

# What Your Business Customers Really Want



Insights from the E Source Large  
Business Customer Gap and Priority  
Benchmark 2016

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# Large Business Customer Respondents By the Numbers

- 94% stated they're involved in paying their organization's energy bills
- 89% stated that energy management is a part of their job responsibilities
- 88% work in buildings owned by their organization
- 86% make energy-related decisions either on their own or as part of a team
- 56% cite facility management or engineering as their primary role or professional responsibility
- 34% cite industrial and manufacturing as the primary activity of their business
- 22% cite property management as the primary activity of their business



# Satisfaction and Value Benchmarks

## KEY FINDINGS

- The overall benchmark score has remained steady throughout the eight years that E Source has conducted the Large Business Customer Gap and Priority study.
- Account representative satisfaction and value scores continue to outpace those same measures at the utility level.

Study year	Overall benchmark score	Utility satisfaction	Utility value	Account rep satisfaction	Account rep value
2016	8.2	8.2	7.9	8.6	8.3
2015	8.2	8.1	7.8	8.8	8.4
2014	8.3	8.2	7.9	8.7	8.4
2013	8.3	8.3	8.0	8.6	8.3
2012	8.2	8.1	7.9	8.4	8.1
2011	8.2	8.2	7.9	8.5	8.2
2010	8.1	8.1	7.8	8.4	8.1
2009	8.1	8.2	8.0	8.4	8.1


**Base:** Utilities that met each year's benchmark. **Question S1\_3, S2\_3:** On a scale of 1 to 10, where 1 means not at all satisfied and 10 means very satisfied, how satisfied are you with your utility/account representative? **S1\_4, S2\_4:** On a scale of 1 to 10, where 1 means not at all valuable and 10 means very valuable, considering all aspects of your utility, including service, image, and the price you pay, how much value do you feel your utility/account representative provides? **Note:** Overall benchmark is the average of the utility satisfaction, utility value, account rep satisfaction, and account rep value.




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# Utility Attributes: Importance and Performance

We grouped related utility attributes to provide an overall view of customers' perceptions in three key areas: image, service, and programs and services. The largest gaps between importance and performance involve service attributes. "Working to keep energy prices down" tops the list with a gap of -2.0. Even the best-in-class performer for this attribute lags behind the importance rating by 0.9, which suggests that working to keep energy prices down is an industrywide issue.

The same can be said about "effectively communicates during energy emergencies" in that the difference at the sample average is nearly -2.0, with the best-in-class performer also nearly a full point off the importance rating.

We conducted regression analysis to determine how the large business customers' ratings of utility performance on different utility attributes affect satisfaction with the utility. The model included the performance ratings for each of the 10 utility attributes as well as satisfaction with the account representative. The top drivers of customer satisfaction with the utility are the provision of reliable energy, trustworthiness, reasonable energy prices, and customer satisfaction with the account rep. 

Attribute group	My utility...	Utility performance	Utility importance	Utility performance / importance gap	Best-in-class utility performance
Service	Works to keep energy prices down 	7.3	9.3	-2.0	8.4
Service	Effectively communicates during energy emergencies	7.8	9.6	-1.8	8.7
Service	Provides reliable energy 	8.7	9.8	-1.1	9.6
Image	Is trustworthy 	8.5	9.5	-1.0	9.1
Programs and services	Provides resources that help me manage my organization's energy costs	7.8	8.7	-0.9	8.3
Programs and services	Offers a variety of rate options	7.3	8.2	-0.9	7.9
Service	Provides me with useful information	8.0	8.8	-0.8	8.6
Image	Is an environmental steward	7.9	8.3	-0.4	8.6
Programs and services	Offers variety of programs and services	7.8	8.0	-0.2	8.3
Image	Is active in the community	7.6	7.3	0.3	8.6

**Base:** Large business key accounts included in the 2016 benchmark. **Question S1\_1:** How important is it for a utility to have the following attributes? **S1\_2:** Now please rate how well your utility performs. **Notes:** 2016 benchmark utility results are based on the utilities that completed the 2016 study and met the 2016 benchmark criteria outlined in the methodology section of this report. NA = not applicable.


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# Account Rep Attributes: Importance and Performance

The largest gaps between account rep importance and performance involve communication attributes. “Effectively communicates during energy emergencies” tops the list with a gap of -0.9 (the second largest gap at the utility level).

We grouped related account rep attributes to provide an overall view of customers’ perceptions in three key areas: relationships, communication, and energy advice.

“Is easy to get a hold of” and “communicates with me when appropriate” follow, each with a gap of -0.6. “Is attentive to my needs,” a relationship attribute, and “understands the needs and challenges of my business,” an energy advice attribute, also have gaps of -0.6.

We conducted regression analysis to determine how the respondents’ ratings of account rep performance on different attributes affect satisfaction. The model includes performance ratings for each of the nine account rep attributes, as well as whether the actual number of in-person rep visits matches the desired number of visits per year. The top three attributes with statistically significant impact on account rep satisfaction are “is attentive to my needs,” “communicates with me when appropriate,” and “understands the needs and challenges of my business,” respectively. 

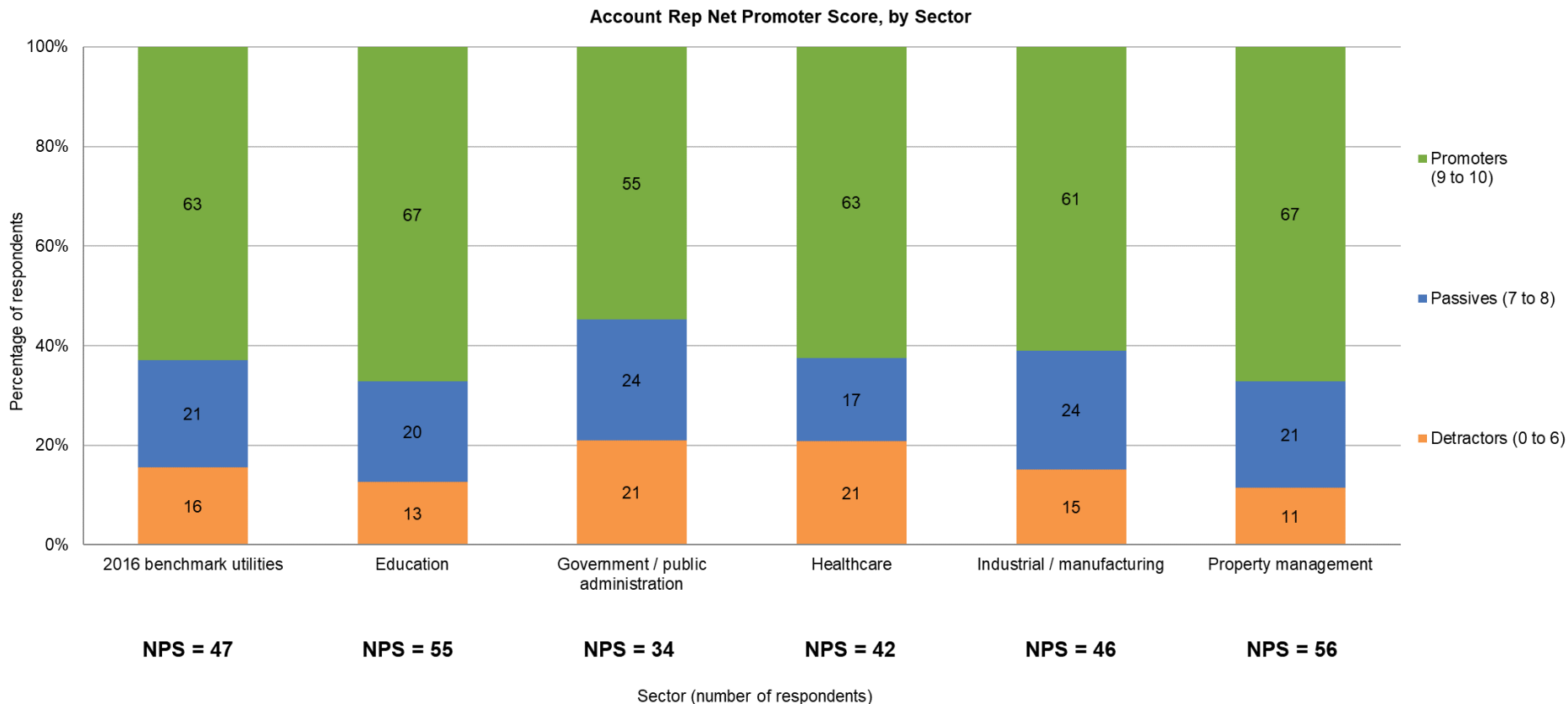
Attribute group	My account representative ...	Account rep performance	Account rep importance	Account rep performance / importance gap	Best-in-class account rep performance
Communication	Effectively communicates during energy emergencies	8.3	9.2	-0.9	9.5
Communication	Is easy to get a hold of	8.6	9.2	-0.6	9.7
Communication	Communicates with me when appropriate 	8.5	9.1	-0.6	9.5
Relationship	Is attentive to my needs 	8.5	9.1	-0.6	9.5
Energy advice	Understands the needs and challenges of my business 	8.3	8.9	-0.6	9.0
Relationship	Resolves my issues on first contract	8.3	8.8	-0.5	9.1
Energy advice	Is a proactive energy advisor	8.1	8.6	-0.5	9.0
Energy advice	Provides resources that help me manage my organization's energy costs	8.2	8.6	-0.4	8.9
Relationship	Is trustworthy	9.1	9.4	-0.3	9.7

**Base:** Large business key accounts included in the 2016 benchmark. **Question S2\_1:** How important is it for a utility account representative to have the following attributes?  
**S2\_2:** Now please rate how well your utility account representative performs. **Note:** 2016 benchmark utility results are based on the utilities that completed the 2016 study and met our 2016 benchmark criteria.

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# Account Rep Net Promoter Score

Large business customers are highly willing to recommend their utility account reps, resulting in scores that are considered good (between 0 and 50) and excellent (above 50) for the sample average and top sectors. The property management and education sectors lead the way with scores of 56 and 55, respectively.



**Base:** Large business key accounts. **Question S2\_6:** Using a scale of 0 to 10 where 0 means not at all likely and 10 means extremely likely, how likely is it that you would recommend your utility account representative to your coworkers and colleagues? **Notes:** 2016 benchmark utility results are based on the utilities that completed the 2016 benchmark and met our 2016 benchmark criteria. NPS = Net Promoter Score.

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# In-Person Visits and Account Rep Satisfaction

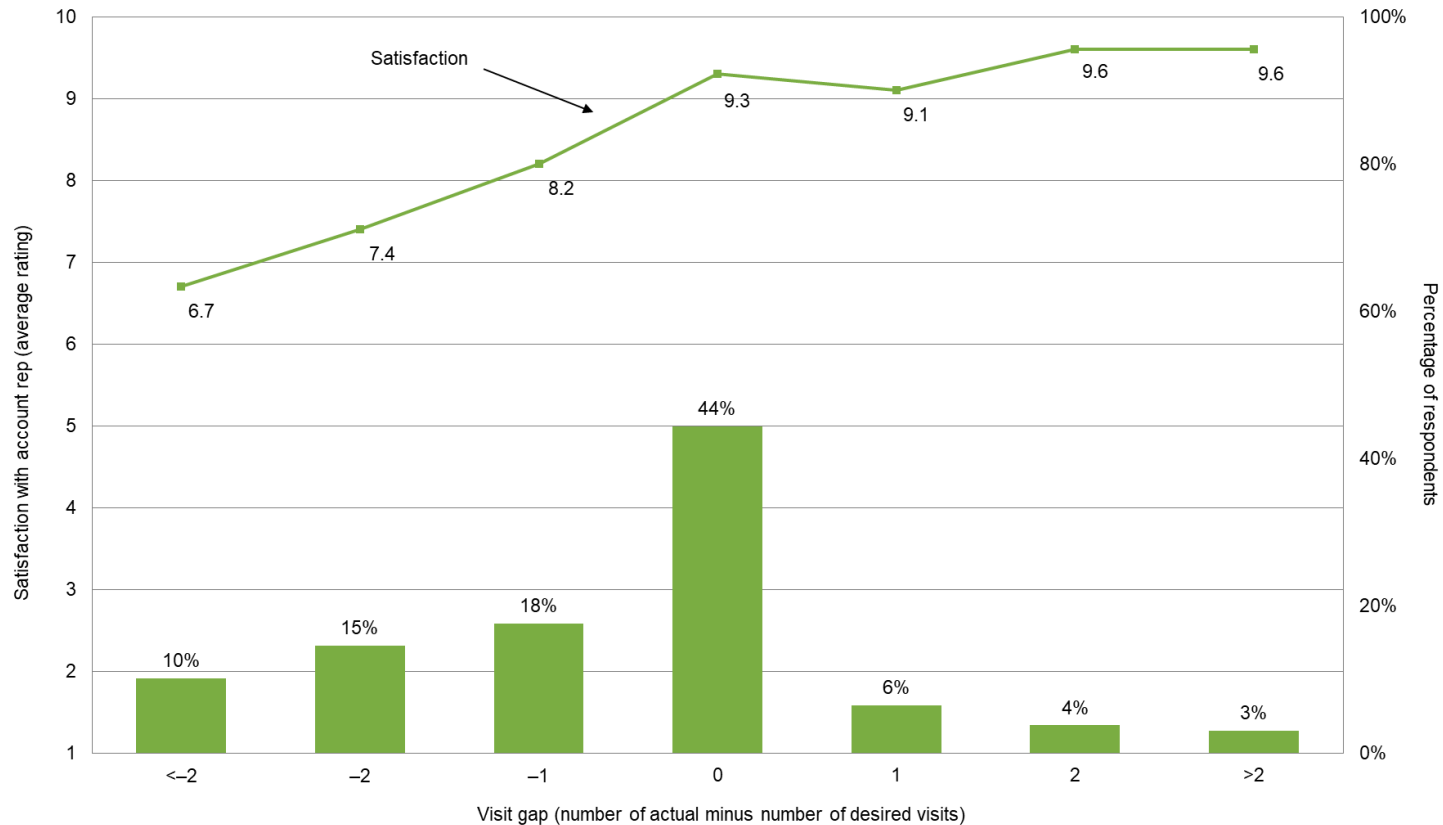
## KEY FINDINGS

Nearly 60% of large business key accounts reported that their account reps met or exceeded their expectations for in-person visits in the previous 12 months.

This still leaves 4 out of 10 large business key accounts that aren't receiving the number of in-person visits they desire.

Account reps looking to improve their satisfaction scores should reach out to their large business accounts to determine their expectations in terms of in-person visits.

 Account Rep Visit Gaps and Satisfaction



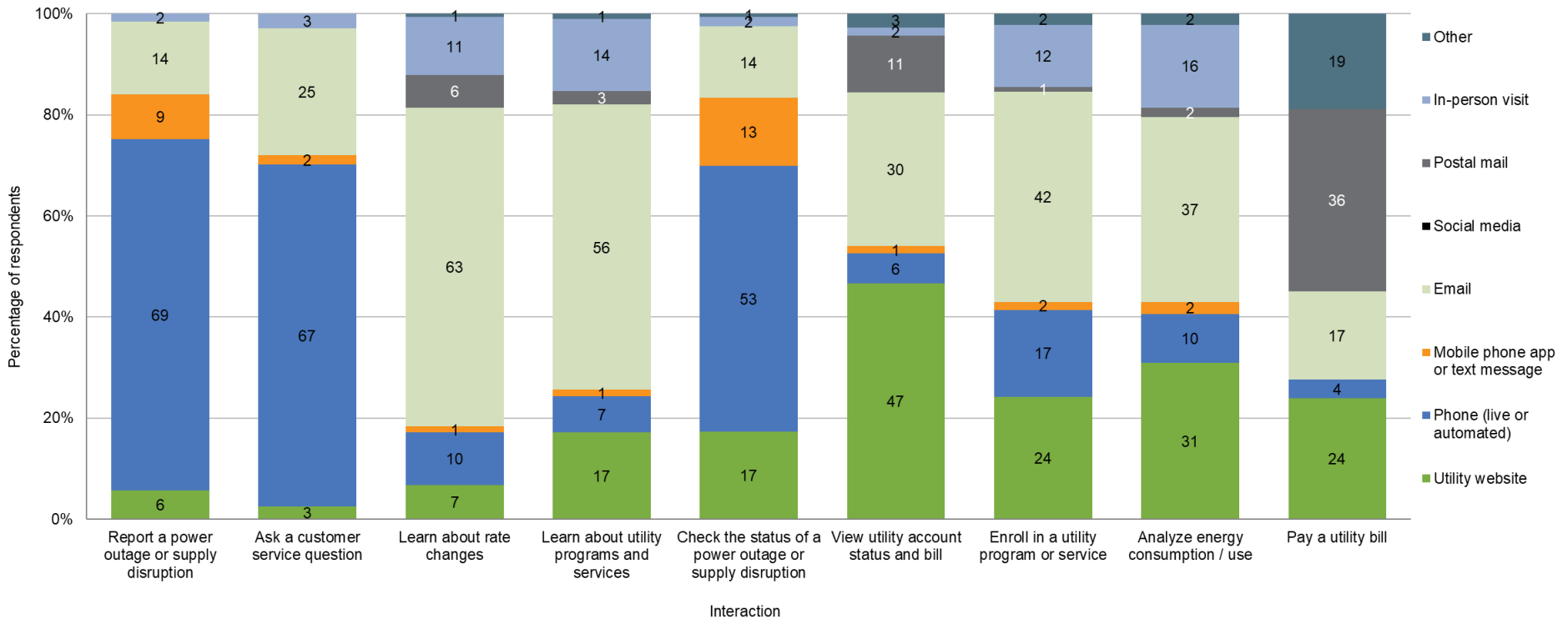
**Base:** Large business key accounts. **Question S2\_3:** Using a scale of 1 to 10 where 1 means not at all satisfied and 10 means very satisfied, overall, how satisfied are you with your utility account representative? **S2\_7:** How many times did your utility account representative visit you in person in the past year? **S2\_8:** How many times would you like your utility account representative to visit you in person each year?

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# Contact Preferences by Utility Interaction

Large business customers prefer to use phone, email, and the utility’s website for interactions with their utility. These customers prefer email for interactions involving learning, enrolling, and analyzing, and phone for reporting outages and asking questions. Postal mail still leads the way as the top contact method for paying a utility bill, but the digital methods—the utility website and email—are close when grouped together.

Preferred Method of Contact by Utility Interaction



**Base:** Large business respondents included in the 2016 benchmark who provided an answer to this question. **Question S3\_3:** Select your most preferred method of contact for each of the following interactions with your utility. **Note:** 2016 benchmark utility results are based on the utilities that completed the 2016 study and met our 2016 benchmark criteria.

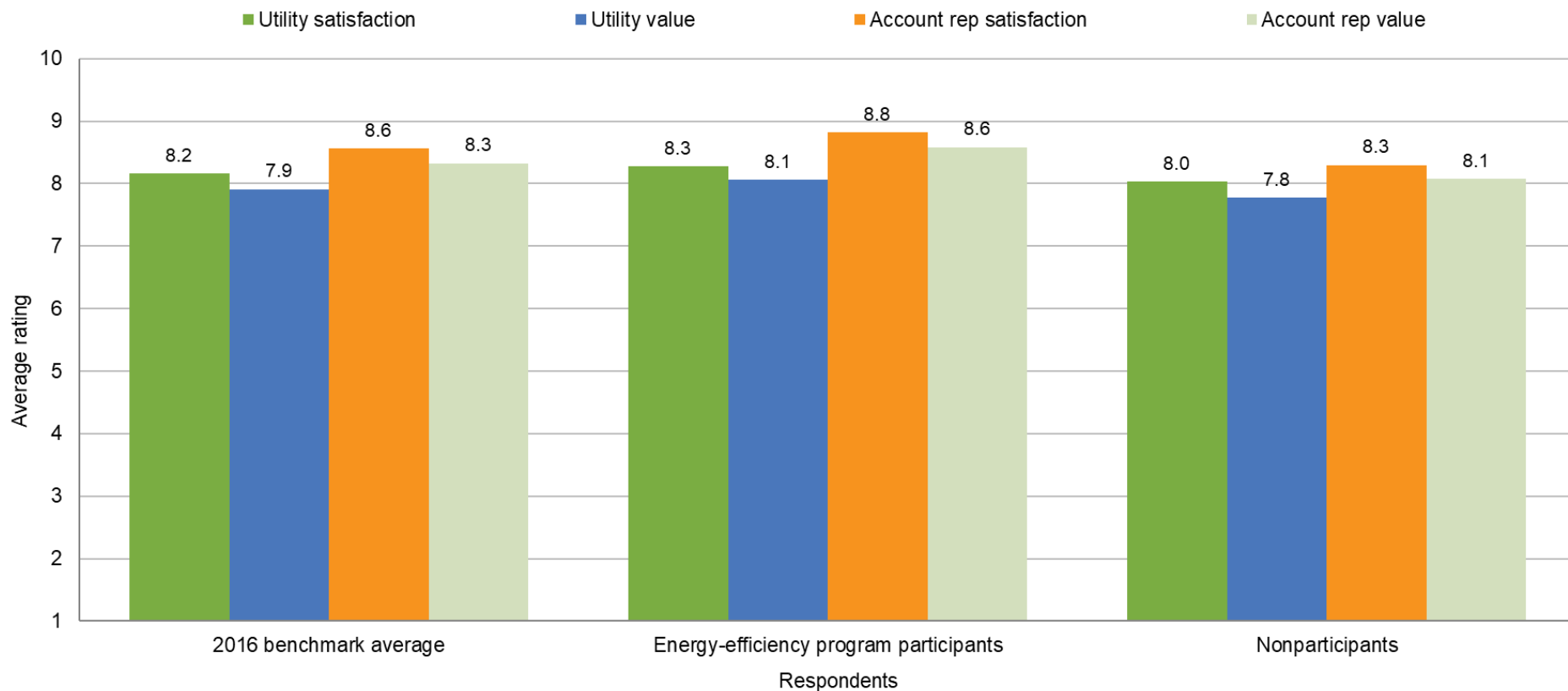
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# Energy-Efficiency Program Participation and Satisfaction and Value Ratings

Energy-efficiency program participants not only rate the programs they participated in highly, but they also give slightly higher utility and account rep satisfaction and value scores than those large business customers that didn't participate. This effect is greater at the account rep level (-0.5 difference) than at the utility level (0.3 difference).

Energy-Efficiency Program Participants' Satisfaction and Value Ratings



**Base:** Large business key accounts. **Question S1\_3:** How satisfied are you with your utility? **S1\_4:** Considering all aspects of your utility, including service, image, and the price you pay, how much value do you feel your utility provides? **S2\_3:** How satisfied are you with your account representative? **S2\_4:** Considering all aspects of your utility, including service, image, and the price you pay, how much value do you feel your account representative provides? **Note:** 2016 benchmark utility results are based on the utilities that completed the 2016 study and met our 2016 benchmark criteria.

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# About the Study

The [Large Business Gap and Priority Benchmark](#) study helps utilities assess their large business customers' most important needs and how successfully the utility is meeting them. This analysis starts with identifying the gap between customer expectations and utility performance.

The gaps we analyzed are specific to more than a dozen critical attributes related to the utility and its account representatives. The results identify which areas of improvement are of the highest priority based on the attributes with the greatest importance and the largest gaps.

These insights will help focus your attention on the issues that matter most to your customers and have the greatest demonstrated effect on customer satisfaction. They will also provide you with data to guide your customer experience initiatives.

Additional survey questions relate to how utilities communicate with large business customers in general and during supply disruptions. We also identify the factors that contribute to decisions about energy-efficiency program participation decision-making and which utility-provided energy-efficiency programs and products your business customers are most interested in.

For information about our market research or to participate in the 2018 benchmark, [email us](#) or call 1-800-ESOURCE (1-800-376-8723).

# About E Source

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.

