Self-Serve Web Portals for Propane Customers

BEFORE WE BEGIN...

Have questions?
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at **lpgasmagazine.com/webinars**.

SPEAKERS

Brian Richesson
Editor-in-Chief
LP Gas magazine

John Redmond
VP of Product Strategy
ADD Systems

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Agenda

- Who is ADD Systems
- A look back at Self-Service history
- Why offer Self-Service
- Self-Service options to consider
  - Basic
  - Advanced

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Agenda

- Technology implementation methods
- Determine your business rules
- Connecting technologies
  - Delivery order to cash process
- Some recommendations
- Wrap up and Q/A

Who is ADD Systems?

- Privately held company
- Founded in 1973
- 160 employees
- 500+ clients
- Offices;
  - Flanders, New Jersey
  - Orlando, Florida
  - Cranston, Rhode Island
  - Montreal, Canada

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ADD Systems – Market Focus

Self-Service History

- Gasoline Stations: First Self-Service
  - June 10th, 1964, Westminster, Colorado
- Banking
  - September 2nd, 1969, Chemical Bank: First ATM
    - Chemical Advertisement: " We will open on September 2nd and never close again"

Self-Service History

- Airline
  - 1995, Continental Airlines introduced the first check-in kiosk
    - Today over 80% of passengers check in electronically
- Consumer Goods
  - Cadabra was founded in 1994

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Self-Service History

Why Offer a Self-Service Option?

- Demographic changes
  - Consumers expect Self-Service alternatives
- Increase the value of your Web Site
  - Drive revenue
    - Promote new products and services
- Grow your business without adding CSRs

Economic Benefits

LPGAS Magazine – Feb. 2016 Published Survey

Nationwide Average $15.35 / Hour

SALARIES AND WAGES – REGIONAL AVERAGES

NON-MANAGEMENT: HOURLY WAGES	East	South	Midwest	West
Sales rep	$17.70/hr	$16.62/hr	$22.61/hr	*
Customer service rep	15.61	14.53	15.13	$16.21/hr
Delivery driver	19.29	17.01	17.93	18.72
Tanker/transport driver	20.4	22.33	19.86	*
Service technician	21.67	18.34	18.15	20.79
Admin/secretary	15.50	14.36	14.29	15.4
General laborer	14.68	11.05	12.85	12.00

*Not enough data available

Annual Salary Including Benefits - $41,000+

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Self-Service Options to Consider

- Basic
  - View transactions
  - What's my balance?
  - Did you get my payment?
  - Make a payment
    - One-time check
    - Credit card
    - EFT
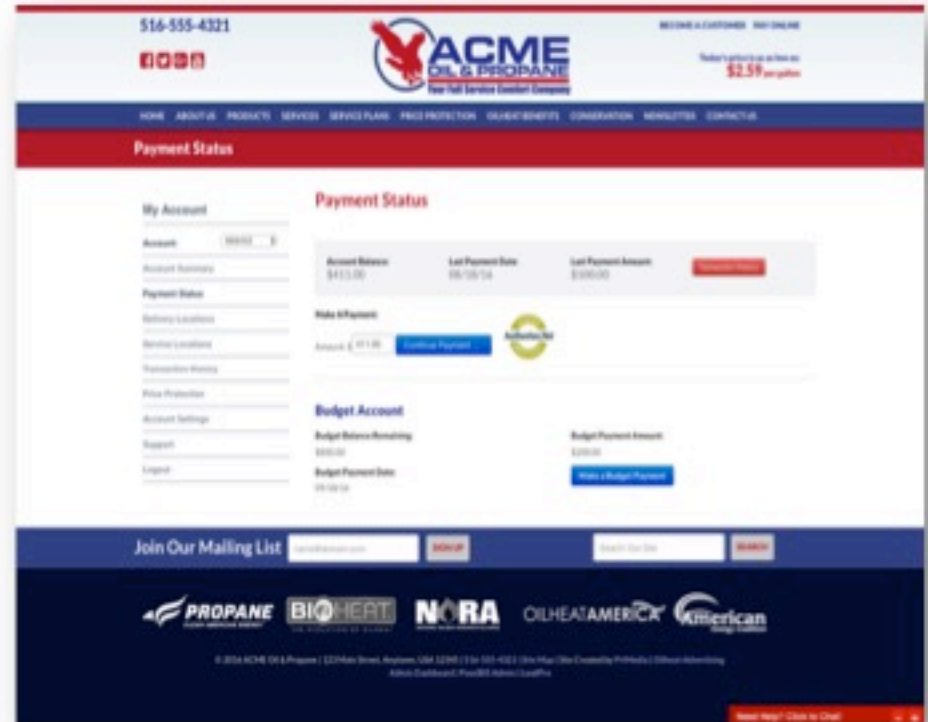
Self-Service Options to Consider
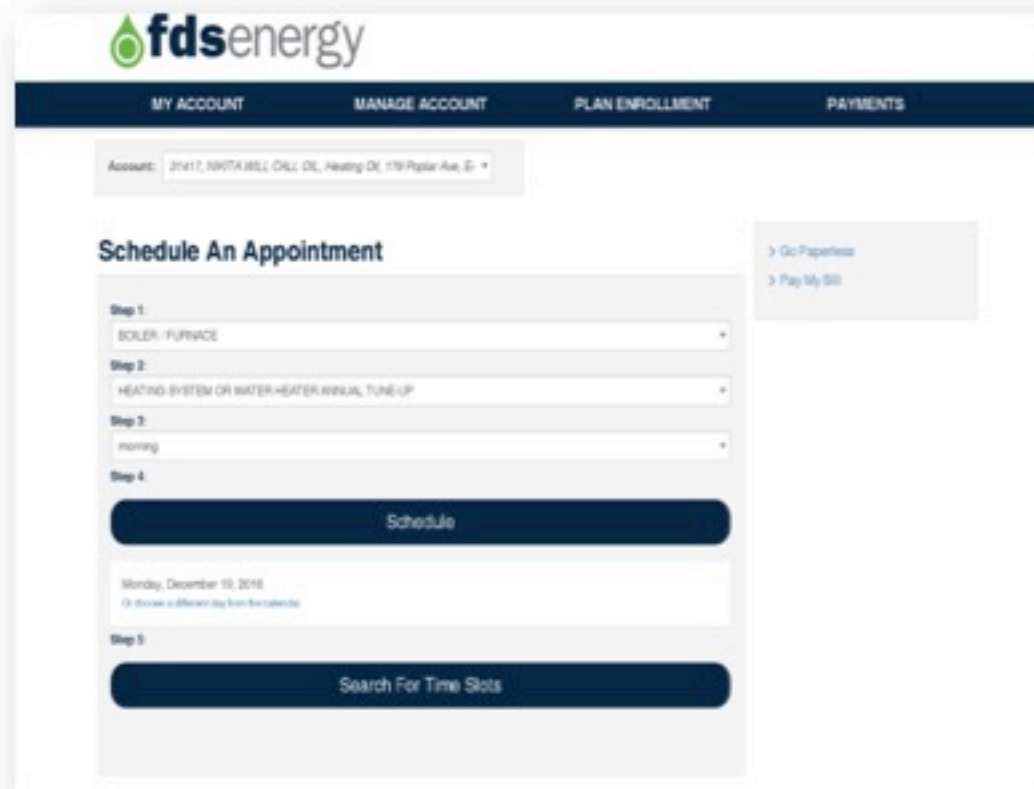
- Advanced
  - Accept delivery orders

Self-Service Options to Consider

- Advanced
  - Accept service orders (Scheduled and Non-Scheduled)

Self-Service Options to Consider

- Bill presentment
- Pricing plan sign-ups / risk management
  - Electronic signature capture
- Lease agreements
  - Electronic signature capture

Consumer Data Mining – Promote Budget

New England BioHeat

| Home / Logout | My Account Info | Payments | Manage Account | Plan Enrollment |

Welcome to our Customer Care Center, Mable Jones

We noticed that you have not taken advantage of our monthly budget plan!

It seems everyone these days is looking for ways to manage their home finances, and there is no better way than with our 12 month budget plan. Here are a few features:

- Even monthly payments
- Includes fuel and service costs
- NO ADDITIONAL CHARGE for this valued service

Want to sign-up? just CLICK HERE

Account	33024
Account Balance	$1,339.33
Budget Amount Due	$0.00
Customer Name	MABLE JONES
Delivery Address	269 Mahogany Ln
Delivery City	REDDING
Last Delivery Date	01/16/2009
Last Delivery Gallons	153.70 gallons
Last Payment Amount	$-3,408.30
Last Payment Date	07/11/2008
Approximate Annual Usage	783.00 gallons
Customer Loyalty Points Earned	8,620 *Click here to Redeem*
Tank Capacity	260.00 gallons
Info Last Updated	05/11/2011 04:23:21

Consumer Data Mining - Promote Will Call to Automatic

➤ Consumer Data Mining – Coupon Offerings

Self-Service Options to Consider

- Advanced – Dependent on other technologies
  - Real-time delivery status notifications
    - Delivery assigned date
    - Delivery made notification
    - Delivery not made notification

Self-Service Options to Consider

- Advanced – Dependent on other technologies
  - Real-time service work order notifications
    - Work order assigned to technician
    - Work order dispatched
    - Technician arrived
    - Work completed

Self-Service Options to Consider

- Advanced - Dependent on other technologies
  - Provide tank monitor information
    - In tank gallons / percentage

57%

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Self-Service Technology Implementation Methods

- SneakerNet
- Dump and load
- Real-time web services

SneakerNet Method – Delivery Order

Order 200 Gallons

Email

Enterprise Database (Live Data)

Consumer on the Web

- ✖ No account validation
- ✖ No consumer info available
- ✖ No credit status check
- ✖ No tank size vs. order validation
- ■ Order created manually in Enterprise System

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Dump and Load Method – Delivery Order

Enterprise Database (Live Data)

Replicated Database ("X" Hours Old Data)

Consumer on the Web

Order 200 Gallons

- ✔ Account validation
- ✔ Account info available (But could be stale)
- ✔ Credit status check (But could be stale)
- ✔ Tank size vs. order validation
- ■ Order created manually in Enterprise System
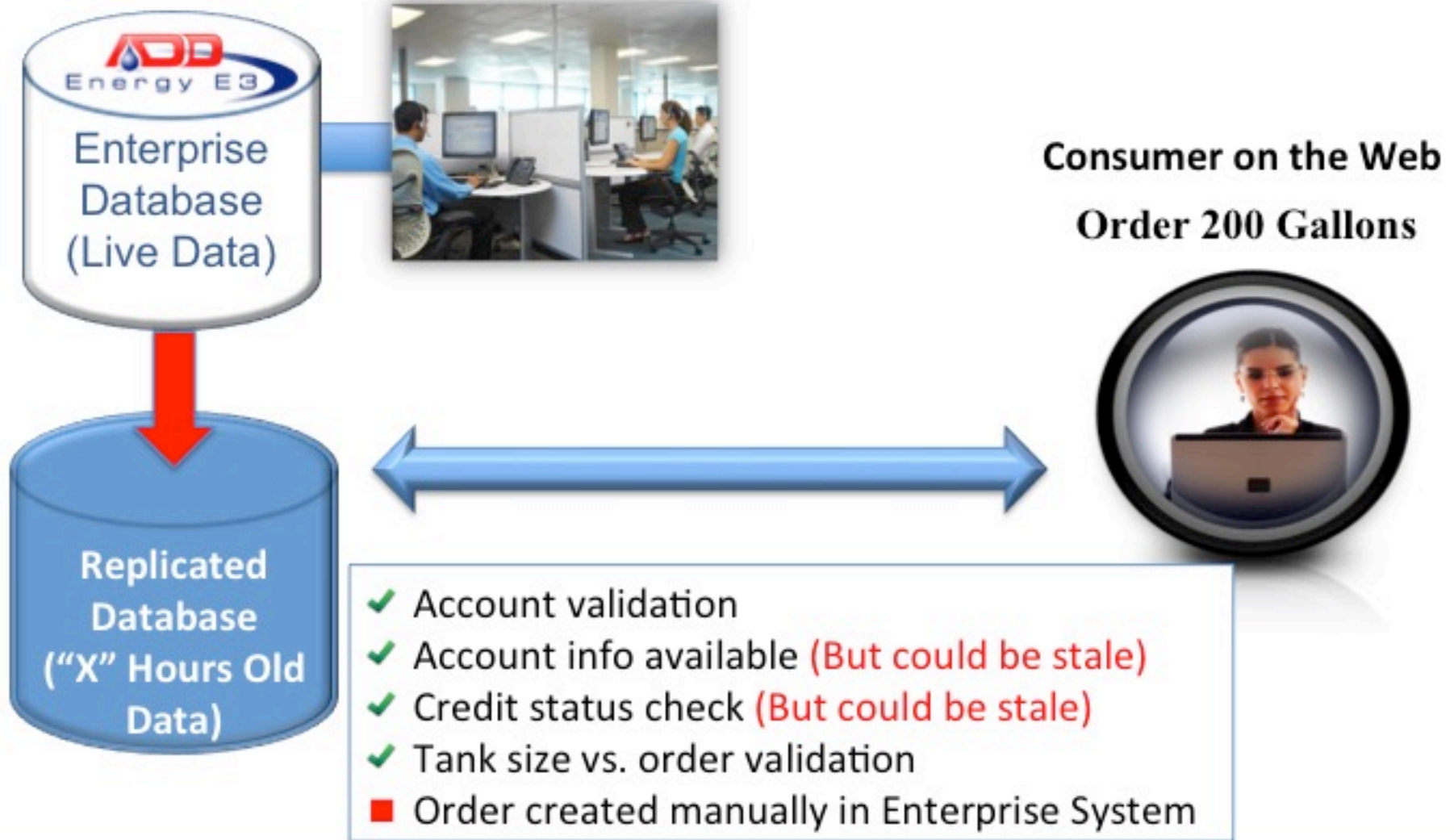
Web Services Method – Delivery Order

- ✔ Account validation
- ✔ Account info available **and current**
- ✔ Credit status check - **current**
- ✔ Tank size vs. order validation
- ✔ Business rules validation available
- ✔ Order created live in Enterprise System

Enterprise Database (Live Data)

Energy E3

SmartConnect®

Consumer on the Web

Order 200 Gallons

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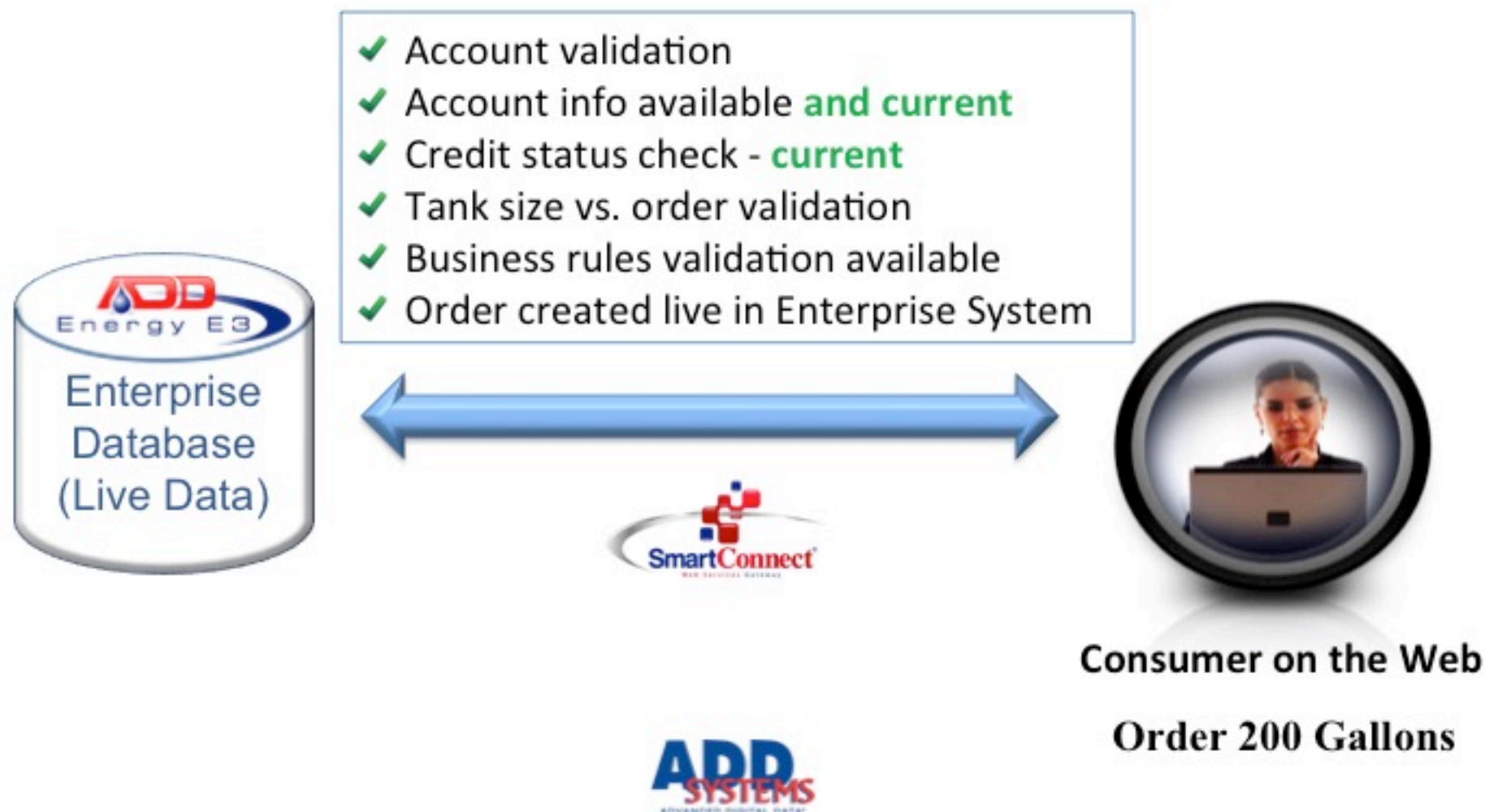
Self Service Feature	SneakerNet	Dump and Load	Web Services
✓ User Authentication	NO	Yes	Yes
✓ Display Customer Info	NO	Data Currency	Live Data
✓ Accept Payments	Manually Posted	Manually Posted	Electronically Posted
✓ Place Delivery Orders	Manually Entered	Manually Entered	Electronically Created
✓ Real-Time Delivery Order Status	NO	NO	Wireless Mobile Req.
✓ Place Service Calls	Manually Entered	Manually Entered	Electronically Created
✓ Real-Time Service Order Status	NO	NO	Wireless Mobile Req.
✓ Schedule Service Calls	NO	NO	Yes
✓ Add / Modify Data	NO	Manually Entered	Electronically
✓ Pricing Plan Enrollment	Manually Entered	Manually Entered	Electronically Created
✓ Bill Presentment	Yes	Data Currency	Yes
✓ Marketing Data Mining	NO	Data Currency	Yes
✓ Capture Sales Leads	Yes	Yes	Electronically Created

www.addsys.com

Determine Your Business Rules

- Account not due for delivery
  - Accept order?
  - Display estimated n-tank percent or gallons?
  - Contact the office?

KNOW THE RULES!

Determine Your Business Rules

- Delivery order process
  - Account on credit hold
    - Ask for payment?
    - Contact the office?

KNOW THE
RULES !

Connecting Technologies

Delivery Order to Cash

Delivery Order to Cash

Raven

Raven Dispatch

Enterprise
Database
(Live Data)

SmartConnect

Consumer on the Web
Order 200 Gallons

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Delivery Order to Cash

- ✓ Credit Checked – **On Hold**
- ✓ Validate Credit Card
- ✓ Pay Over-Due Balance
- ✓ Place Delivery Order
- ✓ Sign Up for Delivery Notifications – Email or Text

Consumer on the Web
Order 200 Gallons

SmartConnect

Energy E3
Enterprise Database (Live Data)

Raven Dispatch

Raven

Delivery Order to Cash

Credit Checked – On Hold
✓ Validate Credit Card
✓ Pay Over-Due Balance
✓ Place Delivery Order
✓ Sign Up for Delivery
Notifications – Email or Text

Raven

Consumer on the Web
Order 200 Gallons

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Enterprise Database (Live Data)

Raven Dispatch

✓ Dispatcher Assigns Order
✓ Customer Notification
Reflected on Portal or
Pushed Via Email or Text

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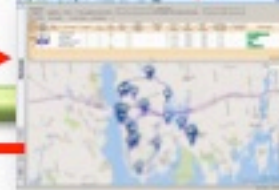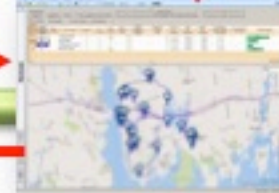
Delivery Order to Cash

- ✓ Credit Checked – **On Hold**
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Consumer on the Web
Order 200 Gallons

SmartConnect

ADD Energy E3
Enterprise Database (Live Data)

Raven Dispatch

Raven

- ✓ Delivery Is Made
- ✓ Customer Notification Reflected on Portal or Pushed Via Email or Text

- ✓ Dispatcher Assigns Order
- ✓ Customer Notification Reflected on Portal or Pushed Via Email or Text

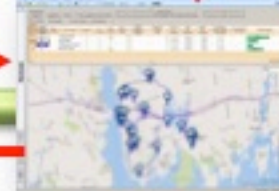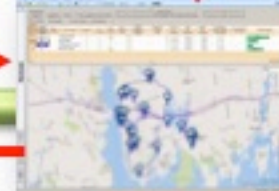ADD SYSTEMS
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Delivery Order to Cash

Credit Checked – On Hold
✓ Validate Credit Card
✓ Pay Over-Due Balance
✓ Place Delivery Order
✓ Sign Up for Delivery
Notifications – Email or Text

Consumer on the Web
Order 200 Gallons

Enterprise Database (Live Data)

Raven Dispatch

✓ **Delivery Is Made**
✓ **Customer Notification** Reflected on Portal or Pushed Via Email or Text

✓ **Credit Card Payment Posted**
✓ **Payment Transaction** Reflected on Portal or Pushed Via Email or Text

✓ **Dispatcher Assigns Order**
✓ **Customer Notification** Reflected on Portal or Pushed Via Email or Text

Some Recommendations

- Hire a Web / Application Developer, not just a Web Designer
    - Technical expertise
    - Marketing talent
    - Industry experience

Some Recommendations

- Take a phased approach
  - Transactions, balance, accept payments
- Determine your business rules
- Promote your Web Site / Portal and measure results
- Your Web Site should support mobile devices

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ADD Systems – Core Products

ADD Systems – Example Clients

Questions?

Contact

Brian Richesson
p: 216-706-3748
e: brichesson@northcoastmedia.net

John Redmond
p: 800-922-0972
e: redmond@addsys.com