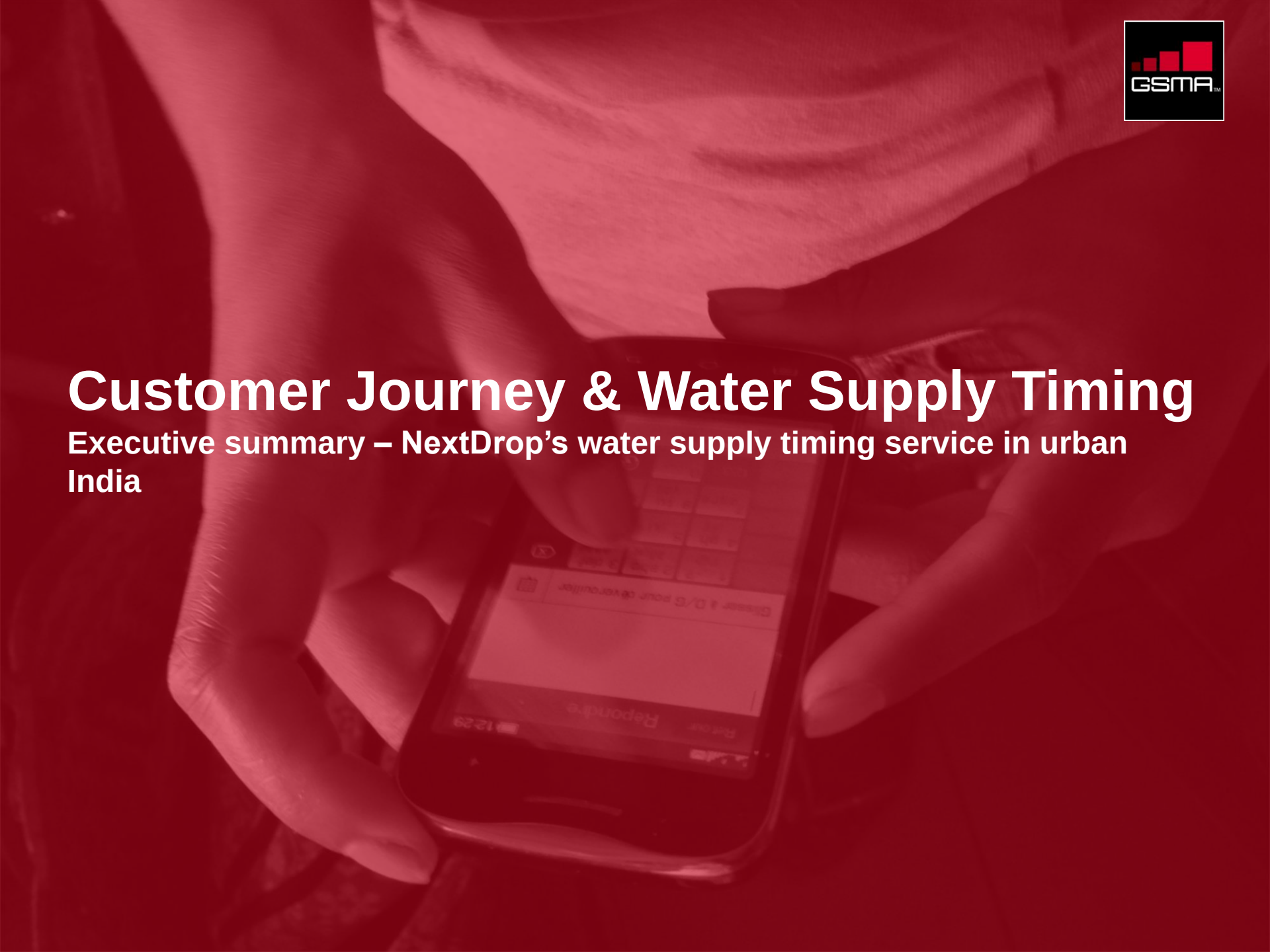


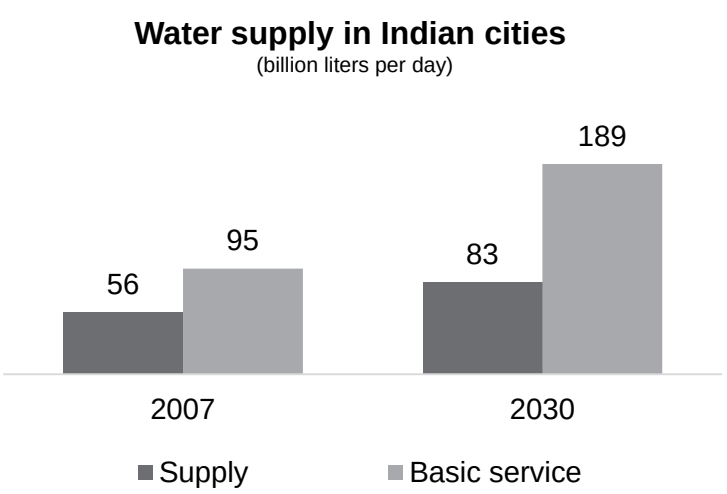
Customer Journey & Water Supply Timing

Executive summary – NextDrop's water supply timing service in urban India

Water supply is an issue in Indian cities, especially for lower income populations

Water demand is outpacing water supply

Water supply is scarce and unreliable in many Indian cities and massive investments are required. Demand is growing faster than supply across many Indian cities.



With lower income populations most vulnerable to the effects

Lower income populations will feel the effects of this water supply problem most acutely. Missing the water supply may come at significant cost.

Lower ← Income → Higher

- Limited storage space – often using buckets, bowls
- Need to fill up storage spaces with water manually
- Having to pay more for tankers is a big expense

- Often have underground and overhead tanks
- Tanks can fill up automatically
- Have another water source such as a private bore well
- If needed, can buy water from tankers

Sources: McKinsey Global Institute, Government of India,

See section in full report:
Project & Organisation Overview

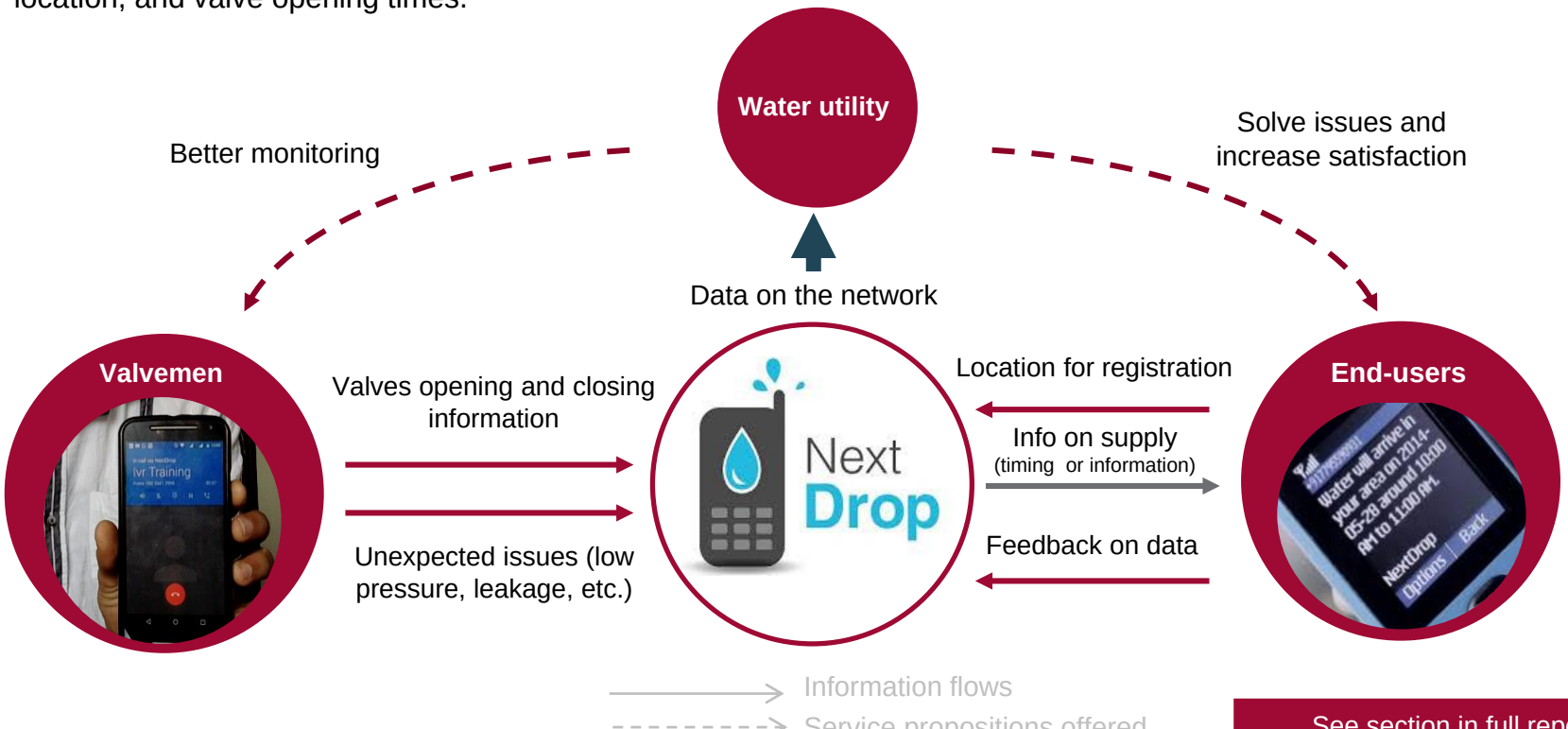
NextDrop addresses a need in the context of this problem by engaging 3 user types

Service delivery based on mobile solutions that captures critical data

NextDrop has created mobile solutions that engage end users and valvemen (individuals who manually open/close valves on the water network daily). These applications capture critical information such as location, and valve opening times.

Such data is used as the basis of key services

Information derived from the data collected forms the basis of service value propositions, **enabling end-users to get information on supply, and the utility to understand network performance.**

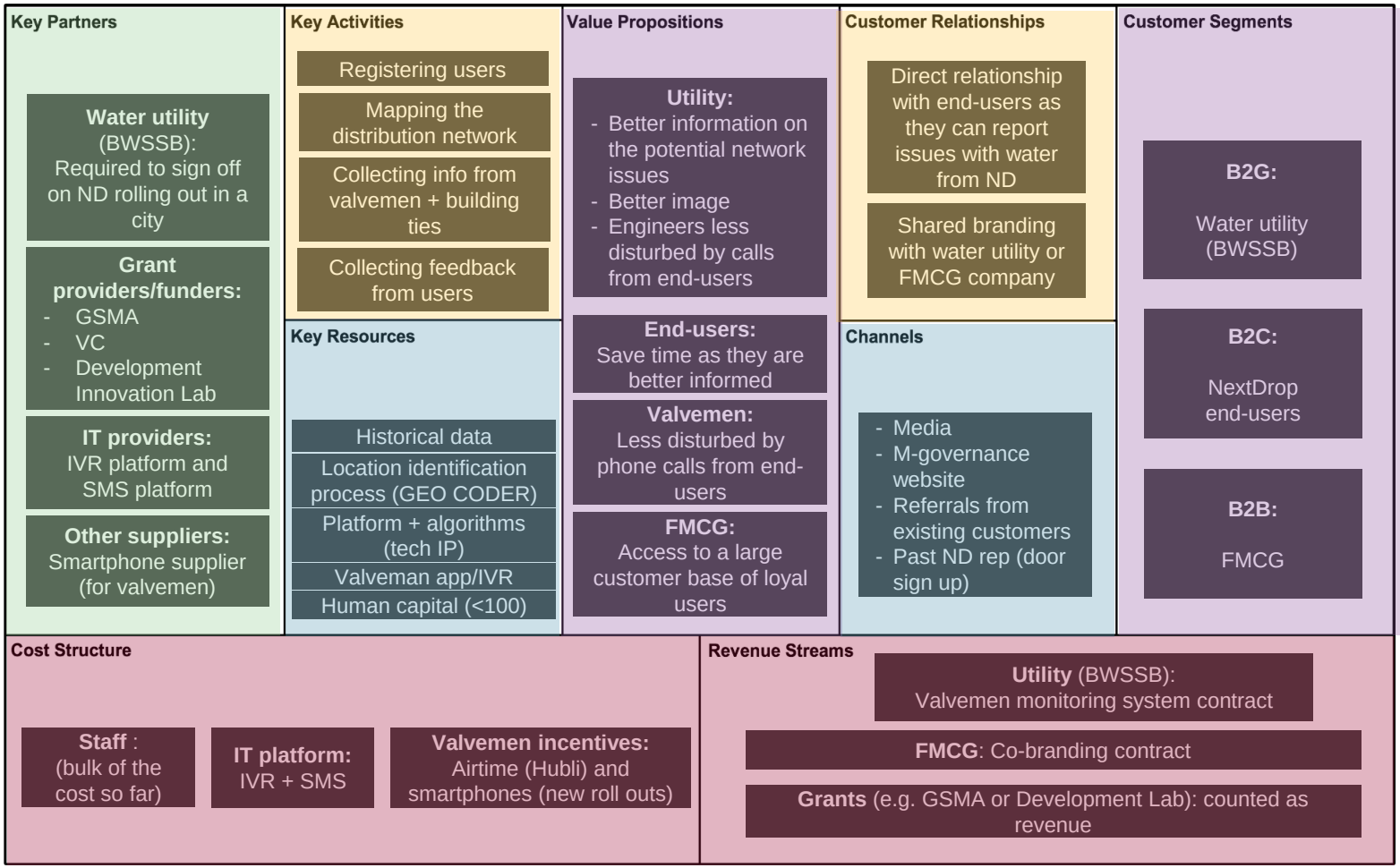


Sources: interviews, GSMA and Altai analysis

See section in full report:
Project & Organisation Overview

NextDrop's business model has spanned multiple customers

Customer Value Proposition | Partners | Key activities/ relationships | Key resources/ channels | Cost/Rev structure



See section in full report: **Business Model Snapshot**

A basic customer journey is mapped for end users

The optimum kind of users for NextDrop are those that provide feedback

By plotting a path of service usage, we are able to define a customer journey for end users where they move toward a greater engagement with NextDrop's service and provide quality feedback that will enhance future service delivery.

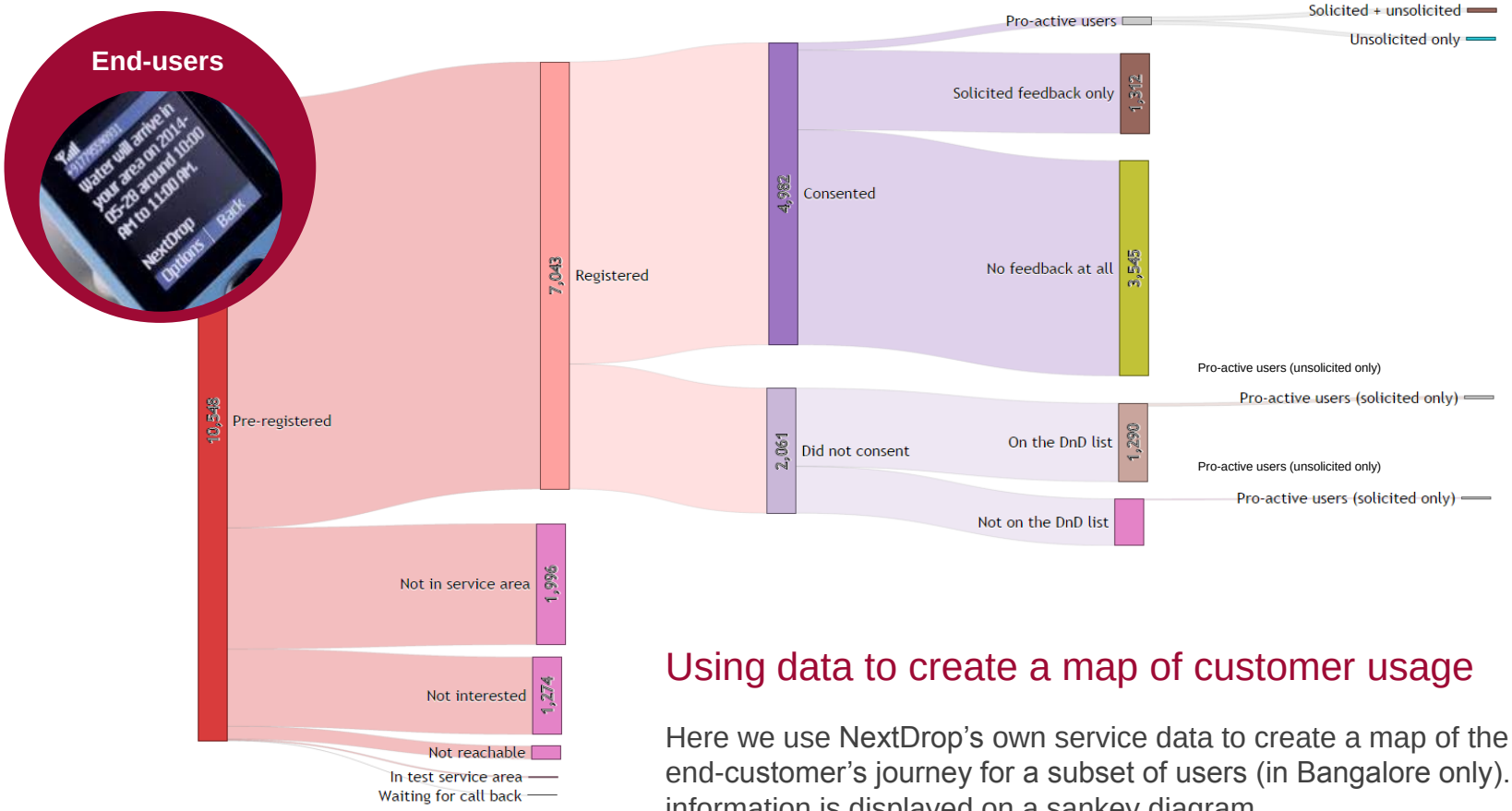
Quality Usage

Aware / understand	Pre-register	Register	Consented	Proactive feedback
Users have potential to register for the service, they are aware / understand it, but have not attempted to register	Individuals who contacted NextDrop to be registered, though they may not yet be registered	Individuals properly registered to the service, providing a location in a service area	Individuals who consented to receive solicited feedback requests by SMS from NextDrop*	Individuals providing unsolicited feedback (spontaneously contacting NextDrop about specific water issues) that impact the system

Note: (*) According to telecom regulation, obtaining users consent is mandatory in order to send them solicited feedback requests

See section in full report:
Mapping the end-user's journey

Overview of the end-user's journey from pre-registration onwards



Using data to create a map of customer usage

Here we use NextDrop's own service data to create a map of the end-customer's journey for a subset of users (in Bangalore only). The information is displayed on a sankey diagram

See section in full report:
Mapping the end-user's journey

A customer journey is also mapped for valvemen

Optimum valvemen usage depends on providing frequent and consistent data

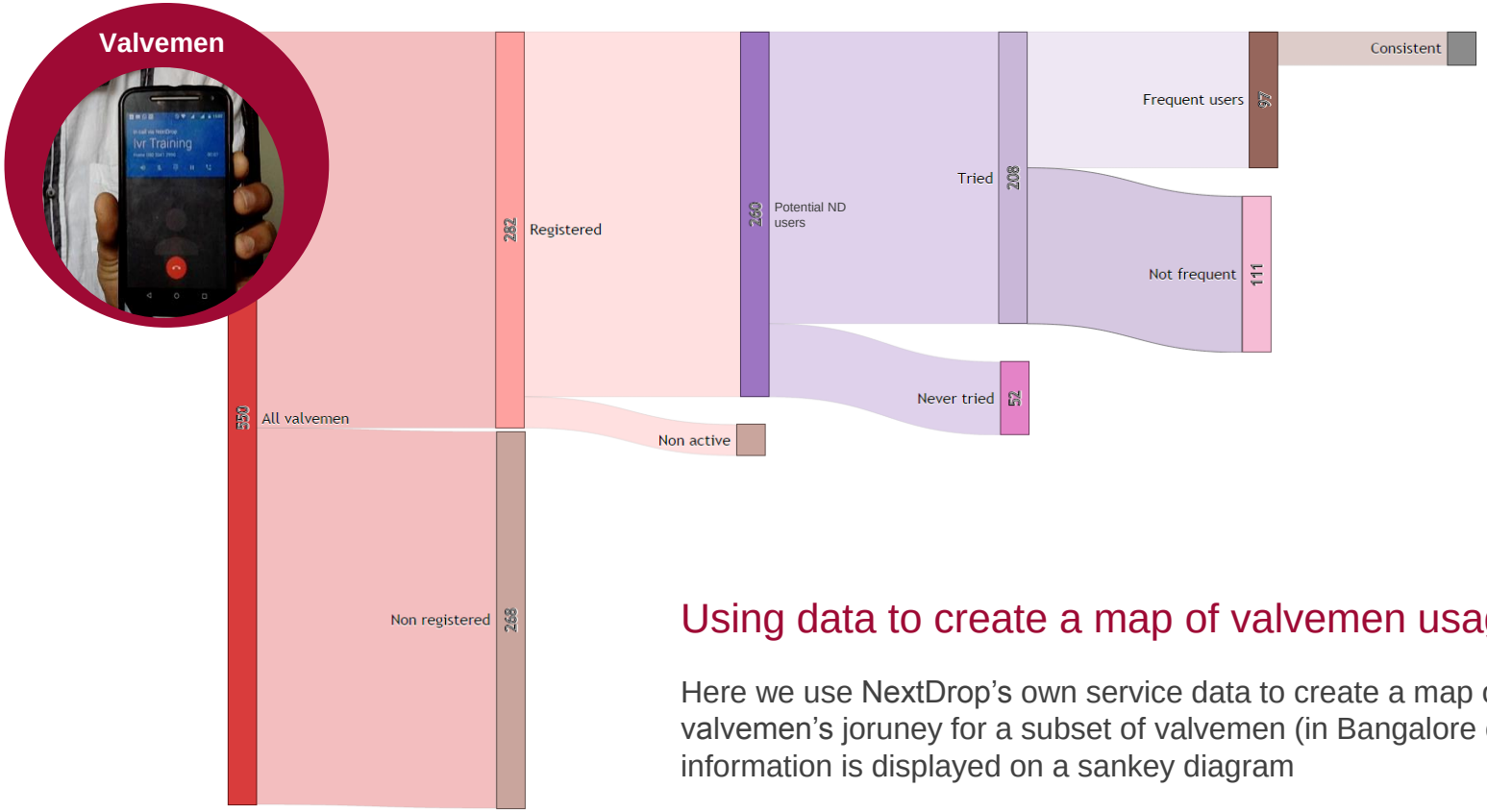
Valvemen provide critical information about the water supply network and their routine is supposed to be fixed each day. The kind of recorded usage that the water utility wants to see is therefore frequent and consistent. We can map a separate journey of usage recorded by a mobile application (in this case an Interactive Voice Response [IVR] app) for valvemen

Quality Usage

Aware / understand	Registered	Tried	Frequent usage	Power usage
Users have potential to register for the service, they are aware / understand it, but have not attempted to register	Valvemen have been registered on the NextDrop system, and have the potential to log valve open/close actions via IVR	Valvemen have made at least one call to IVR	Valvemen make regular calls to the IVR over the period that they are a user on the system	Valveman provides consistent information, meaning that they exhibit a stable routine behaviour

See section in full report:
Mapping the valvemen Journey

Overview of the valvemen journey to consistent usage



Using data to create a map of valvemen usage

Here we use NextDrop's own service data to create a map of the valvemen's joruney for a subset of valvemen (in Bangalore only). The information is displayed on a sankey diagram

See section in full report:
Mapping the Valvemen Journey

We developed three potential growth options for NextDrop

Using the results from data analytics and an analysis of the business model, three strategic directions are posited with associated recommendations for future implementation.

Deeper utility engagement & city iteration

Short/medium term

Allow greater depth of engagement and product development in a focus city (e.g. Bangalore) to provide the proof points to replicate iteratively across other cities, partnering with water utilities

Driving rapid breadth & scale across users/partners

Short/medium term

Focus on scaling across new cities and new types of B2B revenue sources (e.g. Utility, FMCG, etc.) as fast as possible

Automation & Infrastructure future focus

Medium/long term

Aim to become turnkey provider with blended automation, infrastructure and software value proposition to the water utility

See section in full report:
Recommendations

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