

CASE STUDY

Discovery, strategy, UX/UI design, custom integrations, technical assessment, custom development and redesigned customer web portal for **Palmer Gas & Oil**.



1 ABOUT PALMER GAS & OIL

Palmer Gas and Oil started in the early 1900's as a country store in North Salem, NH owned by William Palmer. The store offered customers everything they could need from milk to mail. In the late 1940s, Palmer started including bottles of gas in his store's offerings for neighbors and friends. Around the same time (1932), Palmer's son-in-law, Charles Ermer, started a

kerosene and fuel oil business in the Salem area. Eventually, the two businesses merged and in 1981 Palmer Gas/Ermer Oil was formed. Over 90 years later with both propane and fuel oil, Palmer Gas & Oil is still making people smile. The simple fuel delivery and service programs along with easy billing and maintenance plans keep customers comfortable year-round.

2 OUR APPROACH

Palmer Gas & Oil came to SilverTech looking for a long-term sustainable solution for its customer and administration web portals. Palmer wanted the new portal to be more user-friendly and improve the overall customer experience. The old "My Account" portal was outdated and a bit cumbersome to use. Palmer Gas & Oil employees could not make content updates to the portal and relied on their vendor for any and all changes. Changes were expensive and error prone. Palmer Gas & Oil also wanted to leverage features like personalization to target certain messages and show/hide features depending on programs customers are enrolled in.

The new web portal would need to be designed for the user to have a friction-free experience, promoting customer self-service, easy to navigate, technically sound.

SilverTech begins any project with the discovery phase. In Discovery, SilverTech's strategy and technical experts worked closely with Palmer Gas & Oil stakeholders to understand and further develop the business goals, website goals, business drivers, technology requirements, sure analytics, success criteria and more to identify how the new portal should function. The new portal needed to reflect the Palmer values of safety, excellence, integrity, teamwork, community, and fun.

3 GOALS

The new My Account dashboard would need to be user friendly and mobile responsive. The innovative design should be clean and modern, giving customers a better digital experience. Palmer Gas & Oil's main goal for the new customer dashboard was to give users a better user experience and increase customer self-

service using the portal. The new customer portal would allow users to create and manage an account, order fuel delivery and service, make payments, check history, and join the rewards program. Additionally, the new Palmer Gas & Oil Administrator portal allows them to manage its home heating business including:

- ✓ Processing payments
- ✓ Reconciling online payments
- ✓ Running credit reports for new customers
- ✓ Setting and managing Oil and Propane contract pricing
- ✓ Creating Pricing and Budget Contracts
- ✓ Mailing out contracts
- ✓ Reviewing reports on gallons sold and average prices.
- ✓ Managing customer rewards

GOALS, BUSINESS DRIVERS AND SUCCESS CRITERIA FOR THE NEW PORTAL

- ✓ Interactive customer facing portal requirements
- ✓ New customer online enrollment form
- ✓ Price protection portal
- ✓ Palmer Points portal
- ✓ Administrator dashboard

4 CMS AND INTEGRATIONS

Progress Sitefinity was the perfect DXP/CMS for the creation and maintenance of the new customer portal due to the custom functionality and features needed to build the improved portal. The Sitefinity CMS allows Palmer administrators to manage the portal from one hub with ease. Palmer needed a system that was easy to use, allowed them to manage as much of the content as possible, and flexible enough to customize and integrate with their third-party systems. Overall security as well as role-based permissions was also an important consideration. In addition, the team at Palmer was interested in personalization so they could provide targeted advertising to various audiences as well as show and hide certain features for several types of customers (Commercial vs Residential) or customers enrolled in certain programs (Enrolled in paperless billing or rewards). Key integrations include:

- ✓ BlueCow CRM - 2-way integration for managing accounts, payments, and contracts
- ✓ Transunion - Perform real-time credit reports on new customer applications.
- ✓ QualPay - Payment Gateway handling real-time and scheduled recurring payments

5 THE RESULTS

The new portal has been a tremendous success and helped Palmer Gas & Oil run its business daily and meet its customer self-service goals. The portal is easier to use and faster allowing Palmer Gas & Oil team members to get their work done more efficiently and more intuitive for end users resulting in better adoption and an increase in customer self-service.

WE GENERATED

New portal accounts
created
3,700

New "Go Paperless"
requests
550

Payments processed in
portal
62,000

Recurring payments
scheduled
500

New pricing contracts
created in portal
3,800

Delivery requests
created in portal
1,400

Customers joined
online rewards
875