

Energy assistance case management



Financial assistance programs are providing relief for utility customers impacted by the current global pandemic and economic fallout. Our energy assistance case management solution, built on the Salesforce platform, simplifies the process for customers to apply with agencies for local utility financial assistance and maintain their utility service connection.

Simplifying cases for customer service

While the Low Income Home Energy Assistance Program (LIHEAP) and other state-run programs are not new, the demand for domestic utility financial assistance is on the rise. Utility customer service organizations may not have the right tools in place to promote assistance options for their customers, navigate the various program requirements or handle the increased demand. Our quick-to-market solution, built on the Salesforce platform, provides a single point of tracking and reporting of customer energy assistance requests. Utilities gain valuable insights into the impacts of bad debt on their cost recovery planning.

How the energy assistance case management solution works

Customer service representatives often face a daunting task in managing customer requests for energy assistance during times of need. The energy assistance case management solution leverages Salesforce Customer Community Self-Service for utility customers to learn more about financial assistance options. Cases created are managed by a customer service agent and passed through customized approval workflows, based on the specific customer needs and programs available.



Built with deep CGI expertise and the agility of the Salesforce platform

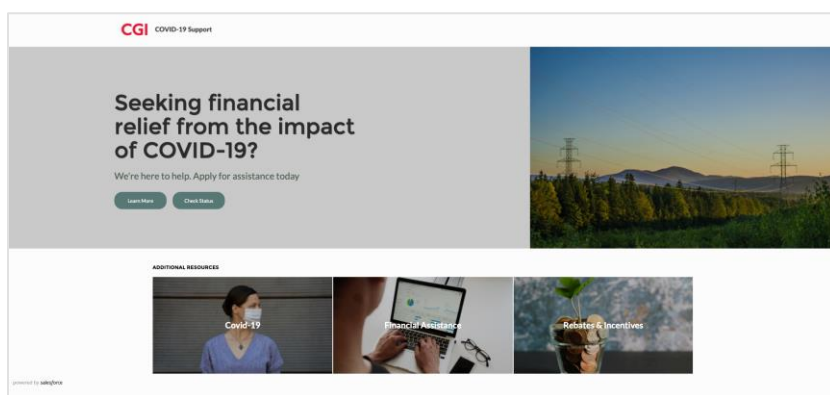
CGI's unique position of delivering solutions and services for the utilities industry, paired with our extensive Salesforce implementation expertise means our experts can deliver a fully-integrated customer service solution quickly. With the clarity and flexibility of the Salesforce platform, our energy assistance case management solution brings a simple user interface and streamlined integration experience for quick results. As an experienced Salesforce integration partner, CGI brings global expertise in implementing and optimizing the platform.



A summary dashboard for executives provides the insights required for financial assistance decision-making and communication with government and program funders.

Benefits for customers

Utility customers can find financial assistance opportunities and answers quickly through the simple interface and application process offered in the energy assistance case management tool. There are often multiple energy assistance programs offered, and navigating the different programs may be difficult for customers. This solution provides utility customers with a one-stop process for all available programs. CGI's approach to the Salesforce platform puts the customer at the center, ensuring that the design and configuration is built with the end user in mind.



Energy assistance case management customer-facing site

Benefits for utilities

By gathering customer application data in the Salesforce platform, utilities can easily report and track application status. Customer service agents can minimize call volume by referring customers to the platform for information and application status, helping to alleviate customer concerns during a potentially stressful time. This solution can auto-scale with ease, allowing utility organizations to adapt quickly to changing conditions and their customer demands.

Utilities get real-time visibility into the volume of assistance program requests and have insight into how demand is shifting or changing. Customer requests are brought into focus, allowing utilities to understand the level of debt and plan what can be recovered from assistance programs and rate case increases. This insight is crucial to understanding the impact of COVID-19 on utility customers and operations.

About CGI

Insights you can act on

Founded in 1976, CGI is among the largest IT and business consulting services firms in the world.

We are insights-driven and outcomes-based to help accelerate returns on your investments. Across hundreds of locations worldwide, we provide comprehensive, scalable and sustainable IT and business consulting services that are informed globally and delivered locally.

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