

# Utilities Contact Center and Digital — Better Together

How to unlock valuable contact center insights to improve customer digital, self-service experiences

**Medallia**



# Introduction

Most contact centers were built with the goal of responding to every customer contact efficiently, typically aiming for 100% satisfaction in the shortest time possible. But one question often ignored is, “Why do people reach out to the contact center in the first place?” Was there a breakdown in the customer journey? Are digital experiences falling short of expectations?

We can spend years responding to these challenges without ever taking the time to figure out how we can prevent them in the first place. This guide will help you do just that. We’ll examine some of the critical touch points throughout the customer journey, and where breakdowns can occur. You’ll also find recommendations for a new approach that helps utilities and energy providers unlock experience insights, remove silos, and prioritize actions that improve the overall customer experience.



- 01** Digital is no longer a channel — it’s your brand and reputation  
With the focus on digital, new friction points have emerged
- 02** The contact center is a gold mine of insights  
This key channel for customers has become overburdened, yet it is full of rich insights that can help organizations understand why contact is happening in the first place
- 03** A new approach is required  
It’s time to capture every interaction — call, inquiry, chat — to improve the digital experience
- 04** Tackle issues on every front  
By listening to signals everywhere, you can eliminate blind spots and understand the best ways to improve digital experiences

# Digital is no longer a channel—it's your brand and reputation

Accelerated by the pandemic, today's journey has changed significantly as utility customers are prioritizing digital experiences. In fact, 75% of people using digital channels for the first time indicate they will continue to use them when things return to "normal."<sup>1</sup>

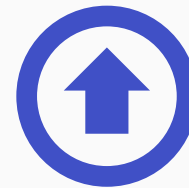
Consequently, multi-year digital implementation plans have been completely scrapped as companies across the globe have been forced to adopt a digital-first approach in real time. Recent data shows they have vaulted five years forward in consumer and business digital adoption in a matter of months.<sup>2</sup>

Though regulation and lack of competition have utility providers lagging behind other industries in digitalization, **utility companies are pivoting to address more issues digitally.**

- Digital adoption grew by 46% in the utilities industry in early 2021.<sup>3</sup>
- In utilities, digital channels perform similarly or better than traditional channels and are usually more cost-effective.<sup>4</sup>
- 95% of utilities leaders believe that digital transformation must be a top priority.<sup>5</sup>

## Did you know?

Changing digital behaviors can have a surprisingly positive impact on revenue and growth models for utility providers.



Industries across regions experienced an average of 20% growth in "fully digital" users in the six months ending in April 2021.<sup>6</sup>



U.S. e-commerce sales grew 44% in 2020 compared to 2019.<sup>7</sup>



In a power outage, 50% of customer satisfaction is derived from customer service factors such as clear and timely communication.<sup>8</sup>



With these changing dynamics, digital is now front and center and has become synonymous with your brand and reputation. Each customer interaction shapes their perception so much that a single bad digital experience can compromise your business. Even when people love a brand, nearly 20% say bad experiences impact their loyalty, and nearly 60% say they'll go elsewhere if they can get a similar product with a better experience.<sup>9</sup> With higher expectations, utility companies must work harder to maintain loyalty through seamless digital experiences.

Because the pandemic caused utility companies to pivot quickly, new friction points in the digital journey have emerged. As customers get frustrated with inconsistent experiences, lack of personalization, repeat issues, or limited self-service options, they turn to the contact center for help. This has had a domino effect on customer support and service departments — a function often seen as the lifeline between the customer and the business.



# The contact center is a gold mine of insights

Contact centers are a crucial channel available to assist and support customers, especially when immediate answers are needed. They are one of the most common ways people interact with companies to share issues, feedback, and frustrations. But they are also extremely difficult to operate, with inefficiencies, high turnover, and variability in agent effectiveness.

**30%**

Greater ability to predict customer satisfaction when companies understand the entire experience versus looking at individual touchpoints.<sup>10</sup>

## Did you know?

Changing digital behaviors can have a surprisingly positive impact on revenue and growth models for utility providers.



75% of consumers expect consistent interactions across all departments.<sup>11</sup>



However, 58% say that they feel like they're communicating with separate departments and not one company.<sup>12</sup>



And when it comes to service issues, 70% of customers expect all of the reps to have the same information about them, but 64% say that they have to re-explain issues.<sup>13</sup>

## Why do customers engage a contact center in the first place?

- 01. They need support for complex issues.** Whether it's a billing inquiry, setting up new residential service, or reporting a building-wide power outage, the need to connect with a representative is often an inevitable stage in the customer journey. While connecting with a human helps alleviate burning questions or complex issues, most utility companies prefer the efficiency and subsequent cost savings of solving through digital self-service.
- 02. The digital self-service model is lacking.** Calls to the contact center are often initiated because of downstream issues related to repetitive digital self-service breakdowns or other problems in the customer journey. One of Medallia's customers says 70% of calls to their contact center directly result from digital self-service issues. For example, a common downstream problem is an inability to schedule a service visit online. Because contact center agents are trained to focus on resolving these calls as quickly as possible, the root cause of the issue often goes undetected. This is how expensive problems get missed.



- 03. The primary reason for the call is resolved, but new downstream issues arise.** According to research, 22% of repeat call volume is related to a problem that prompted an original call, even if that problem was adequately addressed the first time around. While the initial call driver was addressed, future calls to the contact center will continue until organizations proactively leverage insights to anticipate these new issues. In fact, 46% of contact center cases could be avoided by looking toward the next potential case. An example cited in a recent Harvard Business Review article shares how Bell Canada addresses a primary issue and uses the insights to head off the next one: "For instance, a high percentage of customers who ordered a particular feature called back for additional instructions on using it. The company's service reps now give a quick tutorial to customers about key aspects of the feature before hanging up."<sup>14</sup> According to CEB Global (now Gartner), companies practicing next-issue avoidance dramatically reduce the likelihood of another 3- to 5-minute phone call (with an upset customer, no less)."<sup>15</sup>

## Is your contact center missing expensive problems?

From digital self-service issues to repetitive downstream problems, the contact center today is overburdened by costly problems that can be prevented with the right digital and self-service experiences. So how do the provider's contact center teams uncover insights hiding in plain sight, reduce the silos, and drive higher-quality customer experiences?

# A new approach is required

The utility provider's contact center is designed to support customer outreach and resolve issues while driving first-call resolution and case closure. The digital channel is designed to help customers self-service, transact, and be on their way. Both channels are focused on managing efficiency and customer satisfaction. Yet both channels have traditionally worked independently of one another. To reduce digital frustration while improving the customer experience, providers need to unlock and share insights captured within the contact center to enhance the digital experience. **The contact center and digital teams need to work better together.**



We are seeing the majority of organizations monitor only ~1% of all contact center calls.

**Rachel Lane**

Contact Center Solution Principal, Medallia

## Start by capturing every interaction.

The top three reasons customers call in the first place can be a treasure trove of insights to help address recurring call volume. Until recently, transcribing and analyzing such an abundance of calls has proven near impossible – at least in a timely enough manner to make insights actionable. Utility companies have done their best to understand these experiences manually, sampling a small percentage of random calls. Sampling enables fast feedback, but provides an incomplete picture and risks missing critical blind spots. With sophisticated speech technology now able to transcribe and analyze every voice interaction, providers can capture each customer interaction and drive rapid improvements within the contact center and beyond.

## Medallia's Contact Center Suite can help you get started by:

- Revealing powerful insights from voice interactions with speech-to-text processing and Artificial Intelligence (AI)-powered acoustic emotional analysis.
- Empowering your frontline teams with real-time feedback, coaching, and quality assurance.
- Surfacing additional customer experience insights by connecting and integrating with third-party systems.



## Let AI be your superhero.

AI uncovers hidden meanings within speech and text conversations to inform more meaningful insights and decision-making. By applying machine learning, utility companies can tap into a gold mine of data that reveals customer sentiment, call topics, and themes in real time. AI can also analyze text in structured formats, such as survey feedback, and unstructured formats like email, chat transcripts, or agent notes while offering suggestions on what customers might need in the moment. By capturing both what your customers are and aren't telling you through this speech and text analysis, you'll get the right insights to surface recurring customer issues across digital, web, product, and customer support.

### Medallia's Contact Center Suite can help you get started by:

- Collecting real-time customer feedback across digital channels, including web, mobile, and in-app.
- Turning every word into insight and action by leveraging AI and machine learning to unlock the rich potential of unstructured data.
- Revealing how users behave on websites and apps by identifying and prioritizing the most urgent customer issues.

## A unified experience management platform breaks down the silos between your contact center and digital teams.

Understanding what your customers are and aren't telling you through speech, voice, and text analysis is only useful if the data is actionable. It must enable the right people and teams to get to the root cause of where digital experience falls short, and result in reducing unnecessary outreach to the contact center. This requires a unified experience management platform that not only captures every interaction and identifies insights through AI-powered analysis, but also engages critical functions within the contact center, digital, web, and product groups. The platform dashboard provides nudges and alerts that unlock the distribution of insights to the right teams so they can create and track action plans against metrics such as Net Promoter Scores®, cost savings, call volume, and agent experience.<sup>16</sup>

A Medallia customer enhanced the digital experience while driving efficiencies within the contact center:

- **200,000 calls reduced**
- **16,000 hours saved**
- **Reassigned 10+ FTEs to other tasks**



# 01 Use Case: Paying a Bill

## Recurring issue:

Isabella is out running errands when she remembers that her utility bill payment is due today. Though she usually pays her bills from her home computer, she quickly downloads the company's mobile app and attempts to log on. Unfortunately, she can't quite remember her password. So, she uses the "forgot password" feature and waits for the password reset email. She waits for 10 minutes and doesn't get the email, so she tries again. An hour goes by, and Isabella still hasn't received the reset instructions. Annoyed, she drives home to pay her bill. Once she submits her payment online, she grabs her keys only to see that the payment receipt page loads with a cryptic error message.

Isabella doesn't want to pay twice, but after checking and rechecking, she still can't tell if the payment went through or not. Isabella is forced to call the utility company for insight. After waiting on hold for 10 minutes, Isabella explains her predicament in detail to the service rep Steve. Steve has to transfer her call to the web support team. Lucy, the web support rep, doesn't know why Isabella is calling. Isabella mutes herself for a second to yell at the ceiling in frustration before patiently reexplaining the reason for her call. After a series of holds, Lucy verifies that Isabella's payment went through successfully and sends her a password reset email. Isabella is grateful that her bill payment isn't late, but is nevertheless drained from the entire experience.

## Traditional Approach

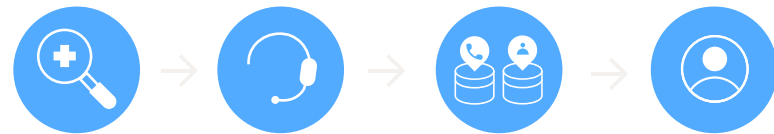




### Intervention and recurring issue resolution:

If insights were freely shared between the contact center and digital teams, both teams would be better equipped to help the customer resolve her issues in less time — reducing customer frustration and costly phone calls into the contact center.

### New Approach



#### Issue

Unable to reset a password and solve a payment processing issue online, a customer calls the contact center for assistance.

#### Individual issue resolution

Contact center agent has insight into the customer's difficulty with the company's digital self-services tools. The agent quickly shares the issue with the digital team to address the mobile app and website errors.

#### Root cause issue resolution

Using rapid transcription and AI analysis, the right teams are empowered with actionable insights to create more efficient digital experiences for customers when errors arise.

#### Results

Quickly resolved the issue that led to recurring call volume and dissatisfied customers.



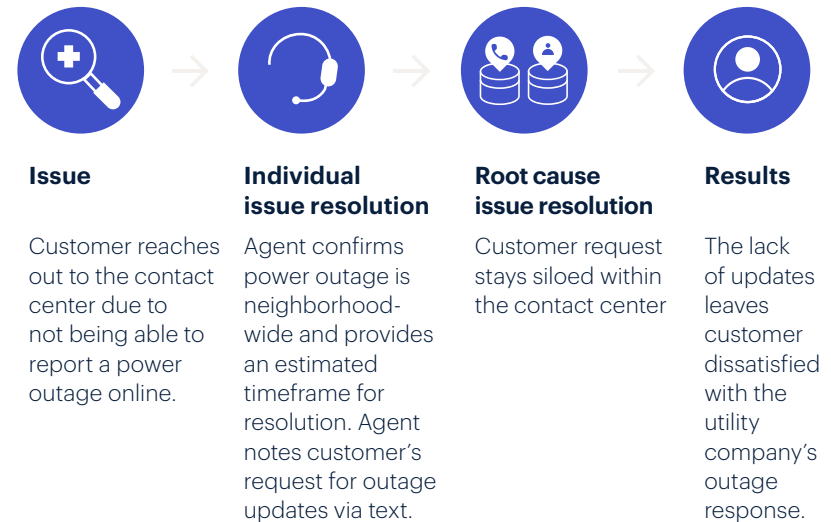
## 02 Use Case: Outage Reporting and Communication

### Recurring issue:

Monique works from home. She's on an important video call with an unhappy but critical client when the connection freezes up without warning. Monique quickly attempts to restart her video app, but soon learns she has bigger problems to deal with — the entire neighborhood is without power. Grabbing her mobile phone to quickly email an apology to her client, Monique then navigates to her utility company's website. She doesn't see any announcements about the outage, so she logs in to her account looking for details there. Still nothing. She calls a customer service phone number and is put on hold for what feels like an eternity. Finally, she reports the power outage to support rep Ben. Once Ben confirms the outage, Monique agrees to opt in for outage resolution updates via text messaging. Four hours pass, but she still hasn't received the promised updates. Now, literally in the dark, Monique's perception of her utility company dips along with the temperature in her home.

Though service rep Ben confirms the outage and provides Monique with an estimated resolution timeframe of "about three hours," Monique's request for text messaging updates did not make it to the appropriate response teams. Consequently, she never received any outage updates or communications at all.

### Traditional Approach



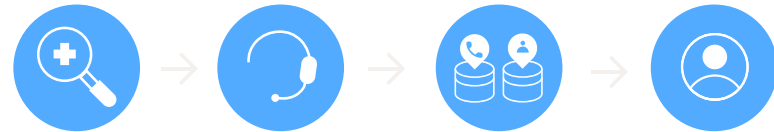




### Intervention and recurring issue resolution:

If customer insights were shared with the outage and marketing teams, they could ensure that the customer received the regular and timely updates she was counting on during a stressful situation. And as an extra measure of support, by applying speech analytics to the customer's conversation with the customer service rep, the utility company could automatically include the customer in an outage text updates program.

### New Approach



#### Issue

Needing to report a power outage but unable to do it online, customer calls the utility company's contact center for additional assistance.

#### Individual issue resolution

Service rep provides the customer with insightful information and ensures the customer's opt-in on text messaging updates is shared with the outage response team.

#### Root cause issue resolution

Using rapid transcription and AI analysis, the outage response team is notified and empowered to act upon customer requests for regular updates via text messaging.

#### Results

Quickly resolved the issue that led to recurring call volume and dissatisfied customers.

## 03 Use Case: Field Service Scheduling

### Recurring issue:

Stephanie, a small business owner, notices that after last night's severe thunderstorm, some of the upper branches of a tree on her office property appear to be breaking off and precariously close to falling into a power line. Stephanie needs a service rep from the power company to remove the tree limbs right away. But when she tries to schedule a service visit online, she doesn't receive any type of confirmation. Did her request make it through successfully? She calls the contact center to find out and confirm the visit.

Contact center agent Toni looks at the schedule for the field services team and sees that though most of the team's vegetation management staff is booked after the storm, they will be able to send someone out by tomorrow morning to resolve the issue. Toni cautions Stephanie that she and her office staff should avoid the tree and the surrounding area in the meantime. However, the insights generated from Stephanie's call — including the difficulty in scheduling the service visit online — are not shared across the company to make improvements to the website and reduce similar calls in the future.

### Traditional Approach



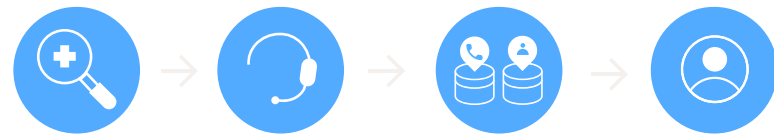




### Intervention and recurring issue resolution:

If the insights from the customer's call were shared with the digital team, they could fix the self-service scheduling errors encountered by business customers on the company's website or app. Additionally, by applying speech analytics to every call, the utility company can proactively communicate customer concerns about specific situations — e.g., the tree about to fall into the power line that is also close to a high-traffic community walkway — to the field services team for faster prioritization and action.

### New Approach



#### Issue

A customer tries to schedule a site visit with her utility company but is unable to confirm the visit and verify the request was received via the company's website.

#### Individual issue resolution

Contact center service agent sees that the field services team is booked but is able to schedule a service call to the customer's company due to the danger presented to customers, employees, and the larger community.

#### Root cause issue resolution

Using rapid transcription and AI analysis, the digital team is empowered with actionable insights to fix self-service scheduling errors.

#### Results

Quickly resolved the underlying digital error issue that caused the customer's confusion, improved the self-service digital experience, and ensured the safety of customers and the community.



# Conclusion

Delivering great customer experiences requires surfacing actionable insights and enabling seamless collaboration between digital and contact center teams. The right foundation ensures organizations listen to and delight customers across all channels.

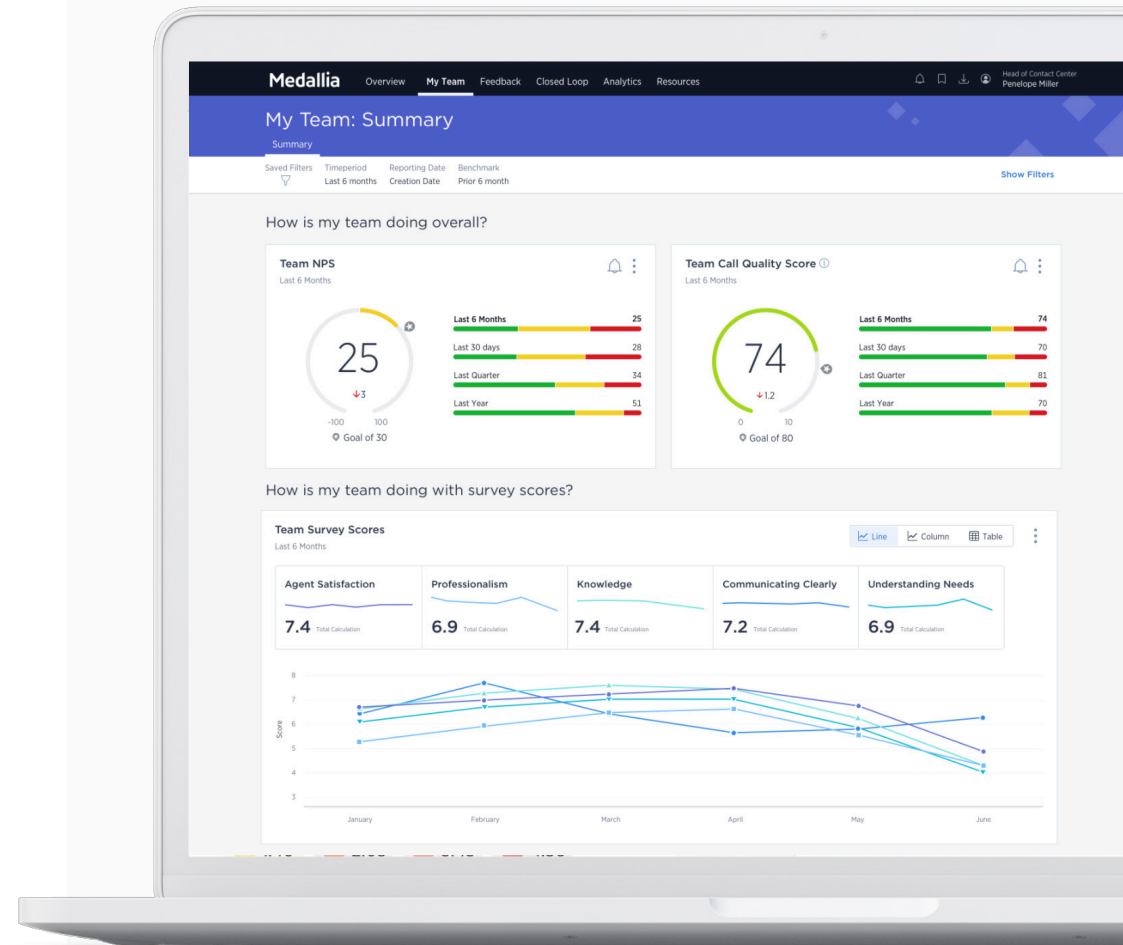
It's more critical now than ever for utility companies to have a comprehensive view of the customer journey. The Medallia platform enables companies to stay connected in real time and elevate the customer experience by embedding rich and intuitive listening tools seamlessly throughout the journey.

**The Medallia platform is designed to make your contact center an epicenter for change.**

**Broad signal capture:** Transcribe each call with high accuracy to capture a rich set of call metrics such as talk time, silence time, overtalk, and tone.

**Intelligent analysis:** Surface actionable insights from every call, such as call reason, customer effort, churn risk, and suggestions.

**Widespread action:** Enable the frontline to take immediate action with real-time insights and combine data from the contact center with cross-channel feedback to drive changes throughout the organization



<sup>1</sup> Source: <https://www.mckinsey.com/business-functions/mckinsey-digital/our-insights/the-covid-19-recovery-will-be-digital-a-plan-for-the-first-90-days>

<sup>2</sup> Source: <https://www.mckinsey.com/business-functions/marketing-and-sales/our-insights/global-surveys-of-consumer-sentiment-during-the-coronavirus-crisis>

<sup>3</sup> Source: <https://www.mckinsey.com/capabilities/mckinsey-digital/our-insights/whats-next-for-digital-consumers>

<sup>4</sup> Source: <https://www.mckinsey.com/industries/electric-power-and-natural-gas/our-insights/transforming-customer-experience-in-utilities>

<sup>5</sup> Source: <https://www2.deloitte.com/us/en/insights/industry/power-and-utilities/digital-transformation-utility-of-the-future.html>

<sup>6</sup> Source: <https://www.mckinsey.com/capabilities/mckinsey-digital/our-insights/whats-next-for-digital-consumers>

<sup>7</sup> Source: <https://www.census.gov/library/stories/2022/04/ecommerce-sales-surged-during-pandemic.html>

<sup>8</sup> Source: McKinsey, Transforming customer experience in utilities

<sup>9</sup> Source: <https://martechseries.com/mts-insights/guest-authors/consumer-dislikes-and-brand-loyalty-in-the-era-of-digital-customer-experience/>

<sup>10</sup> Source: <https://www.mckinsey.com/industries/retail/our-insights/the-three-cs-of-customer-satisfaction-consistency-consistency-consistency>

<sup>11</sup> Source: <https://www2.deloitte.com/si/en/pages/strategy-operations/articles/changing-consumer-digital-marketing-impact-Covid-19.html>

<sup>12</sup> Source: <https://www2.deloitte.com/si/en/pages/strategy-operations/articles/changing-consumer-digital-marketing-impact-Covid-19.html>

<sup>13</sup> Source: <https://www2.deloitte.com/si/en/pages/strategy-operations/articles/changing-consumer-digital-marketing-impact-Covid-19.html>

<sup>14</sup> Source: <https://hbr.org/2010/07/stop-trying-to-delight-your-customers>

<sup>15</sup> Source: <https://customerthink.com/next-issue-avoidance-how-contact-centers-can-preempt-follow-up-calls/>

<sup>16</sup> Note: Net Promoter, Net Promoter Score and NPS are registered trademarks of Bain & Company, Inc., Fred Reichheld and Satmetrix Systems, Inc. All other trademarks are the property of their respective owners.

## Meet with a Medallia Expert →

### About Medallia

Medallia is the pioneer and market leader in Experience Management. Medallia's award-winning SaaS platform, the Medallia Experience Cloud, leads the market in the understanding and management of experience for customers, employees and citizens. Medallia captures experience signals created on daily journeys in person, digital and IoT interactions and applies proprietary AI technology to reveal personalized and predictive insights that can drive action with tremendous business results. Using Medallia Experience Cloud, customers can reduce churn, turn detractors into promoters and buyers and create in-the-moment cross-sell and up-sell opportunities, providing clear and potent returns on investment. [www.medallia.com](https://www.medallia.com)

---

**Follow us:** [in medallia](#) [blog.medallia.com](#) [@Medallia](#)

---