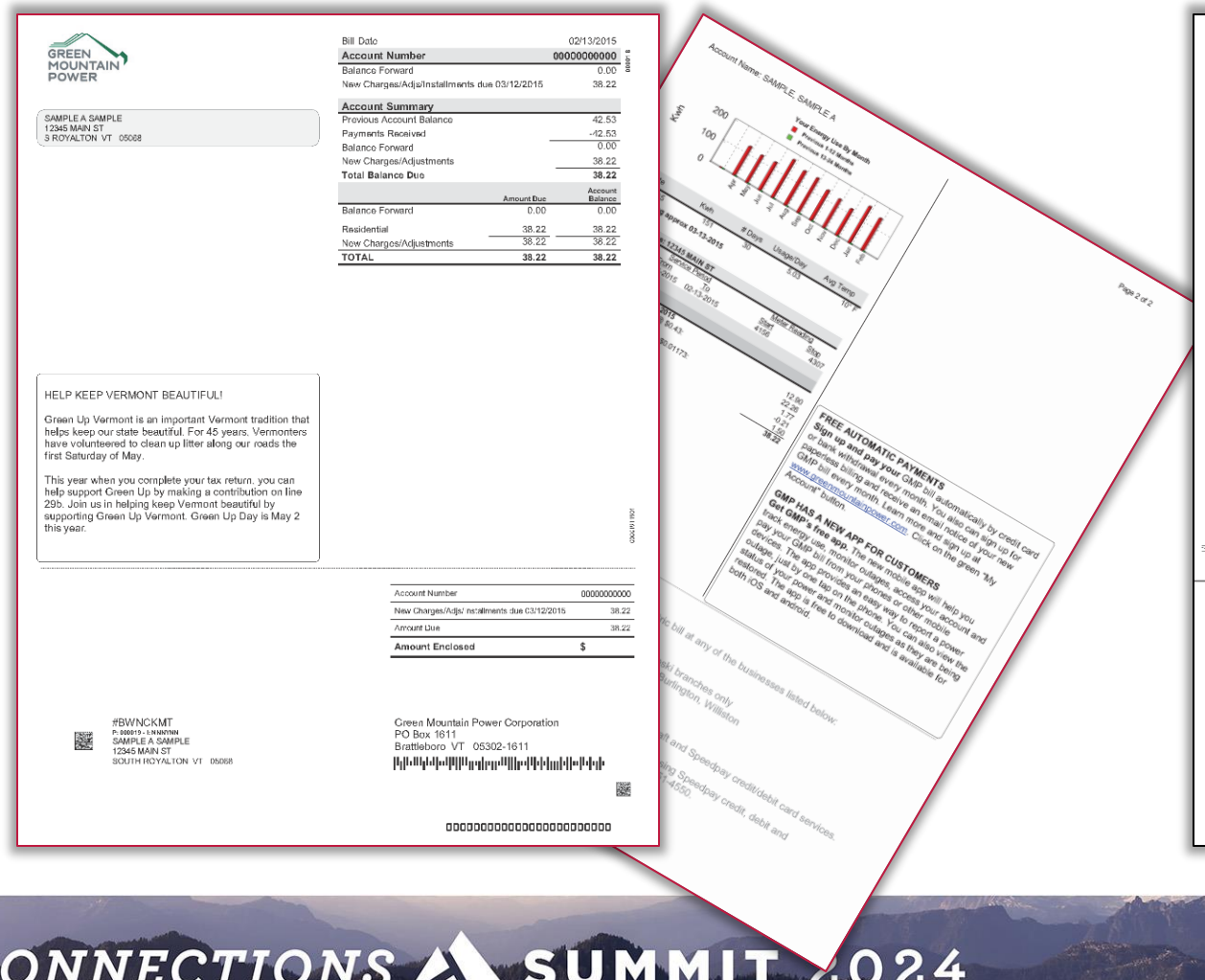
NEW! Current Charges
Breakdown of how this month's current charges breakdown by services received.

Payment Options
You have multiple ways to pay your bill - just choose the one that's most convenient for you.

Make Your Bills Clear and Easy to Read

doxim®

Before

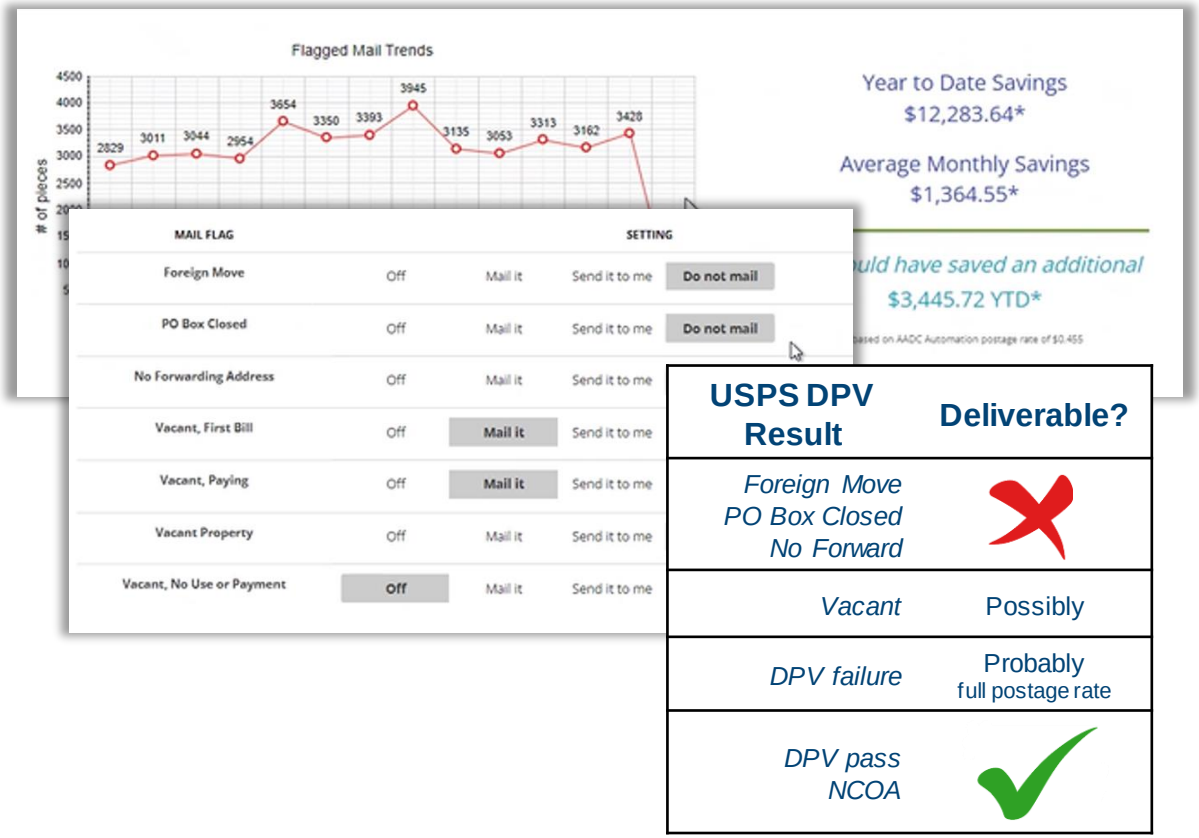


After

Optimize Customer Billing

Make Sure Bills Go to the Correct Address

Identify Addressing Issues in Advance to Prevent Undeliverable Mail



USPS DPV Result	Deliverable?
Foreign Move *PO Box Closed* *No Forward*	✗
Vacant	Possibly
DPV failure	Probably full postage rate
DPV pass *NCOA*	✓

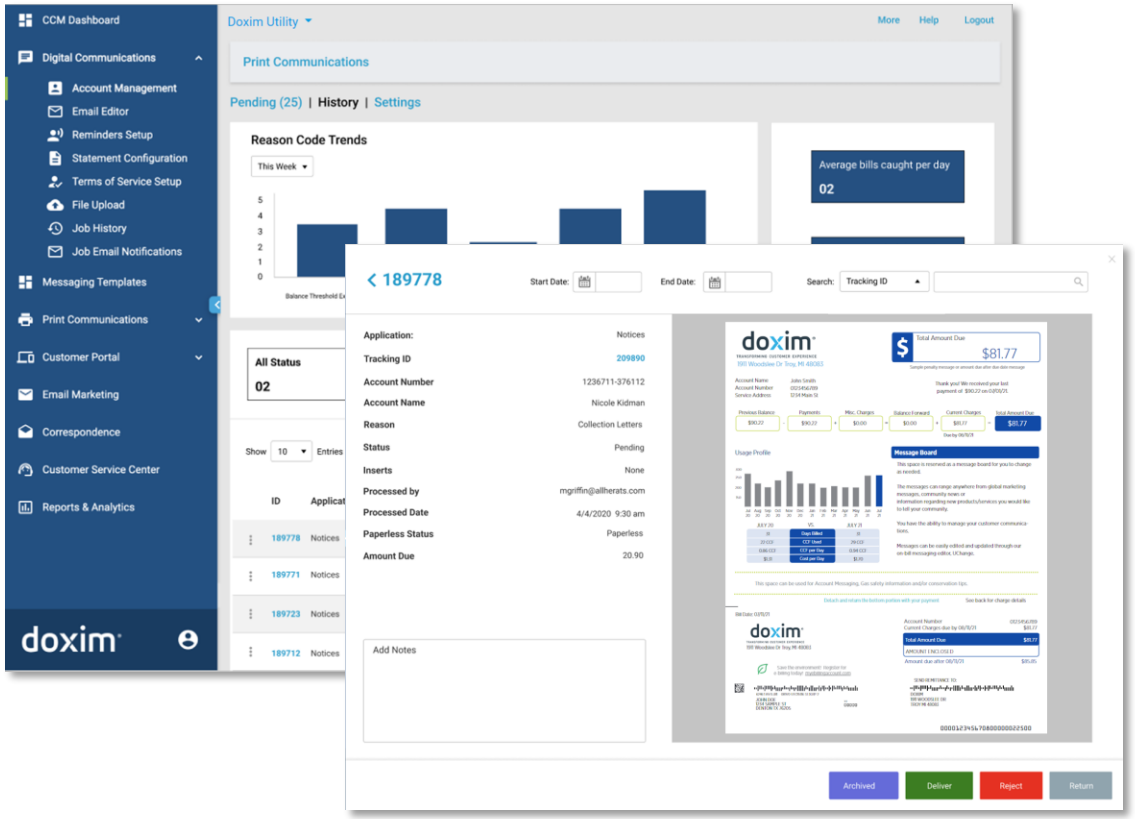
- **Address QA**: Identify undeliverable addresses and define rules for suppression or special handling
- Specify account exceptions, if needed

KEY BENEFITS

- ✓ Prevent undeliverable mail going out
- ✓ Reduce cost of mail returns
- ✓ Avoid secure destruction
- ✓ Prevent support calls & costs
- ✓ Reduce postage costs
- ✓ Improve overall customer experience and satisfaction

Make Sure Billing Data is Accurate

Proactively hold and validate bills and statements data before it reaches the customer



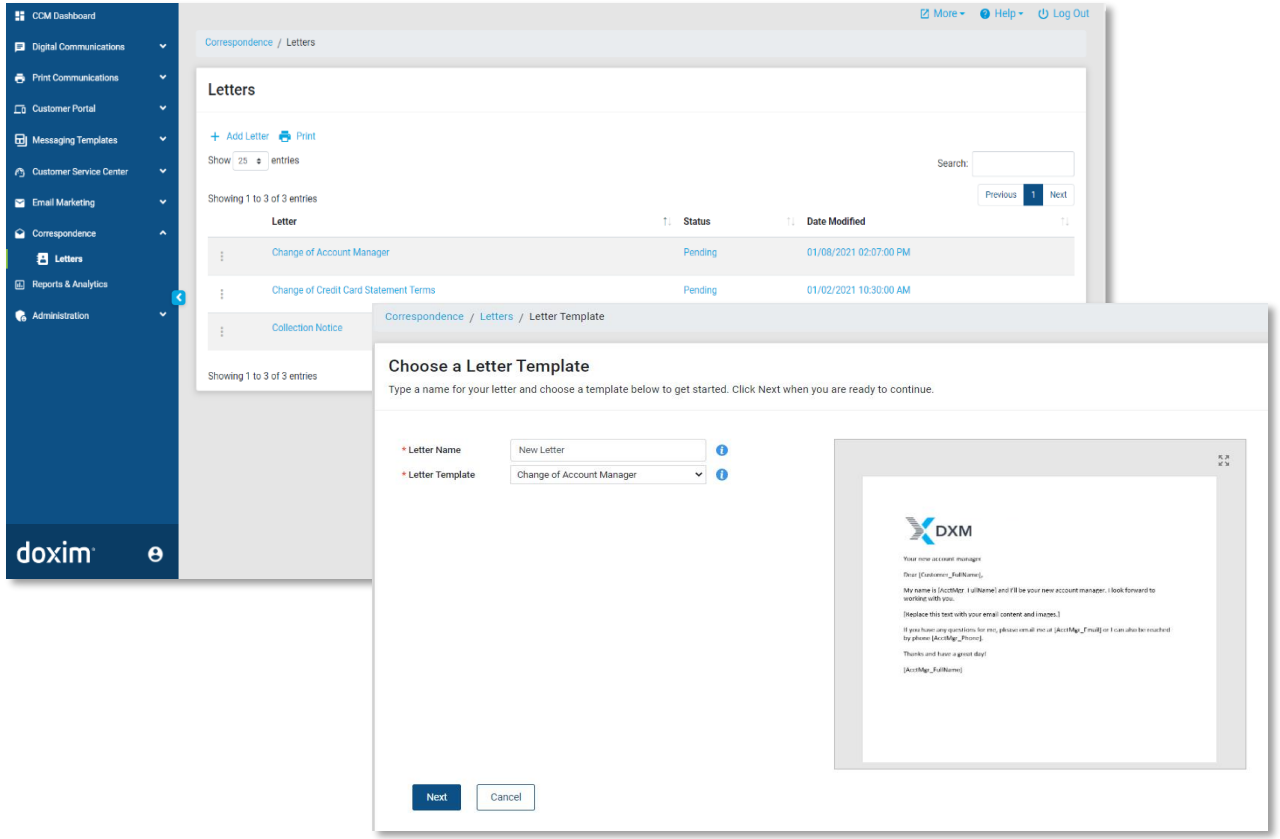
- **Exception Handling**: Improves the quality and accuracy of your regulated bills and statements
- Set customized criteria for documents you want to review prior to composition
- When criteria are met, the solution automatically pulls the items identified and holds them for your review and disposition

KEY BENEFITS

- ✓ Increase accuracy and eliminate errors
- ✓ Accelerate collections
- ✓ Reduce days sales outstanding (DSO)
- ✓ Prevent support calls & costs
- ✓ Improve overall customer experience and satisfaction

Send Urgent Communications, Rapidly

Empower Your Business Users to Author Communications On Demand



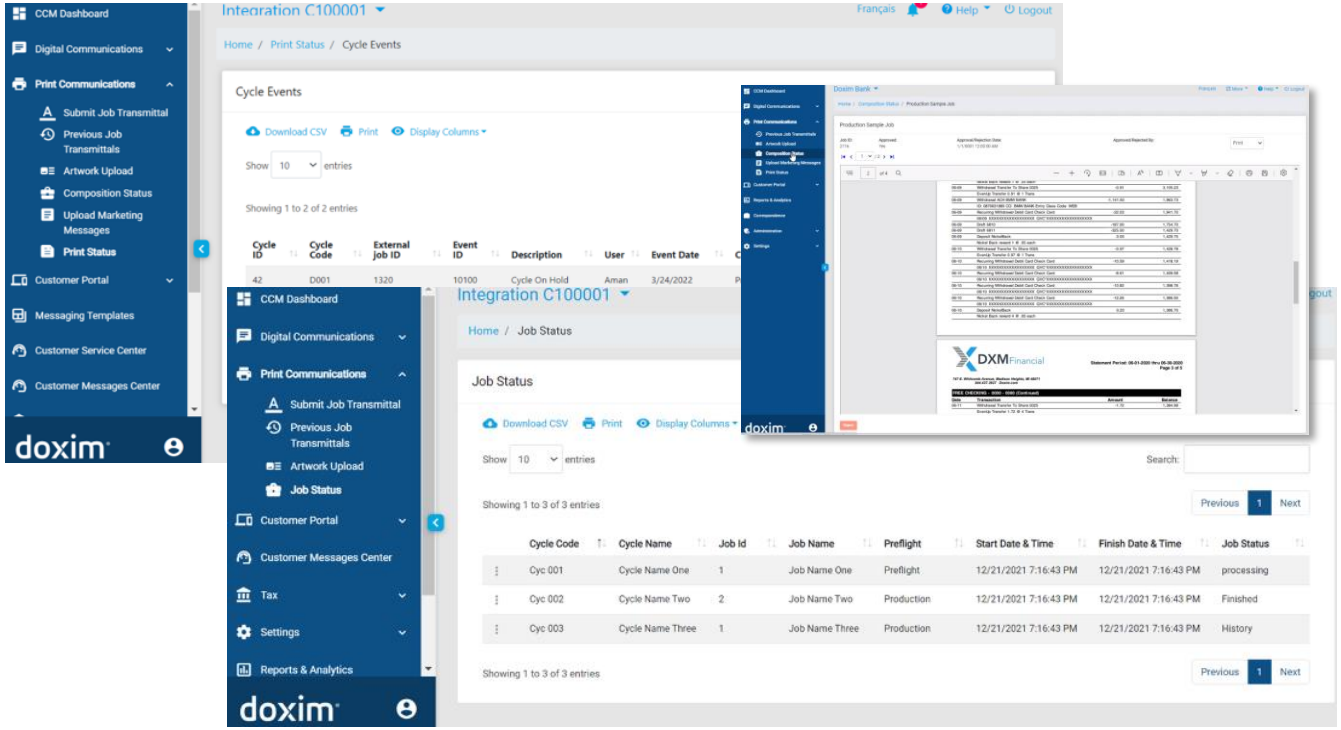
- On-demand authoring of 'impromptu' letters by business users
- Use of standard, pre-approved templates
- Update unlocked blocks with intuitive, easy-to-use editor
- Submit directly into production following approval

✓ Gain speed / agility to address new business opportunities or support issues

✓ Manage compliance risk and costs

Gain End-to-End Insights and Tracking

Batch Progression and Document Level



- Insight into progression of batch in Doxim production / job processing
- Near real-time statistics and available piece level tracking to the customer's door using USPS informed visibility
- History of Doxim processing and output

Delivering Cost Savings Through Technology

doxim®

Greenville Utilities

"We knew it would be important to leverage Doxim's Oracle CC&B knowledge when designing and working on our bills prior to conversion. However, we underestimated how valuable this experience really is! Your team has done a fantastic job working with us before and post go live on our new system."

450
Reduced envelopes per file through householding

4,959
Potentially bad addresses identified

32,885
Bills caught in 7 months

892
Were rejected

27
CC&B rules implemented

270
Due date more than 40 days after bill date

Questions?

CONNECTIONS
SUMMIT
ELECTRICITIES

Thank You!

josh.ciccia@doxim.com
Account Executive, Utilities