UTILITY 2.0
WINNING OVER THE NEXT GENERATION OF UTILITY CUSTOMERS

Deloitte survey helps providers assess opportunities to strengthen relationships, grow revenue
EXECUTIVE SUMMARY

The Power & Utilities (P&U) industry is on the cusp of transformation driven by technological advances, decreasing energy intensity, heightened environmental awareness, and evolving customer expectations. Although the P&U business model has remained relatively unchanged over the past century, traditional electricity, natural gas, and water utility providers are not exempt from the growing influence of these transformational forces.

Historically, residential and commercial energy consumers expected their utility companies to provide a reliable, affordable, unidirectional flow of electricity and information. Increasingly, however, consumers are demanding more environmentally conscious energy options, two-way communication, and transactive platforms that offer an interoperable, distributed energy framework versus the established hierarchical grid structure. To win over these savvy and engaged P&U consumers, utility providers will need to assess opportunities and challenges in the critical areas of new products and services, communication platforms and practices, and overall customer satisfaction.

In early 2017, Deloitte and YouGov America conducted the 2017 Next Generation Power & Utilities Customer Survey with residential and medium/small commercial utility customers, as well as a small number of utility providers, to help P&U executives better understand customer expectations now and in the near-term future that may influence investment and strategy decisions. Surprisingly, there is significant customer interest in broader options and services from their trusted utility service providers. Our survey findings reveal a mix of positive news and areas for improvement:

- Counter to providers' perception, customer satisfaction levels are high, attributable primarily to service reliability and low prices.\(^1\)
- Energy and utility consumers are motivated by environmental concerns and the desire to reduce costs. They are cutting their energy and water consumption, leading to stagnant demand growth for the first time in the industry’s history. Clear opportunities exist to offset the decreasing consumption by offering new energy efficiency (EE), distributed energy resources (DER), and analytics products and services that consumers are interested in.
- Utility providers are not in sync with their customers’ needs and expectations, which services to offer, and how to communicate their value. Competitors may look to take advantage of a “participation gap” among customers that are interested in new EE and DER products/services, but are not participating—in part, because utility providers are not offering such solutions or encouraging customer involvement.
- Consumers are increasingly likely to take part in a transactive platform like microgeneration or community solar. They see their utility providers as trusted advisors to help them make the shift towards a two-way flow of energy and information.
Residential and commercial consumers are interested in dynamic, two-way communication with their utility providers. This includes continuing personalized conversations with customer sales representatives (CSRs) when desired, as well as expanded options such as website and automated self-service.

Utility providers have brand permission to offer additional products, and collaborating with EE and DER companies could increase customer participation in new product/solution offerings.

General consensus is that utility providers will be well-served by directing future investments towards becoming more customer-centric in the products/services and communication platforms they offer. Providers should consider a number of smart next steps to help grow revenues and strengthen customer relationships:

- Acknowledge and identify the differences in product, service, and communication preferences between residential and commercial customer segments, as well as differences within these segments.
- Use segment differences to advance a customized mix of products, services, and omni-channel communication strategies for each audience.
- Experiment with highly targeted pilot programs for new transactive platforms.
- Consider new pricing strategies including segment-specific products and services bundling.
- Partner within and outside the P&U industry to help meet evolving customer expectations, especially the desire for energy-efficient products and services.
- Use partnering and acquisitions to develop and launch new transactive energy programs.
- Invest in integrating customer service and communications channels to strengthen the provider-customer relationship. Consider adopting a Smart Contact approach that aligns operations with the changing nature of customer interactions, driven by new technology and the behaviors of the connected consumer.

Exponential growth in technological capabilities and evolving customer expectations lie at the heart of a fundamental change taking place in the relationship between Power & Utilities (P&U) providers and consumers.

Traditionally, electric, natural gas, and water utility companies supplied reliable, affordable, one-way power/water flows to customers who typically were satisfied hearing as little as possible from their provider. However, an increasing focus on energy efficiency (EE) and self-service, the growth of distributed energy resources (DER), and the spread of sensors, smartphones and other technology advancements are making consumers more aware of their energy usage and giving them the ability to control it remotely. Additionally, innovations in solar and wind energy are making the self-generation of electricity an increasingly viable option for many customers.

In addition to, and enabled by new technologies, P&U customer expectations are evolving, which is disrupting the traditional P&U business model and new product/service development. Residential and commercial consumers want more access to information, personalized service, and opportunities to minimize their environmental impact. For example, 73 percent of commercial customers say they are very or extremely interested in energy management analytics, and 52 percent of residential customers are very or extremely interested in rebates for EE appliances. As digitally enabled, behind-the-meter energy generation and efficiency increasingly impact utility operations, the communication platforms available to next-gen consumers will assume added importance.

These changes are taking place amidst a challenging economic climate in which load growth is flattening. Faced with maintaining high fixed costs, utility providers must look for new opportunities to raise revenues and become more efficient. The general consensus is that utility providers will be well-served by directing future investments towards becoming more customer-centric in the services and communication platforms they offer. This thesis is further supported by the 2017 Deloitte Center for Energy Solutions paper Choose, Aggregate, Transact, which highlights increasing demand for renewables, aggregation services and access to transactive energy platforms.

Investment activity varies across P&U segments. Electric utilities appear to have made more forward-looking, customer-centric investments than gas and water utilities, as evidenced by offering a wider range of customer communication platforms. One reason for this difference could be gas and water utilities’ lower service variability and the impact of end-user technologies. Another possible reason: Investment does not necessarily align with consumers’ interests. For example, 25 percent of providers surveyed in 2017 express interest in investing in wind and solar generation, compared to residential interest in these services of 35 percent and commercial interest of 74 percent.
As another example, providers may overestimate consumer interest in smart home technology: 75 percent report plans to invest, while just 33 percent of residential customers are currently interested in the service.

In addition to re-assessing investment opportunities, P&U providers should consider how to implement new product and service offerings using updated customer segmentation models and pricing strategies. For instance, as found in the Deloitte Resources 2017 Study, millennials express preferences that differ from their older counterparts in terms of environmental activism, bundling, and communication preferences.

To help utility company executives plan their investment and product-development decisions, Deloitte and YouGov America conducted the 2017 Next Generation Power & Utilities Customer Survey in early 2017. The survey was focused on the following areas:

Customer satisfaction
• Are customers satisfied with their utility provider’s offerings?
• Are there differences between residential and commercial customers?

Communication platforms
• How do customers want to communicate with their utility providers (electric, gas, water)?
• Are utility providers providing the means of communications desired by their customers?

New products and services
• What products and services are utility customers interested in? Are utility providers providing the services asked for by their customers?
• Who do customers trust to advise them and install the next generation of products and services?
• Do all customers want to embrace the shift from ratepayer to prosumer?

In January 2017, Deloitte and YouGov America conducted an online survey of residential and commercial utility customers to understand their relationship with their utility providers. Deloitte also collected observations from a small number of utility providers to assess the areas of customer satisfaction, communication platforms, and new products and services.

Survey of residential and commercial utility customers
• Nationally representative US survey
• Residential: 1504 customers with primary or shared decision makers for utilities for the household
• Commercial: 304 business decision-makers with primary or shared responsibility for energy management for their company
• Online surveys completed January 2017

Our survey’s purpose was to enhance the conversation about customer satisfaction in the P&U industry so that electricity, natural gas, and water utility providers can develop solutions, generally enabled by digital technologies, that bridge product/service and communication gaps, and better meet the needs and expectations of next-generation utility consumers. This paper shares major survey findings, explains implications for utility providers, and offers suggested next steps to grow revenues and strengthen customer relationships.

ABOUT THIS STUDY
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SURVEY DESIGN

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To meet the emerging and evolving needs of their residential and commercial customers, utility companies should begin by working to understand what is driving consumers’ needs, expectations, and interests.

According to our research, next-generation energy customers differ in their energy practices and preferences. A lot of consumers are content with the traditional, affordable, reliable power model; however, growing numbers of consumers...

• Have higher expectations:
  – Consumers want their provider transactions to be easy, informative, and offer the opportunity to talk with someone when they so desire.
  – Although primarily motivated by price and the desire to reduce costs, energy consumers also are motivated by environmental concerns. They are consuming less electricity, leading to stagnant load growth for the first time in the industry’s history. To raise revenues, utility providers will need to offer new products and services.
  – Consumers express interest in EE programs, better information, and analytics to help monitor and manage usage, access to clean energy within the existing supply mix or through microgeneration and aggregated DERs. However, there is a disconnect between consumers’ stated interest and actual participation in EE programs and DERs.

• Express interest in dynamic, two-way communication with providers:
  – Residential and commercial consumers are interested in using various channels to communicate with their utility provider across different stages in the customer lifecycle.
  – Are increasingly likely to take part in a transactive platform like microgeneration or community solar.

• As digitally enabled, behind-the-meter energy generation increasingly impacts utility company operations, effective two-way communication with customers will assume added importance.

Our survey findings also reveal that, while residential and commercial utility customers and utility providers have some overlapping interests and expectations (e.g., lowering costs and increasing energy efficiency), others are segment specific—and so are the product development and communication implications for utility companies.
Key findings

The average residential respondent:

- Is highly satisfied with their utility providers (Figure 1) overall. Seventy-six percent of respondents rate their natural gas provider “Excellent” or “Very Good”; 73 percent rate their electricity provider “Excellent” or “Very Good”; and 66 percent rate their water provider “Excellent” or “Very Good.” Satisfaction is driven primarily by quality of service and low prices.

Figure 1: Overall utility satisfaction
Q16: Overall, how would you rate the services provided by each of the utilities used by your household?

- Uses a variety of communication channels to interact with their utility providers (Figure 2).

Figure 2: Communication platforms ever used
Q22: Which of the following have you ever used to interact with your household’s utility providers? Please select all that apply.

- Is generally satisfied with the communications platforms they use with their utility providers.

Water utility satisfaction
“The water utility is behind the times when it comes to managing its information. There is no way to access information online. Everything has to be done in person or on the phone.”
—Survey respondent

Natural gas utility satisfaction
“I honestly don’t hear much from my natural gas utility. They could do a better job providing information on their services and ways I could be lowering my bill.”
—Survey respondent

- Is interested in using multiple channels to communicate with providers (Figure 3).
  - There is rising interest in new channels, but continued strong interest in traditional channels when desired.
  - Older generations are more interested in communicating via a phone call than younger generations.
  - Choice of platform (e.g., text notification) depends on the reason for communicating throughout the customer experience lifecycle.

Figure 3: Interest in communication platform
Q33: How interested are you in using each of the following methods to interact with your utility providers?

- Does not participate in an EE program, but is interested in participating in the future, especially with regards to lighting and appliances (Figures 4 and 5):
  - Fifty-nine percent are interested in LED lighting, but only 36 percent participate.
  - Fifty-one percent are interested in rebates for EE appliances, but only 13 percent participate.
  - Thirty percent are interested in time-of-use rates, but only seven percent participate.

Figure 4: Participation in energy efficiency programs
Q37: Do you currently use or participate in any of the following energy efficiency programs? Please select all that apply.
Electricity utility satisfaction

“Efficiency programs are not very well promoted and they need to be.”

—Survey respondent

Utility providers should explore partnering opportunities within and outside the industry to develop new EE, DER, and analytics products/services and close the “participation gap” for customers that are interested, but not participating in these offerings.9

Utility providers need to become more customer-centric to deal with changes to the traditional utility model, as many customers are no longer satisfied with simply receiving a one-way power flow while hearing as little as possible from their utility.

Utility providers should tap into public sentiment surrounding environmentalism, particularly in their interactions with urban and young consumers.

Providers should consider bundling as a potential pricing strategy to maximize convenience and provide new services.

IMPLICATIONS FOR P&U COMPANIES

Given the inclination of residential respondents to trust their utility provider with the installation of added services, utility providers need to determine if they can exploit legacy brand awareness and customer “stickiness” to grow their business and revenues.

• It is primarily motivated to participate in an EE program in order to reduce costs (53 percent ranked as primary factor) (Figure 6), but is also very interested in protecting the environment (24 percent ranked as primary factor).
  - While saving money is the top factor across all age groups, younger consumers rank environmental considerations higher than older consumers.

• They are interested in purchasing solar panels with energy storage (about 50 percent of survey respondents) and in purchasing a share in a “community solar” installation (50 percent of respondents). Younger consumers are leading the charge for this distributed energy platform: 35 percent of respondents ages 21–34 are “extremely interested” in community solar—significantly more than those of other ages.9

In addition, residential respondents suggest that:

 Utility providers can better help residential customers monitor and manage their usage levels via smart meters, online access to real-time usage information, and proactive alerts/notifications.

 Electric utilities could increase customer satisfaction by improving communications related to outages, accessing information about usage and how to gain efficiencies, and incorporating renewables/better “green” energy programs.

 Utility providers could increase satisfaction by addressing customer service and safety concerns.

 Water utilities could increase customer satisfaction by focusing on billing frequency, notifications of planned outages for maintenance, and the ability to pay bills online. Some respondents feel that water utilities are “behind the times” compared to electricity suppliers.
Key findings

The average commercial respondent:

- Is highly satisfied with their utility providers (Figure 9) overall. Ninety percent of respondents rate their electricity provider “Excellent” or “Very Good”; 86 percent rate their natural gas provider “Excellent” or “Very Good”, and 82 percent rate their water provider “Excellent” or “Very Good.”

- Is more likely than a residential respondent to value quality of service (top consideration for 58 percent of respondents), especially if there is an explicit value-add.
- Has a preference for reporting problems by phone call and receiving notifications by call or text, with company website as the other top choice of communication platform (Figure 10).

- Expresses general enthusiasm for communications platforms across the board and has a greater desire than residential respondents for more self-service apps.

- Considers preserving the environment to be a primary motivator for participating in EE programs (50 percent rank it as the #1 factor (Figure 11).

- In general, shows higher interest levels than residential respondents (see Figure 5) for EE programs (Figure 12) and DERs (Figure 13)—which points to the importance of customer segmentation in product and service offerings, communication channels, etc.

- When combining respondents’ first and second choices, managing and/or reducing costs is within two points of preserving the environment.

- Considers preserving the environment to be a primary motivator for participating in EE programs (50 percent rank it as the #1 factor) (Figure 11).
When assessing where to play in the new market and where value can be created, providers should note that commercial customers are generally very willing to pay more for additional services such as microgrid, EE programs, DERs, and electric vehicle charging stations.

- Is most interested in adding chiller and load management to their energy efficiency mix because 76 percent of respondents already participate in LED or energy-efficient lighting. In terms of distributed energy resources, there is a high level of interest in backup/emergency generators, particularly within the federal and health care services sectors. In terms of energy management, interest is highest for aggregation across facilities.

- Considers their utility provider to be a trusted advisor (Figure 14) and the preferred provider for EE and DER programs (Figure 15).

**IMPLICATIONS FOR P&U COMPANIES**

**PROVIDER**

**DEMOGRAPHICS**

The provider respondent represented a utility with:

- Median revenue: $2 billion
- Residential customers: 800,000
- Commercial customers: $1,000

**Key findings**

- The average utility provider respondent:
  - Estimates overall customer satisfaction levels to be lower than their residential and commercial customers (Figure 16), with price and quality of service driving satisfaction levels.
  - Allows current customers to contact them through the company website or by phone (100 percent of respondents). Approximately 88 percent also have a social media presence through which current customers can interact with the company (although only three of eight providers surveyed are using social media to reach out to new clients).
  - Is most interested in using traditional communication platforms (e.g., phone calls and company website), with just 3-in-10 or fewer respondents expressing interest in adopting new technologies. This is consistent with findings from Deloitte’s Global Contact Center Survey, which found that a phone call will likely remain the most common form of customer interaction, though it will likely fall from 64 percent of contacts in 2017 to 47 percent in 2019.
  - Is planning to add an additional communication platform (75 percent of respondents): mobile app, mobile chatbot, text message, and web chat are the most popular options (Figure 17).

**Figure 14: Provider as trusted advisor**

Q44: How would you rate each of the utility provider options below as being a trusted advisor to help monitor and manage your company’s usage levels?

**Figure 15: Provider of distributed energy resources**

Q65: Who would your company be willing to consider as a provider of the following distributed energy resources? Please select all that apply.

**Figure 16: Estimated customer satisfaction**

Q71: And which of the following are you planning to offer in the future to your customers to interact with your utility? Please select all that apply.

**Figure 17: Communication platforms**

Q19: And which of the following are you planning to offer in the future to your customers to interact with your utility? Please select all that apply.

**Figure 18: Figure 15: Provider of distributed energy resources**

**Figure 19: Figure 16: Estimated customer satisfaction**

**Figure 20: Figure 17: Communication platforms**

**Figure 21: Key findings**

**Figure 22: Key findings**

**Figure 23: Key findings**

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**IMPLICATIONS FOR P&U COMPANIES**

Because customers are typically very satisfied with existing communication platforms and overall quality of service, utility providers should prioritize improving the customer experience through the provision of additional services. Yet only 25 percent of surveyed providers consider investing in smart grids, smart metering, and sustainable technology to be “extremely important” to customer experience.

Providers need to ramp up their digital engagement efforts. Just under two-thirds of providers surveyed believe that digital engagement is an important investment, even though digital communication is expected to grow 120 percent within the E&R industry. Social media is particularly important to reach millennials, provide usage and efficiency tips, and become a trusted advisor.

Providers may need to reconsider their priorities when investing in new technology to better align with consumers’ preferences. For example, providers are more interested in investing in smart home technology (75 percent of provider respondents) than solar (25 percent of provider respondents), while consumers are more interested in solar (39 percent of residential respondents) than smart home (32 percent of residential respondents).

Providers should consider partnering with DER companies to advance their agenda.

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**SUSTAINABILITY IS NOT A FAD**

Findings from the Deloitte and YouGov America survey of residential and commercial utilities customers and utility providers map closely to those of the Deloitte Resources 2017 Study, which indicate that sustainability is not a fad. US residential consumers and businesses remain committed to reducing their energy consumption and expanding the use of renewables.

For additional Deloitte Resources 2017 results and insights, visit: www.deloitte.com/us/resources

**Residential consumers**
- 63 percent are very concerned about climate change and their personal carbon footprints
- 69 percent believe that climate change is caused by human actions
- Keeping energy bills affordable and using clean energy sources are the most important energy issues
  - 37 percent citing increasing the use of solar power
  - 25 percent citing increasing the use of wind power
- 79 percent stated they took steps to reduce their electric bill over the past year
  - 45 percent are willing to be occasionally “powered off” if they could save 15 percent on their annual electric bills
- 39 percent now say they use energy apps
- 64 percent of millennial respondents say they are interested in installing solar panels (if eligible)
- 53 percent say they are interested in purchasing a share in a community or “shared” solar installation

**Commercial consumers**
- Businesses reduced their electricity consumption by 19 percent in 2016
- 6-in-10 have onsite electricity generation
  - 21 percent of their supply is coming from renewables
- 9-in-10 companies say they have invested funds in energy management, representing 31 percent of total capital budget
- 61 percent stated their customers are demanding a certain percentage of electricity from renewable sources
  - 42 percent—Using timers/sensors to control when equipment is powered on
  - 47 percent—Installing motion/occupancy sensors
  - 40 percent—Installing building energy management systems
- Basic tactics still benefit businesses
  - 31 percent—Participating in a utility-sponsored demand reduction program
  - 27 percent—Installing electricity generation solutions (e.g., solar panels) on facilities
SUGGESTED NEXT STEPS

In light of advancing technologies, changing customer expectations, and a shifting economic landscape, we suggest that utility providers focus attention on three categories when investigating and selecting new investment opportunities to attract and retain next-generation utility customers.

SEGMENTATION

- Acknowledge and identify the differences in product, service, and communication preferences between residential and commercial customer segments, as well as differences within these segments. For example, survey results show that over half of residential consumers are primarily motivated to take part in energy efficiency programs that would help them manage or reduce costs, with a secondary focus on preserving the environment. This is not surprising, given the fact that over three-fourths of businesses (78 percent) promote their environmental efforts to their customers. Appearing in step with similar corporations is another factor inspiring corporations to reduce their energy use.
- Use segment differences to advance a customized mix of products, services, and communication strategies for each audience. However, be sure to take into account that many energy consumers—both residential and commercial—are risk-averse, so gradual introductions to and implementations of new offerings may be needed.
- Develop segment-specific incentives and communications to convert more consumers’ stated interest in participating in energy efficiency programs into action.
- Experiment with highly targeted pilot programs for new transactive platforms. Consider pricing strategies around segment-specific products and services bundling. According to survey results, 36 percent of residential consumers are “extremely or very interested” in bundling services (the top five, in order of preference, are electricity, natural gas, energy efficiency, Internet service, waste removal), with price (77 percent) and convenience (67 percent) as primary drivers.

PARTNERSHIPS

- Partner within and outside the P&U industry to help meet evolving customer expectations, especially their desire for energy efficient products and services. An example, some utility providers are partnering with real estate developers to build or retrofit customers’ homes with the long-term energy efficiency solutions they say they desire, but are often not willing to undertake on their own.
- Use partnering and acquisitions to get in front of new transactive energy programs. Consumers demand cleaner sources of energy that will allow them to take the “meter off the wall and put it in the hands of community members.” The increasing affordability of wind and solar will no doubt accelerate the transition to a “distributed” energy production model, wherein both small and large power generators can trade energy for homes and businesses. This shift is already apparent in deregulated states that allow consumers to buy clean energy directly from retail providers. In response, many utility providers have chosen to acquire or buy partial ownership in potential disruptors: Since 2010, European and US utility companies have invested some $3 billion to that end.

SUGGESTED NEXT STEPS
SMART CONTACT

• Invest in integrating customer service and communications channels to strengthen the provider-customer relationship. Consider adopting a Smart Contact approach that aligns operations with the changing nature of customer interactions, driven by new technology and the behaviors of the connected consumer.

• The Smart Contact approach is about getting the right contacts to the right resolver, whether human or otherwise. Smart Contact addresses four key themes:
  – The move towards digital action: As digital behavior continues to move to mobile and consolidates into fewer apps, utility customer service organizations need to be where their customers communicate, and this is increasingly through social and messaging applications. In parallel, the growth of personal assistants and smart, connected technologies are creating new channels where humans could be out of the equation altogether.
  – The rise of the bot—realizing the promise of self-service: Contact digitization offers customer service organizations the possibility of finally delivering effective, customer-friendly self-service. Chatbots and artificial intelligence (AI) can do the hard work for the customer, searching for the answer to a question or completing a process on their behalf.
  – Making personal connections—a new place for people: While bots and AI are going to take on increasingly complex tasks, they may never be able to connect with a customer the way a human can. The human CSR of the future will deliver the moments that matter emotionally.
  – The agile operating model—crowdsourcing, mobile working and the ‘gig’ economy: The less predictable nature of new contact channels will strain traditional methods of demand management, which are largely built around voice contact. Utility providers will need more agile, flexible solutions to handle these contacts. Crowdsourcing customer service through the gig economy, with agents managing responses from their mobile devices, gives companies access to a flexible workforce which can handle some of the inquiries the bots can’t. Meanwhile, the experienced contact center workforce can focus on proactively handling higher-risk, higher-value contacts.

CONCLUSION

Advancing technology, static demand, heightened environmental awareness, and evolving customer expectations pose numerous financial and operational challenges for the P&U industry. As well, disruptive forces are compelling utility providers to change their traditional business model and creating an imperative to act promptly and decisively.

The stakes are high: The utility sector is the most capital-intensive industrial sector by a significant margin. In the past eight years, US electric and gas utility capital expenditures have increased by a factor of two-thirds. This massive influx of capital to an all-time high of about $115 billion was in large part due to investments urgently required to upgrade and reinforce the grid against threats from aging infrastructure, increasingly severe weather, and advanced cybersecurity risks. Electric transmission and distribution (T&D) has dominated the capital spending plans of utility providers in recent years, and will likely continue to grow.

It is more important than ever for utility providers to select investments that will deliver customer value and grow their business. Executives grappling with these decisions face tradeoffs—how should resources be allocated towards existing infrastructure, new technologies, and customer experience? The potential benefits of targeted investments may manifest themselves in numerous ways. For example, higher customer satisfaction rates can improve rate case outcomes (Figure 18).

Our survey shows growing customer awareness and acceptance of next-generation energy efficiency and new distributed energy models. The challenge for utility providers is determining how to create value in a smart power environment—especially as new entrants disrupt the industry landscape. Where utility providers play and how they transition there will be vital. Barriers to change include a complicated web of state and federal regulations, the importance of delivering both customer and shareholder value, and constraints posed by utility providers’ traditionally conservative culture. However, our survey reveals a number of positive signs, such as consumer trust, perception of reliability, and high levels of satisfaction, that should help utility company executives move forward with their investment and product development decisions.
Utility 2.0 | Winning over the next generation of utility customers

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ENDNOTES

1. A low-expectation, “just keep my prices low and my lights on” mentality may contribute here.


3. Smart Contact: Next-generation customer service and the operating model of the future

4. A greater percentage of residential electric customers reported having used newer communication platforms such as website, text message, web chat and mobile app than both residential natural gas and water customers.


6. Ibid

7. Choose, Aggregate, Transact, Deloitte Center for Energy Solutions, 2017

8. Global Contact Center Survey

9. Deloitte Resources 2016 Study

10. Deloitte Resources 2016 Study

11. This slogan represents the goals of Brooklyn Microgrid, a transactive platform that allows peer-to-peer trading of solar energy.

12. Ibid

13. Smart Contact: Next generation customer service and the operating model of the future


15. Ibid


17. Ibid

18. Ibid


20. Form EIA-861 – Sales to Ultimate Customers from between 2006 to 2015 – All US, All Sectors. 2006 – 3.67 million GWH, 2015 – 3.76 million GWH. Annual growth rate of less than 0.1%

21. Beyond the Math

22. From Growth to Modernization

23. Beyond the Math
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