

CASE STUDY

Rising to the Personalization Challenge Through the Contact Center



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Customers today expect more than just a transactional relationship from their utility. They are benchmarking their utility and other service providers against companies like Amazon and Netflix.

National Grid USA, part of one of the largest investor-owned energy companies in the world, is an electric and gas utility that provides service to more than 20 million customers in Massachusetts, New York, and Rhode Island. The Northeastern utility recognized these shifting customer expectations, and rose to the personalization challenge by creating a more personalized experience, beginning with their low-to-moderate income (LMI) customers.

For many LMI customers looking to resolve utility-related issues, the call center is often the first point of contact, with the majority of questions relating to payment problems or billing inquiries. Many of these calls can be lengthy, with over 30% resulting in additional, follow-up conversations. This was no exception for National Grid: they had traditionally experienced high call volumes from their LMI customers—resulting in millions of dollars in contact center costs every year. While the utility had a dozen programs available to help LMI customers, customer service representatives (CSRs) often did not know which programs a customer qualified for, nor which were the best fit. For these reasons, National Grid chose Uplight's CX Personalization to engage their LMI customer segment.

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– TERENCE SOBOLEWSKI,
CCO, NATIONAL GRID

There are 40 million LMI households in the United States, which make up 10-30% of a typical utility's customer base.

In 2018, National Grid collaborated with Uplight on a pilot focusing on improving service to the more than 650,000 LMI customers in their Rhode Island and Massachusetts territories. By combining the relevant data from multiple data sources into a utility-specific data model, Uplight was able to provide personalized insights and next-best actions in the contact center and via proactive email. National Grid's CSRs and email marketing team now had access to personalized and ranked recommendations on the best low-income program option for each LMI customer, which updated in real time as customers accepted or rejected the offers.

"We had three goals with our low-income personalization pilot: enhance customer service, reduce operational expenses, and successfully demonstrate the technology and business processes for delivering a personalized customer experience through multiple communication channels," said Kelly Carney, vice president of customer process enablement at National Grid.

In just 10 weeks, National Grid was able to implement the new solution, which included training over 200 CSRs on using the software. As a result, CSRs now have a complete view of each customer's profile as they contact the contact center—including account and billing history, and a list of prioritized and actionable recommendations—enabling CSRs to quickly present each customer with the most appropriate solution, speedily.

"One of the challenges is quickly matching each customer with their best action, given the wide range of programs", said Kelly Carney. "Personalization helps CSRs do this effectively and fast, increasing enrollments and enhancing the customer experience."

These recommendations are presented consistently across all customer touchpoints, ensuring that recommendations are provided to customers calling in or receiving an email.

200-400%

increases in email open rates

14%

decrease in call volume for customers who enrolled

16%

increase in arrears collections

15%

improvement in trust scores among surveyed customers who went through the improved contact center experience

53%

increase in program enrollment on average through call center channel, with some as high as 120%

The CSRs at National Grid also experienced immediate benefits from the new tool in their direct interactions with customers.

"It is really user friendly."

"I was skeptical to start, but I've now enrolled seven extra people in paperless billing this morning that I wouldn't have otherwise. It helps me know what to talk about with the customer."

"Customers are really loving it. I am having customers say, 'You are so amazing and thank you for giving me this information.'"

Based on the pilot success, National Grid is expanding the personalization solution beyond their 650,000 LMI customers to reach more than 2 million customers in Massachusetts and Rhode Island by April 2019, with additional expansions to other National Grid customers to follow in the summer. The new initiative will incorporate offers such as energy efficiency, ePay and eBill options in addition to low-income programs, plus additional advanced analytics and functionalities.

"Providing a personalized customer experience is a required capability for National Grid as we move forward," said Terence Sobolewski, Chief Customer Officer at National Grid. "Not only do our customers expect it, but also it is a key enabler to achieving our other corporate objectives, from operational expense management to the introduction and growth of innovative new services and programs. To succeed, personalization must be comprehensive, and that is the solution Uplight is providing us."

The personalization pilot benefited customers, CSRs, and the utility itself. LMI customers are more likely to have much-needed, reduced-cost energy bills, enrollment in better-fit programs, and, overall, a better and more satisfying experience with their utility. For LMI customers who struggle financially, the impact and benefit of receiving more personalized and better-fit recommendations could mean being able to pay their bill on time, instead of ending up in arrears. For CSRs, having the most relevant recommendations at their fingertips helped them serve their customers with even greater expertise and solve their issues more efficiently.

On top of this, National Grid enhanced their customer service, reduced operational expenses, and delivered personalization through multiple channels. Best of all, yet more of National Grid's customers will experience Amazon-like interactions as the utility expands personalization to a broader set of customers.

About Uplight

Born from the merger of Tendril and Simple Energy, and the acquisitions of FirstFuel, EEme and EnergySavvy, Uplight is the leading provider of end-to-end customer-centric technology solutions dedicated solely to serving the energy ecosystem. Uplight provides software and services to more than 75 of the world's leading electric and gas utilities, with the mission of motivating and enabling energy users and providers to accelerate the clean energy ecosystem.

Uplight is the leader in Demand Side Management, Energy Analytics, Utility Marketplaces, Utility Personalization, and Home Energy Management. Together, these solutions form a unified, end-to-end customer energy experience system that's proven at enterprise scale, yet nimble enough to deliver innovative solutions quickly. Utility leaders at all levels rely on Uplight and its customer-focused digital energy experiences to improve customer satisfaction, deliver energy and capacity outcomes, reduce service costs, increase revenue, and reduce carbon emissions.

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Contact Uplight to learn how you can become a personalized utility and transform the customer experience. Contact us at research@uplight.com or visit www.uplight.com

