

ABCs of CX



If you've ever had a conversation with a customer experience (CX) professional, you've probably been barraged by buzzwords. The [E Source Customer Experience Glossary](#) fills in all the gaps for you. It contains more than 100 CX-related terms and definitions to help you start speaking the same language as your CX peers.

In this e-book, you'll find a sample of some of the words and phrases we've compiled in the [complete glossary](#).



average speed to answer (ASA):

(n) the time it takes a customer service representative to answer an incoming call.

ASA can have an effect on customer satisfaction (CSAT), but it's rarely the only thing driving CSAT up or down. From the 2016 [E Source Contact Center Performance Survey](#) we learned that none of the utilities that performed above average in satisfaction had an ASA longer than 2.0 minutes. However, five of the utilities that had lower satisfaction levels took longer than 1.5 minutes to answer a call. Our advice? Don't rely on a shorter ASA alone to boost satisfaction. But expect a longer ASA to reduce it.



Customer Effort Score (CES):

(n) a measure of how much effort a customer expends to address an issue or execute a transaction with a utility.

Just over one-quarter of respondents to the 2016 [E Source Customer Experience Survey](#) noted that they measure Customer Effort Score.

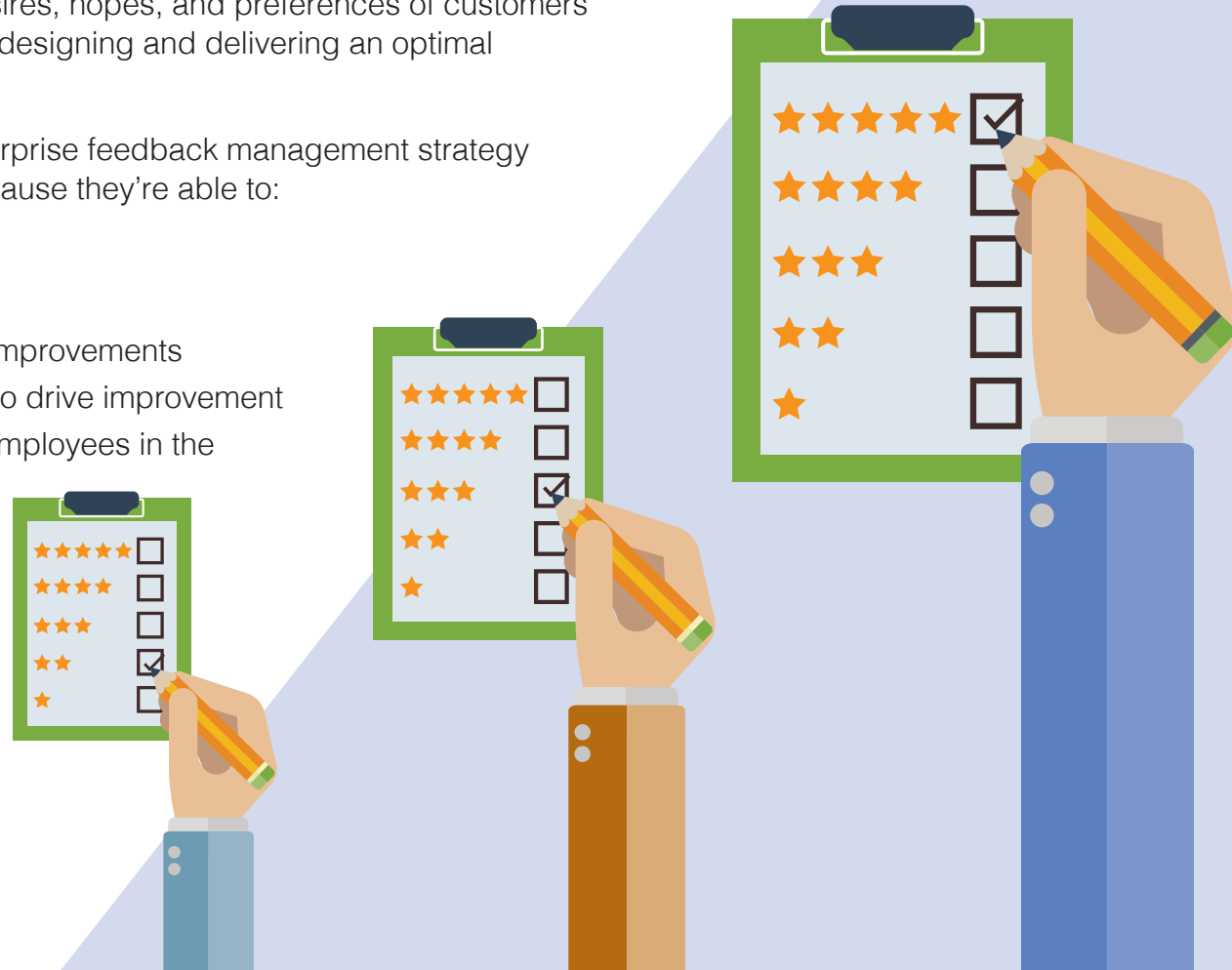


enterprise feedback management (EFM):

(n) the holistic, closed-loop process of listening to, analyzing, and acting upon the implied and expressed needs, desires, hopes, and preferences of customers and employees for the purpose of designing and delivering an optimal customer experience.

Utilities with a comprehensive enterprise feedback management strategy have a competitive advantage because they're able to:

- Listen to customers in real time
- Analyze the results
- Make swift and meaningful CX improvements
- Measure their results over time to drive improvement
- Incorporate the voices of their employees in the analysis



journey map:

(n) a diagram of the steps a customer goes through to resolve an issue or conduct a transaction with a utility.

A journey map is not your standard utility process map. Rather, it's a visual depiction of the interactions customers have with your utility. Journey mapping helps you visualize all the highs and lows people experience as they move through your processes. The great thing about journey mapping is that it doesn't need to be relegated to the customer service functions of the organization. We've seen examples of utilities using journey mapping to examine demand-side management programs and identify improvements to increase participation rates and cost-effectiveness.



omnichannel:

(n) experiences that are seamless across channels where data is not lost.

When you create an omnichannel environment, you're helping customers have the same experience across all your channels. That means the look and feel of your website are the same as the look and feel of your direct mailers. It also means the process of transferring service, for example, doesn't vary if a customer chooses to do it over the interactive voice response system (IVR) or through a live agent. However, you don't have to offer all experiences across all channels. There are some experiences that don't make sense in a particular channel. For example, do you want people to report gas emergencies via email? Probably not. But you do want a system that recognizes that someone sent an email about a gas emergency and that quickly routes an outbound call to follow up with the customer. The [E Source Omnichannel Survey](#) looks at which channels customers are using and how they expect companies to interact with them in those environments. The survey also benchmarks North American utilities' omnichannel performance.




personas:

(n) groups of customers whose behaviors and preferences simplify into a character that is predictive of the larger group; personas, as relatable archetypes, embody the authentic actions and trends of many customers or employees and portray the common vision of a targeted group.

The E Source report [Persona Creation Guide: Top Questions, Answered](#) (available with certain memberships) offers step-by-step suggestions for creating utility customer personas. To help your employees get a better understanding of the different types of customers they serve, create persona handouts. Through easy-to-digest graphics and text blurbs, these fictitious biographies tell your customers' stories, providing such information as income, marriage status, goals and frustrations, brand loyalty, likes and dislikes, and spending habits.

Gail: Penny-Pinching Mom

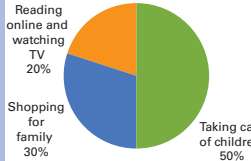


SYMPATHETIC
LOYAL
THOUGHTFUL
CARING
DILIGENT
CASH-STRAPPED

HARDWORKING
BUSY
PASSIONATE
DETERMINED

A day in my life

My family's well-being is my focus.



Activity	Percentage
Taking care of children	50%
Shopping for family	30%
Reading online and watching TV	20%

Demographics

- Age: 36
- Annual household income: \$55,000
- Married, three children

My priorities

- Keep my family comfortable
- Balance the monthly budget
- Help my local community

Goals I have

- Be a good role model for my kids
- Find simple, creative ways to save time or money
- Seek out kind, helpful people

Behavior scale

Behavior	Scale
Favors low cost	— Favors less time
Shops in-store	— Shops online
Researches before doing	— Quick to act
Sticks to habits	— Open to trying new things
Spends time at home	— Spends time away from home

Frustrations I have

When I have a problem with a product or service, companies don't understand that I expect a quick way to resolve it—whenever and wherever I need to.


How I think about energy use

I'm too busy to worry about how my family is using energy, but I'm worried about wasting money.

Trusted information sources

- Local newspaper
- Huffington Post
- Facebook
- Today show
- Mommy bloggers

Brands I'm loyal to



Kroger **amazon**
USAA **TOYOTA**

For me, it's all about saving time and money so that I can provide a great life for my family. I seek out anyone who can help me do more with less!

quality assurance (QA):

(n) a discipline that examines how agents process interactions from the company's perspective or the customer's perspective and ensures that the approach meets predetermined quality criteria.

Our report [Managing Quality Assurance in the Utility Contact Center](#) (available with certain memberships) gives five tips for taking your QA program to the next level. For example, are you assessing all the channels your agents could be using to interact with customers? Are you using technology to automate parts of the QA process? You should be. Find more tips in the full report.



responsive design:

(n) a mobile-design approach that allows a website to fluidly change and respond to fit any screen or device size.

In the 2015 [E Source Review of North American Electric and Gas Company Residential Websites](#), we found that utilities that had incorporated intelligent responsive design into their website ranked higher than those utilities that had not configured their desktop site for mobile devices. Has your utility invested in responsive design? If they're not already, your customers will get frustrated by having to expand their smartphone and tablet views to accommodate your static site.



transactional survey:

(n) a survey customers take after completing a transaction with the utility.

A large midwestern utility uses 360-degree after-call surveys to get feedback from its customers about their interactions with utility reps. The utility randomly requests surveys of 40 percent of the calls that come in, and approximately 35 percent of the customers who are offered the survey complete it. The reps also take surveys to capture how they felt their calls went. This information allows the utility to see whether there's a disconnect between the agents' perception of interactions and the customers'.



voice of the customer (VOC):

(n) the implied and expressed needs, desires, hopes, and preferences of a utility's customers; utilities use this information to design and deliver the optimal customer experience efficiently and effectively (also, the process of gathering these inputs).

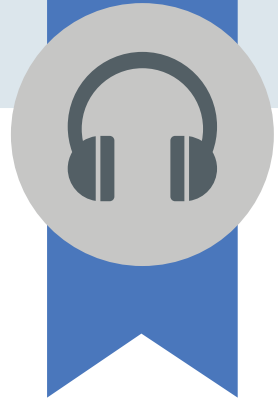
Businesses are getting feedback from customers all the time in almost every format through almost every channel. It's impossible to listen to every source, so utilities need to choose carefully which channels to tune into. Begin with an exhaustive inventory of all your customer feedback sources—for example:

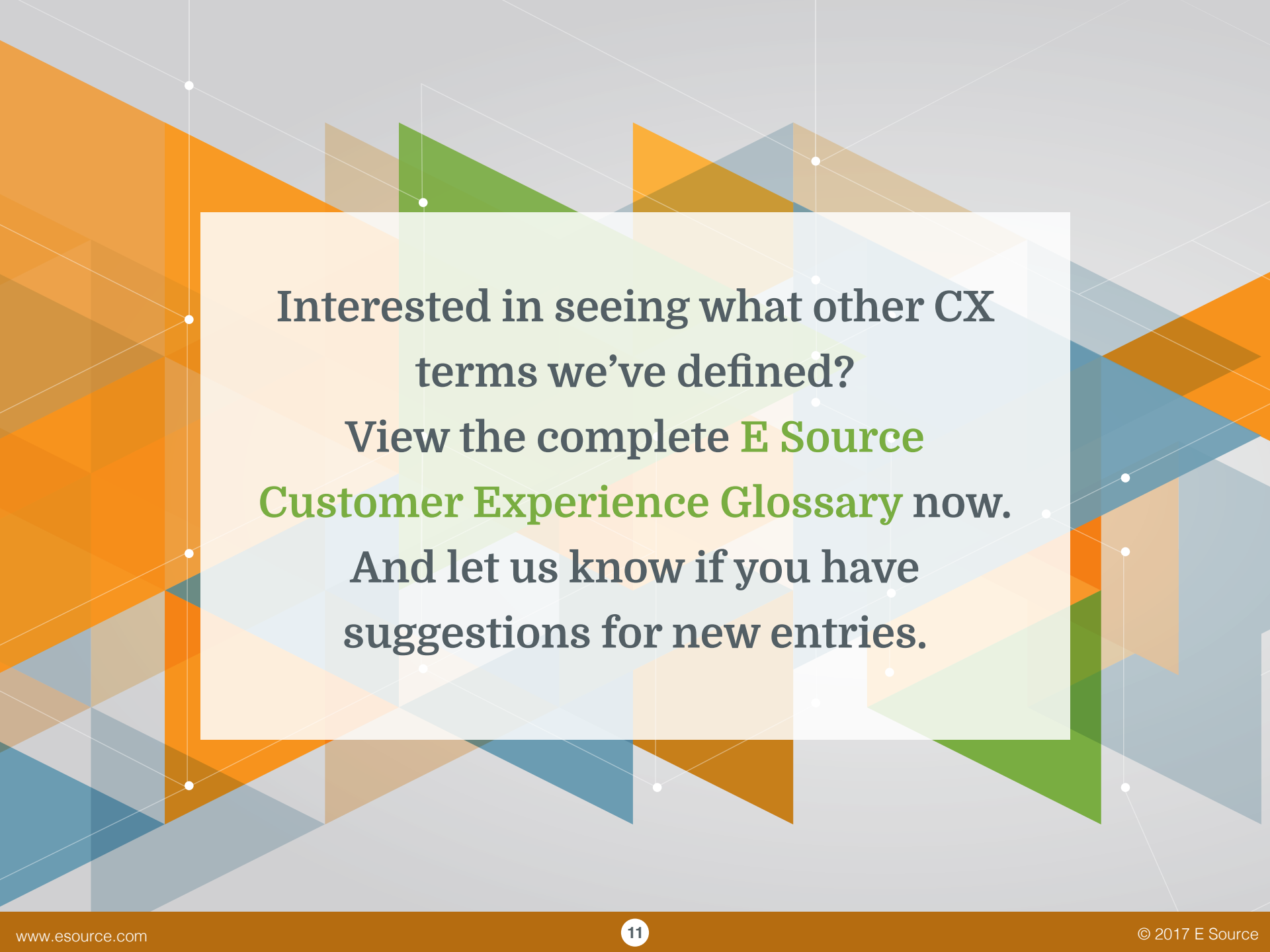
- CSAT surveys
- J.D. Power CSAT results
- Website feedback
- Focus groups
- IVR interactions
- Call center recordings and transcripts
- Email and chat transcripts
- Market research interviews and surveys
- Online communities
- Customer complaints
- Customer inquiries
- Transactional surveys
- Commission hearings
- Sales account reviews
- Customer relationship management notes
- Customer advisory boards
- Social media conversations and interactions (for example, Twitter, Facebook, Instagram, and Yelp)

Then, prioritize the channels according to:

- Size and influence of channel user base
- Frequency of use
- Feedback value
- Channel purpose (for example, outage reporting, program promotion, or advertising)
- Ease of monitoring and maintaining the channel
- A cost-benefit analysis of monitoring and maintaining the channel

After you've done this channel audit, set up a schedule and assign an owner to manage each channel.





Interested in seeing what other CX
terms we've defined?
View the complete **E Source**
Customer Experience Glossary now.
And let us know if you have
suggestions for new entries.



For 30 years, E Source has been providing market research, data, and consulting services to more than 300 utilities and their partners. This guidance helps our customers advance their efficiency programs, enhance customer relationships, and use energy more efficiently.



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