ORACLE

Oracle Energy and Water
Customer Edge
Conference

Empower Key Account Managers to scale your C&I business

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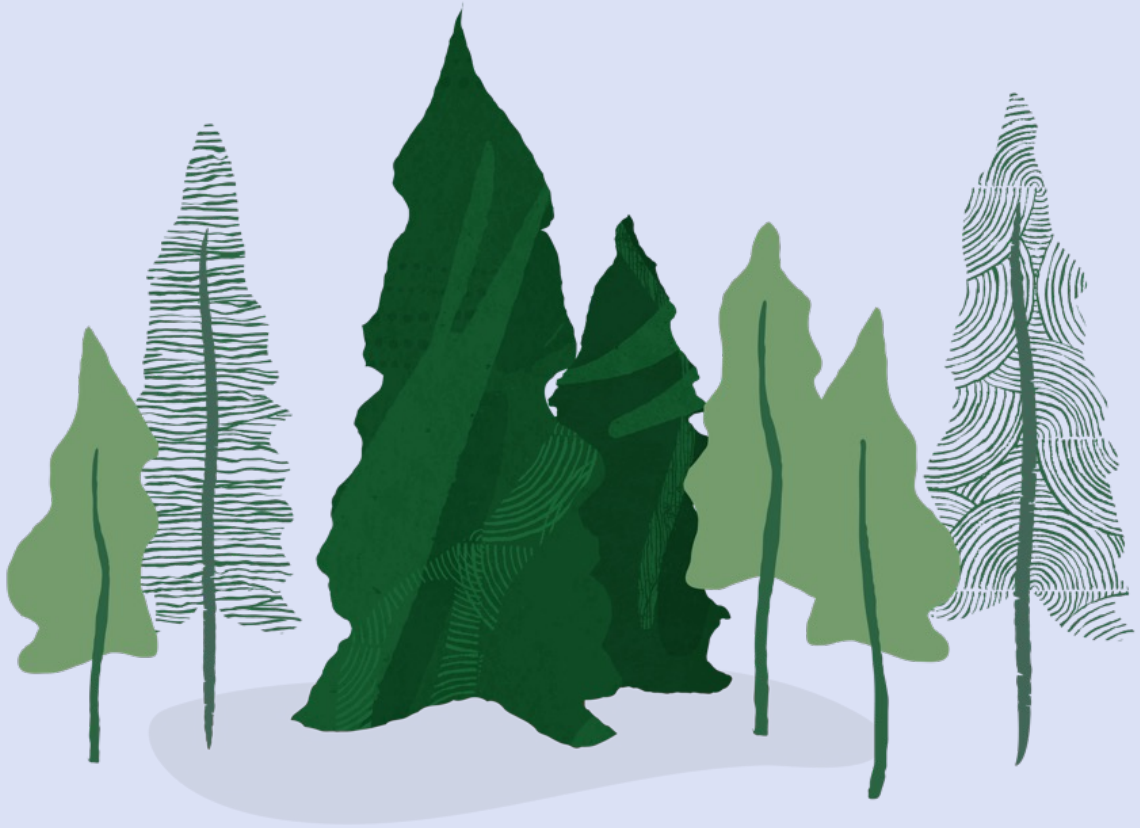
Customer Transformation Track

Play Edge Quiz Game to help us donate more trees!



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Speakers

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Senior Principal Product Manager

Steven Grover

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Safe harbor statement

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Session Agenda

1. Market Challenges and Opportunities
2. Customer Experience for Sales and Account Management
3. Demo: Sales and Service for Key Account Managers
4. How CX for Utilities makes Key Account Managers more successful
5. Forecasting and Quoting for C&I Customers
6. Solution Roadmap
7. Q&A

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1. Market Challenges and Opportunities

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Embracing change to scale C&I

21%

Revenue

of utilities stated that revenue growth was their top strategic priority for the next 2 years

33%

Sales

confirmed that they are planning to invest in sales & account management for C&I over the next two years

22%

Channels

recognised sales channel efficacy as a major organisational gap in relation to offering new products and services

52%

Environmental

said that they believe it was important to have low carbon and renewable energy options

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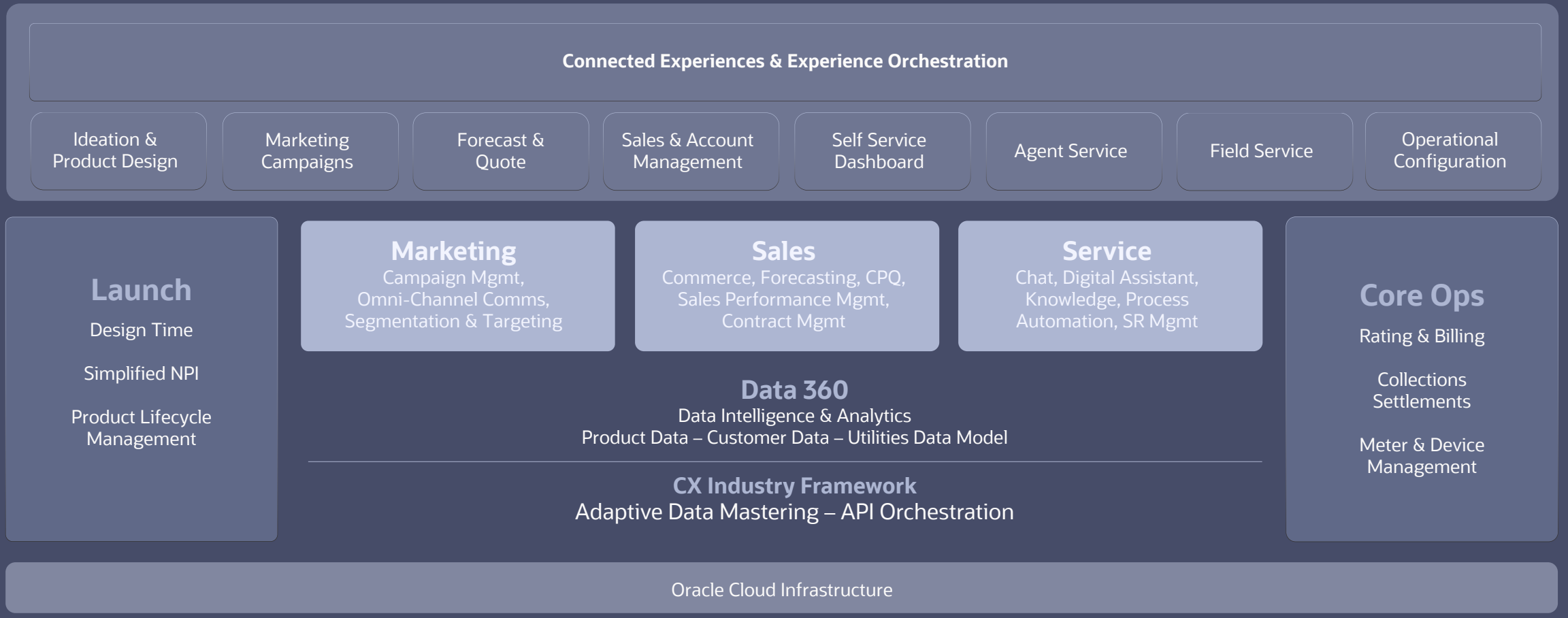
We've reimagined the Utility Customer Platform



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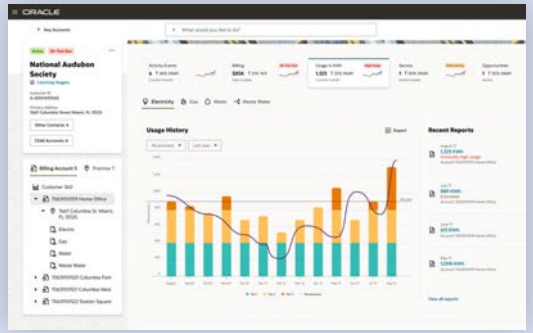
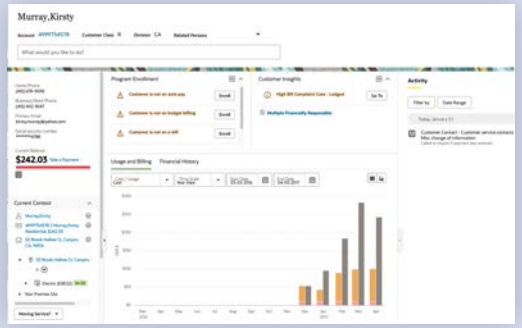
Purpose-built CX solutions for Utilities



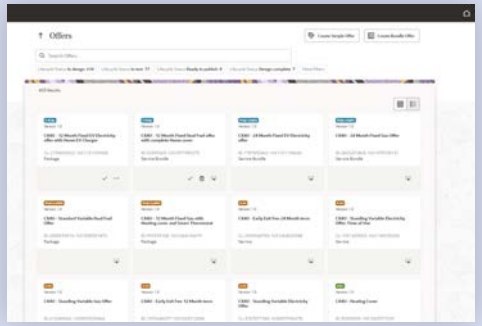
Sales & Account Management

Increase KAM productivity and program interest and revenue



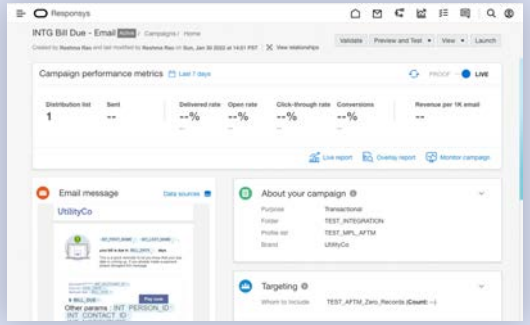
Agent Service

Improve the agent experience and lower integration costs



Digital First

Increase customer satisfaction and efficiency through automation



Marketing & Communications

70% click-to-open rate on targeted campaigns

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2. CX for Sales and Account Management

For Key Account Managers

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Key Account Managers Serve Commercial & Industrial Customers

~80%

of utility revenue comes from C&I customers

Retail/ Restaurants

Education and school districts

City and public works

Healthcare

I have questions about my bill

Help me understand our usage data

Am I on the best rate?

Help me decarbonize my business

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“We are missing a holistic view of the customer.”

Key Account Manager
Large Utility

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“The biggest gap is that our CRM isn’t integrated; data is pulled from different places and then we run analysis in excel.”

Key Account Manager
Large Utility

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“The ideal state for me on my account is I never get a call from a customer saying hey, such and such bill is high, or what is going on with this read. I'd really like to get to the point where I've got monitoring in place where I'm getting push notifications when something is abnormal.”

Key Account Manager
West Coast Public Utility

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What your Account Managers need

- Customer 360 view
- Smart data & guided recommendations
- Predictive Analysis
- Better experience

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Understand the C&I customer with a 360 view

Respond in real time to moments of need

Recommend intelligent offers to deliver value

Leverage all available data to increase service and effectiveness

It’s time to think differently

Utilities create value in customer relationships beyond delivering electricity, gas and water

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3. Demo

CX for Utilities
Key Account Manager Experience

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4. How CX for Utilities make Key Account Managers more successful

Capabilities

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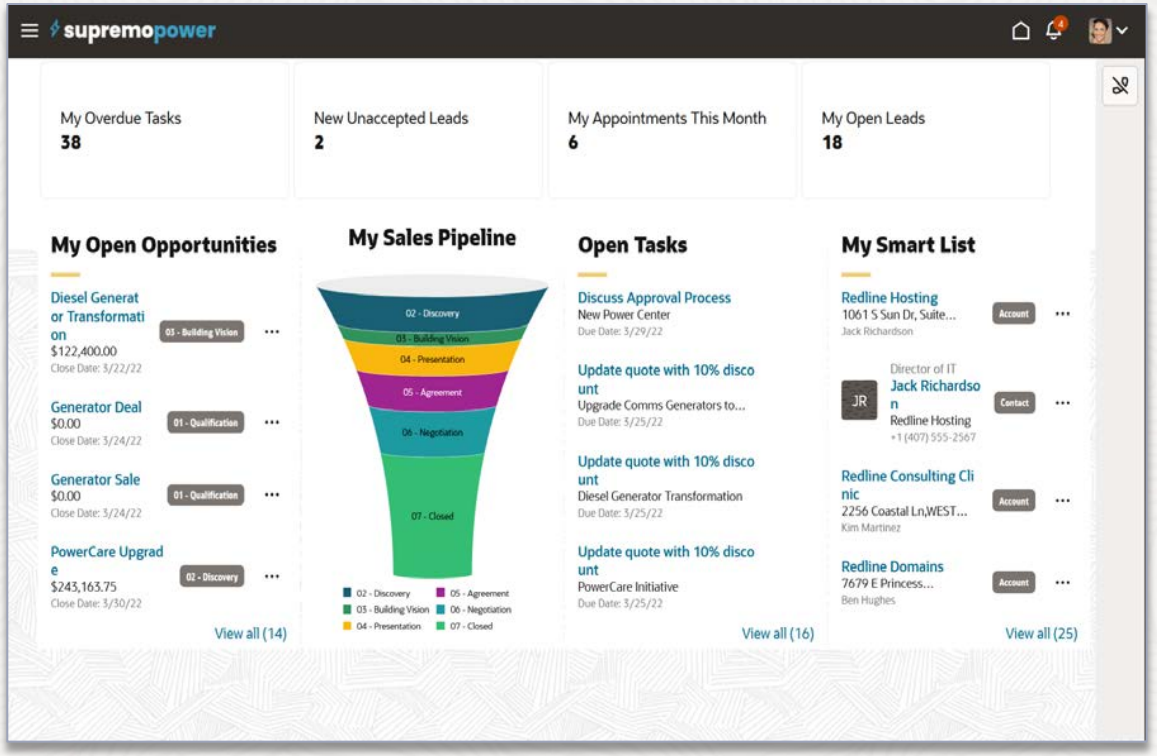
CX for Utilities Sales

Designed to help Key Account Managers increase customer satisfaction and revenue

- Key customer accounts list with drill-in to Customer 360 for a complete view with actionable insights and alerts
- Navigate complex customer accounts with many billing accounts, premises, and service types
- Get intelligent insights, alerts, and recommendations to stay focused on the most critical tasks
- Generate leads based on targeted marketing campaigns and leverage AIML for lead qualification
- Use repeatable, intelligent guided sales processes to increase efficiency and grow revenue
- Use advanced forecasting and quoting capabilities for energy and non-energy products



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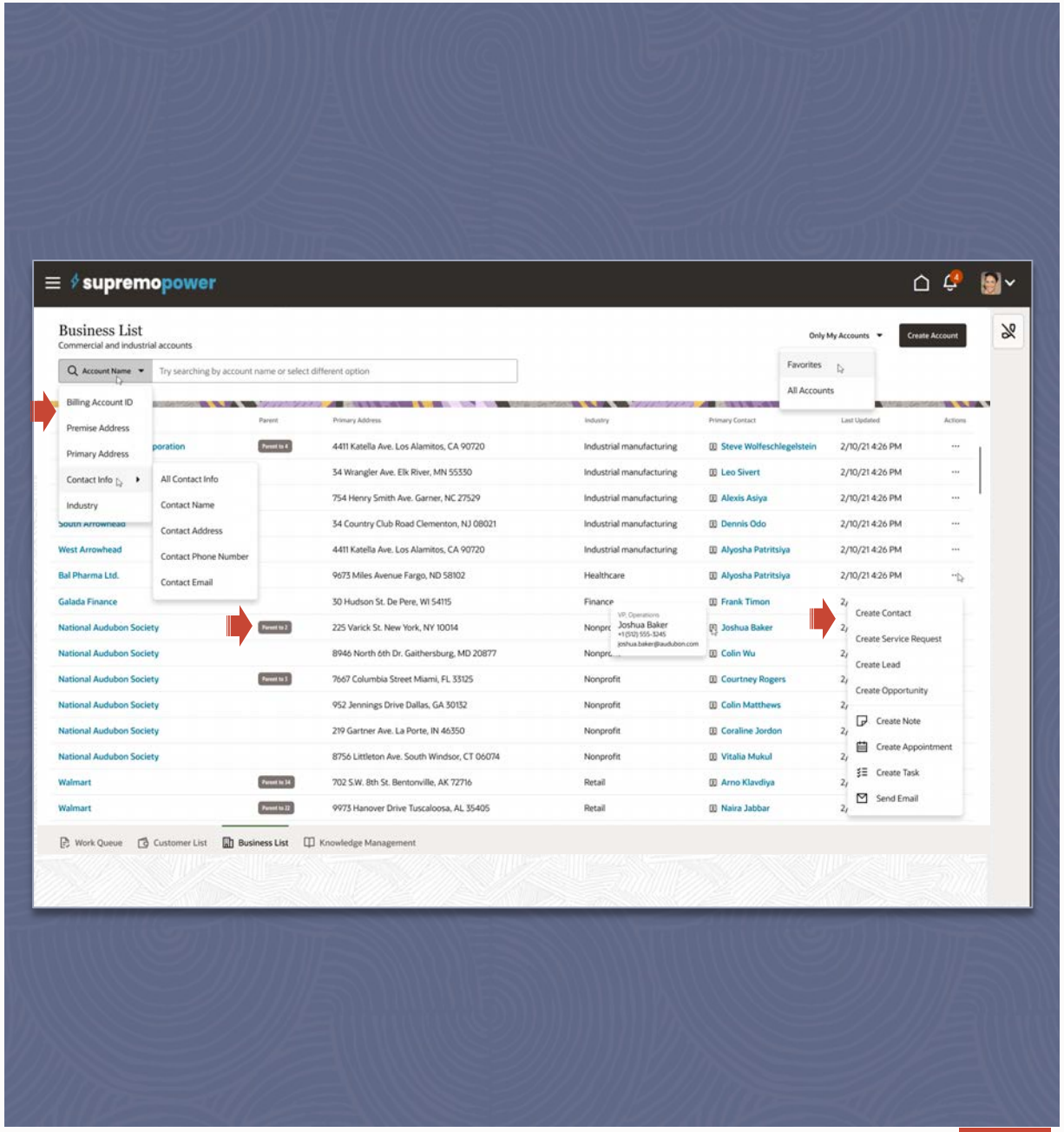
Customer Accounts List

- **Find customers quickly**
  - Search for customers by name, contact information, billing account, or service location
- **Identify complex accounts**
  - Visual indicator shows parent account and the number of child accounts under it
- **Take action**
  - Create contact, activity, service request



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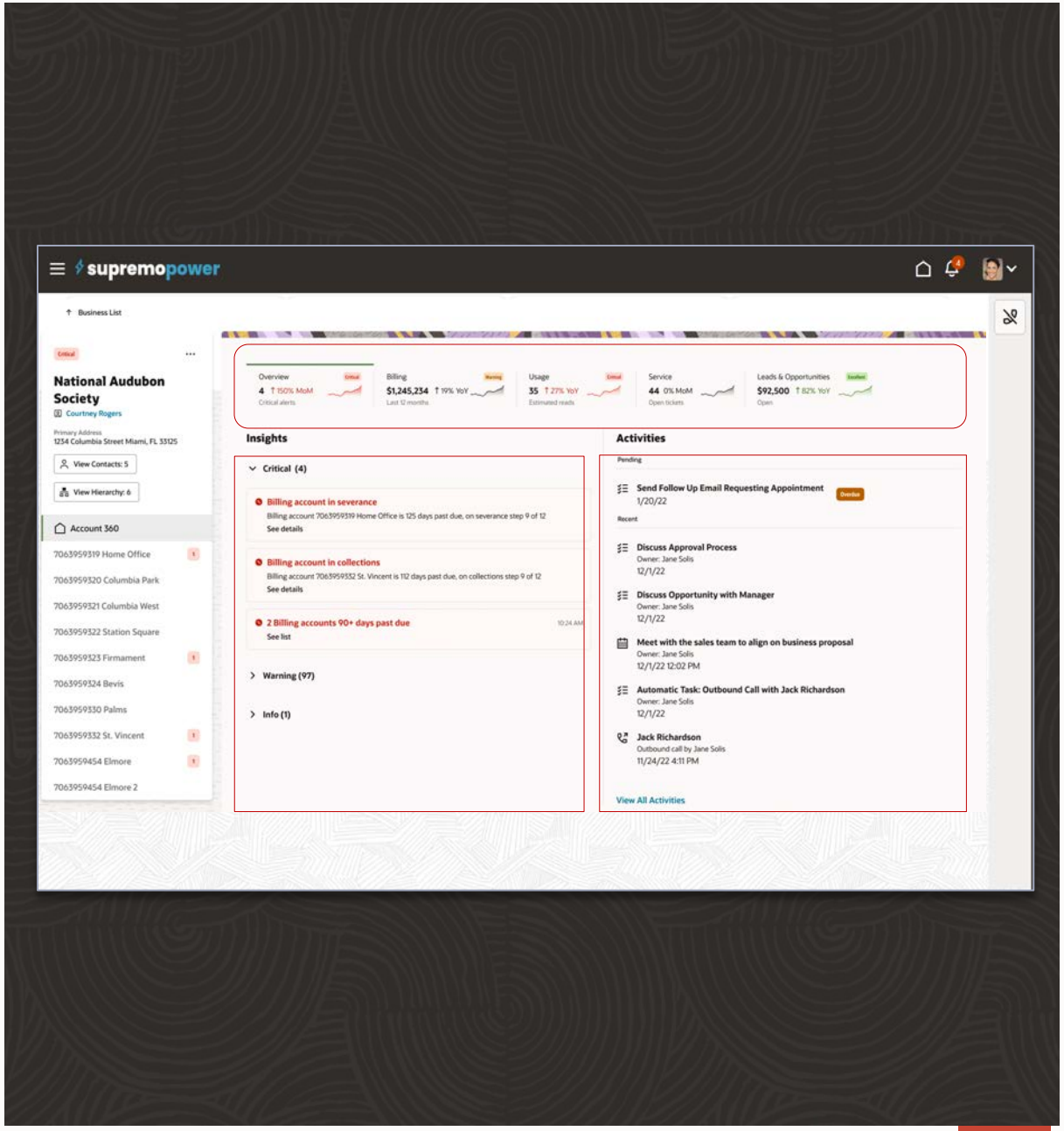
Customer 360

Holistic view of the customer

- Focus on the most critical sales and service events, and customer interactions
- Complete view of the customer across sales, service, and billing
- Actionable, data-driven, insights and recommendations
- Sales and service activity scorecards
- Drill-in to detail screens to view more detail and take action



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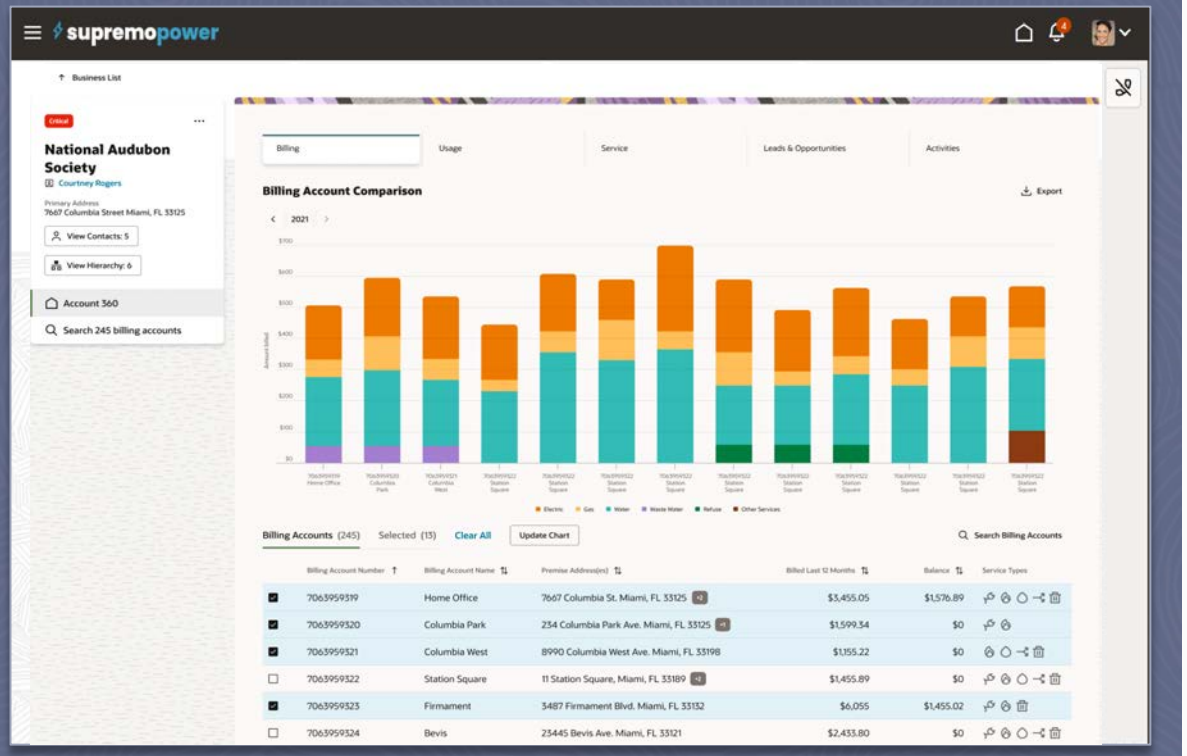
Billing and Usage 360

Complete view of customer's billing and usage history across accounts

- Search across many billing accounts
- Navigate to the billing account's details to view financial and usage history
- Compare billing accounts to each other in charts
- Understand usage across many service locations
- View usage by bill period



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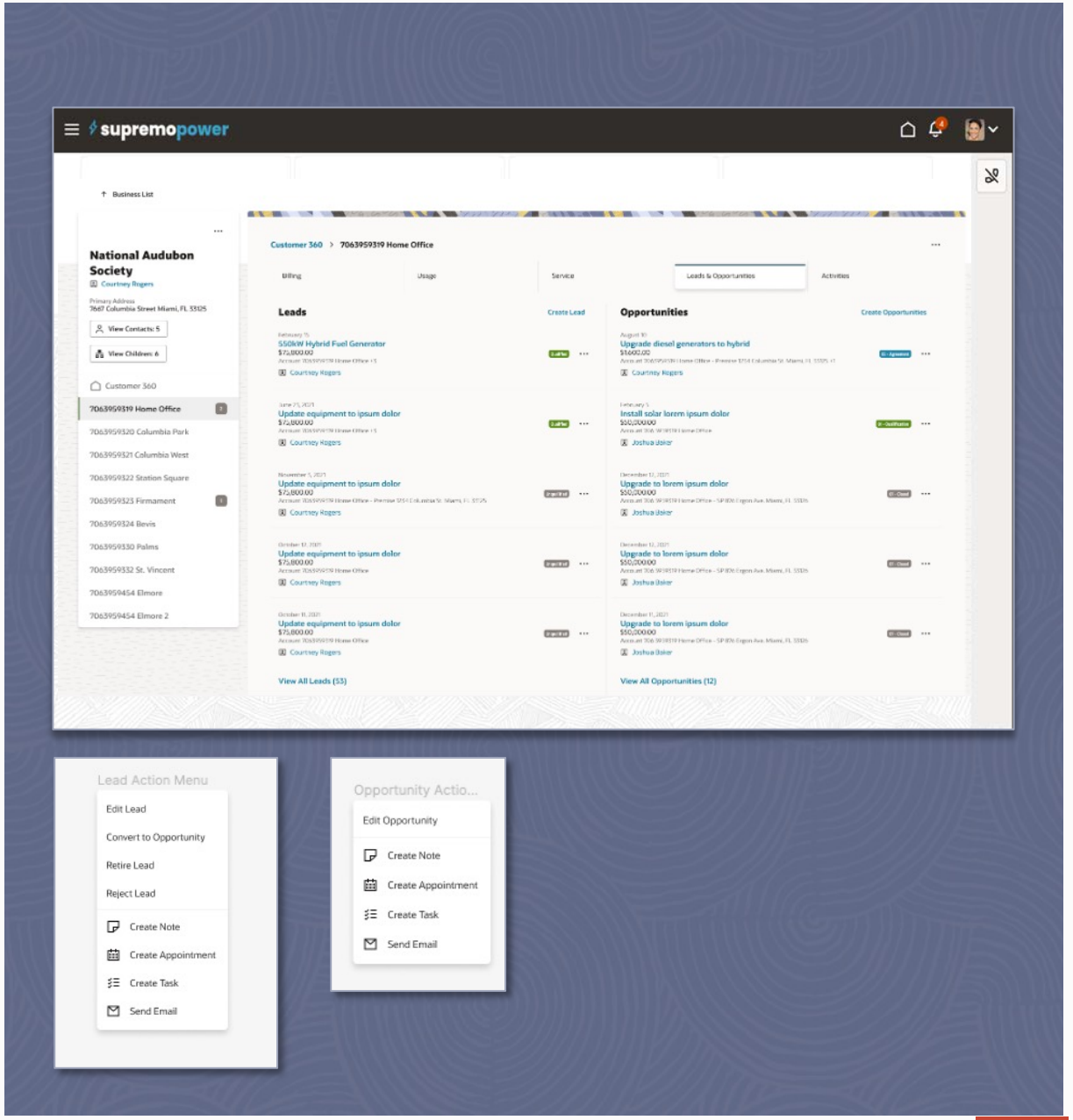
Leads & Opportunities 360

- Complete view of leads and opportunities
- Create new leads and opportunities
- Take quick actions: e.g., qualify lead or create a task for an opportunity
- Drill-in to view and edit a lead or opportunity detail



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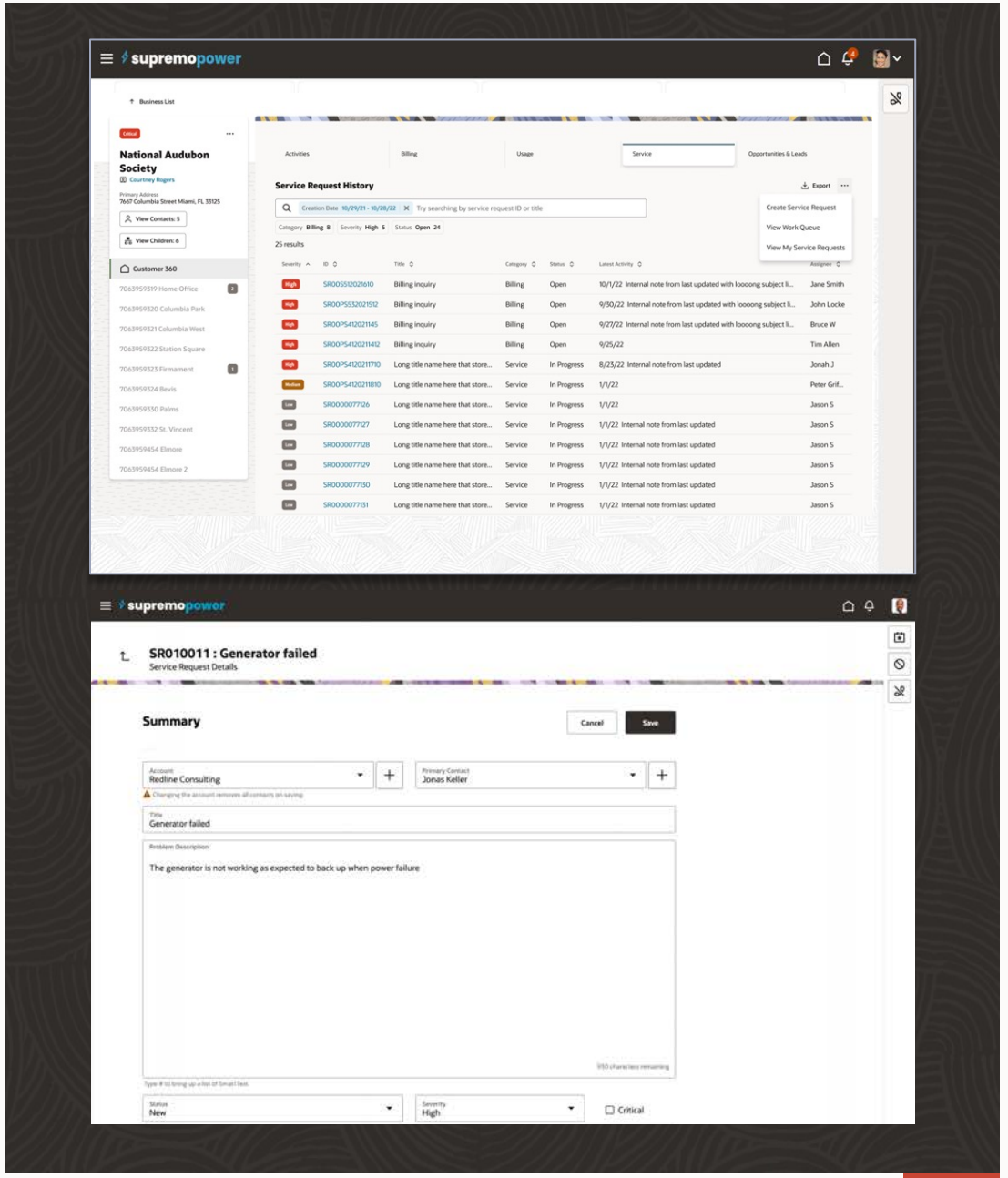
Service Requests 360

- Complete view of service requests across all customer's planning and billing accounts
- Search for service requests
- Associate service requests with billing account(s), premises, and/or service points
- Preview important details
- Drill-in to view and edit a service request



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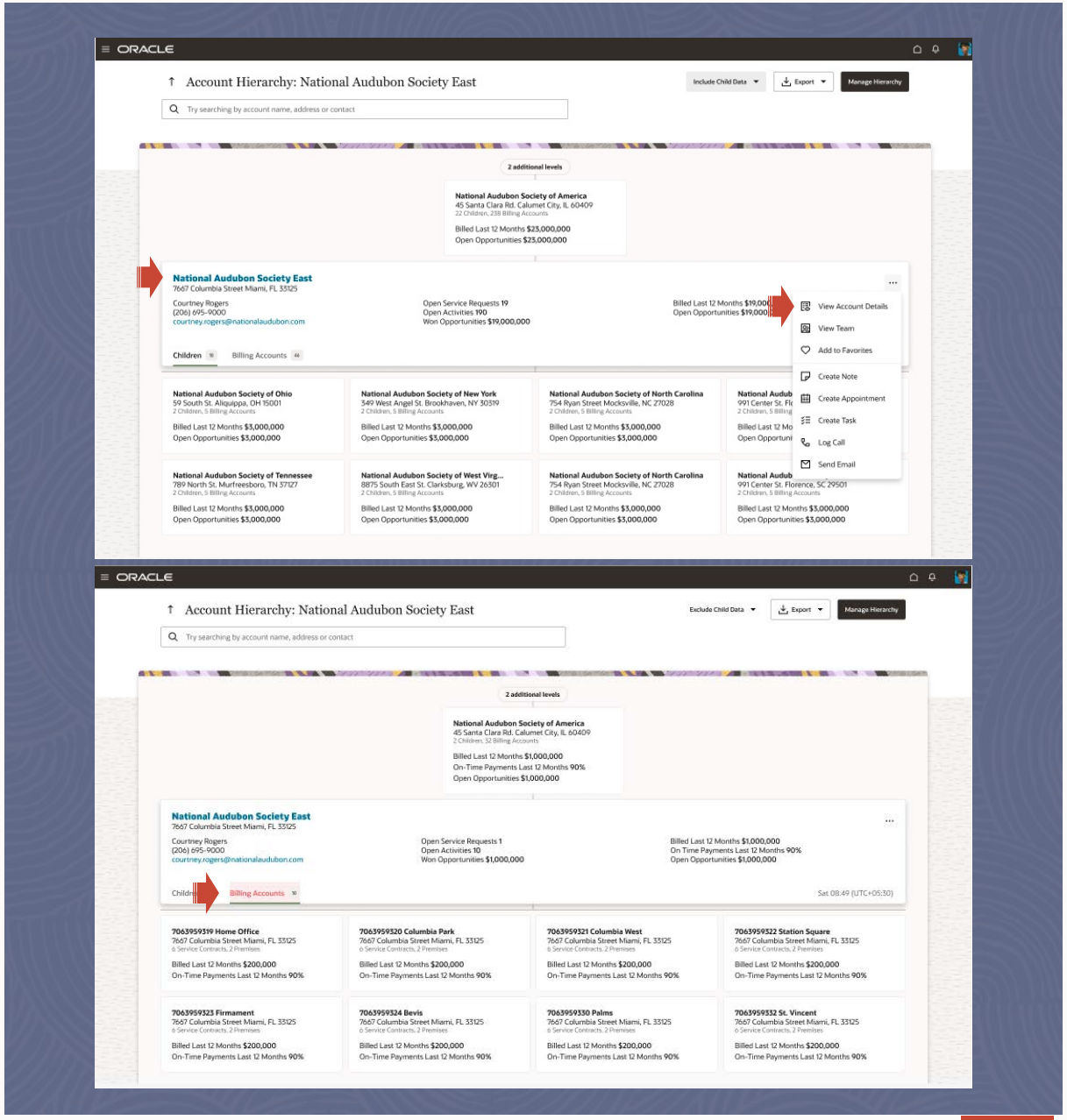
Account Hierarchy

Navigate complex accounts with many billing accounts, service agreements, premises and service points

- Navigate up and across the account hierarchy tree
- Drill-in to Customer 360 details
- Click a customer card to view summaries and rollups
- Take action
- Billing Account details with drill-in to Premise view



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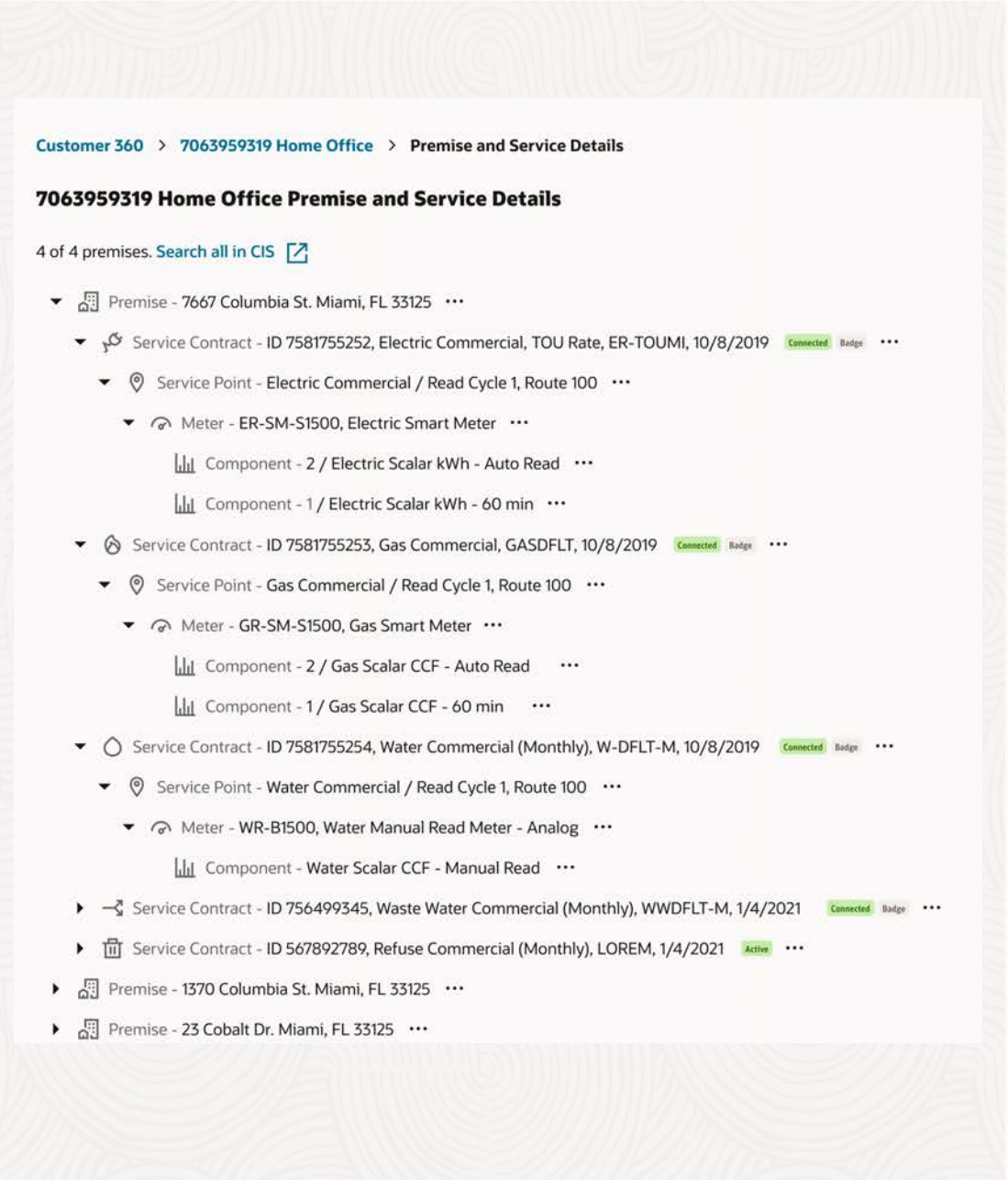
Premise and Service Details

Premise and Service Details summarizes account/asset relationships for KAMs

- Visualize the relationship of premises, contracts, service points for a single billing account
- Navigate to the customer information system
- Premise relationships to other accounts



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5. Forecasting and Quoting

Scale your C&I Business

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“Our detailed energy use forecasts for each construction phase and each phase of the Games helped show technical competence in London 2012’s winning bid. During construction, we used those forecasts to tailor each construction company’s energy contract to make it easier to manage their budgets.”

EDF UK

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Where do IT System and Solution Investment Priorities Lie?

IDC Survey 2022

37%

of NA utilities stated that Configure, Price and Quote solutions would be a priority for investment over the next 2 years

35%

of European utilities stated that Configure, Price and Quote solutions would be a priority for investment over the next 2 years

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Forecast & Quote demo

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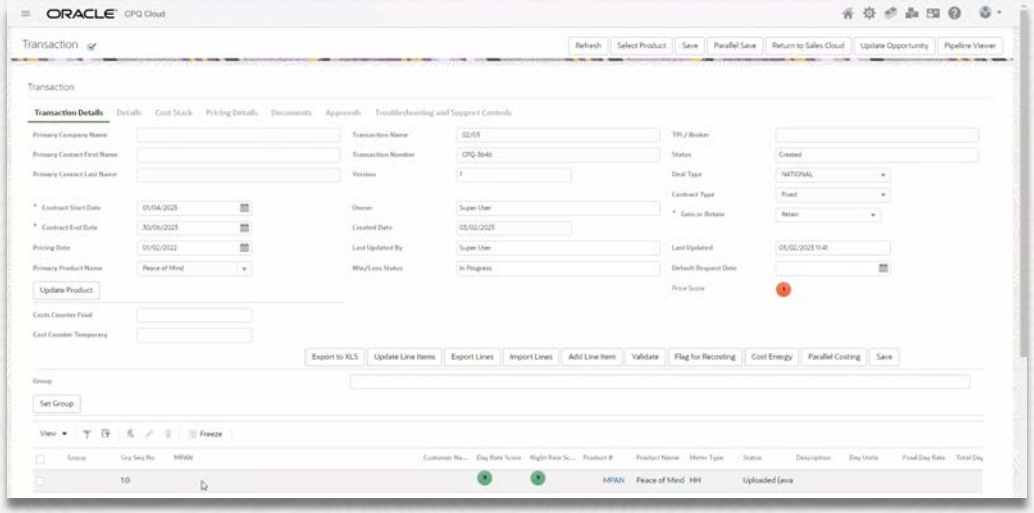
Forecasting & Quoting

Extends CX for Utilities Sales enabling a comprehensive lead to cash process

- Intelligent ML based forecasting
- Complex cost driven energy pricing calculations
- Non-energy product quoting
- Integrates with the CIS and Sales application



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From Lead to Cash

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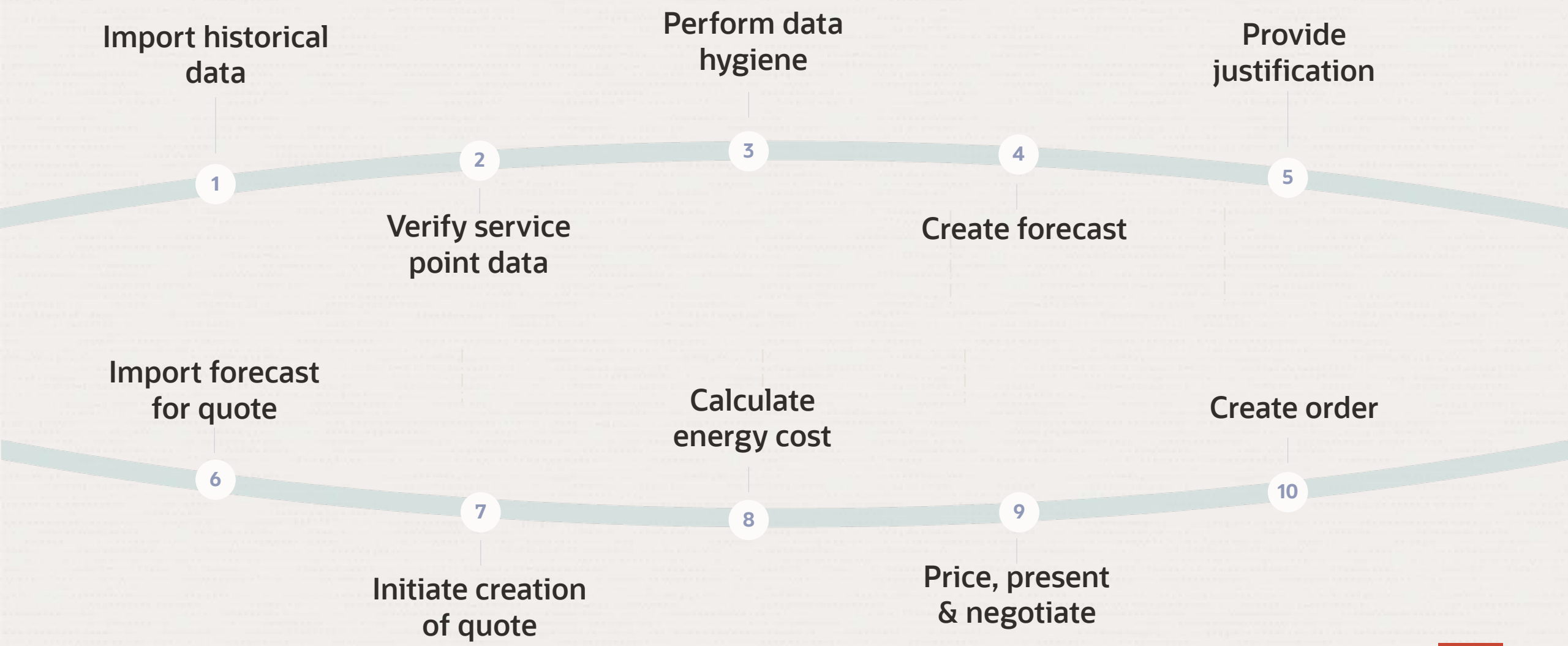
The Forecast & Quoting Journey



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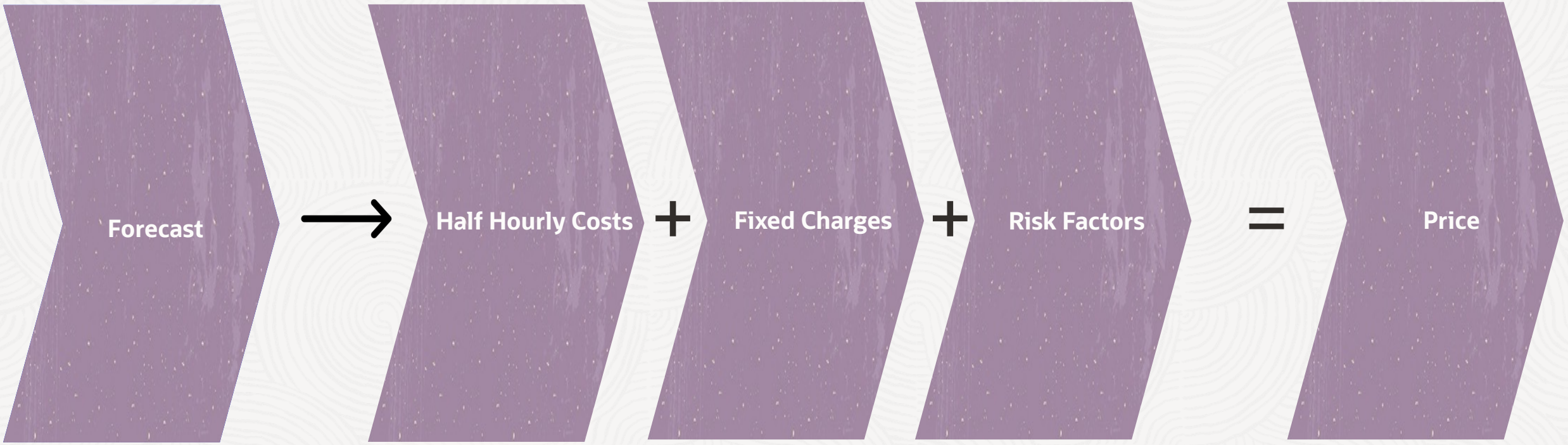
Cost-Centric Energy Pricing



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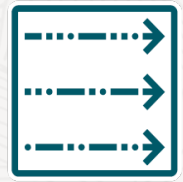
Forecasting – Key Features

- A fully managed service running on the Oracle Cloud Infrastructure
- Uses machine learning and statistical algorithms to deliver highly accurate time-series forecasts
- AutoML builds multiple models and ensembles to create the best fit model to maximize forecast accuracy
- Delivers forecasts with optional Confidence Interval and Explainability to bring transparency and clarity to forecasts

Automatic data preprocessing



Automated best model selection

Explainability & Confidence Intervals

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Quoting – Key Features

Deal Management & Analysis

Workflow Approvals

Pricing Optimization & Quoting

Product & Service Configuration

Guided Selling

Proposal Generator

Channel Enablement

Order Execution

Contract Management

Reporting

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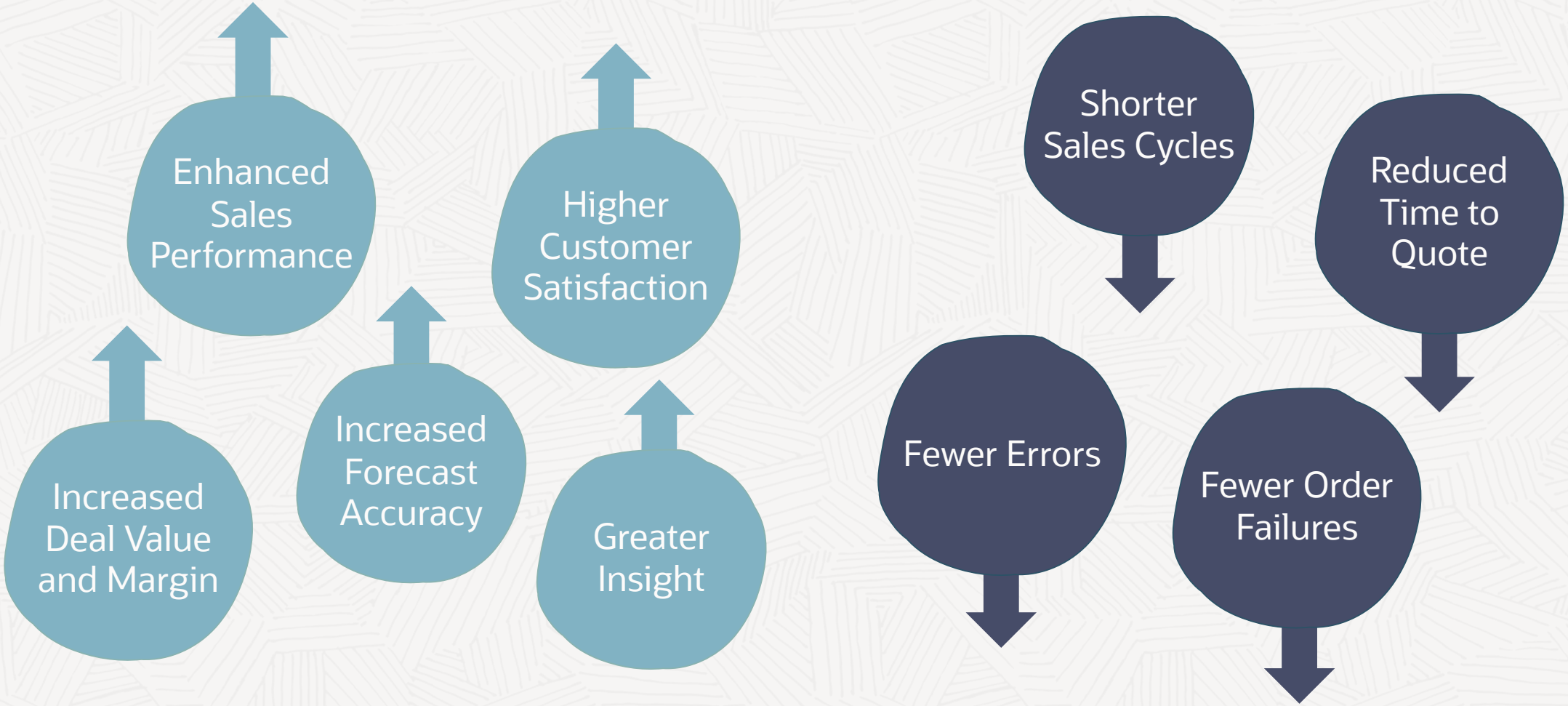
Forecasting & Quoting – Key Benefits



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6. Solution Roadmap

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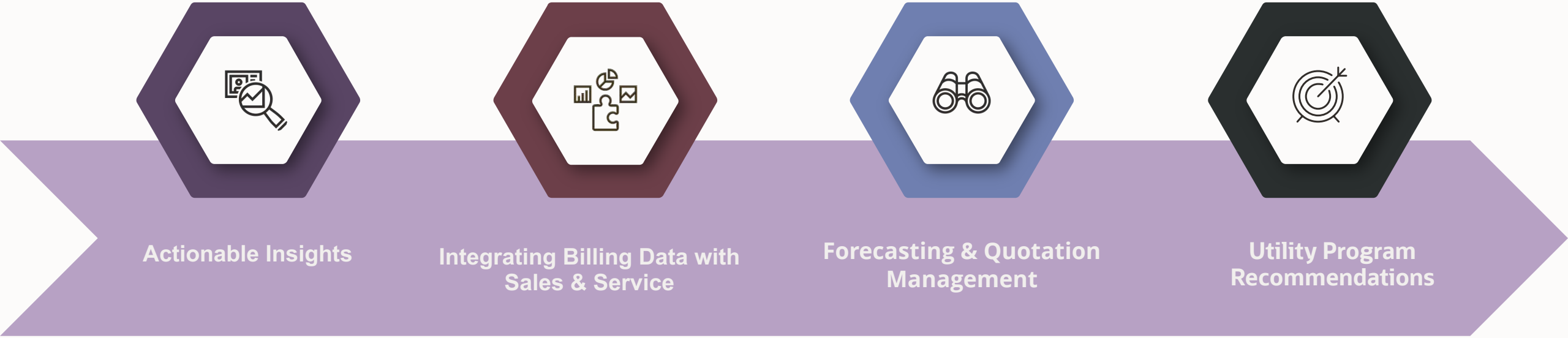
CX for Utilities Blended Sales & Service Roadmap

Focus Areas (Next 9-24 months)



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7. Q&A

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Got Key Account Managers?

We'd love to talk to them.

Please get in touch:

Shirin Lange, User Research Team

Shirin.Lange@oracle.com

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Let's Eat!

Lunch
Harbor Ballroom, Level 2
12:00-1:00

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What's Up Here After Lunch?

Past, Present, and Future of Work Management and To Dos

Learn about research and user feedback on To Do management. The session will contain a demo of recent features and best practices for leveraging the features. We will preview Next Gen Work Management that enables better prioritization and assignment for billing related To Dos and opportunities to use machine learning to improve operational efficiency.

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Bring your BIG IDEAS to the Oracle Ignite Series

Seaport Ballroom, 2:10 – 5:00pm

Customer Edge 2023 Grand Finale:
Oracle Ignite Pitch Competition
Seaport Ballroom 4:10 – 5:00

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Play Edge Quiz Game to help us donate more trees!

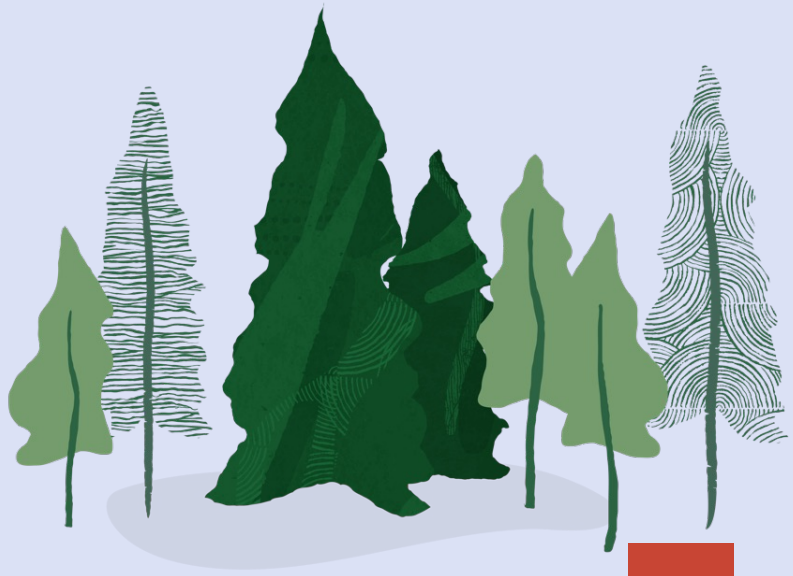
Customer Transformation

Enterprise Optimization & Execution

Grid Modernization

Opower Customer Engagement and Decarb

Technology & Cloud Transformation



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