

Power your digital transformation

Use data to energize your digital-first customer engagement

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1. Foreword

Speed is the new currency – and nowhere before has change been so fast and apparent as now. Consumer-facing energy and utilities companies seek to adapt and thrive in the fast-changing digital landscape, modernizing the customer experience and meeting tomorrow’s customer needs.

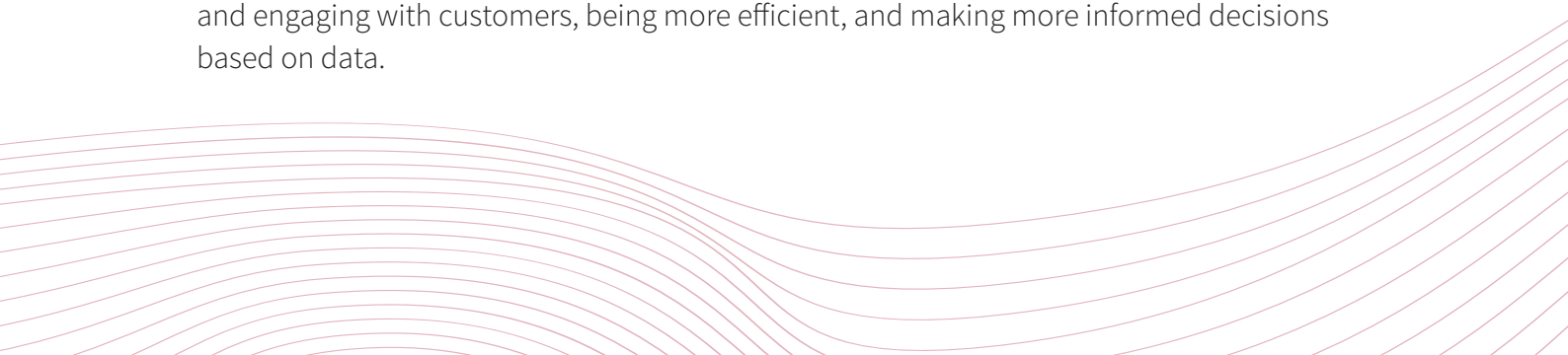
Global energy markets are in crisis due to long-term trends and current events, including shifts in sentiment among customers and investors, carbon pricing, the post-covid-19 surge in global demand, and, most recently, the conflict in Ukraine. Especially in Europe, energy providers operating in consumer markets also face political pressure and regulations that require companies to increase customer choice and value and leverage more from their assets to ensure they provide uninterrupted and efficient service. Companies are looking for innovations that enable them to become leaders in providing sustainable energy. The customer expectations for the energy and utilities companies are similar to any other consumer brands, forcing companies to invest in digital services and new innovative products and provide transparency on relevant information, e.g., pricing or sustainability topics.

In **a recent NelsonHall survey** on the global energy and utilities sector, the critical business priorities identified were:

- Improving customer service (including expanded use of self-service, mobile, and chat capabilities) and enhancing customer experience
- Launching new products and services
- Increasing efficiencies and digitalizing operations.

According to **research by EY**, consumers prefer using digital channels with their energy providers. At the same time, companies need to tightly integrate their digital services with the service offered by customer service agents for a seamless customer experience. Currently, there are gaps in the experience, so the energy and utilities sector needs to develop its services to answer these needs.

The famous quote by Albert Einstein states that “in the midst of every crisis lies great opportunity”. Now is the time to transform your business. And it is not about some shiny new technology program magically solving all problems. It’s about better collaboration and engaging with customers, being more efficient, and making more informed decisions based on data.



2. Take advantage of data

In the future, mobile applications and additional channels will help collect more data about customers, their location, and other supporting data sources. Continuously more and more data will become available. The more you know, the more you can understand, and the more you can help.

Data is at the heart of digitalization. By using data smartly, you can provide a unique customer experience that can impact the business in many ways. First, you may need to take a bird's eye view of your customer service concept and customer journey to see which processes and interactions personalization make sense. After that, you need to understand if you have the necessary data and which systems collect it – this can include manual steps and automated sources. There are no shortcuts; there is no data to be analyzed or utilized without data collection.

As there is often plenty of information available, you have to be able to decipher what is valuable (and what is not) and how you can use the information as part of your overall digital transformation strategy. An excellent place to start is with customer information: building a master database of all the customers. From their likes and dislikes to purchase history, collate and consolidate the information you have and, most importantly, ensure data collection automatically flows into one central place such as the CRM system.

Gathering data can be done in various ways:

- **Secure portals** allow you to gather data on the customer regarding who they are, where they are in the purchasing process, the web pages or products visited, or the previous customer service cases they have had with the company.
- **Pre-chat windows** and **chatbots** can gather data on the customer and pass it through to the customer service agent or CRM system.
- To better understand your customers' needs, you can also **ask them directly** about what they are interested in and what channels they would like to use for different customer service scenarios. You can conduct a **survey** or even invite customers to join your feedback workshop since you need that first-hand information.

Gradually this all starts to build a picture of the customer that you can use to serve the customer in a more personalized way.

Artificial intelligence provides a lot of new opportunities. An AI assistant can mine large amounts of data about the customer and give the customer recommended solutions directly. It can simply help the customer service agent or sales rep provide a more personalized service to the customer.

3. Manage digital customer engagement

Switching one's electricity provider is usually one of those things that one only thinks about when the need is at hand, like renewing a contract when moving a house. The buying decision is affected by price, but there is no doubt that brand and customer experience play their part.

Customers often complete over half of the buyer's journey entirely online before even engaging directly with a company. Consumers of all age groups **prefer digital channels** eight times out of ten when contacting their energy provider. The digital channels are seen as easier to use, but worryingly 60% of consumers have experienced problems when using their energy provider's digital services.

Energy and utilities companies need to reimagine their customer experience: develop their digital services to meet customer expectations, turn their customer service agents into advisors to boost customer acquisition, and provide excellent customer service anytime and anywhere. It is time to aim toward more customer-centric strategies to turn customer choice into a competitive advantage.



Develop customer centricity

To achieve a customer-centric approach, you need to reverse-engineer your service processes: start by understanding what your customers go through, what they need to do to get service, and how your service should feel from their perspective. After this, think about which solutions and processes you need to implement to make your customers' vision of excellent service come true.

To develop customer centricity, think about:

- **Engagement.** How can you engage customers to collect development ideas and feedback?
- **Innovation.** How can you encourage customer-facing personnel to provide new ideas and improvements proactively? What tools would make testing your market and trying new disruptive strategies easier?
- **Experimentation.** What kind of business experimentation does your company support considering development budget, approval processes, current tech stack, operational hierarchy, organizational structures or skills, and available resources? How ready is your company to “fail fast,” i.e., accept failures as innovations and development initiatives?
- **Scalability.** How scalable are the new ideas? Scalability should be the target with every new idea or change.

St1: Customer experience and customer satisfaction in the new digital era

The Finnish energy company St1 had quickly grown so that the customer data and communication became siloed. But now, St1 finally has a 360-degree view of the customer with Salesforce.

Read the whole story [→](#)

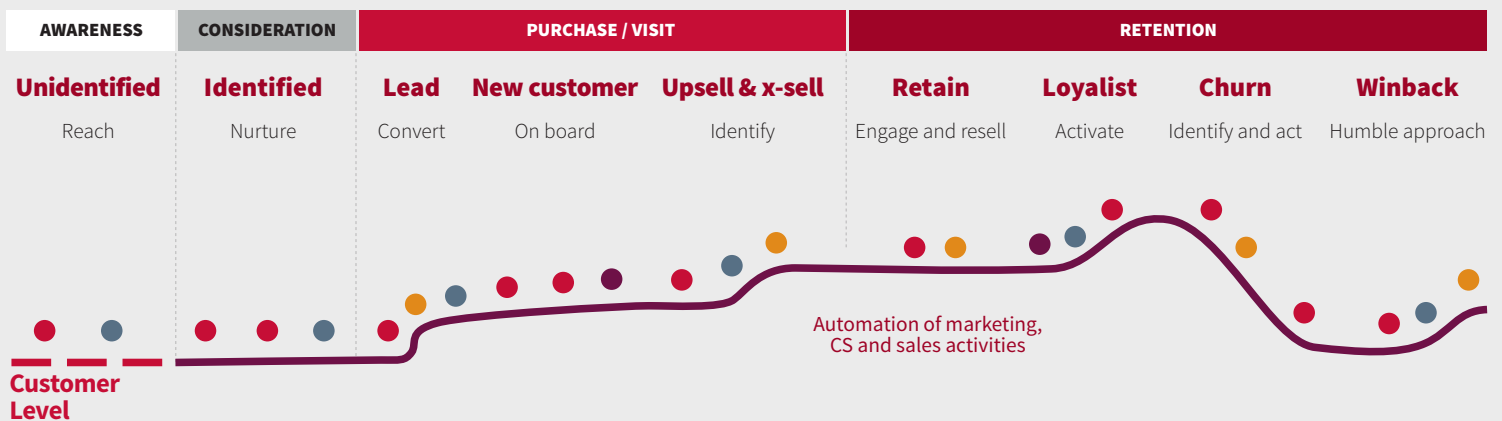


Understand the moments of truth

So-called “moments of truth” help you understand what is essential for the customers and what makes them buy your services and products. And not only once but repeatedly, turning them into loyal customers.

A good way to start mapping the moments of truth is to put yourself in the customer’s position. There are probably many customer journeys as customers or personas, so each path is different. Do not get stuck there, but try to understand the journey on a high level.

- Sketch an overview of the customer’s journey on a paper or a digital whiteboard. Start from the point when the customer first connects with the company, through the buying and decision making to further engagement phases.
- Identify the life cycle stages, channels, touchpoints, and related technological capabilities. Write down which content the customer consumes at each journey stage.
- When there is a high-level picture of the customer lifecycle, it becomes easier to identify the “moments of truth” where it is essential to make a difference, both from your business and the customers’ point of view.



After that, it is easier to proceed to a more detailed analysis with the help of customer data. Data is our key ingredient for proper customer understanding. It gives us insights into how our marketing activities, such as campaigns, automated programs, or events, perform and how the different individuals behave and react to messages they receive.

Suppose we don’t look at the data and analyze the critical moments for the customer experience, customer satisfaction, and ROI. In that case, we are risking focusing on the wrong things. It is impossible to invest everywhere with the same level of effort. Think about your business objectives.

Focus on personalized service

Personalization is a great way to differentiate yourself as an energy and utilities company. Offering a personalized service means understanding the customer and tailoring the service to their situation and needs. Again, there is an inherent requirement of knowing your customers and gathering and utilizing data regarding them.

Personalization works in customer communication: marketing messages convert better when personalized. Your average customer also expects more today than they did yesterday, and personalized customer service is a way to differentiate your product from the competition.

It can be wise to start with a smaller scope involving a limited number of customers and service channels — for example, self-service — and plan out what kind of personalized customer service experience you aim to achieve.

A typical example of personalization is the website. First, you identify a user as either your existing or potential customer, then adjust what they see based on this information. For a returning customer, you may show product or service recommendations based on their past behavior; for a potential customer, you may show marketing content or a promotion to help them convert into a customer.

From a customer service agent's perspective having the customer data at the ready allows them to serve the customer in a personalized and productive manner. Whether on a website where the customer cannot find what they are looking for or the customer is following up on a previous case through chat, having the data at the agent's fingertips enables them to provide the customer the service they expect.

Offer self-service

Most customers seek out the power to self-serve as much as possible and then work with customer service as needed. The more information and choice you can put at the fingertips of your buyers, the better.

Implementing self-service allows the agents to utilize their time on the more complex cases for the business. It also lowers the amount of cases agents have to work on, decreasing the average cost per case. All this means more savings and efficiency, which can make a big difference to the running cost of customer service.

There are different ways companies can offer self-service to their customers. For example, in the energy and utilities sector, it could be an online service where the customer can check their current energy consumption, see tips for lowering energy costs, or contact customer service via chat to answer their question.

- **Knowledge articles**


Producing relevant articles for customers to use for self-service is an excellent deflection technique. However, it is worth noting that the pieces are only as relevant as you make them, so keeping them up to date is an essential consideration for self-service success. Knowledge is a living thing and should be kept alive.

- **Collaboration**

Collaboration is a great case deflection technique. Allowing your customers to collaborate can be a daunting prospect, but harnessing your customer community can lower the number of inquiries. You can also gain good insight into how your customers use your products and use that information for product development in the future.

- **Chat and chatbots**

Offering chat and chatbot options are very common nowadays – meaning that customers are also used to using those services. In the start, using chatbots with simple use cases can make a big difference in improving productivity. After a while, your bots can harness the power of your existing knowledge base and CRM data and serve customers even more extensively before needing to connect the customer to an agent.



4. Way forward

In these turbulent times, it is your opportunity to succeed. Use data to energize your digital-first customer engagements and ensure your services meet customers' expectations. A consistent end-to-end customer experience requires technical skills and an understanding of all customer-facing touchpoints.

Fluido has comprehensive experience leveraging technologies to support your business goals, strategy, and customer experience. We help you define a roadmap that starts by building a solid scalable fundament and continues with items that help you expand the use of technology in your organization.

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