

SUCCESS STORY

Leading Energy & Utilities Provider

VALUE DELIVERED

- ✓ OSF delivered the initial portal, successfully brought the solution live, and secured follow-on transformation work through **demonstrated business value** and delivery excellence.
- ✓ Combined **deep Energy & Utilities expertise** with Salesforce platform knowledge to translate complex business requirements into scalable digital solutions.
- ✓ Established a **long-term partnership** focused on continuous innovation, process optimization, and customer experience improvement.
- ✓ Won subsequent transformation work in a **competitive environment** against major global consultancies.



OSF | DIGITAL

Scaling Self-Service Operations with a Digital Customer Portal

Customer Profile

Our customer is a leading integrated energy and utilities provider serving business customers through a **complex portfolio of energy products and services**.

Challenge

Modernizing customer-facing processes and supporting long-term growth

- ✓ Customers relied on **manual processes** and sales representatives for key account and contract-related activities.
- ✓ Existing self-service capabilities provided **limited visibility and functionality** for managing contracts and operational activities.
- ✓ Wanted to **improve customer experience**, increase scalability, and improve operational efficiency.

Customer Adoption

- ✓ Supported business customers to adopt **self-service capabilities** for account access, contract visibility, scheduling, and service management
- ✓ Transitioned internal teams from spreadsheet-based and manual processes to **digital workflows** with increased visibility, traceability, and operational control.

Outcome-Driven Solution

Implemented an end-to-end Gas On-Grid scheduling solution that provides greater control, traceability, and visibility for users

- ✓ Created a portal for their B2B clients using **Experience and Service Clouds** within the **Energy & Utilities Cloud** platform.
- ✓ Clients will be **able to self-serve** to view contracts, gas consumption, account information, and more.
- ✓ The solution included Digital Engagement and **WhatsApp integrated with the provider's SAP ERP**.
- ✓ **Automated and digitized processes** to avoid human errors and increase operational efficiency.
- ✓ Enabled self-service to improve the client experience and **increase CSAT**.
- ✓ The ongoing second phase expands contract **life cycle management capabilities** and creates a scalable operational foundation for future enhancements.

- ▶ **Automated business-critical processes**
Reduced manual effort and minimized errors
- ▶ **Future-proofed, scalable platform**
Ongoing evolution of customer operations

PRODUCTS

Energy & Utilities Cloud

Service Cloud

Experience Cloud

Sales Cloud