

# UPDATE: Customer Relationship Management Tool

---

Chris Tamasi

External Affairs: Member Relations & Stakeholder Services

**Management Committee:**

December 21, 2017



# Agenda

- **Research**
- **People, Processes and Tools**
- **Salesforce / Member Community highlights/benefits**
- **Progress / Next Steps**
- **Reference Material**
- **Q&A**

# Research

The NYISO's Stakeholder and Member Services teams have conducted extensive research examining the people, processes and tools of like and dislike organizations to build a comprehensive customer experience.

- **ISO/RTO Council**
- **Customer Support Focus Groups**
- **CSI feedback**
- **Gartner, Inc.**

# People, Process, Tools...

## ■ People:

- Creation of “Knowledge is Power”
  - Bi-weekly internal training program to further develop Stakeholder Services’ knowledge
- Customer Satisfaction Index
  - Program to solicit customer feedback for improvement

## ■ Process:

- Creating process efficiencies for internal and external customers
  - Automation of manual processes and improved customer experience

## ■ Tools:

- Suite of Customer Service Tools
  - Focused in communications, contact & case management, and customer registration

# Suite of Tools...

- **Bold Chat:**
  - Interactive online chat feature for direct access to Customer Support
- **Salesforce:**
  - Customer Relations Management (CRM) tool
- **NYISO Member Community: Live!**
  - **Self-service functionality**
    - Contact management
    - Submit and manage ticket inquiries /status tracking
    - Manage email list subscriptions
  - **Easy Access to Information**
  - **Automated Online registration**
  - **Improved Collaboration**

# Progress / Next Steps:

- ✓ Internal / external user training Aug/Sep 2017
- ✓ CRM demonstration – Customer Support Focus Group Sep/Nov 2017
- ✓ Pilot Program Nov/Dec 2017
- ✓ Deploy CRM/Member Community Dec 2017
- CRM phase II - 2019
  - Explore additional tool functionality and improvements

# Reference Material:

- **Member Community Agreement**

- <http://www.nyiso.com/public/webdocs/sf/NYISO-Member-Community-Usage-Agreement.pdf>

- **Additional material can be found on the Customer Support Page**

- [http://www.nyiso.com/public/markets\\_operations/services/customer\\_support/index.jsp](http://www.nyiso.com/public/markets_operations/services/customer_support/index.jsp)

# Questions?