

# Creating a self-service strategy that drives customer satisfaction

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Online exchange





E Source helps utilities and cities reduce costs, evolve their technologies, increase customer satisfaction (CSAT), and create industry-leading programs.

Our innovative solutions are delivered through predictive data science, market intelligence, consulting, and advisory services.

# Your hosts for today



**Eryc Eyl**

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**Lisa Schulte**

Senior Analyst,  
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# This is a virtual roundtable discussion



Participation is essential



We'll publish a recording and slides on the [event page](#)



Use Zoom's Q&A feature to pose questions and share comments



Rename yourself to include your utility or city name



Unmute your line when you're ready to speak (\*6)



Turn your video on

# Key takeaways



## **Include self-service metrics as part of your key performance indicators (KPIs).**

This will help you understand the experience customers have and how you can improve.




## **Use self-service results to champion customer experience (CX).**

Increased enrollment in self-service and lower call volumes were top business outcomes of CX efforts.



## **Engage customers in self-service beyond basic bill viewing.**

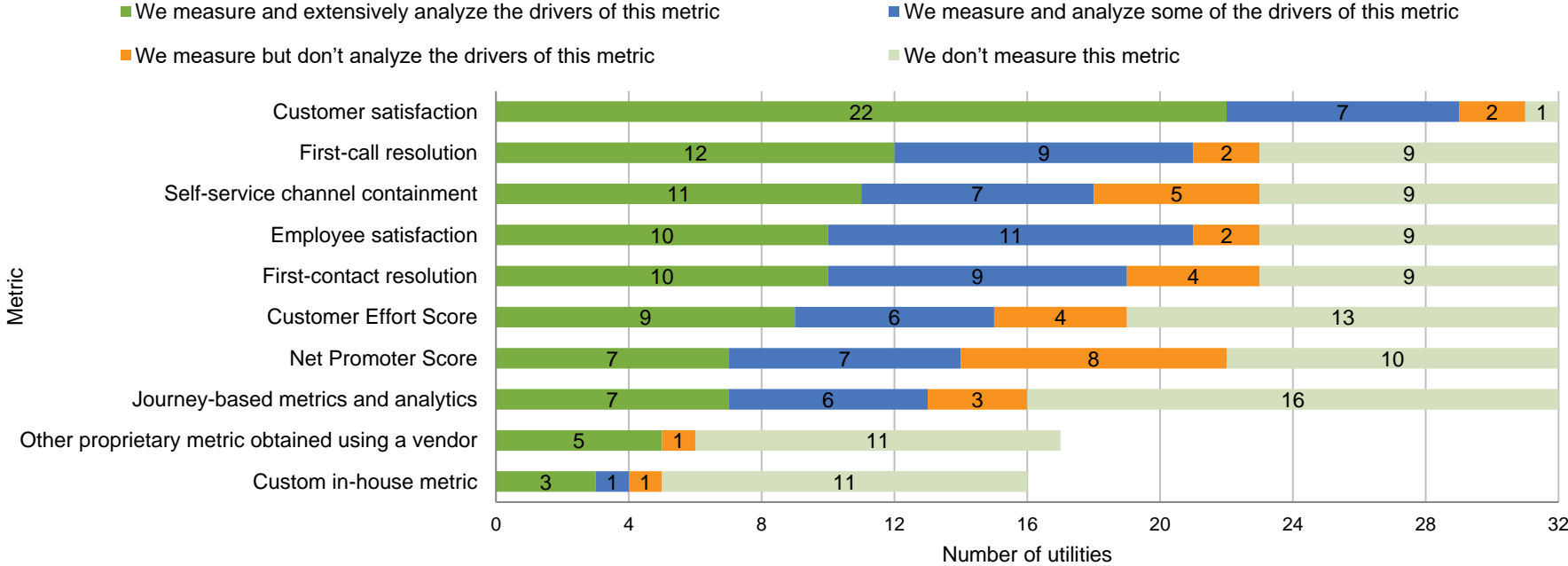
Self-service activities with low participation had some of the largest satisfaction gaps between those who had and hadn't self-served, meaning there's opportunity to increase usage and satisfaction through self-service.

A nighttime cityscape with illuminated buildings and a complex highway interchange, serving as the background for the slide.

# How is self-service part of your CX strategy?

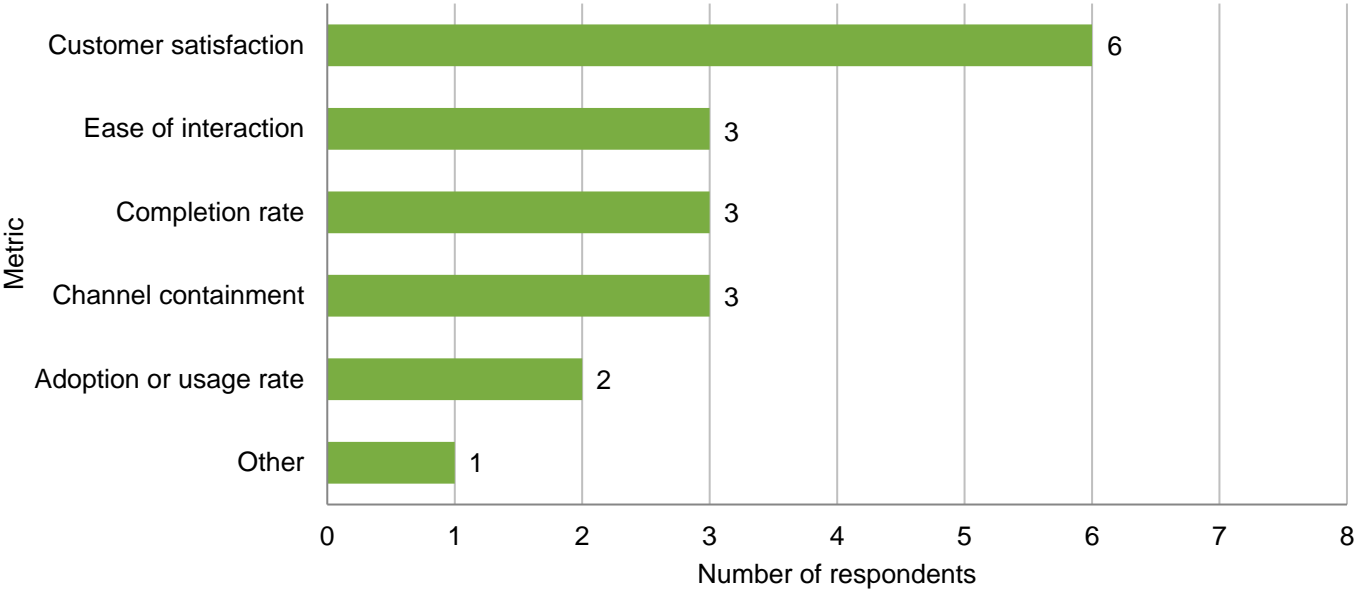
# Self-service metrics are part of CX KPIs

Metrics utilities measure and analyze



Base: All respondents (n = 32 utilities). Question S5\_1: Which of the following metrics does your organization measure and analyze? © E Source (2022 Customer Experience Survey)

# Poll: How are you measuring your self-service performance?



**Base:** Event participants (n = 8). **Question:** How are you measuring your self-service performance? Select all that apply.  
**Note:** Use caution when sample size falls below 30. © E Source



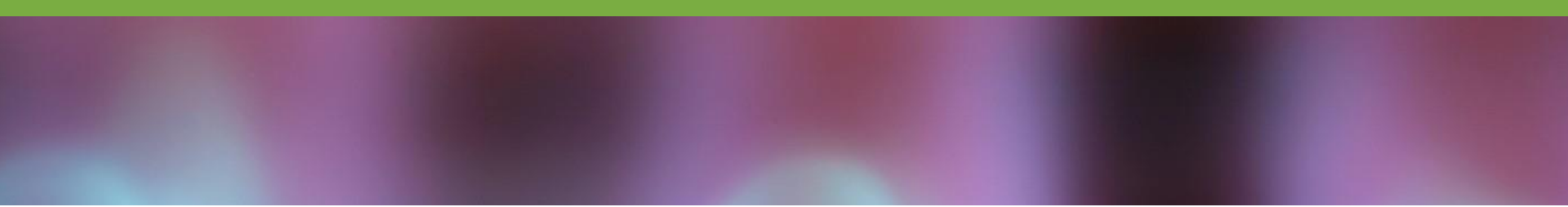
# Business outcomes of CX efforts

Business outcome resulting from CX efforts	Number of utilities
Increased customer advocacy	20
Increased participation in customer service programs such as paperless billing or self-service	18
Better brand perception	18
Greater customer satisfaction as measured by J.D. Power, MSI, ACSI, or another third-party benchmark	15
Reduced contact center volume	14

**Base:** All respondents (n = 32 utilities). **Question S5\_4:** What business outcomes have your utility's CX efforts affected? Select all that apply. **Notes:** CX = customer experience; MSI = Marketing Science Institute; ACSI = American Customer Satisfaction Index. Only the top five selected options are shown. © E Source (2022 Customer Experience Survey)

# Discussion

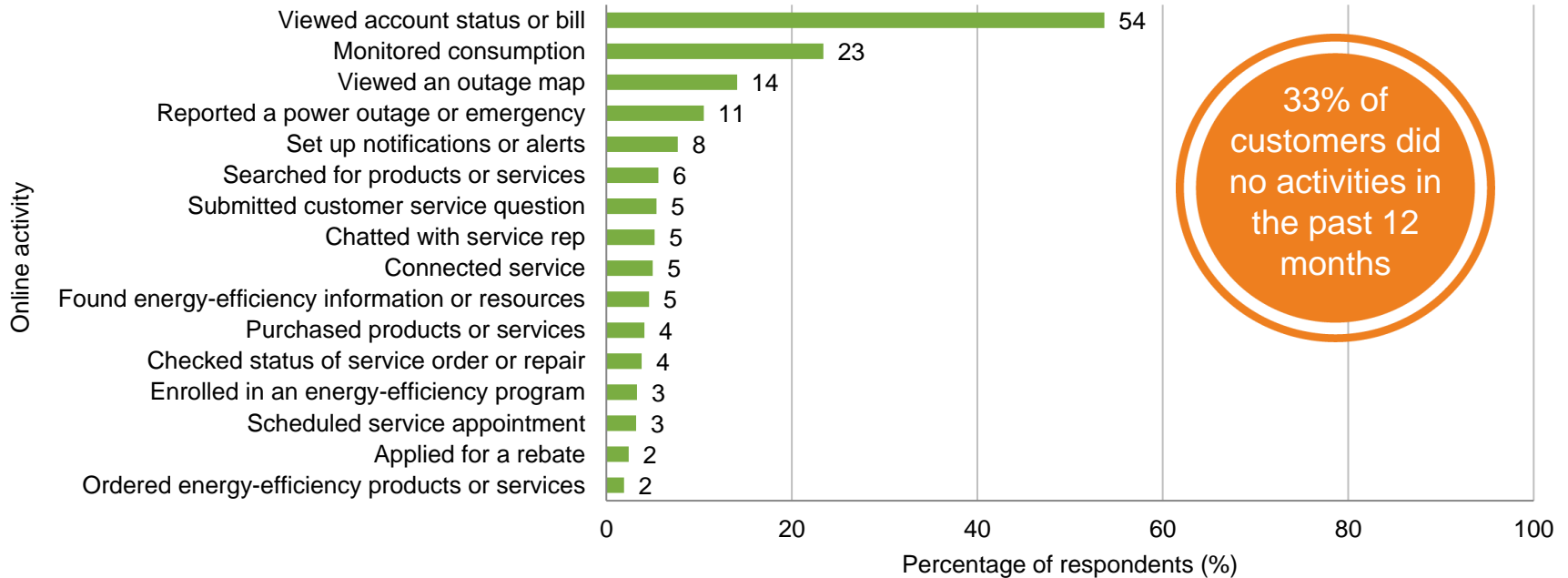
- How does self-service fit within your overall CX strategy?
- What challenges do you face in providing great self-service experiences?



# Prioritizing self-service interactions to drive CSAT



# Website activities by participation rate



**Base:** Respondents of electricity or dual-fuel providers (n = 31,281). **Question A6:** In the past 12 months, have you done any of the following with your electricity provider online? (Select all that apply) [Filtered] **Note:** Some options were only available to those who pay a bill or have an online account. Percentages shown in the charts reflect weighted data; sample sizes (n) are based on unweighted data. © E Source (US Residential Customer Insights Center; data from the 2021 Claritas Energy Behavior Track survey)

# Interactions with higher satisfaction for self-serving customers

Satisfaction with electricity provider  
(top-2 box)

Online activity	Adoption rate who have self-served (n = 31,281)	Have self-served	Have not self-served	Satisfaction gap (top-2 box)
Ordered new products or services	4%	76%	64%	+12
Obtained product/service information	6%	75%	64%	+11
Found energy efficiency information/resources	5%	74%	63%	+11
Checked status of service order or repair	4%	75%	65%	+10
Ordered energy efficiency products or services	2%	73%	64%	+9
Scheduled service appointment	3%	73%	65%	+8
Connected/established/transferred service	5%	71%	64%	+7
Submitted customer service question	5%	69%	64%	+5
Monitored energy consumption/use	23%	67%	63%	+4
Set up notifications/alerts	8%	69%	65%	+4
Chatted with service rep online	5%	68%	64%	+4
Enrolled in an energy efficiency program	3%	68%	64%	+4
Viewed account status/bill	54%	66%	64%	+2

**Base:** Respondents of electricity or dual-fuel providers. Sample size for "have self-served" and "have not self-served" varies by transaction. **Questions A6:** In the past 12 months, have you done any of the following with your electricity provider online? (Select all that apply) **A12:** Taking into account your overall satisfaction as a customer of your electricity provider, how would you rate them? **A6NEW:** Please rate the ease of viewing your account status or bill online with your electricity provider. **Note:** Some options were only available to those who pay a bill or have an online account. Percentages shown in the charts reflect weighted data; sample sizes (n) are based on unweighted data. © E Source (US Residential Customer Insights Center; data from the 2021 Claritas Energy Behavior Track survey)

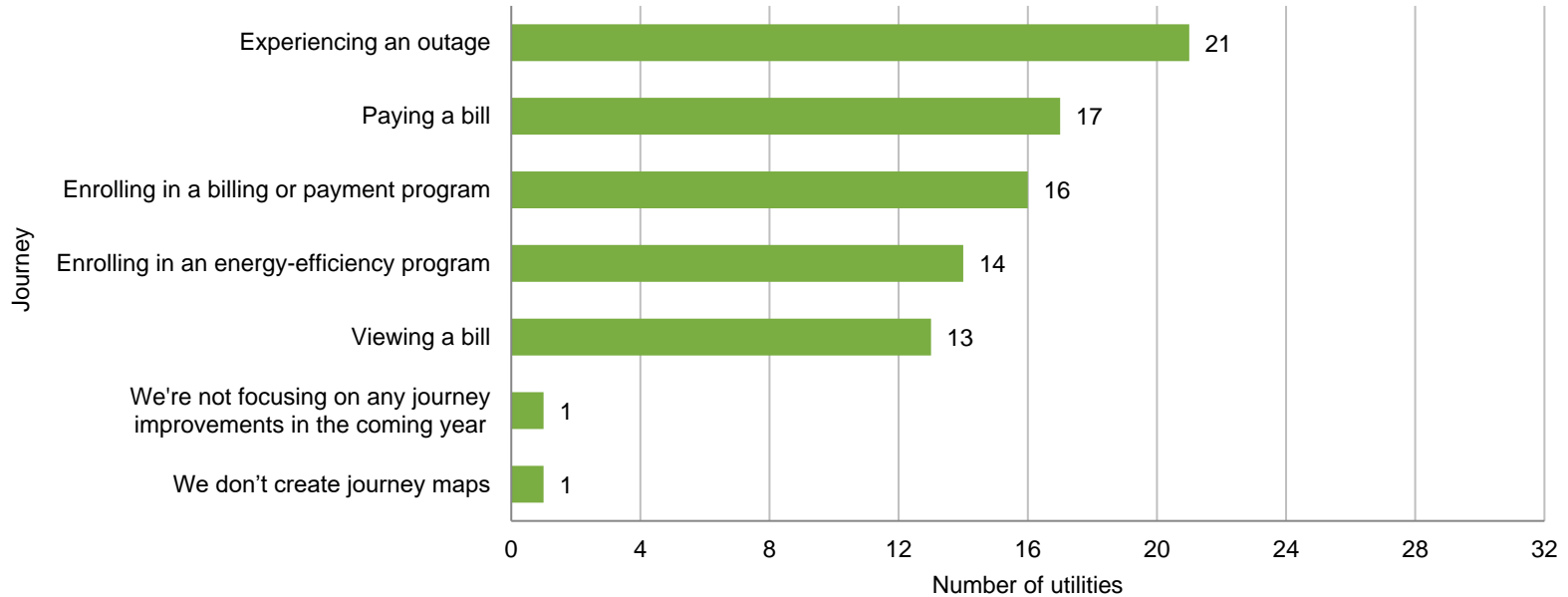
# Interactions with negative satisfaction gaps between self-service and non-self-service

Satisfaction with electricity provider  
(top-2 box)

Online activity	Adoption rate who have self-served (n = 31,281)	Have self-served	Have not self-served	Satisfaction gap (top-2 box)	Ease of interaction (top-2 box)
Viewed a power outage map	14%	63%	64%	-1	55%
Reported a power outage/emergency	10%	63%	64%	-1	60%
Applied for a rebate	2%	65%	66%	-1	50%

**Base:** Respondents of electricity or dual-fuel providers. Sample size for "have self-served" and "have not self-served" varies by transaction. **Questions A6:** In the past 12 months, have you done any of the following with your electricity provider online? (Select all that apply) **A12:** Taking into account your overall satisfaction as a customer of your electricity provider, how would you rate them? **A6NEW:** Please rate the ease of viewing your account status or bill online with your electricity provider. **Note:** Some options were only available to those who pay a bill or have an online account. Percentages shown in the charts reflect weighted data; sample sizes (n) are based on unweighted data. © E Source (US Residential Customer Insights Center; data from the 2021 Claritas Energy Behavior Track survey)

# Prioritized journeys for next 12 months



**Base:** All respondents (n = 32 utilities). **Question S3\_5:** Which customer journeys is your utility focused on improving in the coming year? Select all that apply.

**Note:** Only the top five journeys are shown. © E Source (2022 Customer Experience Survey)

# Discussion

- Which self-service journeys are you prioritizing for 2022?
- How did you prioritize these journeys?
- What recent successes have you had with your self-service offerings? Have you been able to measure any specific CX impacts as a result?
- How are you getting customers to use your self-service channels? How can you offer the right channel for the interaction?



# What else did you want to discuss with the group?

- Long-term electrification journeys such as electrifying a home over time. How can utilities encourage, provide resources, and guide customers through self-service tools?
- Increasing self-service for moving journeys (start and stop service)?
- Other topics we haven't touched on yet?

# Questions?



# Speak at the E Source Forum 2022

September 13–16  
Denver, CO

[www.esource.com/forum2022](http://www.esource.com/forum2022)





# Contact us



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