bidgely

CX PLATFORM SCORECARD

Customer engagement, satisfaction, and trust are playing an essential role in helping utilities achieve their decarbonization, resiliency and other future-ready imperatives. At the same time, the CX space is crowded with competing approaches, each promising to boost utility-customer relationships and bring utilities closer to their goals.

These 10 criteria offer a practical scorecard to evaluate the alternatives.

Criteria 1: Advanced Disaggregation for Meaningful Intelligence

More advanced Time of Use (TOU) disaggregation breaks down consumption to previously unattainable granularity. This breakthrough level of precision opens up a new world of CX possibilities for energy providers.

➡ **LOOK FOR** CX solutions that can provide itemized energy reports for the primary electric loads. The energy itemization should include at least 8-12 end-use categories (depending on what categories apply to each customer's appliance ownership and use). TOU insights should also be provided for the primary electric loads, including water heating, pool pump, electric vehicles, air conditioning, and space heating. For maximum accuracy, the energy itemization should be based on customer-specific AMI data at 15-60 minute intervals, and not static models applied to large customer segments.

Criteria 2: Personalized Insights for Higher CSAT

Effective personalized engagement and better CX start with creating a holistic and accurate 360° profile of every customer in a service territory. Generic insights leave customers unhappy and dissatisfied.

➡ **LOOK FOR** CX solutions that provide robust customer profiles for every customer in a service territory using behind-the-meter data and analyses of actual customer energy habits, enriched by other supporting data inputs. Look for platforms capable of continuously improving and personalizing these insights as customers go about their daily lives and engage with the utility over time.

Criteria 3: Empower Customers with Better Energy Intelligence

The most advanced CX platforms empower customers with appliance-specific, hyper-personalized recommendations that allow them to take meaningful and immediate action and feel good about doing so.
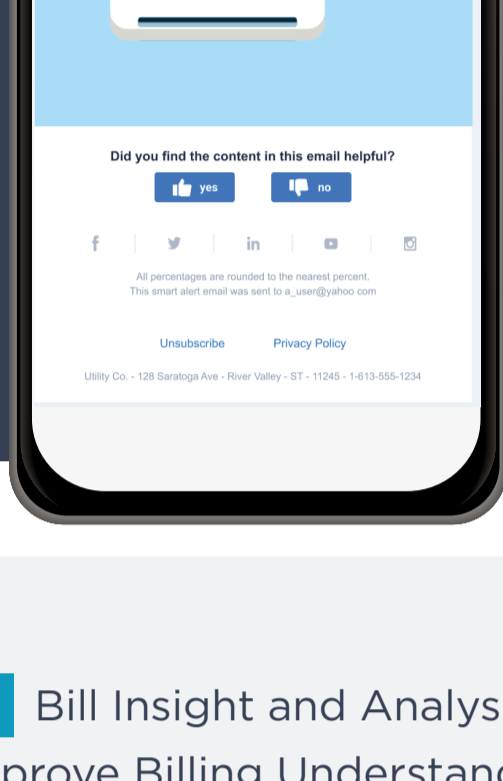
➡ **LOOK FOR** CX solutions that differentiate between inefficiencies driven by user actions vs. inefficiencies driven by appliance conditions. The root cause of the inefficiency should guide personalized recommendations. Look for platforms able to highlight which appliances contribute to home-level inefficiencies and empower users to focus on the appropriate appliances for maximum return on their efforts and money spent.
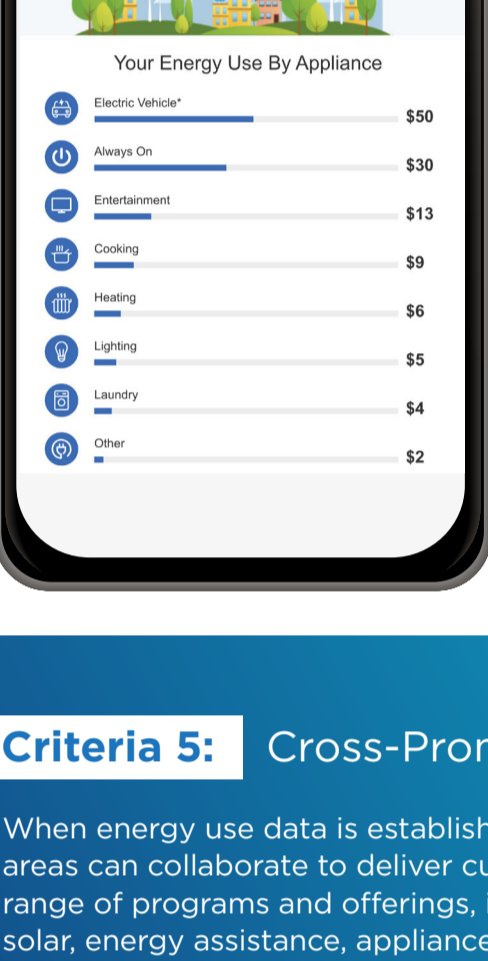
Criteria 4: Bill Insight and Analysis Tools to Improve Billing Understanding

By providing customers with self-service and omnichannel bill analysis tools, such as a web portal and email alerts at every stage of the billing cycle, utilities can help customers better understand their bills and how to take steps that have a meaningful impact on their energy costs.

➡ **LOOK FOR** CX solutions that provide bill analysis tools which enable customers to understand how their energy choices and appliances impact their energy costs—and what they can do to save.

Criteria 5: Cross-Promotion to Increase Participation

When energy use data is established as a single source of truth, traditionally siloed operational areas can collaborate to deliver customer insights and recommendations that promote a wide range of programs and offerings, including energy efficiency and Demand-Side Management, solar, energy assistance, appliance rebates, weatherization, LED upgrades, water conservation and more.
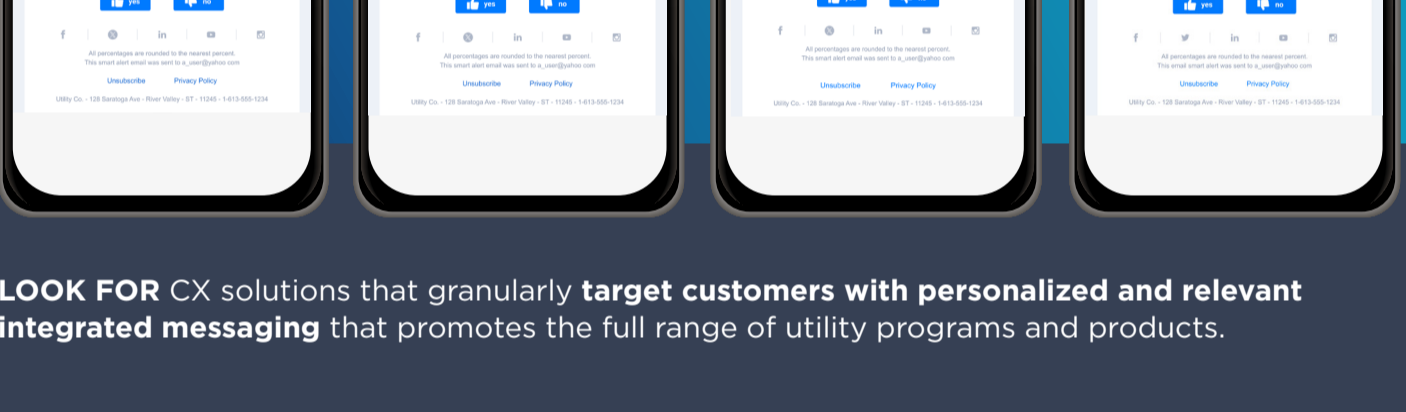
➡ **LOOK FOR** CX solutions that granularly target customers with personalized and relevant integrated messaging that promotes the full range of utility programs and products.
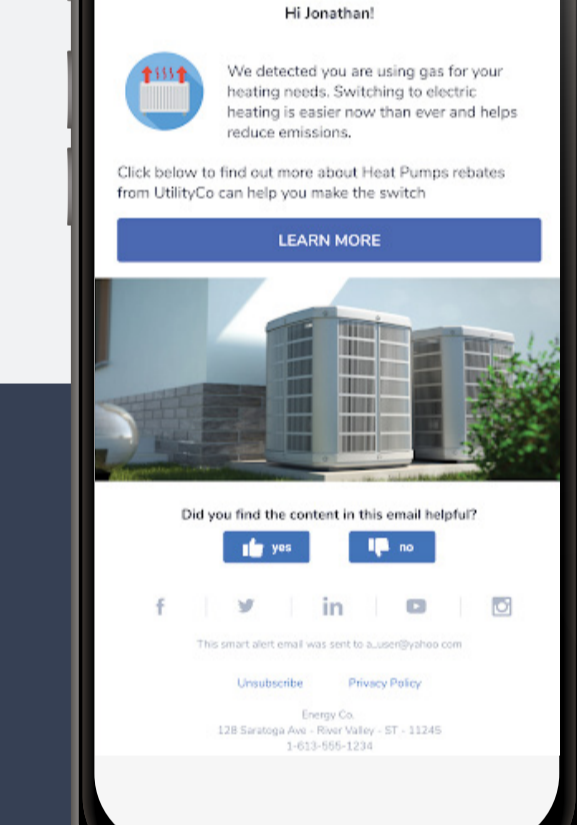
Criteria 6: Support for Customers' Decarbonization Efforts

For electric utilities, electrification represents the most significant opportunity in a generation to increase base demand and margins while simultaneously introducing new utility services like home and public charging infrastructure. For gas utilities customer engagement is essential to lower carbon emissions.

➡ **LOOK FOR** CX solutions capable of providing customers with education about their carbon emissions in the context of their energy consumption, and metrics by which to track them. Look for customer engagement strategies that **promote appliance efficiency and upgrades in an intelligent and hyper-personalized way**, to align with each consumer's unique energy habits, needs, and values.

## Criteria 7: Digital Engagement to Reduce Cost to Serve

Utilities have historically moved slowly in offering the individualized digital capabilities that customers now expect. CX solutions that deliver equally powerful outcomes across both traditional and digital channels better enable digital transformation, and provide a more successful path to meet today's CX standards.

➡ **LOOK FOR** CX tools that can improve the personalization capabilities of both web portals and mobile apps. Look for CX solutions that provide a mechanism to seamlessly transition customers from non-digital channels to digital (e.g. via QR Codes) as well as a mechanism for customers to easily access their web insights from an email without having to log in.

Criteria 8: Seamless Technology Integration for Ease of Implementation

Many stand-alone CX solutions claim that the value of their platform comes from replacing multiple existing systems in your IT stack. In contrast, we suggest that if your existing systems are performing well, there's no need to upend your organization just to upgrade your CX.
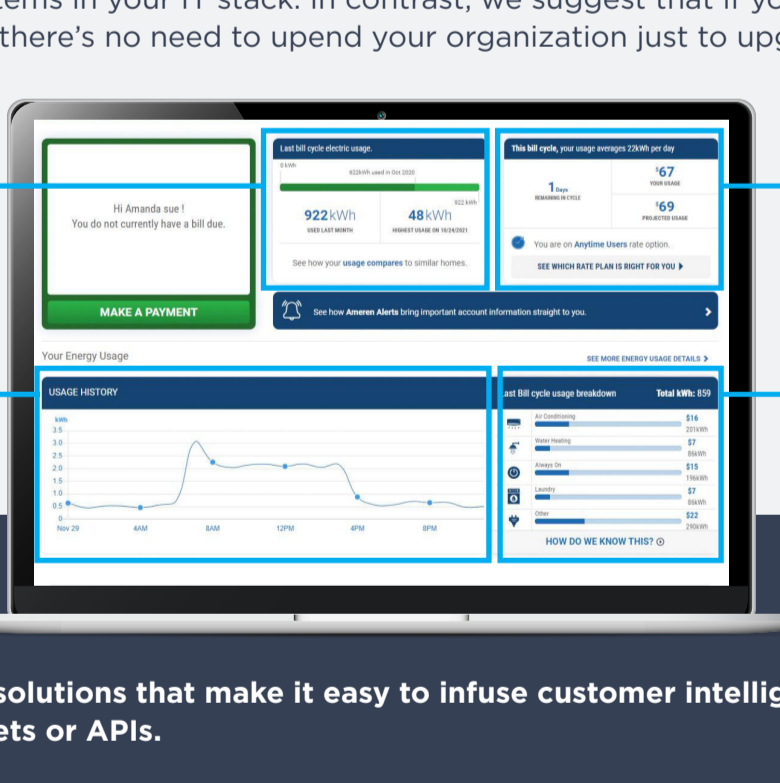
Bill insights with high usage and similar home comparison call-out

A historical view of the customer's usage

An estimate of the next projected bill calculated based on the customer's actual usage so far

An itemized view of the customer's bill

➡ **LOOK FOR** flexible solutions that make it easy to infuse customer intelligence into diverse IT systems using widgets or APIs.

Criteria 9: Call Center Support for CSR Empowerment

While utilities continue to expand the role of online and mobile channels as a point of contact and extend self-service options, the call center currently remains the primary channel for customer support. Empowering CSRs with customer intelligence helps them shorten call duration, limit call escalation, reduce call volume and improve customer satisfaction while serving as a trusted advisor.
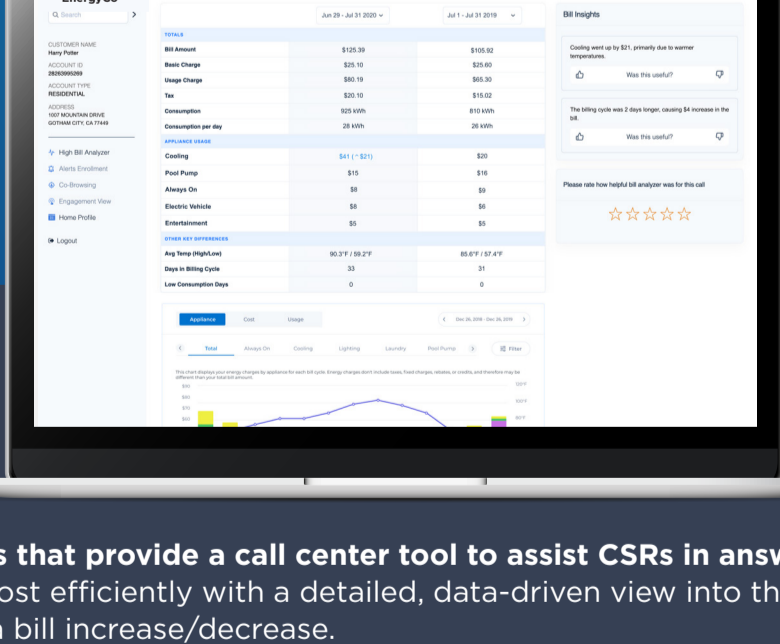
➡ **LOOK FOR** solutions that provide a call center tool to assist CSRs in answering bill-related customer queries most efficiently with a detailed, data-driven view into the individual factors that contributed to a bill increase/decrease.

Criteria 10: Proven Track Record to Build Confidence

It goes without saying, but proven technology, demonstrated experience, and proven outcomes are essential elements of vendor comparison. Analysts' reports can play an invaluable role in this assessment, providing nuanced comparison tools across vendors and helping to differentiate what sets each vendor apart. Intellectual property is also a useful metric. How much emphasis does the vendor place on R&D and pioneering patented data science approaches to better foster CX? Consider also the breadth and scale of a vendor's deployments. How many utilities have deployed the technology on behalf of how many customers?

➡ **LOOK FOR** measurable outcomes, case studies, and third-party validations. Don't hesitate to ask around to learn first-hand about how your utility peers have leveraged a specific vendor or technology.