



THE **7**-RULE

ACTION PLAN TO OUTPERFORM THE
COMPETITION IN EV CHARGING

OR

How to become
the most successful eMSP ever



What defines a great eMobility Service Provider?

That is a question I have been asked many times by people working at car manufacturers, leasing companies, insurance companies, charge point operators and in a whole range of other industries. The question is certainly justified as the eMSP is destined to play a central role in orchestrating the charging experience for EV drivers.

The eMSP occupies that part of the EV charging ecosystem which is most visible and tangible to the EV driver. Offering a great eMSP service therefore sends a strong signal of intent towards your customers.



Jacob Van Zonneveld

In e-mobility since 2012
Co-founder of Plugsurfing & DEFTPOWER

Introduction

I have been working on building EV charging products for the past decade, and in that time, I've collected insights and experiences which let me give you a better answer to what makes a great eMSP than the standard one-liners I used to provide. With great, I do not mean good enough that users won't complain too loudly. EV drivers deserve a charging product which is designed around their needs and real-world experience, not one which is created solely based on theoretical assumptions polished in spreadsheets and PowerPoints.

The good news is that the threshold to become eMSP is significantly lower today than it was ten years ago, when everything had to be invented from scratch. Today the core foundations have already been laid.

I wish to share some of the lessons I have learned with you in this white paper, so that if one day you start offering EV charging services you can hit the ground running, make your customers happy and create a truly future-oriented business model. I do this by sharing what I believe are the seven rules you should follow when looking to become an eMSP. Enjoy the read, and one day I hope to greet you as a happy eMobility Service Provider powering this exciting transition to sustainable mobility.



What is an eMSP?

The e-Mobility Service Provider enables the electric vehicle owner to search, find and pay for EV charging, regardless of the charging network operator.

This multi-network charging, called "roaming", is ensured by the agreements which the eMSP holds allowing it to settle payments between electric vehicle drivers and charging point network owners.

RULE

1 2 3 4 5 6 7

Centralise your customer touchpoints

“50 percent of consumers are likely to switch brands if a company does not anticipate their needs.” - Salesforce

Let's face it: nobody likes charging. A life without charging is better than a life with charging and regardless of marketing slogans, choosing your eMSP will never be as exciting as receiving your first electric vehicle or seeing your child take their first steps. So, people are not inclined to obsess over an eMSP charging card, but they do need one and they want it to be easy and reliable.

Why, then, should you offer one? Because you already have a customer touchpoint and the more you maximise this touchpoint the less contact the customer needs to have with other brands.

When an EV driver uses your charging service they interact with your brand whenever they pull up to a charging point, swipe their card or tap

around in the app, receive an invoice, and make a payment. The more engaged you are when in touch with the customer, the more familiar they are with your brand, and the more likely they will accept more products and services from you. That is a lot of interaction! Imagine the impact this can have on the customer lifetime value.

Maximizing your touchpoints starts by recognizing where they are, both online and offline. Your mission is to identify the earliest customer touchpoint you have to the EV driver, and to then leverage this as best you can to tie that driver to your brand. Be diligent when identifying when this is and how you can use it, because if you have customers that are 100% in need of a charging card and they don't get it from you at the right time, then you can be 100% sure that someone else, perhaps to your dearest competitor, will provide this to them.

—
3x

per week EV drivers
open the eMSP app



RULE

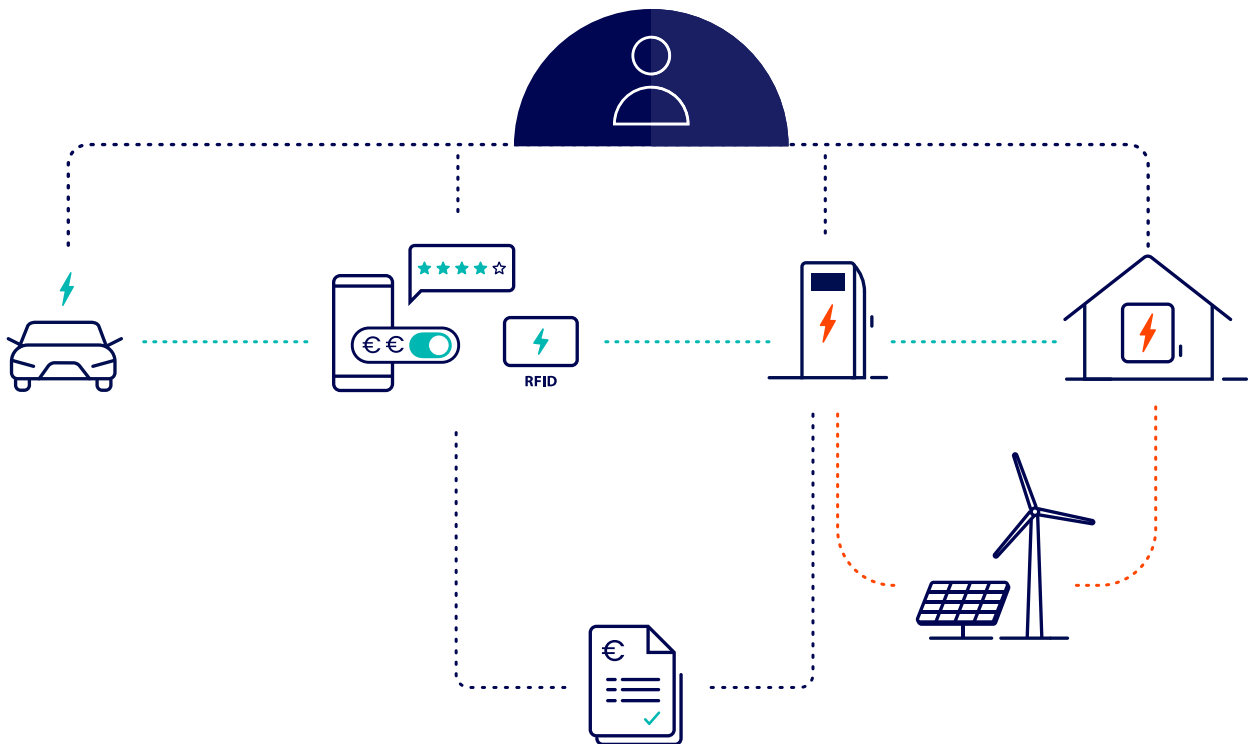
1 2 3 4 5 6 7

Play to your own strengths

„Courage is grace under pressure.“ - Ernest Hemingway

So, you've decided that offering EV charging services is good for your business. Now, you need to figure out how to stand out from the hundreds of other companies who've reached the same conclusion! As with any business model, the answer to how to how to build a successful one is different for everyone, but the approach is the same: play to your strengths.

The key question to ask yourself is not how your EV charging product differentiates from others in isolation, it's **how you can create a unique value proposition across your entire ecosystem of products and services**. It is when your customer is buying or leasing your car, buying your wall-box or even your car insurance policy or home electricity contract, that you can add value and ▶



RULE

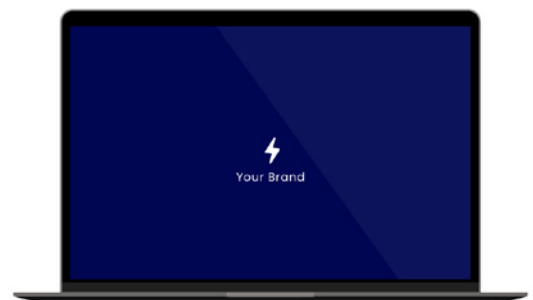
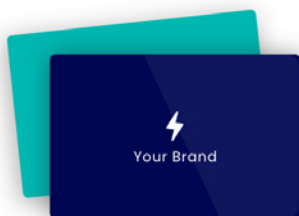
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cement that new customer relationship with a charging app. Especially when the services are connected and strengthen each other. There definitely is an emergent level here and this is still not widely understood.

Bundling EV charging with other EV-related products and services makes the purchasing decision more attractive than when every product is offered separately. Either out of convenience or because of pricing. Equally important is that it is less attractive for customers to switch away from an individual product or service when it's part of a bundle because they face losing the convenience, improved experience, or sharper pricing offered through the bundle. You don't

have to offer every product or service, but the more elements of the driver's e-mobility customer journey you can connect, the more value you can create and the closer you can tie them to your brand.

Of course, price matters, EV drivers consume electricity and electricity is a commodity. But it is less decisive than you might think. More important is the trust drivers have in your brand, the quality of your product and how you bring your customer into your ecosystem.



APIs are the way

“We are only as strong as we are united, as weak as we are divided.” -
Albus Percival Wulfric Brian Dumbledore in *The Goblet of Fire*

Imagine every time you use a new Google product for the first time – like Google Mail, Google Photos, or Google Drive – you’re asked to create a new account and register all of your information again, including credit card details. You’d be frustrated. “Why does Google keep asking for the same information!” Of course, this is not the case, but in the automotive and utility world this practice is as common as rain on an English summer’s day. This frustrates users who feel the company already has the information they are being asked to provide. Worse, this occurs right at the start of their customer journey – not a good first impression!

If the aim is to build a holistic customer experience, this type of fragmented experience is ruinous. As we’ve established, your aim should

be to build a multi-service value proposition which engages the customer across as much of their EV journey as possible. Integrations are key to building and managing a community of customers across different products and services. Separate apps are fine, often even desirable, but make sure the accounts behind them are connected! An open platform which allows all data or functionality to be exchanged via API is not a nice-to-have, it’s a must-have. Truly, this is the way.

22%
annual utility churn

RULE

3 4 5 6 7

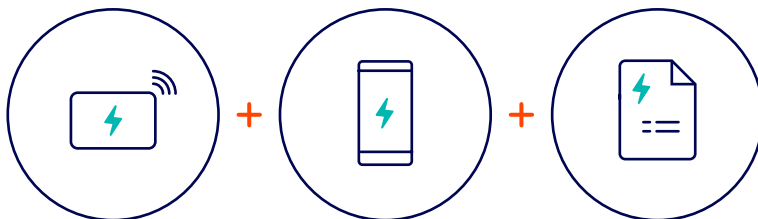
Care about your customer experience. The whole journey

„Think about every touchpoint your company has with its customers and ask yourself if you are talking in their language or yours.” - Dan Gingiss

Achieving a great customer experience is hard work, requiring patience, resilience, and great teamwork. An intuitive app looks simple when you use it, but the way the developer got there included some blood, sweat and tears, all spent on reducing the amount of clicks, integrating customer feedback without blowing up IT-resources and whilst staying consistent with your SLAs. Think twice how you will try to work this out.

The UX aside - your aim should be for the entire 360-degree EV charging customer experience to come from you and nobody else. Otherwise,

you dilute your own brand. A painful example is that many EV drivers receive a charging card from one company, but after using it receive their monthly charging invoice from another! This so called co-branded solution now dilutes your brand, and this is something you want to avoid at all costs. Sending an invoice might be scary, but it is a recurring touchpoint with your customer and when your brand is on the charging card it also should be on the invoice. And it's a good reason to send a monthly email to your customer, which is a luxury!



Your product has to be outstanding

„We are what we repeatedly do. Excellence, then, is not an act, but a habit.“ - Will Durant

A great customer experience is impossible without a first-class product, and that requires a first-class product team. Conversely, dealing with a subpar product team or an unstable platform is like opening Pandora's Box, you'll soon find that there is a never-ending backlog of issues. The end result is always the same – unhappy customers, unhappy staff for the highest price.

So what quality features do you need to dig? Beyond the perceivably obvious measurements of which MSP has the largest network, it is much harder to assess who has the best network and subsequent quality assurance management. It is like being offered 5G internet bandwidth, but the connection is poor 50% of the time, so that I can never really benefit from it. An average EV driver visits not more than 10 different charging sites per year, how can you ensure he has 10 times a hassle-free charging experience?

A great and often overlooked example is that roughly 10% of charging transactions sent by CPOs to eMSPs are erroneous in some way (i.e., wrong pricing, meter values, date). This means 10% of the invoices you send out will be incorrect in some way unless you are able to recognise this and doing something about it. A great eMSP product can reduce this number to at most 0.1%, and will offer guarantees to cover the remainder. Imagine processing 100,000 transactions per day and you can see how important this underrated aspect of the eMSP business is. In music they say a band is as good as its drummer. The product team is the drummer.

202%

Customer acquisition growth
eMSPs per year

300€

average CAC for utilities

Own the customer relationship and your data (!)

„In the world of Internet Customer Service, it's important to remember your competitor is only one mouse click away.” - Doug Warne

The EV driver is your customer and should be exclusively served by you, your brand, your values - not those of your supplier or competitor. You might think this is obvious, but what I have seen over the past years is very contradictory to this approach. All too often the customer is shared or even entirely referred to a supplier of charging cards and charging equipment. Yes, in the short term this means less “hassle” (as if serving your customers is a hassle) but in the long term you are not building a meaningful customer base. This way you will never make the best business decisions.

Tomorrow's leaders in e-mobility use digital transformation for customer ownership. You need to gain the ability to track EV drivers' behaviour and requirements through their actions both before and after they purchase a product or service from you. That means knowing how to engage with them and influence their be-

haviour, then using these insights to meet their ever-changing needs. So, to be clear: **you must own the customer relationship and the customer data.**

If the customer is signing your supplier's terms of use and privacy policy, they are in control, and you no longer own the customer touchpoint you are sponsoring. The industry is evolving quickly, and you may find that down the line your supplier or “partner” might be tempted to use what is effectively their customer touchpoint to drag your customer into a different ecosystem. Any migration requires your supplier's cooperation, because they hold the end-user contract and are the data controller. At that point, you've funded a tool which is actively losing you customers.

350€

Potential additional revenue per vehicle when owning the customer

Avoid vendor lock-ins from your suppliers

„Yeah, woow, whoo, yaaa, that is how it always starts. But later there's running, screaming.” - Jeff Goldblum as Malcolm in The Lost World

Software vendor lock-ins are usually preventable, but the landmines can be hard to spot. One common example in e-mobility is a company that wants to become both CPO and eMSP sourcing the software for both from the same supplier without requiring them to be open from the start. If you do this and later discover that there are better CPO or EMP solutions on the market, you will find that can't switch either part without losing the other.

Another common mistake made by companies trying to quickly become eMSPs is to rely on their supplier's EMA-ID (Party ID, i.e. DE-ABC). That ties you to their network and their cards. Any migration to a solution operating under a different ID is painful for you and your customers as you lose both your existing charging keys and any agreements made based on the old ID.

Even worse than just a vendor lock-in is a non-neutral supplier. In the rush to enter this market, many players have taken an eMSP solution from a supplier that is in direct competition with them. Think carefully about what your respective roles in this market are likely to be. If you get it wrong, all of your valuable data and insights risk going straight to a competitor.





Conclusion

Following these seven rules will set you up for the long term in EV charging. Your value proposition will be scalable, resilient, and still flexible whilst we leap into the future. Your customers will appreciate your efforts for making their life easier and your own colleagues will enjoy doing meaningful work. Applying the rules might require change in your organisation and, sometimes, change is hard. If your organisation is not incentivised to think and act long-term then changing that should be rule number zero. Stick to the seven rules and your business will thrive.



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