Thought Leaders Speak Out 2023

ENGAGING CUSTOMERS WITH TECHNOLOGY

Key Takeaways: Advancing Customer Programs and Distribution System Planning
Fireside Chat with Avista and Bidgely (September 2023)

The Institute for Electric Innovation's ***Thought Leaders Speak Out 2023: Engaging Customers with Technology*** series brings together electric company executives with customer responsibilities to share lessons learned and the results of successful customer engagement strategies.

This dialogue focused on advancing customer programs & distribution planning using data and featured a discussion between Andrew Barrington of Avista and Abhay Gupta of Bidgely. Avista partnered with Bidgely to leverage smart meter load disaggregation to offer customers targeted and personalized solutions and improve call center performance. Adam Cooper of IEI provided welcome and closing remarks, and Mary Kipp of Puget Sound Energy moderated the discussion. Key takeaways are summarized and highlighted below.

[*Click Here for the Agenda and Speaker Bios*](#)

[*Watch Puget Sound Energy's Opening Remarks Here*](#)

Leveraging customer insights to deliver personalized customer experiences and improve call center performance.

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Avista rolled out Bidgely's disaggregation analytics internally to their customer service representatives (CSRs) first in order to ensure internal alignment. After the Care Portal was released for customers, the CSRs were already familiar with the platform and were better able to assist customers.

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Bidgely explains customers are expecting electric companies to provide them the same level of services they receive from companies, such as Google, Netflix, and Amazon. It has become more critical than ever for electric companies to leverage customer data to offer personalized experiences and services.

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Avista details how CSRs are leveraging customers' monthly and yearly energy usage insights and bill comparison tools to better assist customers with high bill inquiries. For example, Avista saw over 3,000 unique visits to the High Bill Analyzer within the Care Portal after an unusually cold month. A great level of interest among customers in accessing their energy usage data was a driving factor behind the release of the Care Portal to customers in 2020.

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Bidgely describes how electric companies can use load disaggregation data to enhance customer experiences and build trust. CSRs can use customer insights to offer detailed explanations behind high bills for fast call resolutions. Data can also help reduce call volumes by proactively alerting customers ahead of high bills and helping customers better manage usage and bills with personalized Home Energy Reports.

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Bidgely describes that electric companies can analyze smart meter disaggregation data and abnormal operating patterns to identify degrading and faulty equipment at customers' homes.

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Avista explains how the load disaggregation tool is benefiting both their CSRs and customers. The Care Portal has an internal customer satisfaction score (CSAT) of 4.5 out of 5. Customers are also seeing the value of Avista's 5-minute interval, granular energy insights, and bill itemization. Avista's energy insight is the second highest viewed page on myavista.com, behind the billing page.

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Avista launched Care Portal for commercial and industrial (C&I) customers in February 2023. Avista discovered C&I customers were looking for access to personalized appliance/equipment level energy usage data to better manage their energy usage and assess needs for appliance/equipment upgrades. The next step for Avista is to launch a multi-premise dashboard to allow C&I customers to compare energy usage across multiple business locations.

Using data to drive customer participation in demand-side management programs and optimize grid planning.

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Bidgely emphasizes the importance of customer data to drive customer participation in demand-side management programs. Understanding the granular customer data, including who has what appliances, level of efficiency, energy usage during peak hours, and the return of investments for customers, enables electric companies to be more surgical about which customers to target to increase program enrollments while optimizing the allocation of available financial incentives.

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Bidgely explains the need for a new approach to grid planning as the load profile is expected to change dramatically over the next ten years with the influx of EVs and other distributed energy resources (DER) coming onto the grid. Pinpointing where DER assets are on the grid and how and when they are used offers critical insights to electric companies to assess grid constraints and navigate decision-making around optimizing load shifting and grid investments.