

# Self-Serve Web Portals for Propane Customers

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by **ADD  
SYSTEMS**

# BEFORE WE BEGIN...

## Have questions?

Type your question into the Q&A box at bottom left or use [#ADDWebinar](#) on Twitter.

## Experiencing technical difficulties?

Ask for help via the Q&A box.

## Want to view this webinar again?

An on-demand version will be available tomorrow at [lpgasmagazine.com/webinars](http://lpgasmagazine.com/webinars).

# SPEAKERS



**Brian Richesson**

Editor-in-Chief  
*LP Gas* magazine



**John Redmond**

VP of Product Strategy  
ADD Systems

**Brian Richesson**  
Editor-in-Chief  
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**John Redmond**  
VP of Product Strategy  
ADD Systems



# Agenda

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





# 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





# ADD Systems – Market Focus



# Self-Service History

- Gasoline Stations: First Self-Service
  - June 10<sup>th</sup>, 1964, Westminster, Colorado
- Banking
  - September 2<sup>nd</sup>, 1969, Chemical Bank: First ATM
    - Chemical Advertisement: “ We will open on September 2<sup>nd</sup> 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



# Self-Service History

**amazon**



# 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



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# Economic Benefits

LPGAS Magazine – Feb. 2016 Published Survey

## **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*

Nationwide Average  
\$15.35 / Hour

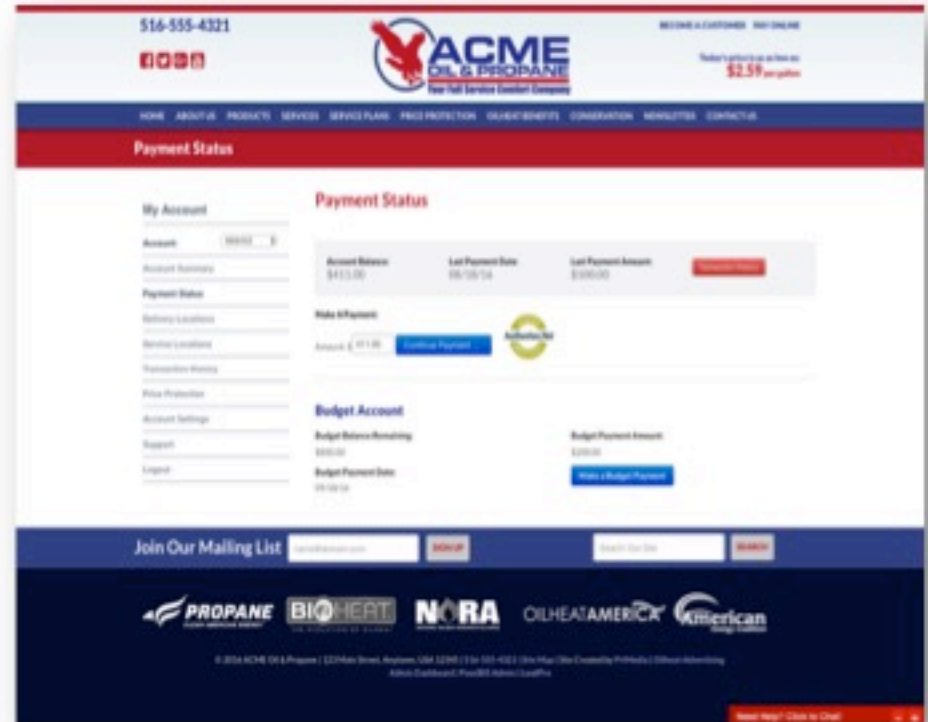
**Annual Salary Including Benefits - \$41,000+**





# 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

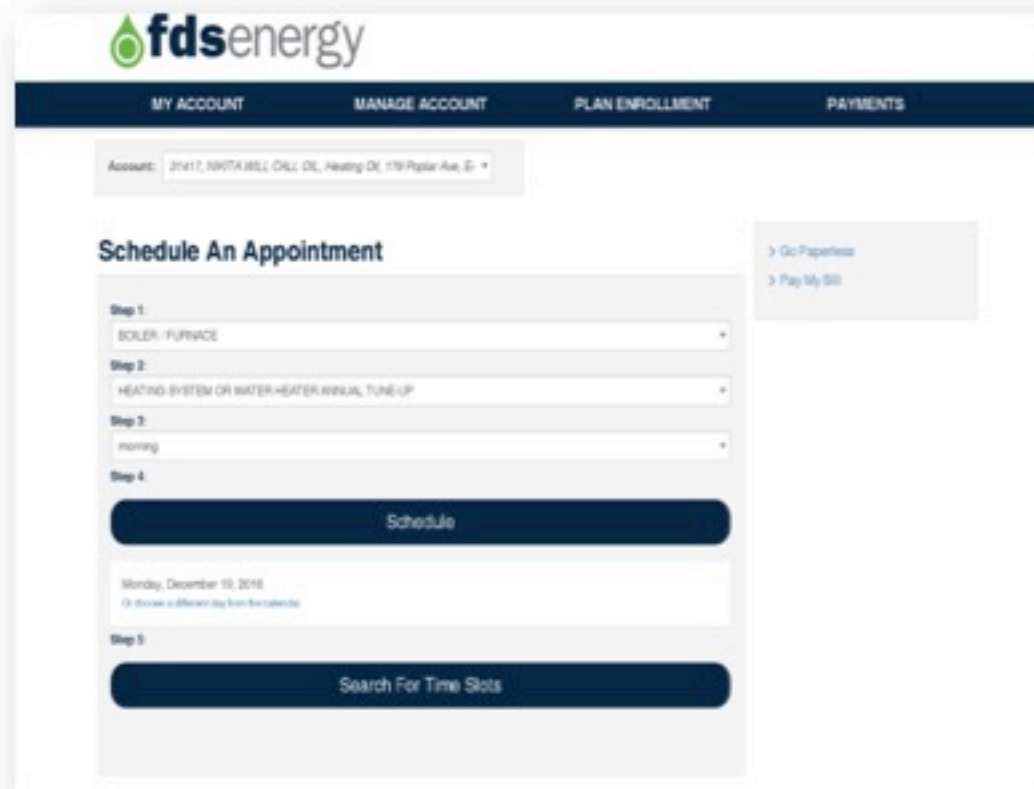
- Advanced
  - Accept delivery orders

The screenshot displays the 'fdsenergy' website interface. At the top, there's a navigation bar with links: 'MY ACCOUNT', 'MANAGE ACCOUNT', 'PLAN ENROLLMENT', and 'PAYMENTS'. Below this, a dropdown menu shows the account name: 'Account: 01417, NHTA WILL CALL OIL, Heating Oil, 179 Poplar Ave, B...'. The main section is titled 'Order Fuel'. It contains a form with the following fields: 'Product' (Heating Oil), 'Tank Location' (0001, 179 Poplar Ave, EASTON, CT 06012), 'Today's Price' (\$2.799 per gallon), 'Your Tank Capacity' (2,800 gallons), 'Fill Tank?' (radio buttons for Yes and No), 'Coupon Code' (with an 'Enter Code' button), 'Total Price' (\$7,827.20), 'Name' (NHTA WILL CALL OIL), 'Phone Number' (203-123-4567), 'Email Address' (sales@fdsenergy.com), and 'Other Comments or Information'. A 'Submit' button is at the bottom of the form. To the right of the form, there's a blue informational box stating: 'You can expect your delivery within 3-5 business days your order. When you place your order, please make sure there is enough fuel in your tank to last until you receive your delivery. Emergency deliveries will be made the same day if possible, or the next business day with an additional surcharge. Your credit card will be charged for the full amount of gallons ordered.' Further right, there are two links: '> Go Paperless' and '> Pay My Bill'.



# Self-Service Options to Consider

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



The screenshot displays the 'fdsenergy' website interface. At the top, there is a navigation bar with links: 'MY ACCOUNT', 'MANAGE ACCOUNT', 'PLAN ENROLLMENT', and 'PAYMENTS'. Below this, an account address is shown: 'Account: 21417, NORTH HILL OIL, Heating Oil, 119 Poplar Ave, E'. The main section is titled 'Schedule An Appointment'. It contains a multi-step form with the following details:

- Step 1:** A dropdown menu with 'BOILER / FURNACE' selected.
- Step 2:** A dropdown menu with 'HEATING SYSTEM OR WATER HEATER ANNUAL TUNE-UP' selected.
- Step 3:** A dropdown menu with 'morning' selected.
- Step 4:** A large dark blue button labeled 'Schedule'.
- Below the button, the date 'Monday, December 10, 2016' is displayed, with a link to 'Or choose a different day from the calendar'.
- Step 5:** A large dark blue button labeled 'Search For Time Slots'.

To the right of the form, there is a grey box containing two links: '> Go Paperless' and '> Pay My Bill'.

# 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                  | REDONG                                     |
| 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 <a href="#">Click here to Redeem</a> |
| Tank Capacity                  | 260.00 gallons                             |
| Info Last Updated              | 05/11/2011 04:23:21                        |



## ➤ Consumer Data Mining - Promote Will Call to Automatic

516-555-4321

 **ACME**  
OIL & PROPANE  
Your Full Service Comfort Company

BECOME A CUSTOMER PAY ONLINE

Today's price is as low as:  
**\$2.59** per gallon

HOME ABOUT US PRODUCTS SERVICES SERVICE PLANS PRICE PROTECTION OILHEAT BENEFITS CONSERVATION NEWSLETTER CONTACT US

### Marketing

Welcome Sue!

Dashboard

Account View

Auto Emails

Coupons

E-Billing

E-Blast

Forms

LeadPro

Live Help

Inquiries

Marketing

Price Protection

Reports

Reward Points

### Marketing Admin

ADD NEW MARKETING

Choose Icon:



Headline: Become an Automatic Delivery C.

Content:

File Edit Tools View

Font Family Font Sizes

**B** *I* A   

Never worry about running out of fuel again.



We'll fill your tank when you're running low.

[Learn More & Enroll Online](#)

p Words: 21

### Active Marketing

**It's Time to Renew Your Comfort Service Plan**

Make sure your comfort systems are protected



We offer plans for your  
Boiler/Furnace  
Heat Pump  
Central Air Conditioner

[Renew Online](#)



Expiration Date: 07/15/16  
Tags: Service Plan Enrolled  
[Manage Marketing](#)

**Become an Automatic Delivery Customer**

Never worry about running out of fuel again

Need Help? Click to Chat!


 



## ➤ Consumer Data Mining – Coupon Offerings

516-555-4321

[f](#) [t](#) [G+](#) [in](#)



**ACME**  
OIL & PROPANE  
Your Full Service Comfort Company

BECOME A CUSTOMER   PAY ONLINE

Today's price is as as low as:  
**\$2.59** per gallon

HOME   ABOUT US   PRODUCTS   SERVICES   SERVICE PLANS   PRICE PROTECTION   OILHEAT BENEFITS   CONSERVATION   NEWSLETTER   CONTACT US

### Coupons

**Welcome**  
**Sue!**

- Dashboard
- Account View
- Auto Emails
- Coupons
- E-Billing
- E-Blast
- Forms
- LeadPro
- Live Help
- Inquiries
- Marketing
- Price Protection

### Coupon Management


**ADD A NEW COUPON**

Upload File:

**Get \$100 off your new furnace.**

Choose ACME Oil & Propane to install your new furnace and take advantage of this special offer.

[Click Here](#)



Exp. Date:


Target:  of the following conditions are met:

|               |   |                                  |                                  |
|---------------|---|----------------------------------|----------------------------------|
| Delivery Type | <input type="text" value="Automatic Delivery"/> | <input type="button" value="-"/> | <input type="button" value="+"/> |
| Budget Status | <input type="text" value="Enrolled"/>           | <input type="button" value="-"/> | <input type="button" value="+"/> |
| Balance       | <input type="text" value="\$0"/>                | <input type="button" value="-"/> | <input type="button" value="+"/> |

#### Active Coupons

**Get \$10 off your next tune-up.**

Help keep your equipment running smoothly and efficiently all year long. Schedule your next tune-up today.



[Click Here to see this Offer](#)

Expiration Date: 07/05/16


Tags: Automatic Delivery

[ Manage Coupon ]

**Get \$100 off your new furnace.**

Choose ACME Oil & Propane to install your new furnace and take advantage of this special offer.

[Click Here](#)



Expiration Date:

**Need Help? Click to Chat!**

# 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



# Self-Service Technology Implementation Methods

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



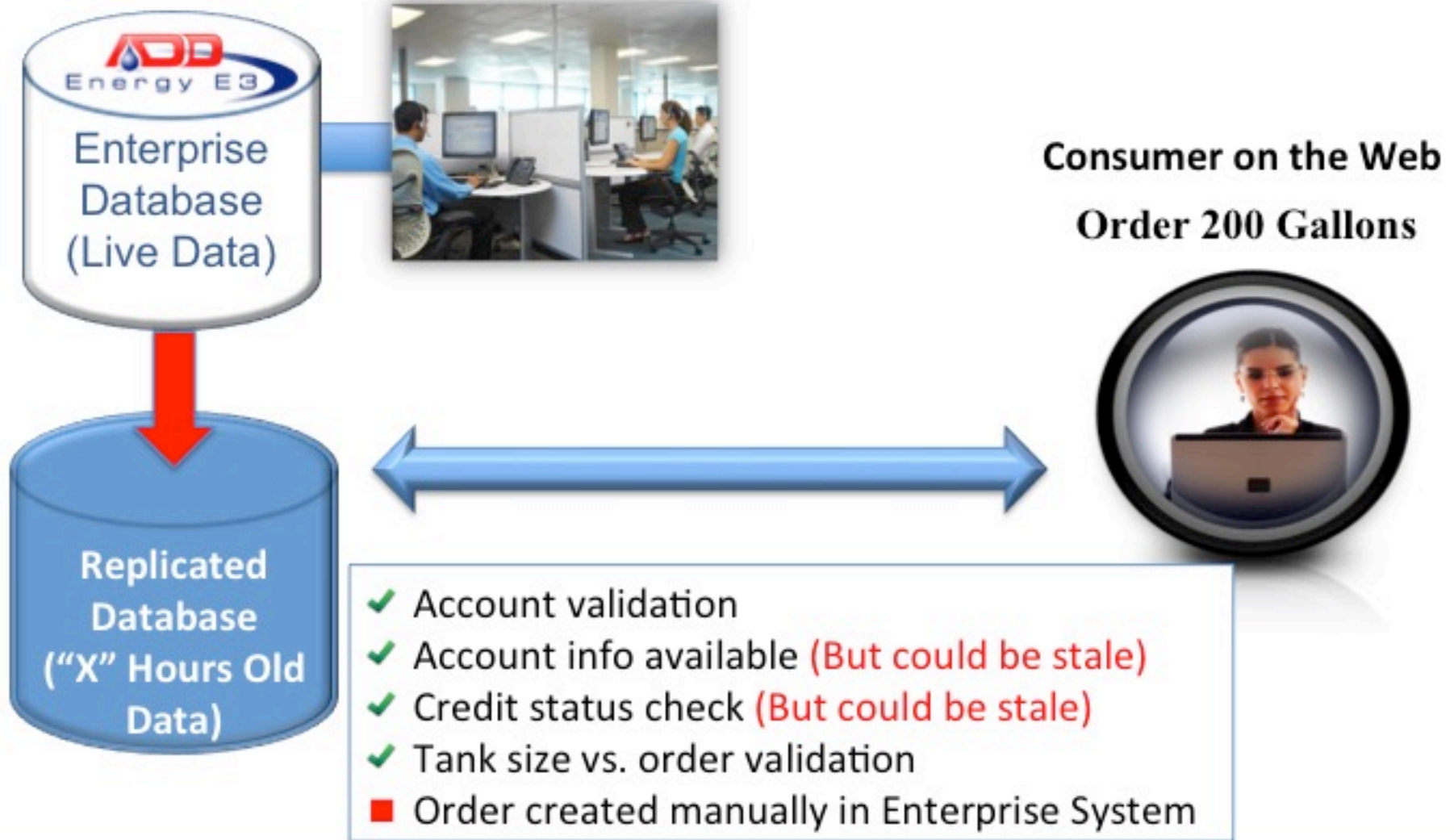


# SneakerNet Method – Delivery Order

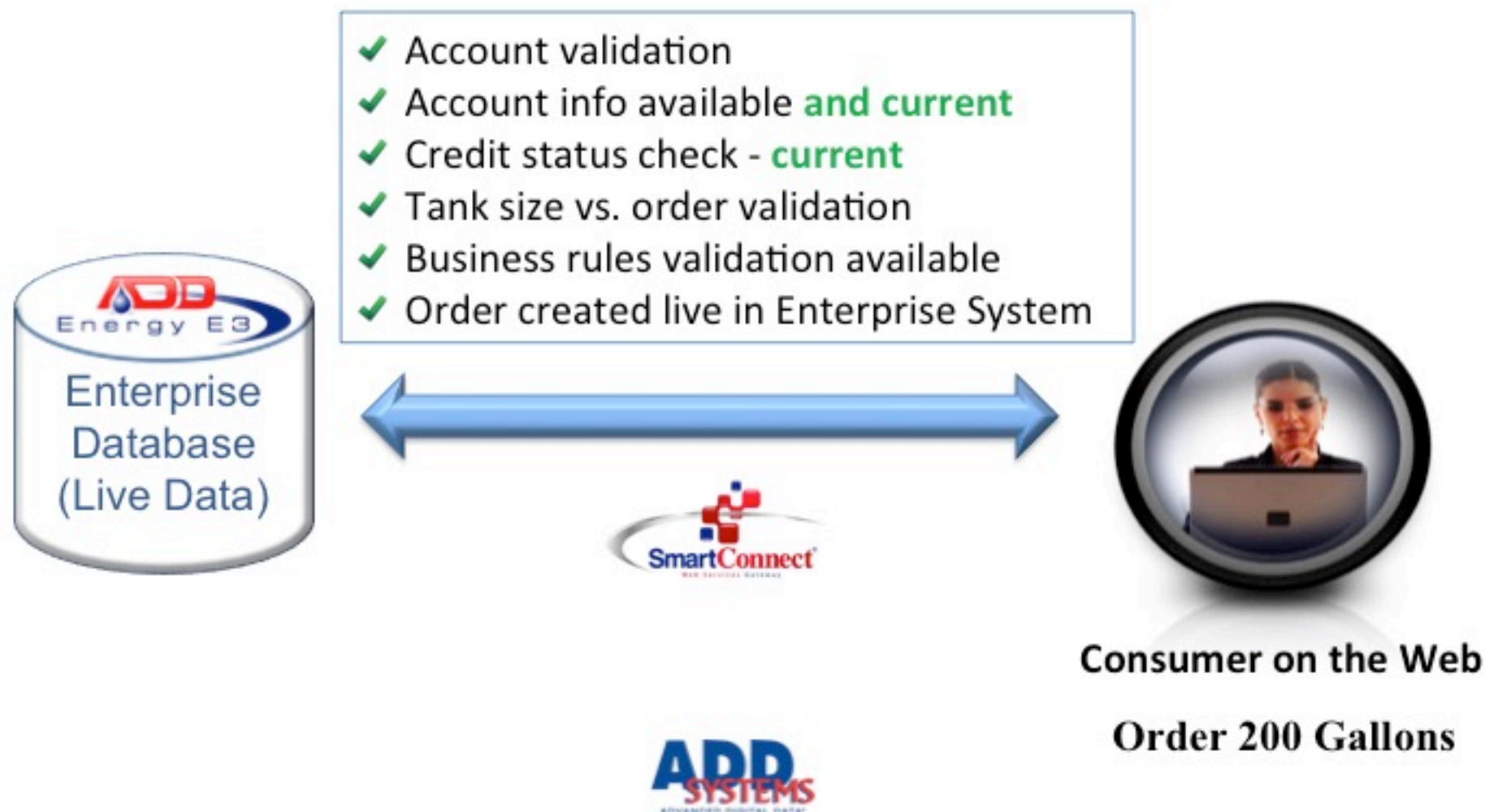




# Dump and Load Method – Delivery Order



# Web Services Method – Delivery Order



| 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<br>www.addsys.com | Yes              | Yes              | Electronically Created |



# 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



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# Delivery Order to Cash

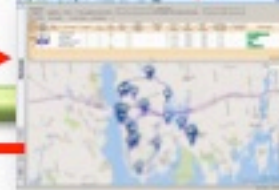
- ✓ Credit Checked – **On Hold**
- ✓ Validate Credit Card
- ✓ Pay Over-Due Balance
- ✓ Place Delivery Order
- ✓ Sign Up for Delivery Notifications – Email or Text



Consumer on the Web  
Order 200 Gallons



Raven Dispatch



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# Delivery Order to Cash

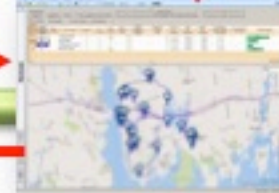
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- ✓ Pay Over-Due Balance
- ✓ Place Delivery Order
- ✓ Sign Up for Delivery Notifications – Email or Text



Consumer on the Web  
Order 200 Gallons



Raven Dispatch



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

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# Delivery Order to Cash

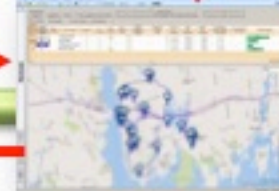
- ✓ Credit Checked – **On Hold**
- ✓ Validate Credit Card
- ✓ Pay Over-Due Balance
- ✓ Place Delivery Order
- ✓ Sign Up for Delivery Notifications – Email or Text



Consumer on the Web  
Order 200 Gallons



Raven Dispatch



- ✓ 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

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# Delivery Order to Cash

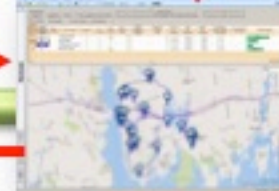
- ✓ Credit Checked – **On Hold**
- ✓ Validate Credit Card
- ✓ Pay Over-Due Balance
- ✓ Place Delivery Order
- ✓ Sign Up for Delivery Notifications – Email or Text



Consumer on the Web  
Order 200 Gallons



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

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# 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



# ADD Systems – Core Products



# ADD Systems – Example Clients



**Superior**  
Propane



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# Questions?

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