

The Utility Customer Experience of the Future

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E Source

2018 E Source Summit for the Tennessee Valley



The Forces of Change

Five Shifts in Consumer Expectations



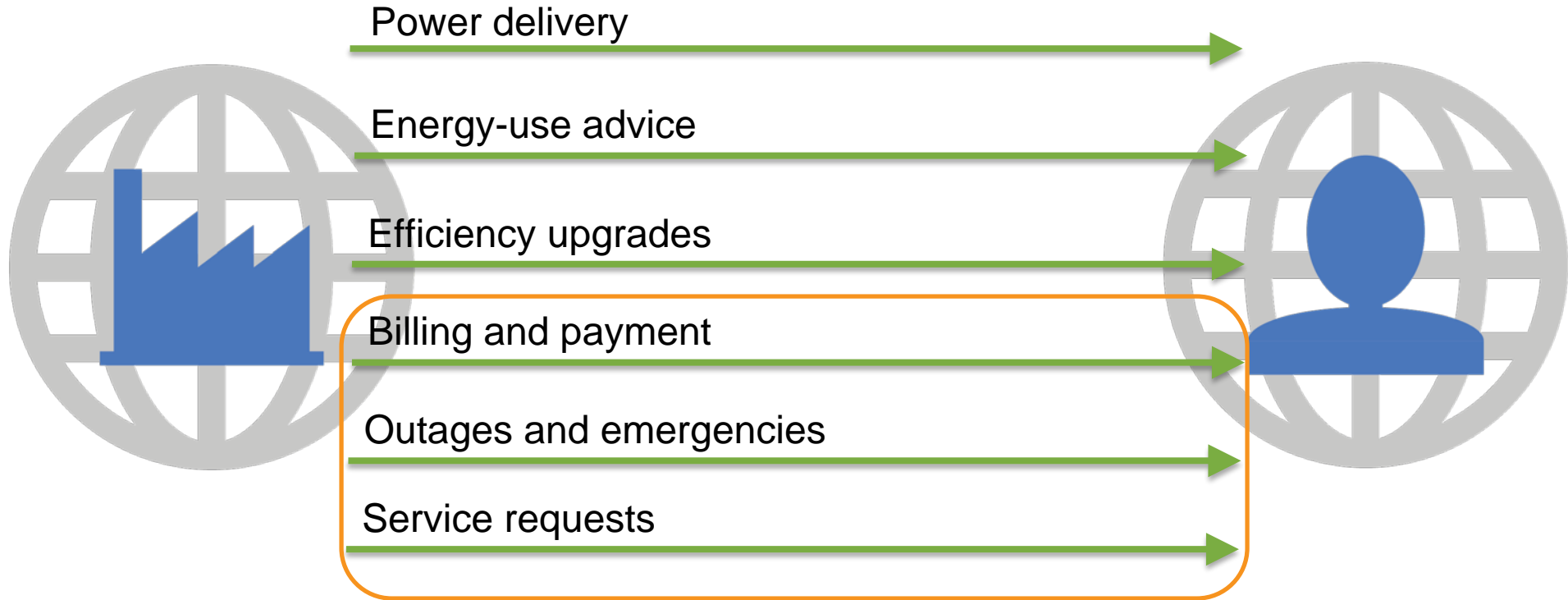
The Technology-Expectations Feedback Loop





Impacts to Utilities

The Utility-Customer Relationship



What product launched in 2016 and has sold **36 million** units in the United States?

Source: Wikipedia

The Potential of Smart Speakers

E Source data indicates that **15%** of residential utility customers own a smart speaker such as the Google Home or Amazon Alexa.

Source: [Customer Perceptions: An Entry Point into the Smart Home](#)

Smart Speakers



News Startups Mobile Gadgets Enterprise Social Europe

Trending Amazon Tesla Microsoft

Apple
Amazon Echo
Amazon
Alexa
Hardware

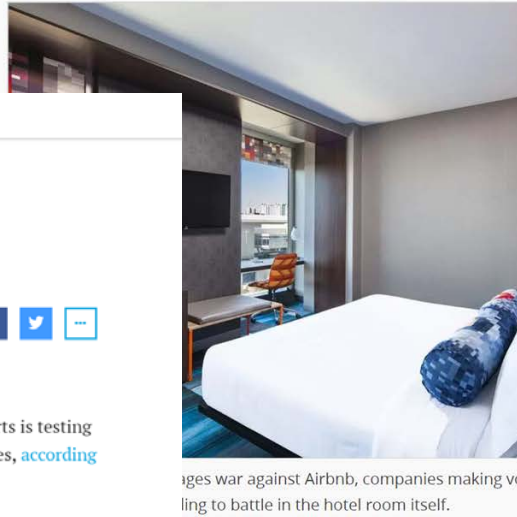
Popular Posts



PewDiePie, the world's most

Amazon's Alexa and Apple's Siri are waging war over the hotel room

Posted Mar 27, 2017 by [Jordan Crook](#) (@jordanrcrook)



iges war against Airbnb, companies making voi
ling to battle in the hotel room itself.

JW Marriott San Antonio Rolls Out Amazon Echo Dot

HOTEL & RESORT | [PATRICK CLARKE](#) | MARCH 13, 2017



Sources: Fortune.com, Techcrunch.com, Travepulse.com

FORTUNE | Tech

HOTELS

Best Western Is Testing Voice-Activated Devices in Its Hotel Rooms

[Jennifer Calfas](#)
Jun 06, 2017



Alexa might be in your next hotel room.

Following [Marriott](#) and [Wynn Resorts](#), Best Western Hotels & Resorts is testing the use of [Amazon](#) Dot devices in its hotels for guests and employees, [according to Skift](#), a travel publication.

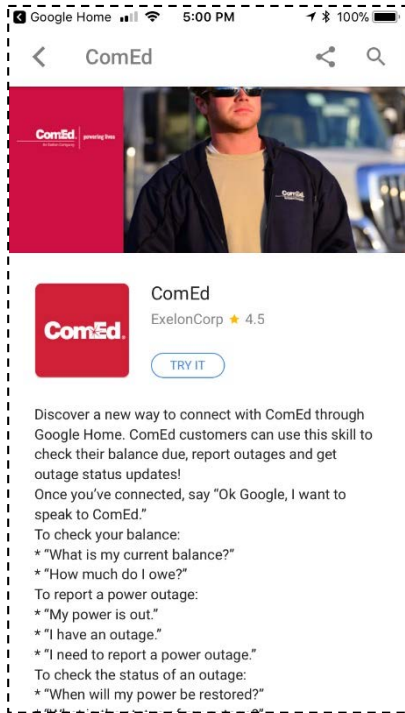
Examples of Smart Speaker Functionality

Functions offered:

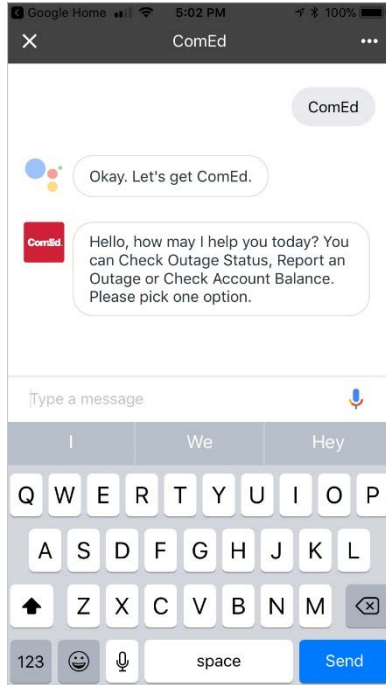
- Handle account balance inquiries
- Make a payment
- Turn on/off smart home device
- Provide rate information

Industries:

- Banking
- Insurance
- Smart home
- Airlines
- Retail



Sources: Google Home App



Source: Amazon.com

Save time and money with a Google Home & Nest Thermostat E



When you sign up for the **Reliant Speak & Save 24 plan**, you'll get a Google Home and Nest Thermostat E at no cost. With this plan, you'll also enjoy **24 months of price security** on your electricity.¹

Thanks to **Google Home**, powered by the Google Assistant, you'll save time and effort by easily voice controlling your world. Plus, the **Nest Thermostat E** can help you save energy, and even programs itself to reduce AC run times up to 15%.²

❖ **Manage your Reliant account, just by speaking**

With simple commands like "How much electricity am I using?" you can manage your Reliant account with Google Home.

❖ **Save energy with the Nest Thermostat E**

The Nest Thermostat E is a proven energy saver and features an easily adjustable schedule. Plus, you can change the temperature in your

Not a customer?

View plans in your area
and make the switch.

[Continue](#)

Already a customer?

Log in to manage your account,
see new offers and more.

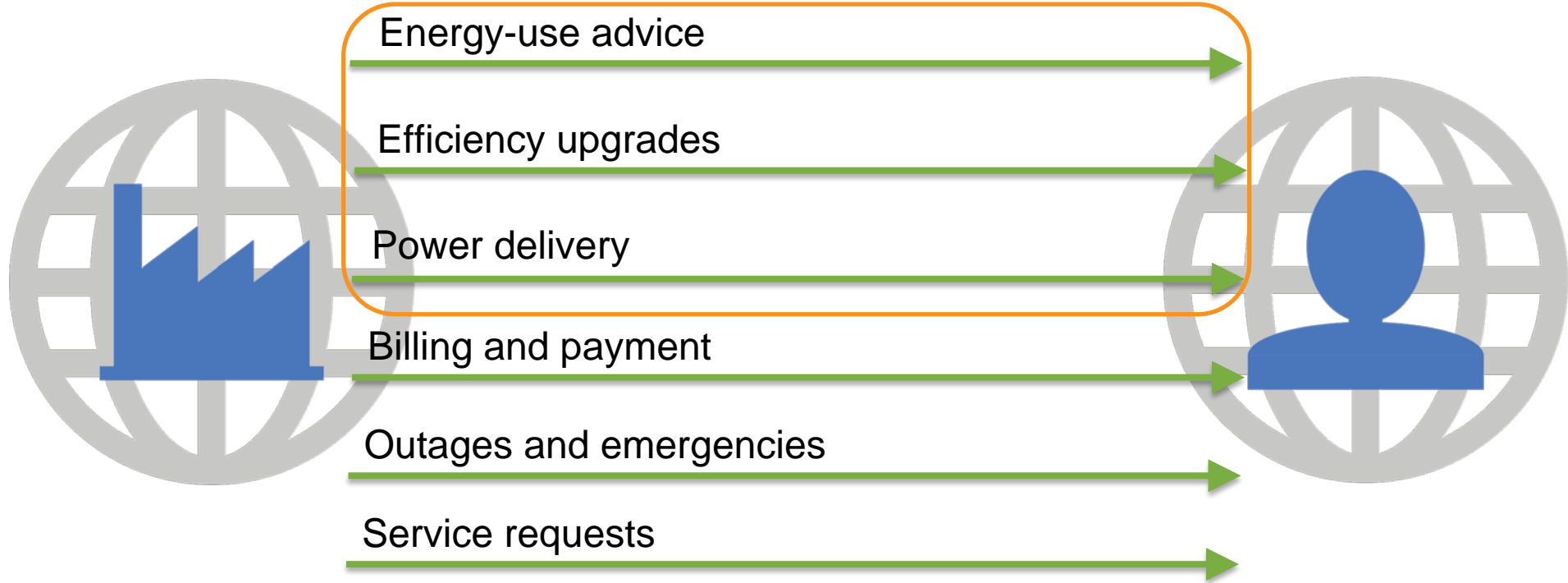
[Log In](#)

Source: Reliant Energy

Five Shifts in Consumer Expectations



The Utility-Customer Relationship





Energy-Use Advice

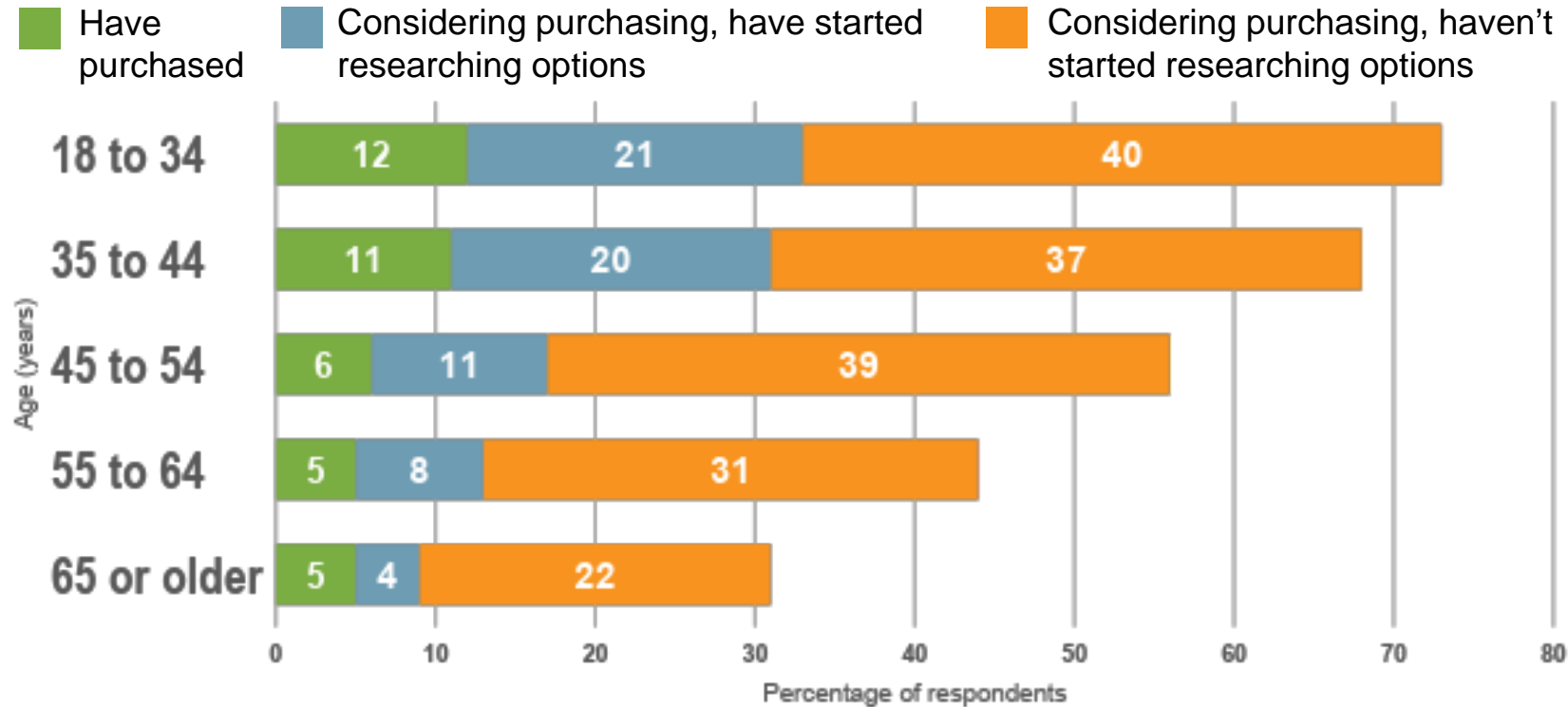
Customers Want Automatic Savings



of customers would find it valuable for smart homes to **“set up devices to automatically save energy without user input.”**

Source: E Source Residential Utility Customer Survey 2016 (n = 959)

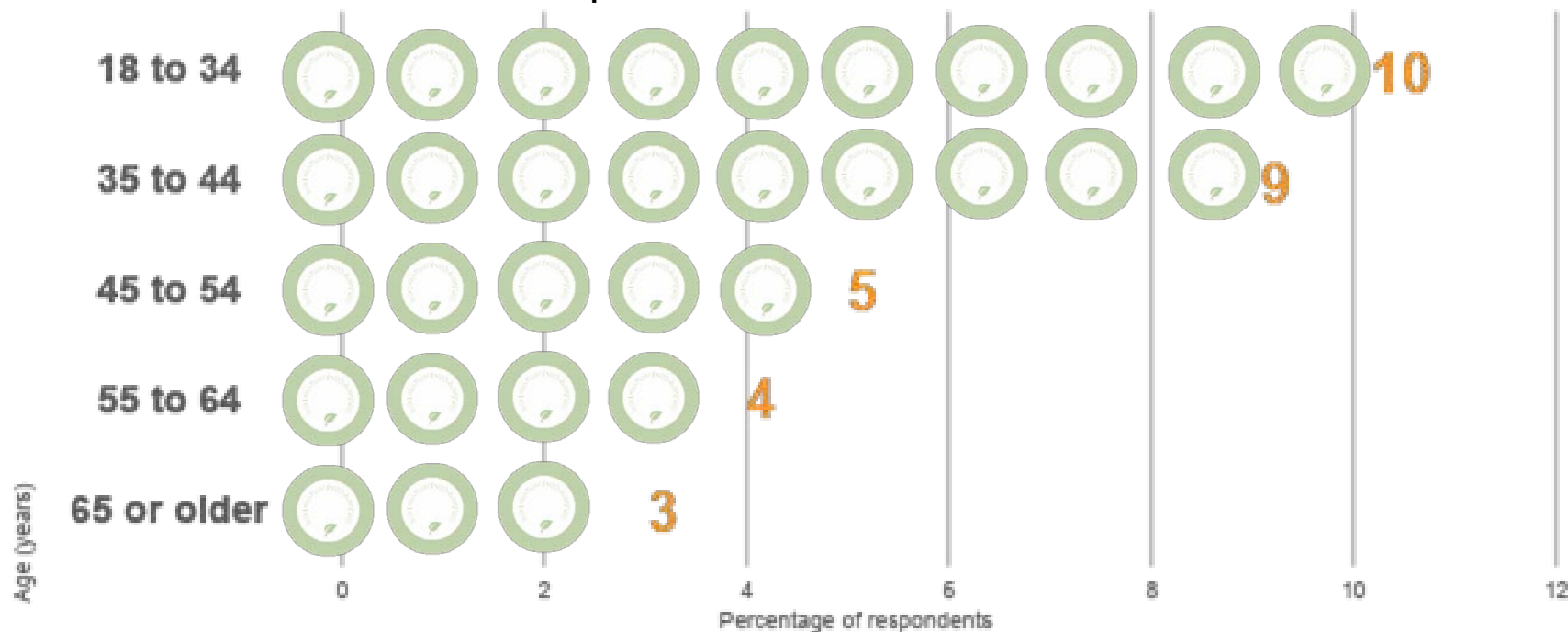
Young Customers Lead the Way on HEM System Adoption



Source: Residential Customer Insights Center 2016

Younger Customers Most Likely to Own Smart Thermostats

Have purchased a “smart” or remote thermostat

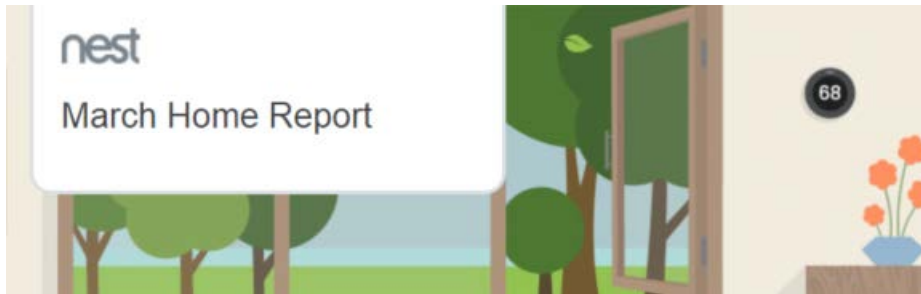


Source: Residential Customer Insights Center 2016

Smart Thermostats

Nest's monthly energy summary email includes:

- Usage report
- Usage analysis
- Comparison to other homes
- Environmental impact analysis



Source: Nest

Energy summary as of March 31

We're looking at info from your Nest Thermostat: Entryway.

Here's how you did:



Why did your energy use change?

We look at a lot of reasons your energy use can change — from weather to your Eco Temperatures — and these are the ones that made the biggest difference this month.

They add up to -81 hours of energy use. The difference of +2 hours was caused by other factors. [Learn more >](#)



Convenient Energy Upgrades





Energy-Efficiency Upgrades

Why Don't All Customers Participate in Energy-Efficiency Upgrades?

- Confidence
- Trust
- Time
- Complication
- Inertia



Renovate America HERO Program Appeal

[Get Financing](#)[Find Contractors](#)[Improve Your Home](#)[Get Support](#)[Login](#)

100% financing on energy-efficient home improvements.



Solar



Heating & Cooling



Windows & Doors



Roofing



Landscaping

"A huge difference in the comfort of our home."

Phia and Bryan from Oceanside, CA, used HERO to lower their electric bill with a high-efficiency heating and cooling upgrade.

Source: Renovate America

Messaging strategy:

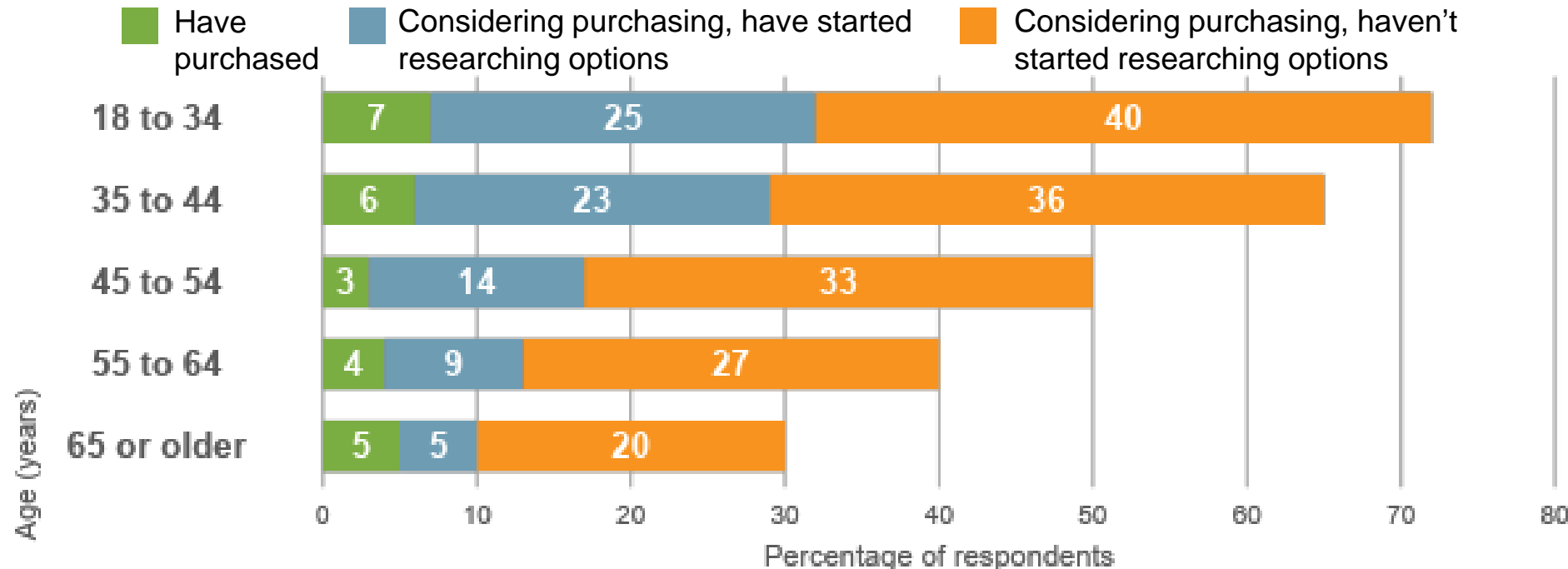
- 100%, no-money-down financing
- Recommended contractors
- "More projects in *less time*"
- "*Easy* application process"
- "Great *experience*"

A person is shown from the chest up, sitting at a desk and using a laptop. The laptop screen displays a social media profile page. The profile includes a header with the name 'People', a profile picture of a man, and a 'My Status' section. Below the status, there are several posts, each with a profile picture and a caption. The text 'Current Name shared in 100%' is visible in the captions. The person's hands are on the laptop keyboard. The entire image is overlaid with a blue tint.

Power Delivery

Younger Customers Are Considering Solar

Stage of Solar PV System Purchase

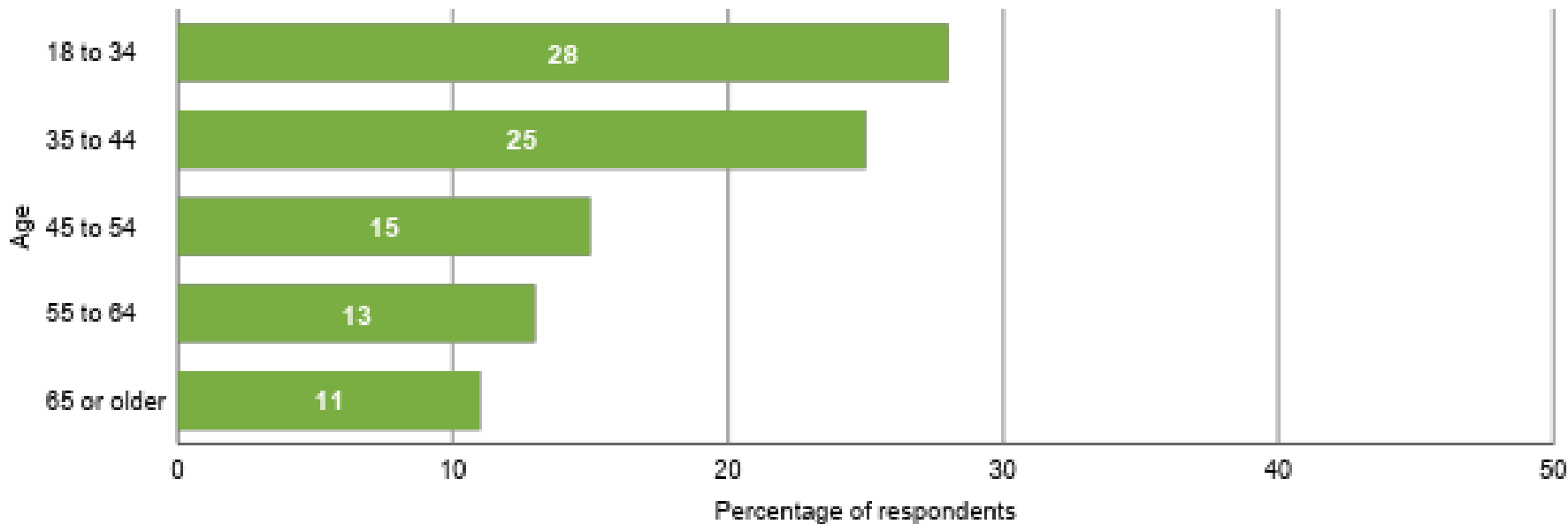


Base: Respondents somewhat or very familiar with solar photovoltaic (PV) systems. **Note:** Data may not add to 100% due to rounding. Percentages shown in the charts reflect weighted data.

Source: Residential Customer Insights Center 2016

Younger Customers Willing to Pay More for Solar

Agreement: “I would pay 10% more each month for solar power” (9 or 10 rating)



Base: All respondents. **Notes:** Respondents used a scale of 1 to 10 where 1 means strongly disagree and 10 means strongly agree. Data may not add to 100% due to rounding. Percentages shown in the charts reflect weighted data; sample sizes (n) are based on unweighted data.

© E Source, Residential Customer Insights Center

Arcadia Power Appeal



- Seamlessness of interactions
- Talk about energy in terms that make sense
- The accessibility of green energy
- Customizable

Courtesy: iStock

Accessible Green Power

Congratulations, you are eligible for clean energy!

Link your local utility account to get started

Xcel Energy CO

Username

Password

Continue

Skip

Forgot your username?
Forgot your password?

Select your panels

Choose panels from one of our projects

Select Project

Passaic River Project ▼

How many panels do you want?


1 ▼

Continue

Price per panel:	\$100.00
Total cost:	\$100.00
Estimated monthly savings:	\$1.00
Savings term:	120 months
Estimated total savings:	\$120.00

Source: Arcadia Power

Simplified Utility Bill

**Arcadia
Power**

JANUARY 2018

Statement Summary

Service Period: Dec 12 - Jan 12

Account number

21710114

Service address

**3811 New Hampshire Ave
NW Unit 1, Washington
DC, 20011**

Payment Method

**Wells Fargo Bank ending in
*****036**

Bill total

\$62.92

Payment scheduled for

Jan 19, 2018

Bill Summary


Local Utility Charge	\$61.24
Wind Energy Charge	\$7.02
Solar Savings	-\$5.34
<hr/>	
Total	\$62.92
Automatic Payment	- \$62.92
Amount Due	\$0.00

Your Impact

This month you used a total of **468 kWh** of energy. **468 kWh** came from clean energy.


Clean kWh

Clean kWh purchased

 **14,599**

Clean Impact

Tons of CO2 equivalent

 **22,191**

Have Questions?

Our team of customer support managers are exceptionally well-trained and are always happy to help.
Email us at customer care@arcadiapower.com

Source: Arcadia Power

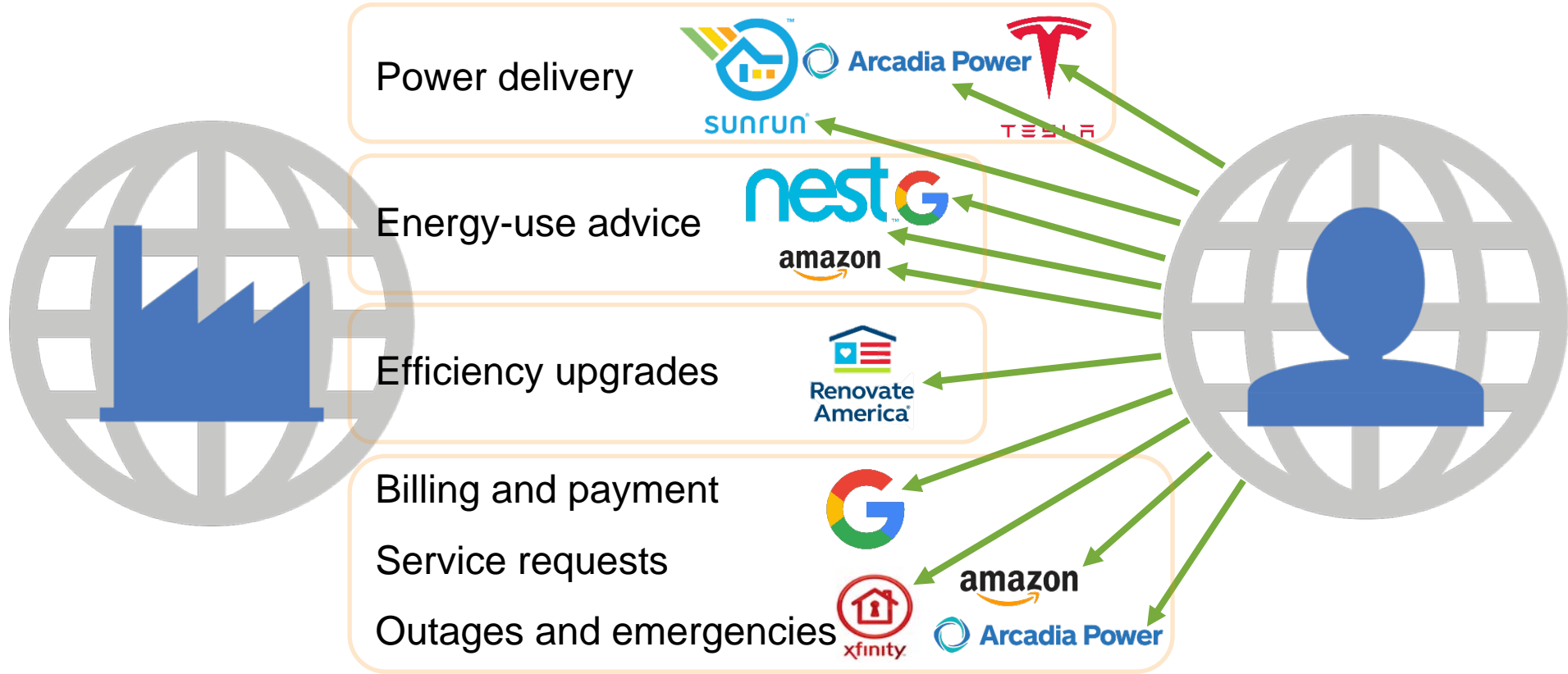
Power-Supply Mix



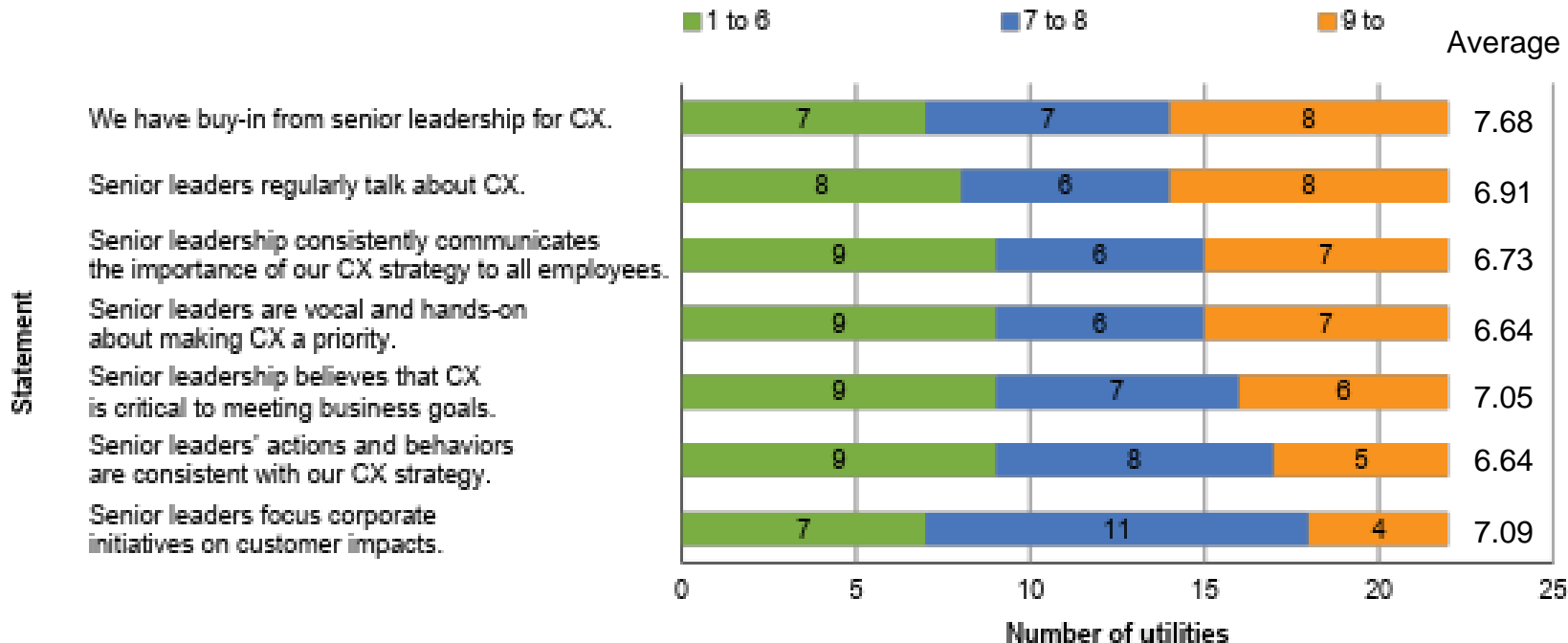


Paradigm Shift in the Utility Customer Experience

The Customer-Controlled-Experience Paradigm



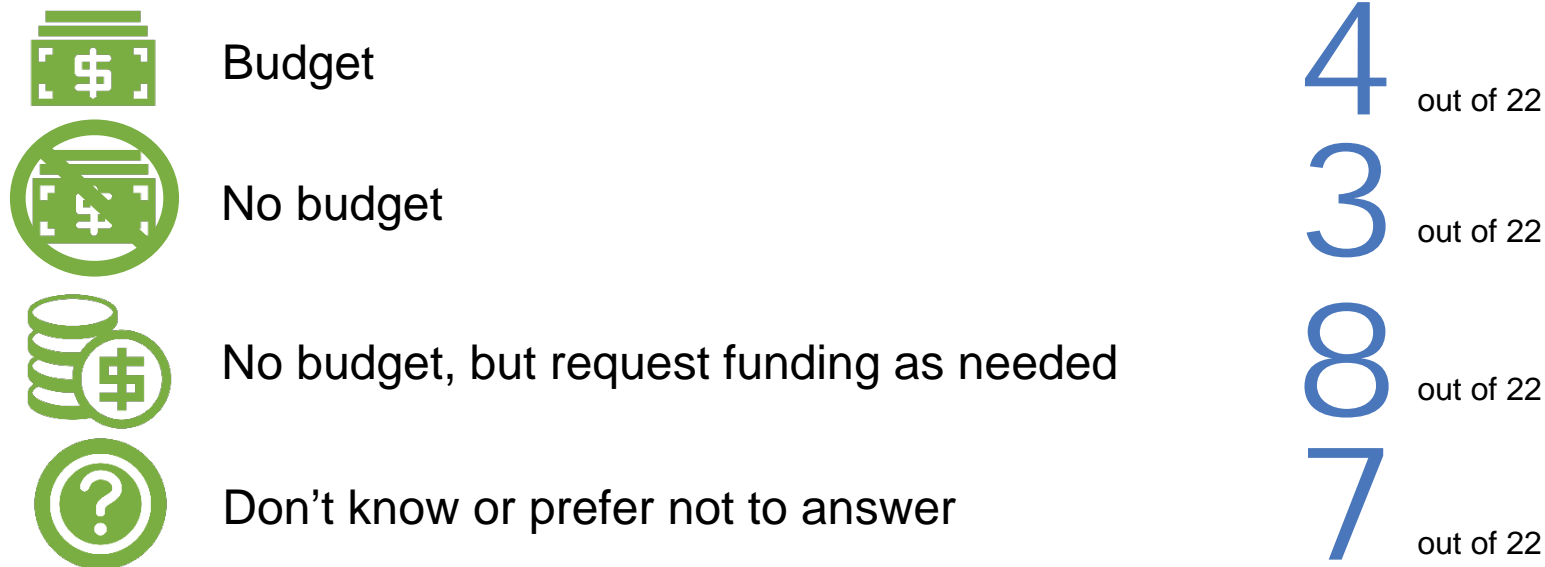
More Agree That Senior Leaders Support CX in 2018 Than in 2016



Base: n = 22 utilities. Question S1_6: Using a scale of 1 to 10, where 1 means strongly disagree and 10 means strongly agree, how strongly do you agree or disagree with the following statements about CX management at your organization?

© E Source (CX Survey 2018)

Most Have No Budget for CX and Request Funding As Needed



Base: n = 22 utilities. **Question S1_14:** What is your organization's annual budget for improving and managing CX, excluding employee salaries and direct customer support (such as customer care, walk-in centers, and account management), but including projects, initiatives, and activities intended to improve or manage CX?

© E Source (CX Survey 2018)

The Building Blocks of a Comprehensive CX Strategy



As Steve Jobs Says...

It's not the customer's job to know
what they want.

In conclusion, how might we...

- Provide more choices?
- Incorporate social status?
- Provide convenience and flexibility?
- Provide speed and efficiency?
- Enable more customization?

For More Information



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