

eBOOK

# The Four Challenges of Modern Utility Customer Care

How to Improve Satisfaction and Reduce Costs in the Age of Personalization



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# The Disconnected Customer Experience

Imagine that one of your utility customers has just called into your contact center complaining that their bill is too high. After spending several minutes switching back and forth among multiple screens, the CSR struggles to recommend the right resolution for the customer. Perhaps the CSR recommends the most popular program, or maybe simply offers some generic tips about saving energy, and then the caller hangs up.

Unfortunately, since the recommendation that was made wasn't actually personalized to that caller's current energy usage pattern, billing history, premise data, weather, etc., the customer doesn't adopt the recommendation—nor pay the next three bills—leading to a disconnection notice and yet another call from that same customer, who is now even more upset.



**But what if, instead, each CSR has information and smart, real-time recommendations that are specifically relevant for that customer at the exact moment they were on the phone?** Rather than an outdated library of generic tips, imagine that your CSR has insights about the customer's current situation based on advanced customer analytics—and that they're not only available to CSRs, but are surfaced consistently across every available customer channel.

Imagine, for the customer calling in with the high bill, that the CSR has the ability to resolve the customer's underlying issue. For example, **what if they could see that this customer's current circumstances likely qualifies them for one of your company's low-to-moderate income (LMI) assistance programs** and that this customer had a history of paying bills on time, but that higher-than-average winter bills were taking a toll? Wouldn't recommending an equalized payment plan (EPP) to spread the cost over a year be the most helpful resolution that could be offered to this client? And if that customer logged into their MyAccount or initiated a chat instead of calling the contact center, they would see the same exact recommendations in those channels as well.

# The Four Challenges of Modern Utility Customer Care

You and your customer care team are under pressure.

**You must not only resolve your customers' issues quickly; you're also under pressure to reduce overall call time, while still maintaining—or even improving—customer satisfaction.** And as if this weren't enough, you're likely doing so with outdated IT systems, siloed data (an impedance to clear insights into the customer's world), an increase in channels to support, and insufficient self-service options. Your organization is probably looking to improve the availability and quality of self-service options, such as interactive voice response (IVR), chat bots, MyAccount, and more. But without the ability to empower those new channels with relevant customer recommendations, you could actually be hurting overall c-sat and operational costs more than you're helping.

Especially in today's always-on world, even minor disruptions in service have a new sense of urgency—making the role of a utility contact center more critical than ever. And customers are demanding a more personalized and engaging experience. Microsoft found that **72% of callers expect CSRs to know they are a customer, along with their product and service history, when they contact them.**<sup>1</sup> But this can seem like an impossible task as customer care organizations

are often under pressure to cut operational costs by reducing call volume, call-handle time, and call frequency.

Fortunately, customer care organizations do have a solution. Regardless of what system you're using today (or even planning to migrate to in the future), modern utility customer experience (UCX) analytics can enable precisely this kind of personalized experience—and can do so without long, expensive and complex IT system upgrades.

But doing so means taking on the four emerging challenges of modern utility customer care: data dilemma, self-service charge, communication explosion, and the plight of the LMI customer. Let's take a deeper look at what these emerging challenges are all about, and what utilities can now do to address them...



## 1 The Data Dilemma: Wading Through Tons of Data With No Insights

CSRs have just a few seconds in which to greet a customer and quickly understand how to solve their problem. But with data in multiple locations utility CSRs don't have simultaneous access to critical information, such as service order history, bill payment history, current usage analysis, program history, account preferences, and more. Instead, CSRs become experts at navigating multiple screens, but are still limited in their ability to pinpoint customer issues and use the knowledge gleaned to offer the best resolution for each caller.

This lack of unified data and insights impedes utilities' understanding of how to optimize their contact centers. They aren't able to do simple analytics and visualizations to identify their customers' biggest issues and reasons for calling.

Some utilities have built data lakes or warehouses to integrate all customer data, but these are typically not effective for the call center. While these systems can be helpful in organizing data, the information contained within is usually either already optimized for a different purpose (warehouses), or does not possess any inherent structure and needs to be configured for each required use (lakes). To make matters worse, many data lakes or warehouses are not designed for real-time use and don't generate the insights needed—making them ineffectual for CSRs.

This lack of insights also affects the overall customer experience. In a survey conducted by Forrester and eGain, 41% of respondents said that their biggest pain point was when "different customer service agents give different answers", and for 34% it was when "customer service agents don't know the answer".<sup>2</sup>

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**CSRs are simultaneously overwhelmed with data because it's in many of the systems they have access to, and starved of data because it's not easy to reach what is needed when they are on a call.**



Training a CSR on all of the utility policies, tools, programs, and offers is not only expensive, but can take four to six months—a long time considering inbound CSRs have one of the highest job turnover rates out there.<sup>3</sup> So, it makes sense that CSRs with varying degrees of training and tenure will present different information or conflicting recommendations—resulting in an inconsistent experience for the customer, and the risk of that customer receiving recommendations that are not the best fit for them. **Since each call averages only minutes in length, the more information that is presented about a customer in one place, the more effective the CSR can be**—especially if that information is presented in a unified and intuitive way.

And even when seasoned CSRs do present relevant recommendations, they may still not understand the underlying reason for a call without having information beyond what that customer is telling them. For example, a customer calling in inquiring about a high bill may be, in fact, calling because they are unable to pay their bill, but aren't comfortable asking for help. Using advanced analytics, a CSR would see that this particular customer had been late on previous bills, and could recommend a payment plan or financial assistance program to help them address the real problem.

## Salt River Project

Salt River Project (SRP) looked to improve customer satisfaction even when customers were encountering service disruptions. Renee Castillo, senior director of customer experience services at SRP, explains:

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**Like many industries, we're trying to give customers information before they can even call us. If they're experiencing an outage and we know about it, we serve up that information before they call us.**

And this strategy continues to be working. SRP has been in the top JD Power customer service rankings for 15 years.

Source: "For utility customer satisfaction, J.D. Power says communication, control are key," Robert Walton, UtilityDive, Jul 19, 2016.

## 2 The Self-Service Charge: Personalizing the IVR, Chatbot, and Other Experiences

One place where utilities and their customers are converging is in the increasing demand for more self-service options that allow users to try and resolve their own issues. In fact, 67% of customers say they would prefer to find help using self-service, rather than talking to a CSR.<sup>4</sup> And since self-service is a critical tool for call containment, it makes good business sense. For example, when executed well, chatbots can resolve more than 80% of chat sessions. This frees up CSRs to deal with more complex customer issues.<sup>5</sup>

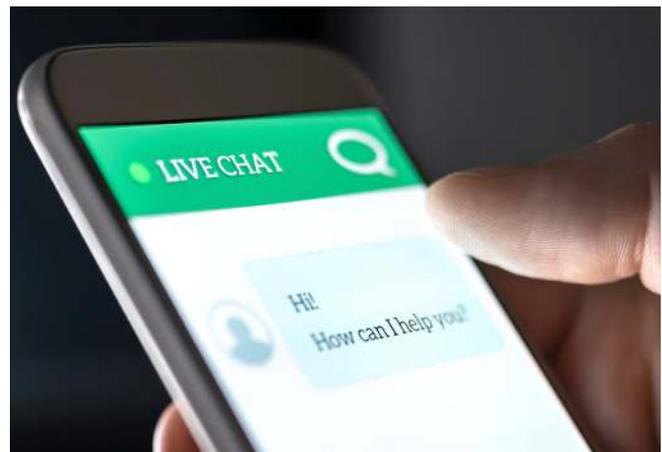
Unfortunately, many utilities fall short on sufficient self-service options, and even when they do have them, the overall customer experience is lacking because they don't provide personalized recommendations and actions. Increased use of self-service options, such as chatbots, IVR, web portals, and mobile apps, has the potential to drive down the number and length of contact center calls, but only if these provide value on a par with or even better than the call center service.

While many self-service options have been around for years and even decades (like IVR), it's critical to upgrade the customer experience by leveraging advanced analytics and personalization—enabling the customer to get a resolution more quickly without navigating menu upon menu of options

to find what they are looking for. For example, for customers calling into the contact center at the time of a known outage, the first IVR option could be to “get more information on an outage resolution”, and a customer who has been late paying bills several times in succession would see a recommendation for a bill payment plan in their MyAccount portal.

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**Accenture found that utilities that have embraced low-touch channels and automated customer support have the potential to lower customer care costs by 30%.<sup>6</sup>**



### 3 The Communication Explosion: Supporting Channels Around the Clock

Many customers also prefer to use methods other than the phone for assistance, such as online chat, social media, web portals, and mobile—with the call center having to support all these channels. And customers frequently use more than one channel. Studies show that **18- to 34-year-olds use five channels regularly for customer service interactions while those 55 and older use three.**<sup>1</sup>

Major events, such as severe weather, can increase the volume of customer contacts across all channels. For example, Georgia Power typically supported 47 conversations daily on social media, but this increased to 24,000 conversations per day during Hurricane Irma. While Georgia Power has its own dedicated social media team, other utilities may need to rely on their call center to respond to interactions in this channel. As more customers use multiple channels, it is more important than ever for utilities to have a uniform presence. According to a report conducted by Zendesk, 89% of customers believe that companies need to offer a consistent customer experience across channels.<sup>7</sup>

#### PUGET SOUND ENERGY

Puget Sound Energy (PSE) sought to bring down the number of calls into the call center through their Get to Zero initiative. The utility developed a multi-channel marketing campaign to update their customer contact information to enable outage notifications and educate customers on the available self-service options.

The campaign resulted in a five-fold increase in customer mobile phone numbers obtained, enabling PSE to inform exponentially more customers about outages and expected resolution. Not only was PSE able to avoid thousands of calls through these proactive notifications, but customer satisfaction scores also increased—by 32%.



Source: "Customer-led, data-driven approach to outage communications key to a successful Digital Utility Transformation effort," Jamison Roof, Ajay Jawahar and Lili Gao, UtilityDive, Nov 3, 2017.

## 4 The Plight of LMI Customers: Resolving Issues and Making Energy Equitable

LMI customers are especially impacted by high bills. These households already spend a disproportionately large amount of their paycheck on energy—more than three times the relative amount that higher income households spend.

This customer segment makes up a significant part of call center volume. Assistance with billing inquiries, such as “Why is my bill so high?”, as well as payment and financial assistance questions, comprise up to half of all calls into the call center.<sup>8</sup> Unexpected, higher-than-normal bills cause a customer to take notice, leading to increased customer call volume and duration.

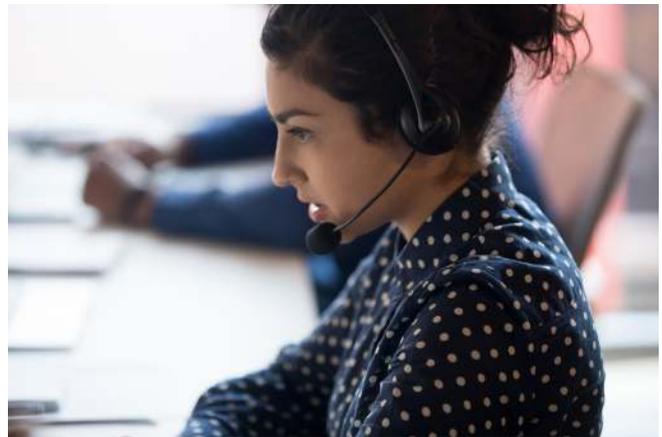
But, customers don’t want their bills to catch them off guard. To avoid additional, unexpected and unwanted surprises, **80% of customers want high-bill notifications**, which can also be beneficial for the utility because these prior notifications have been shown to decrease the number of calls into the contact center by 19%.<sup>9</sup>

While billing-related questions are the most common reason to call, they can also often be the most time consuming to resolve—and to resolve first time—given the complexity of eligibility requirements for LMI programs. In fact, **many CSRs can avoid offering these programs altogether because of the confusion, creating missed opportunities for LMI customers and millions of dollars of lost revenue in non-payments.**

Enabling advanced analytics and personalization allows CSRs to easily see and recommend the right program for each customer. Such options may now include various energy efficiency or savings programs, payment extensions, payment plans, federal rate assistance, community assistance, or other discounts.

Utility customer service is more important than ever, with more demanding customers who have more choices around their energy usage and an expansion of the channels available. But with increasing pressure to reduce operational expenses, customer care managers have ambitious goals to decrease call time and call volume while maintaining or improving customer satisfaction. And, most customers would agree: they prefer not to call in the first place.

**So, what’s a utility customer care manager to do?**

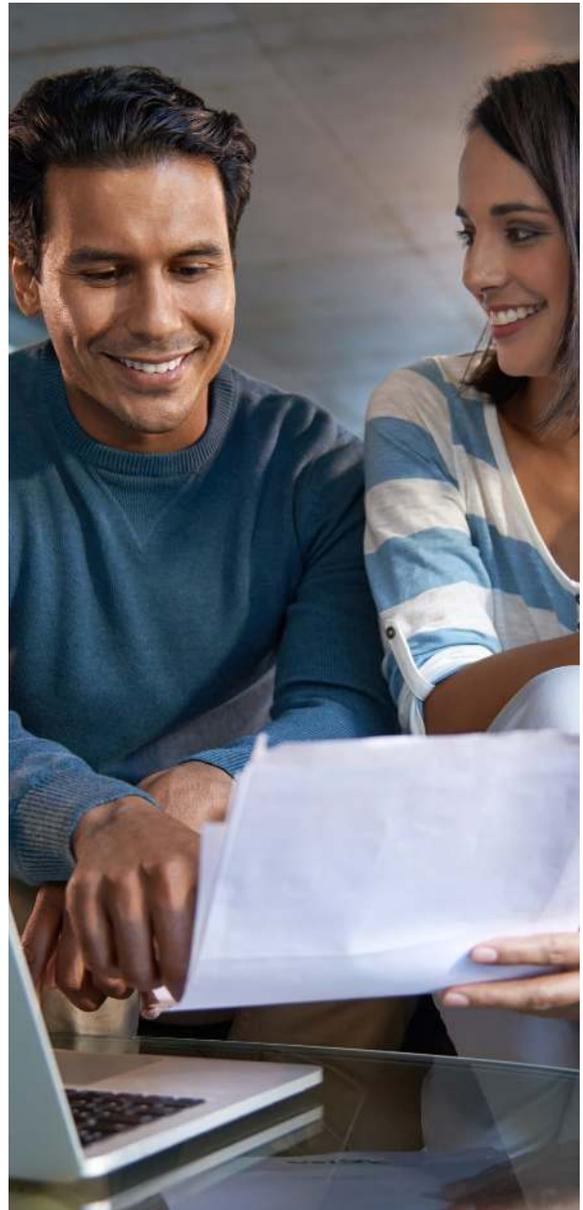


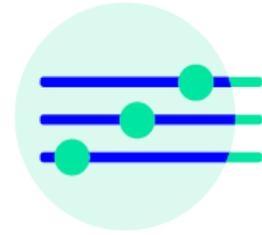
# The Utility Personalization Approach

Fortunately, there is hope. By providing deep insights and integrating these with CSR software, 360-view software, CRMs, and more, utilities can lessen the pressure on the call center—reducing the number of calls and making it easier to resolve issues the first time. In this way, the CSR could, for example, immediately tell the customer that called regarding a high bill about an LMI equalized payment plan by viewing the real-time recommendations—thereby reducing the likelihood of subsequent calls and improving customer satisfaction.

This kind of cloud-based personalization software enables utilities to develop prioritized, analytics-driven recommendations from unified data—available to the CSR in real time, and across every customer channel. **And with this newly integrated data, utilities can understand where their biggest areas of opportunity are for call containment.**

As a result, utilities can surface essential information about a customer, make tailored recommendations for each of them, and proactively notify them if they face an unusually high bill, if another rate plan might be a better fit, or if there are ways in which they can easily save energy—enabling utility call center staff to resolve customer issues more quickly, reduce call time, and increase customer satisfaction.





**Over 80% of chat sessions can be resolved by a chatbot.**

Source: "Chatbots in Customer Service,"  
Accenture Interactive, 2016.

Each of the four emerging utility challenges can be addressed by following these recommendations:

1. **Utilize unified data to create a system of record for insights and recommendations** including service order history, bill payment history, current usage analysis, program history, account preferences, and even third-party demographic data, either in the cloud or on premise.
2. Use advanced, predictive analytics to rank relevant recommendations, **creating smart, next-best actions for each customer**— identifying the underlying issues for a customer so that they don't even have to ask, and also enabling a more consistent customer experience. Next-best actions also help CSRs ramp up more quickly.
3. Surface these customized recommendations across all available channels, via direct mail, email, chatbots, IVR, mobile apps, call center staff and at the self-service portal, **empowering customers to take control of their energy usage, better manage their bills, make their homes more energy efficient, and more, at their own convenience.**
4. Be sure to incorporate these personalized **recommendations across all channels so that LMI customers can get the help they need** before they call into the contact center—reducing the number of billing and financial assistance calls.

Best of all, once implemented, cloud-based personalization is not only available to CSRs, but can be exploited by the utility to deliver a tailored experience in marketing campaigns, in the customer portal, with field-service technicians, and across other channels, leading to more satisfied customers and an even further decrease in call center call volume.

## The Utility Customer Experience Platform

Uplight brings together data from disparate utility information sources, creating unified access to all key customer data points, and enabling sophisticated personalization analytics to rank the best offer for each customer. Then these insights and next-best-action strategies can be integrated directly into the platform, accessible by staff across the utility.

And the good news is that Uplight's cloud-based personalization solutions can integrate with, and get the most out of all utility systems—whether they are state of the art or 30 years old. With more modern systems, Uplight can plug in directly using an API, for example, to provide immediate insights within the system. And with older software, our software can flag areas where CSRs might need to check out data in that platform.

### ARIZONA PUBLIC SERVICE

Every summer, rising temperatures result in high energy bills and an increase of calls into the call center. Arizona Public Service (APS) wanted to turn complaints into satisfied customers. The utility equipped CSRs with links to Uplight's Residential Online Assessment to provide customers calling about high bills with personalized recommendations for reducing them through no-cost or low-cost options, as well as suggesting behavioral changes to lower their bills. That summer, APS saw a 5% increase in customer service satisfaction and a 14% increase in contact resolution satisfaction.



Source: "Engagement Turns High Bill Callers into More Satisfied Consumers," Uplight, 2017.

## The CSR Information Challenge

CSRs frequently use two or more monitors in order to access a utility's Enterprise Resource Planning (ERP) system for billing, an Enterprise Asset Management (EAM) system for work dispatch, Call Center software, Customer Relationship Management (CRM) software for some customer data, a Customer Information System (CIS) for other customer data, software to manage complex transactions, and even the utility's own website for more information on programs and services. Added to this, they may need to access help tutorials or training binders for instructions on how to perform a certain task.

# Quick Guide to Solving Top Customer Care Challenges

PROBLEM	SOLUTION
Even simple analytics on data aren't possible.	Leverage advanced analytics and customer insights on all available data.
Customers have higher expectations.	Use insights from unified data to develop personalized, next-best actions for each customer.
CSR training is time consuming and expensive, and CSRs have an exceptionally high turnover rate.	CSRs can leverage customized, next-best actions and predictive analytics to quickly identify the offers without months of training.
CSRs can provide an inconsistent experience.	Next-best actions act as personalized call scripts for CSRs, and ensure that a customer receives the same message across all channels.
There is an increased number of channels.	Deliver personalized, next-best actions across all channels to ensure a consistent experience.
LMI customers/high-bill inquiries make up the majority of calls.	Provide proactive, high-bill alerts and personalized next-best actions for of calls. LMI customers to help them take control of their bill and energy usage.
First-call resolution is low.	Advanced analytics enable a utility to understand what might be the underlying issue to a call or contact, and make a recommendation based on that, not just related to the questions that the customer asks.
Self-service needs to be more effective and expanded.	Leverage next-best actions for chatbots, IVR, mobile apps, web apps, and other self-service options to create a personalized, yet consistent experience.



## Footnotes

- 1 "2016 State of Global Customer Service Report," Microsoft, 2016.
- 2 "The Biggest Contact Center Pain Point? Inconsistent Information," Zarina de Ruiter, CX Network, Apr 23, 2015.
- 3 "Understanding Call Center Turnover," talkdesk, Mar 11, 2016.
- 4 "Customers want to help themselves?," Zendesk.
- 5 "Chatbots in Customer Service," Accenture Interactive, 2016.
- 6 "18 things utilities need to know about Accenture's new report on energy consumers," Casey Davis-Van Atta, Oracle Utilities, Jul 14, 2014 7. "The Multi-Channel Customer Care Report," Zendesk, 2016.
- 8 It pays to be proactive: How two utilities cut their cost to serve," Krista Bochicchio, Oracle Utilities, May 11, 2016.
- 9 "8 facts to remember about consumer attitude toward utility bills," Casey Davis-Van Atta, Oracle Utilities, Sept 3, 2015.

# About Uplight

Born from the merger of Tendril and Simple Energy, and the acquisitions of FirstFuel, EEme, EnergySavvy and Ecotagious, 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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Interested in learning more about how Uplight can help you accelerate the clean energy ecosystem? Send us a note [research@uplight.com](mailto:research@uplight.com) or visit [www.uplight.com](http://www.uplight.com)

