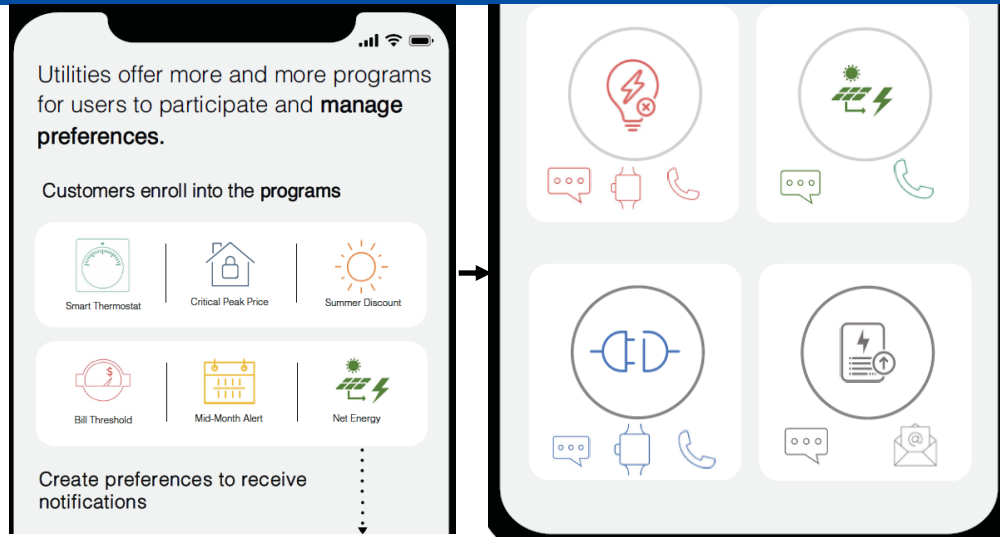


Enterprise Preference Management For Utilities Industry using SAP CR&B

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“The limited preference options that we provide are captured in disparate systems and through disparate processes that require almost continuous updates to the system of record. Every preference element is standalone and must be manually updated.”

In an era, when technology is transforming the way people lead their lives, it’s increasingly becoming important for companies to use state of the art technology to communicate with the customer. Effective communication can be a competitive differentiator for most companies. In order for effective communication to occur, it’s imperative for companies to honor enterprise preferences with regard to the content, mode/channel, and

timing of communication. However, companies are facing challenges in implementing enterprise preference management solutions due to perceived loss of control to customers, and disparate legacy systems. In response to this need, uPrefer Solutions has developed a rapidly deployable, low cost, and scalable solution built on an existing SAP Utilities framework, making Enterprise Preference Management an integral part of SAP

for Utilities and eliminating the need for expensive third party software. This solution enables companies to effectively communicate with the customer, thereby increasing customer satisfaction, as well as achieving better sales & marketing campaign results, and ultimately, an improved bottom-line.

“Firms should ideally implement a centralized solution designed to store and distribute preferences regardless of where they were collected.”

Forrester Research²



Why is communication with the customer important and what is a Enterprise Preference & Notification Management solution?

For most companies, and for Utilities in particular, customer satisfaction is the most important performance indicator. Higher customer satisfaction results in an improved competitive position, and favorable rate case outcomes for utilities. Customer satisfaction is not only a function of the quality of the product offerings, but also dependent on effective communication.

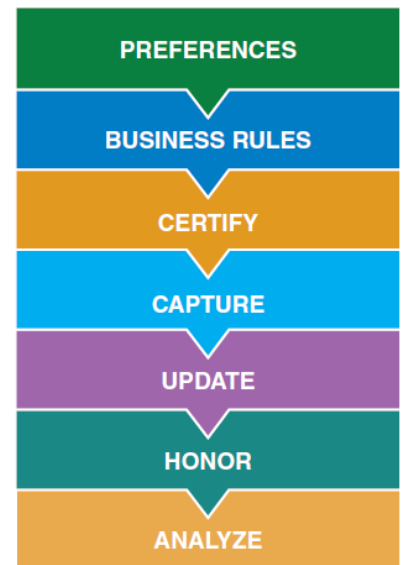
Given the wide array of communication channels available, such as mobile, email, text, and social media among others, customers are bombarded with a wide variety of information. However, information overload without regard to the enterprise preferences on how they would like to be communicated which can negate the effectiveness of such information. An effective Enterprise Preference Manage-

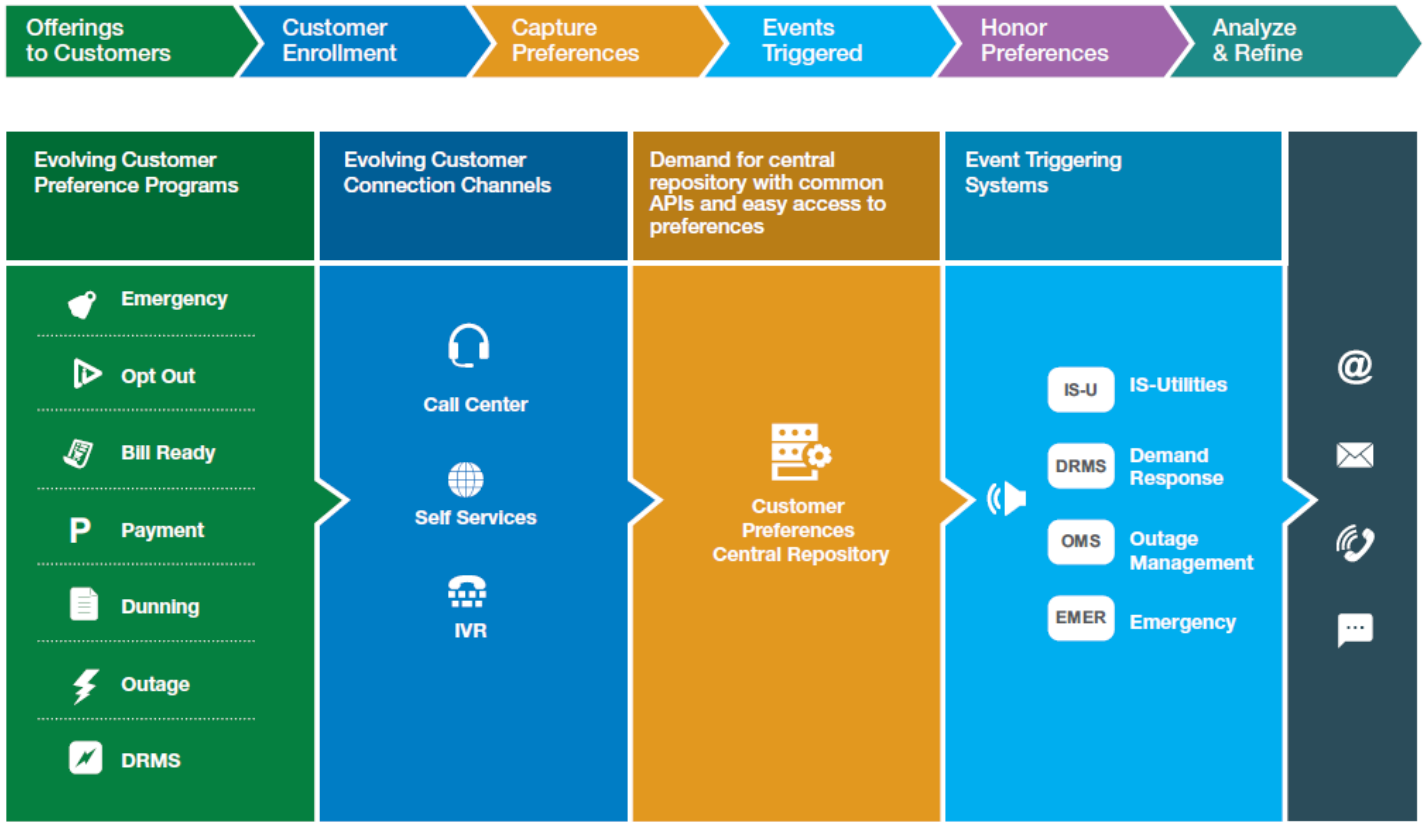
take into consideration enterprise preferences with respect to what, when and how they would like to receive information. By employing such a solution, a company can tailor its communication strategies to deliver personal, relevant, and engaging messages. An effective Enterprise Preference Management solution will have the following elements:

What to receive – content type: Alerts, promotions, new products, problem situations etc.

When to receive – frequency and time of the day: Daily, weekly, monthly, yearly, or never; Time of the day to receive such messages

How to receive – Mode/Channel of communication: Email, text, voice messages, snail mail, social media etc.





Companies sensitive to these preferences will likely lead the way in gaining excellent customer experience going forward.

How are companies managing enterprise preferences currently and what are the limitations of such strategies?

- Custom data storage for each preference type, which suffers from the limitations in terms of,
 - Customer data sits in disparate systems throughout the organization leading to multiple views of the customer
 - Synchronization between enterprise preference data and the customer's communication data has to be established manually.
- A third party system to store all preferences, the limitations of which are:
 - Customer data is stored in a 3rd party hosted server involves heavy data replication resulting data latency
 - Needs daily synchronization of master data and transaction data with 3rd party system
 - High maintenance costs due to multiple interfaces

“Leaders define not only how data will be gathered but where it will reside in the enterprise to ensure suitable ongoing management and availability to users for the execution of preference management programs.”

Forrester²

Given the limitations associated with each of the existing solutions, there is clearly a need for a solution that provides a central repository for all the enterprise preferences, and yet be a part of

How is an uPrefer Solutions enabled solution better than the existing solutions in the market?

uPrefer Solutions has developed a rapidly deployable, low-cost, and scalable solution built on existing SAP framework making Enterprise Preference, Notifications and Consent Management an integral part of SAP for Utilities and eliminating the need for direct and indirect costs like data synchronization with third party software. The advantages of “uPrefer Solutions” solution are as follows:

From a customer point of view:

- Puts customer in control of

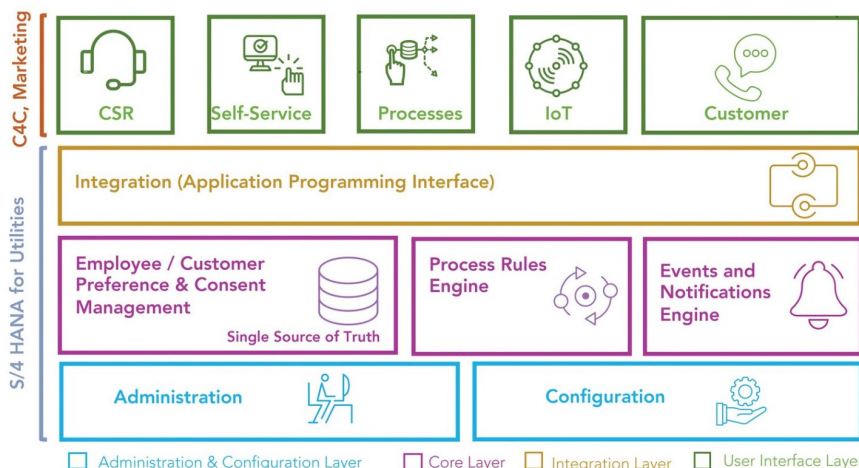
their preferences

- Provides an easy to use interface that allows the customers to manager their preferences through their chosen medium.

From the company point of view:

- Less custom code; built on existing framework
- Provides central repository for all enterprise preference data, allowing for a single view of the customer

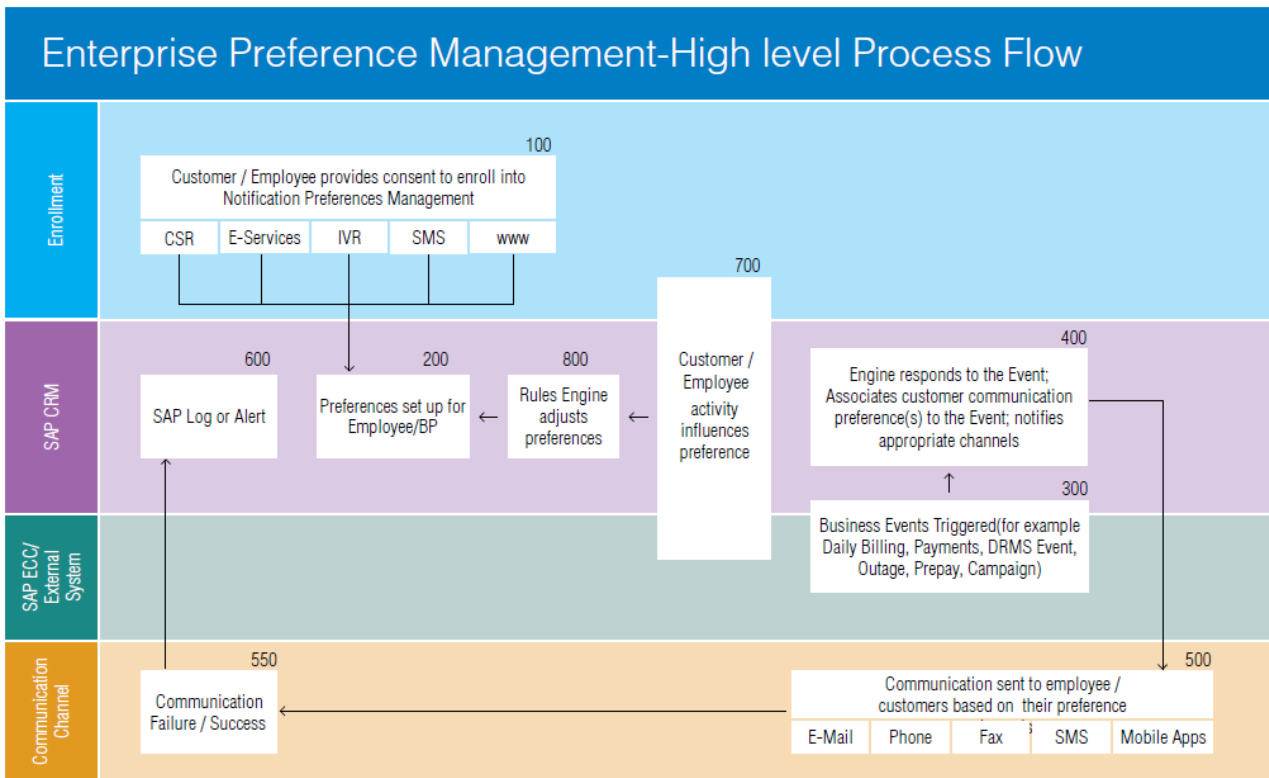
- Reduces Call Volume by providing flexible web interface
- Since data is native to CRM, it is available for other purposes like marketing, backend processes and BI integration
- Allows for better customer experience auditing and tracing
- Allows for Statutory compliance (Do Not Call etc.)



Source : uPrefer Solutions, Inc.

Can you provide a high level process flow of uPrefer Solutions Enterprise Preferences Management solution?

uPrefer Solutions Enterprise Preference Management solution uses the established SAP CRM framework to make Preference Management an integral part of the SAP for Utilities. A high level process flow is shown below:



“Requirements for notification, consent and subject rights requests (SRRs) are driving rapid adoption of consent and preference management platforms (CPMPs). Providing an effective customer-centric experience requires organizational transformation and technology engagement, whether through vendor solutions or in-house development.”

Gartner 2022³

Conclusion:

“Sophisticated Utilities need sophisticated solutions”. uPrefer's Enterprise Preference and Notification Management solution is one such. Low-cost and built entirely on the existing SAP framework, this solution minimizes custom code, provides a single view of the customer, and integrates seamlessly into existing channels of customer communication.

Notes:

1. Forrester Consulting report titled "Overcoming the Barriers to Preference Management" May 21, 2010
2. Forrester Research “Implement Preference Management To Build Customer Trust” Oct 20, 2015
3. Market Guide for Consent and Preference Management for Marketers, Sep, 22, 2022

uPrefer Solutions, Inc.

With offices in Texas, New Jersey and United Kingdom, uPrefer Solutions specializes in product development and Business Integration based on SAP for Utilities technologies. uPrefer Solutions, Inc. is an SAP Partner company. The leadership team has a combined experience of over 52 years in SAP implementation with a focus on utilities.

uPrefer Product Portfolio

- ⇒ Customer and employee preference management solution for utilities industry. The solution is native to SAP for Utilities (ISU in ECC or S/4 Hana).
- ⇒ Notification Gateway to trigger, log Events.
- ⇒ Authorization / Consent Management Solution for Utilities.
- ⇒ Terms & Conditions and Privacy Policy Management for Utilities.
- ⇒ Customer 360 degree view platform that is a foundation for artificial intelligence enabled customer call reason prediction.

uPrefer Products are 100% US Built and Premium Certified by SAP, AG.



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