

E SOURCE  
HUB



AT THE  
FORUM

# E Source Toolbox for Customer Service Optimizers

Jeffrey Daigle

forum

# Meet our contact center persona



Front-liner

“How do I make the contact center efficient while driving customer satisfaction?”

“What technologies could I use to handle simple questions and deflect contacts from the center?”

“When is the best time to start the collections process on delinquent accounts?”

# Utility customer care

The E Source Utility Customer Care Service enhances **customer service strategies** in the energy industry and defines how to serve sophisticated customers with growing expectations.



# The utility customer care toolbox



## Research

Our library of topical research can help you improve all of your customer service processes—from payment processing to the call center



## Market research

In-depth analysis of your IVR as well as a benchmark report to help you understand how you rank in the utility industry



## Ask E Source

If we haven't already written research on it, our experts will do custom research for you



## Networking

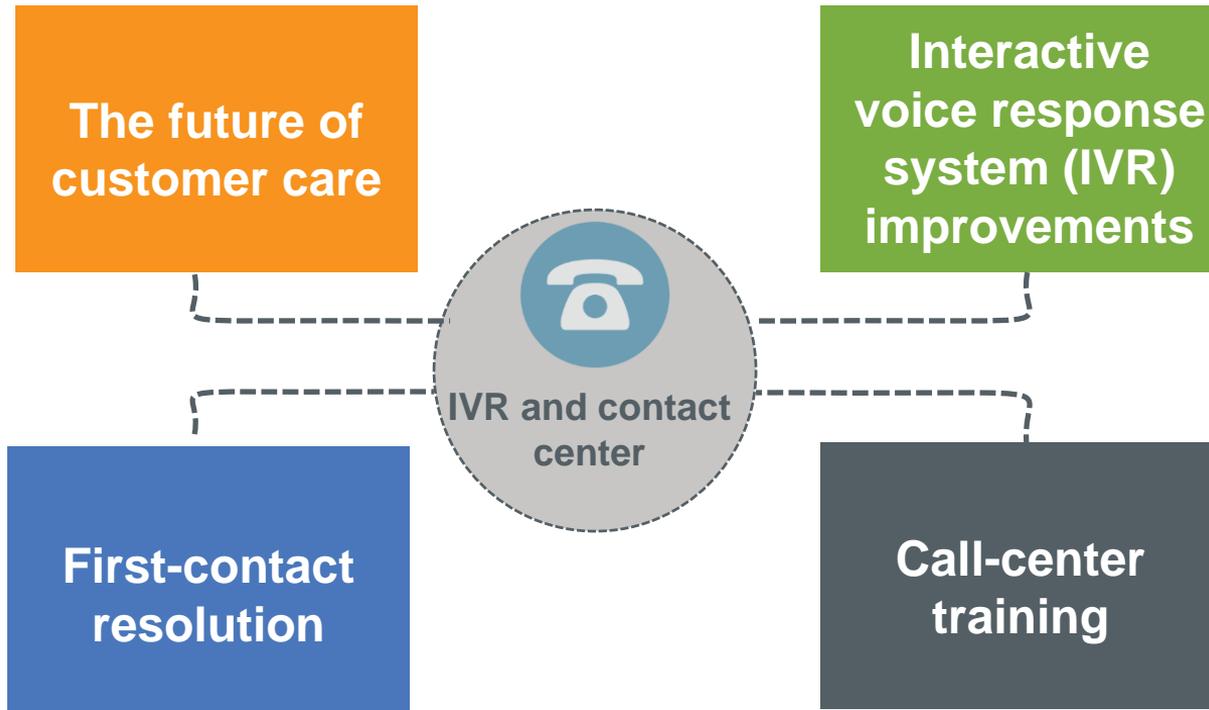
Use our in-person and online events to connect with other industry professionals



## Tools

The [Utility IVR Design Center](#) gives you specific best-practice examples

# Customer care trends we're tracking



# Future state of contact centers



- Innovations in call routing
- Shifting demographics in the call center
- Contact center quality assurance



# Omnichannel



# Defining an omnichannel experience

## E SOURCE DEFINITION



A holistic approach to provide the customer with a seamless and integrated experience regardless of channel.

# E Source Utility IVR Benchmark



# Utility IVR Design Center



[Design Center Home](#) [Results](#) [Design Guides](#) [My Assessments](#)

## Utility IVR Design Center

[View published](#) [New draft](#) [Moderate](#) [Clone this deliverable](#)

This site is your source for information on the E Source benchmark studies on interactive voice response systems (IVRs). From here, you can access all of our past and current IVR benchmark studies, plus rankings, feature analysis, and additional resources to help your utility design a highly functional and user-friendly IVR.

[Learn more about the history of our IVR benchmarks](#)

### Results

Find out what's new in this year's study—view the current rankings and read about our top findings, the state of utility IVRs today, and our methodology.

[View all](#)

### Design Guides

Our feature-by-feature analysis includes an explanation of what we looked for, key findings, audio clips of the best examples, design considerations, and direct quotes from our reviewers.

[View all](#)

### Assessments

Check out the slides and recordings from our benchmark web conferences, past rankings, and the Fantasy IVR. Starting in 2014, any company-specific IVR assessments you request can also be found here.

[View all](#)

# Individual IVR assessment

By Sarah Fiebiger

Published: March 28, 2014 | Individual Improvement Report

## Contents

### Key Findings

- Overall Benchmark Results
- Top Areas for Improvement

### Analysis by Feature

- Account Balance
- Disconnect Status
- How to Reconnect Service
- Last Payment Received
- Make a Payment
- Moving
- Payment Arrangements
- Reach a CSR
- Report an Outage or Gas Leak Emergency
- Work Orders

### About the Study

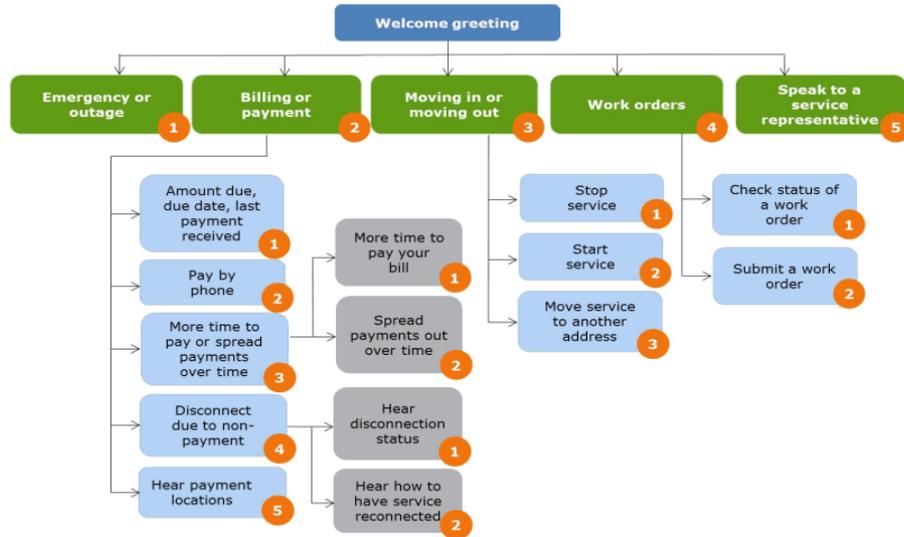
### Resources

# Tactical, actionable information

FIGURE 1: 2014 Fantasy Utility IVR Menu Diagram

An ideal utility IVR would place the five most urgent and frequently used options at the front (shown under the welcome greeting). Circled numbers indicate the numbers customers can press on their phone or say to reach that option. For example, to get more time to pay a bill, a customer would press or say "2" in the main menu for "billing and payment," then "3" in the submenu for "more time to pay or to spread payments over time," and finally "1" for "more time to pay your bill."

You can [download this E Source 2014 Fantasy Utility IVR Menu Tree \(PDF\)](#).



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# Data points and case studies to assist

TABLE 1: Comparison of frequency of quality checks for utility and non-utility companies

In 2015, we asked several utility and non-utility organizations how frequently they performed quality checks on agents. Although there's no standard metric for this data, consistency is essential. Companies should perform checks regularly and across every channel their agents use.

Utility	Frequency of quality-assurance monitoring
Alabama Power	30-minute blocks and random calls for each agent
Hydro One	1,200 interactions (calls, emails) per month
SDG&E	1 percent of all calls
Silicon Valley Power	3 to 5 calls per agent per month
Non-utility	Frequency of quality-assurance monitoring
Banner Health	3 percent of calls
BioTrust	3 interactions per agent per week
Crocs Inc.	1 interaction per channel per week
Southwest Credit Systems	5 percent of calls
The Steritech Group	1 to 2 percent of calls and 15 percent of documentation

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## Tips for How to Comply with TCPA Regulations

How does a utility seek to protect itself from potential litigation? We've compiled a checklist to help you keep track of your TCPA compliance efforts (Figure 1).

FIGURE 1: TCPA compliance checklist

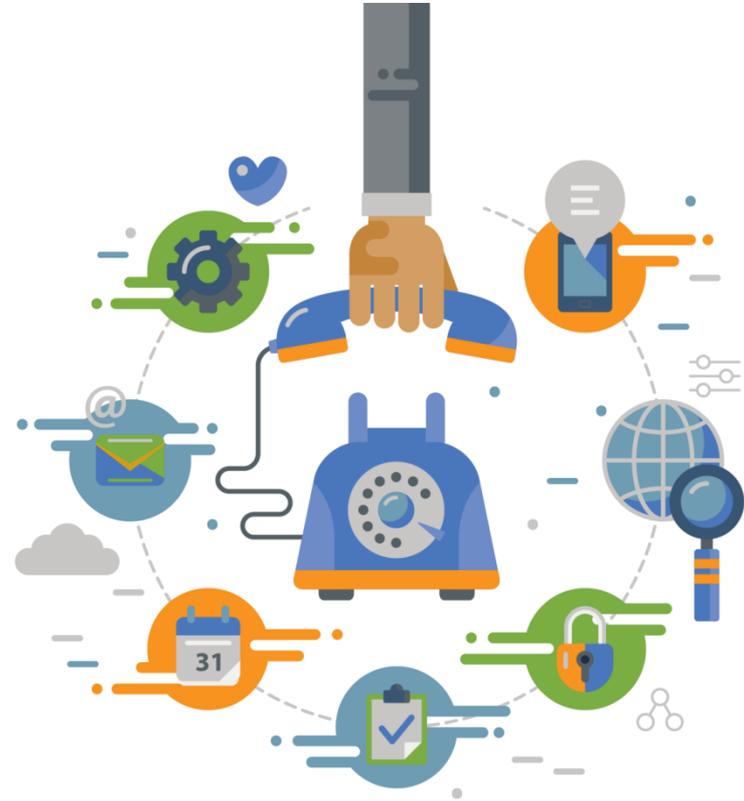
Use this checklist to help you stay on top of your compliance with Telephone Consumer Protection Act (TCPA) regulations.

- Place opt-out messaging in all outbound text messages and robocalls.
- Create a stringent process that makes it easy for customers to opt out of inbound contact.
- Use mobile apps to send notifications to customers along with outage- and emergency-related messages.
- Utilize preference centers to enable customers to allow or disallow communications from you, and prompt them to update their preferences annually.
- Train agents to validate customer contact information when customers call the contact center.

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# Contact center performance

- Contact center and walk-in staffing
- Interaction handling
- Business operations
- Interactions by contact channel
- Agent interaction handling for call, email, and chat
- Traditional contact center metrics
- Cost-per-channel metrics
- First-contact resolution



# Recent Questions

“ What will local utility payment offices look like in the future, considering evolving customer needs and expectations?

“ How do utilities reduce the number of customers who “zero out” of their interactive voice response system?

“ How do utilities staff appropriately for customer information system (CIS) deployments?

“ How are best-in-class contact centers organized? How do they handle call routing, agent-to-supervisor ratios, and quality assurance?

“ What are utility best practices for providing estimated times of restoration to customers?



A person is shown from behind, sitting at a desk and using a laptop. The laptop screen displays a social media profile page with a 'People' header, a profile picture, and a 'My Status' section. The background is a solid blue color.

# Consulting and advisory solutions

# Contact center optimization: 4-step approach



Understand



Plan



Implement



Optimize

# Understand



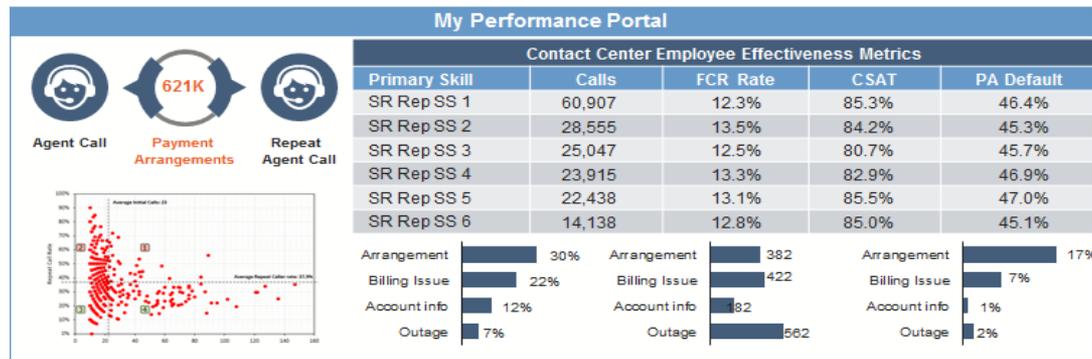


# Metrics and measurement review

The right metrics drive the right behavior; the wrong metrics drive the wrong behavior

E Source conducts a deep review of all operational, transactional, employee, and customer metrics and compares them to industry averages to assess your company's current state, determine which metrics are right for your organization, and establish targets based on research and tracking to achieve goal.

E Source custom research, benchmarking, and best practices inform our strategy to ensure that you receive recommendations that are backed by sound data.



# Plan

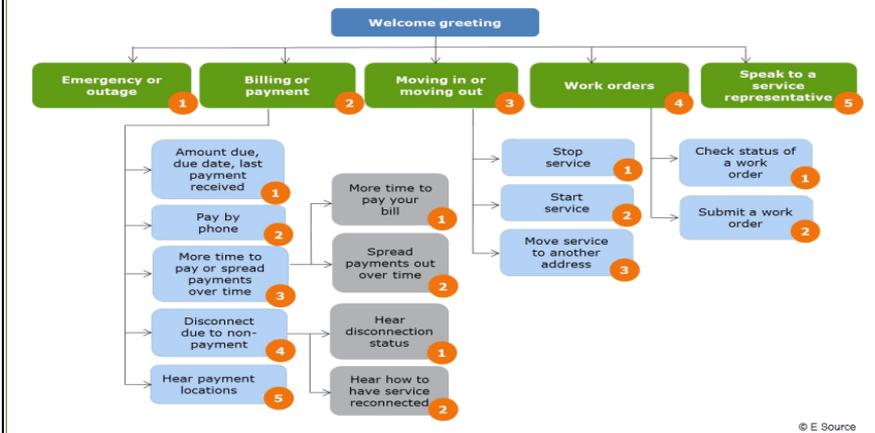


- Promise and service standards
- IVR menu and phone tree optimization
- Speech analytics recommendation
- Text analytics recommendation
- Measurement framework: metrics and transactional surveys
- Outbound dialer optimization
- New channels

**FIGURE 1: 2014 Fantasy Utility IVR Menu Diagram**

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You can download this E Source 2014 Fantasy Utility IVR Menu Tree (PDF).



# Implement



- Change management training
- Internal communications
- Contact staffing and budgets
- Hiring, recognition, and training
- Technology and vendors
- Journey mapping

FIGURE 2: How are utility staff getting trained in customer experience?

While front-line employees are learning CX skills and behaviors through formal training, utility senior staff aren't offered CX training.

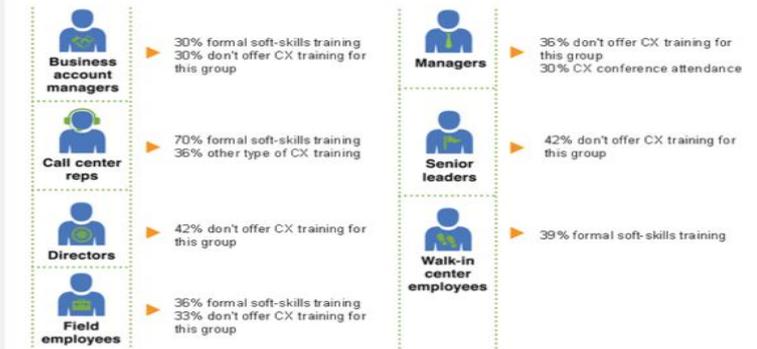


FIGURE 4: The 6 E's of Employee Engagement

Employee engagement is a process best taken in chronological steps. Companies that listen to their employees, communicate with them, and enable them to do their part to achieve company objectives will create internal brand advocates.



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# Optimize



- Ongoing journey mapping
- Follow-up advisory services and check-ins
- Review of metrics and business case elements to determine success



# Next steps

-  Visit the Learning Lab to try out these tools yourself
-  Schedule a meeting at the Forum with your customer success director
-  Attend the Forum session “Developing Your Future-Forward Contact Channel Strategy”
-  Call us after the Forum to schedule a time for us to meet with your team
-  Subscribe to monthly newsletters and weekly alerts

# For more information



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