

ORACLE

Oracle Energy and Water
Customer Edge
Conference

Future of Utility Customer Experiences

James Steadman and Nam Nguyen

Oracle Customer Experience for Utilities

March 2023



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Bring your BIG IDEAS to the Oracle Ignite Series

Seaport Ballroom, Tuesday 14 March 2:10 – 5:00pm

Hear the pitch

Join a team

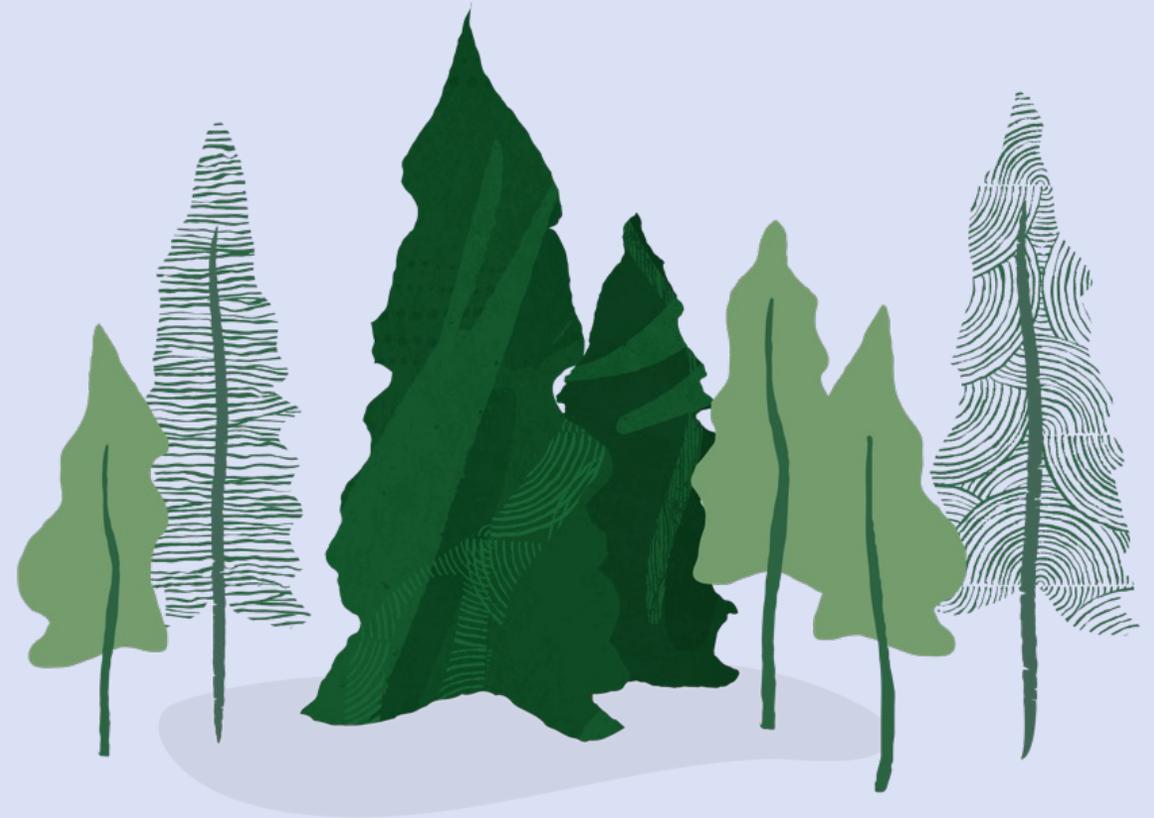
Build a solution

Select the
winner!

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

Customer Transformation Track

Play Edge Quiz Game to help us donate more trees!



Speakers



James Steadman
CX Industry Solutions



Nam Nguyen
E&W Product Management

Safe harbor statement

The following is intended to outline our general product direction. It is intended for information purposes only, and may not be incorporated into any contract. It is not a commitment to deliver any material, code, or functionality, and should not be relied upon in making purchasing decisions. The development, release, timing, and pricing of any features or functionality described for Oracle's products may change and remains at the sole discretion of Oracle Corporation.

Challenges & Opportunities

Customer Prioritised

According to a Frost & Sullivan survey of CX-related executives, more than **40%** of energy companies globally plan to invest heavily in customer support channels in 2023

Digital Transformation

Frost & Sullivan's energy market research shows that utilities in North America and Europe spend more money on digital transformation to enhance customer relationships than grid optimization investments.

Investment Focus

These expenditures will be more than 2x grid-related digital transformation investments by 2030.

Customer are looking for change

73%

Personalisation

of consumers wanted to be offered personalized discounts and offers

57%

Channels

stated their desire for a choice in the way they interact with utilities through a variety of communication channels

52%

Environmental

responded that they believe it was important to have low carbon and renewable energy option but 64% said their energy provider had never mentioned it

44%

Products

were looking for utilities to provide them with goods and services alongside their core, solar panels & home batteries, EV purchase & charging subscriptions

Choice

The evolving disruptor for energy and water





Scale

An aerial photograph of a large industrial facility with a grey metal roof. The roof is densely packed with rows of blue solar panels. Several long, white, rectangular skylight structures are spaced across the roof. The building is surrounded by green trees and a paved road with a few trucks. In the background, other industrial buildings and a city skyline are visible under a clear sky.

Exploit the
opportunity in
Commercial &
Industrial



Delivering For C&I



Diversify

Boost revenue through
new business models

Know your
customer



A new approach to tackle changing CX needs

According to IDC research, utilities are investing in industry-specific CRM solutions and a more integrated business landscape

50%

of utilities have invested or are investing in an **integrated platform supporting CX and back-office processes.**

Loosely connected front and back offices are creating issues for energy suppliers around the world, including **issues with revenue operations, customer service, and escalating IT costs**

60%

of energy utilities seek **industry-specific CX Solutions**

These “industry CX” cloud suites feature standardized preconfigured processes and support for complex workflows out of the box, **combining energy CX, engagement, and multiservice orchestration**



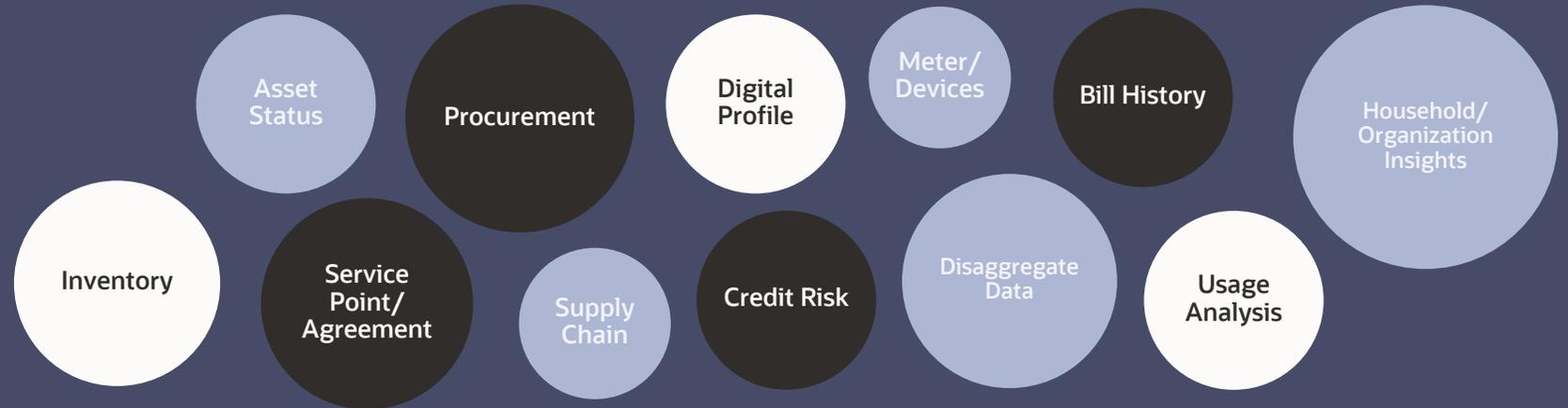
Customer Experience for Utilities

End-2-end solution across traditional siloes with industry data models, flows and certifications baked in

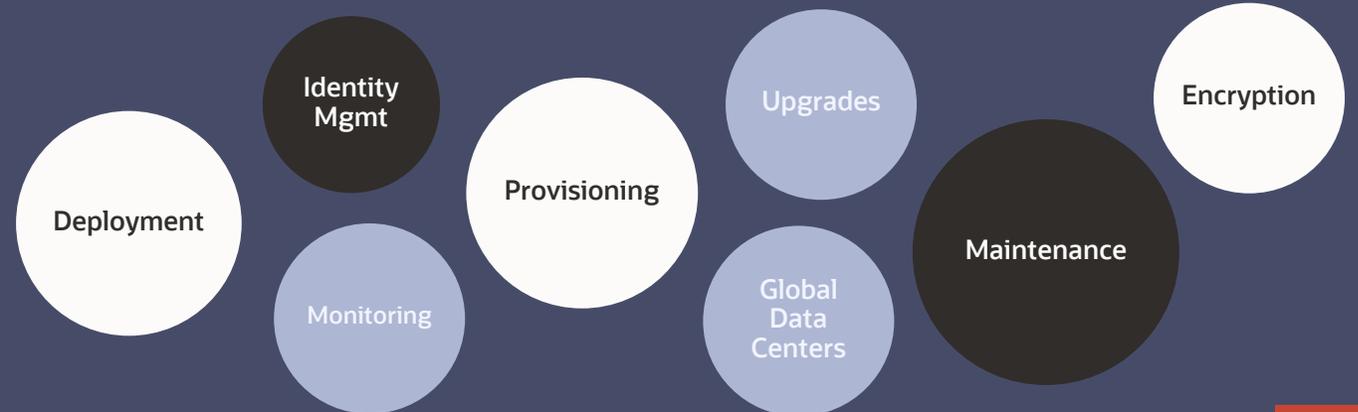
Exceptional experiences Happen Here



When Enterprise Data & Processes Come Together



And When Infrastructure Supports



CX for Utilities design principles

Flexible integration strategy supports hybrid data systems that seamlessly interoperate across Fusion and Industry solutions



Tailored for Utilities

Utility specific experiences, processes and data model



Experiences

Data Driven, extensible, omni-channel, Redwood UX



Data

Insights and analytics, common data model, adaptive data mastering



Co-existence and Evolution

API first approach, process integration



Cloud

Security, agility and predictability



We're reimaging the utility customer platform

Connected Experiences & Experience Orchestration

Product Launch

Campaigns & Engagement

Commerce

Account Management

Self Service

Agent Service

Field Service

Operational Configuration

Marketing

Sales

Service

Meter to Cash

Billing

Credit & Collections

Rating

Metering

Payments

Service Orders

Data 360

Data Intelligence & Analytics
Product Data – Customer Data – Utilities Data Model

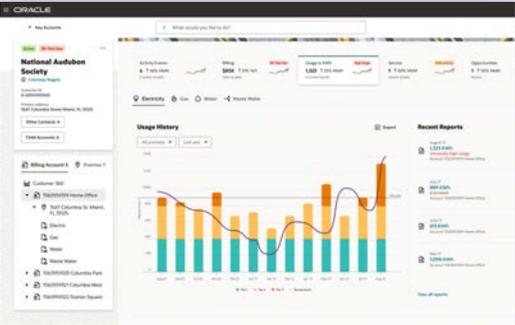
CX Industry Framework

Adaptive Data Mastering – API Orchestration

Oracle Cloud Infrastructure

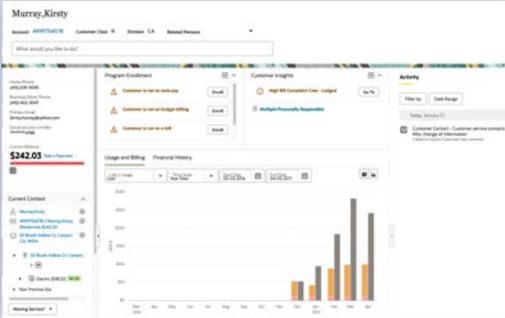


Purpose-built customer solutions for Utilities



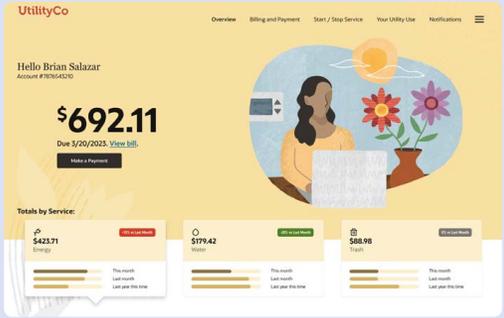
Sales & Account Management

Increase KAM productivity and program interest and revenue



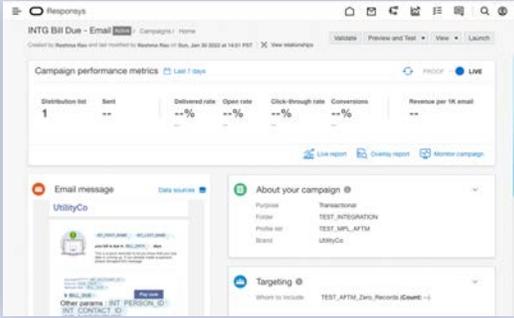
Agent Service

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



Sales

Driving revenue growth



Complete sales
& commerce
lifecycle



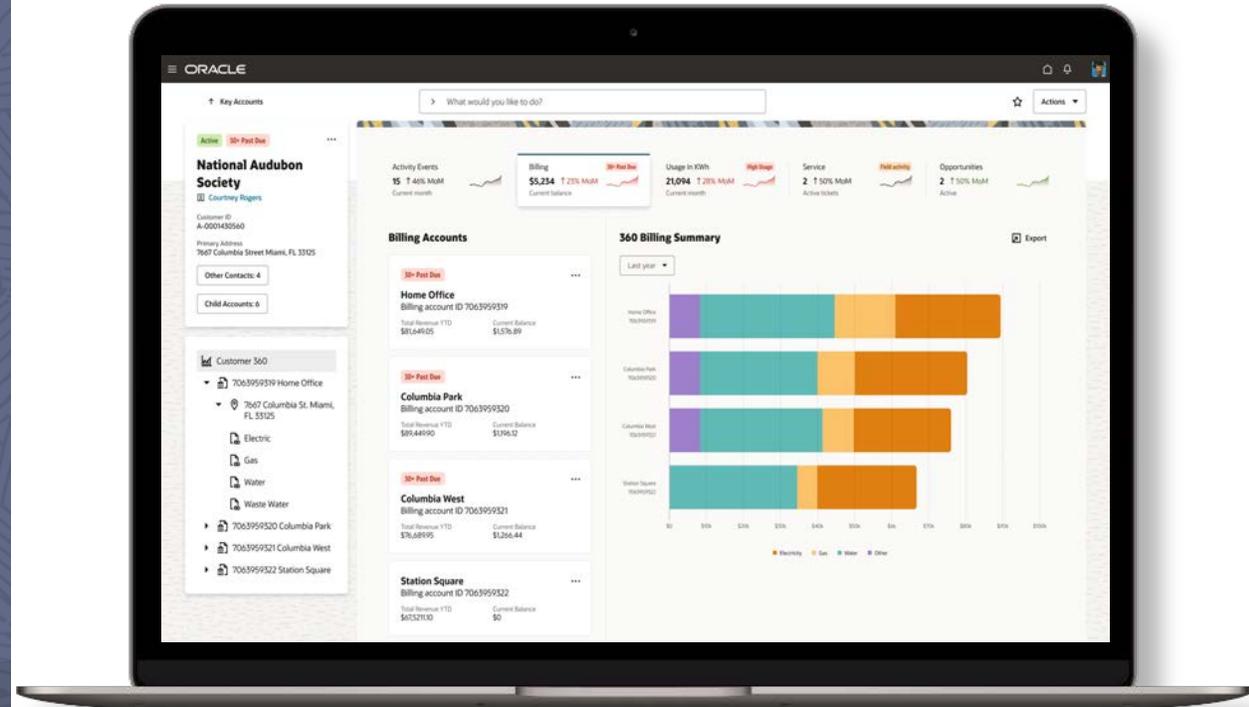
Complex C&I
account
management



Intelligent
buying
experience



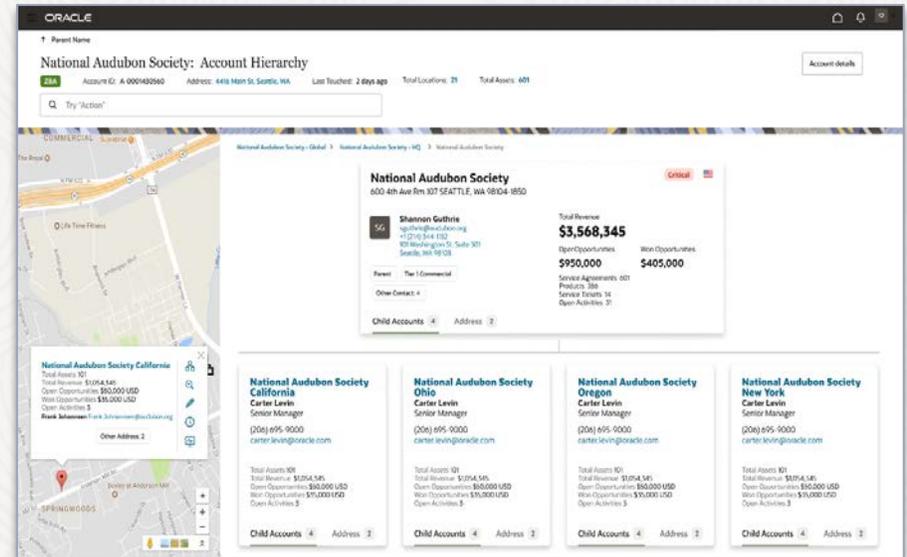
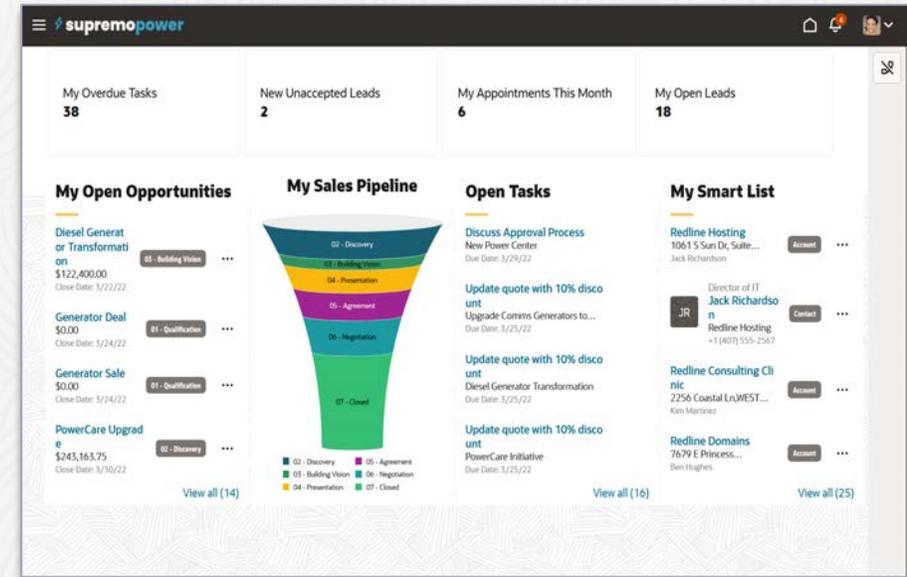
Integrated
sales and
service



CX for Utilities Sales

Designed to help Key Account Manager to increase customer satisfaction and revenue

- 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
- **Intelligent insights**, alerts, and recommendations to stay focused on the most critical tasks
- Generate leads based on targeted marketing campaigns and leverage AI/ML 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



Service

Customer Centric optimization



Customer 360
View



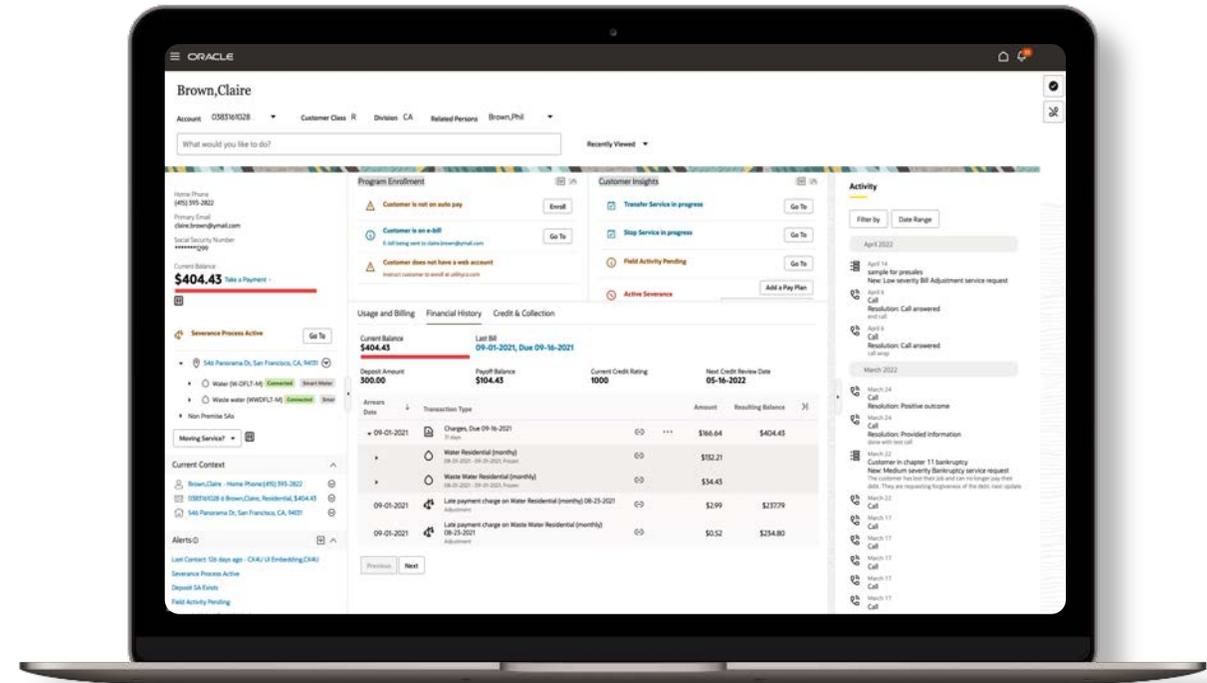
Insights and
workflows

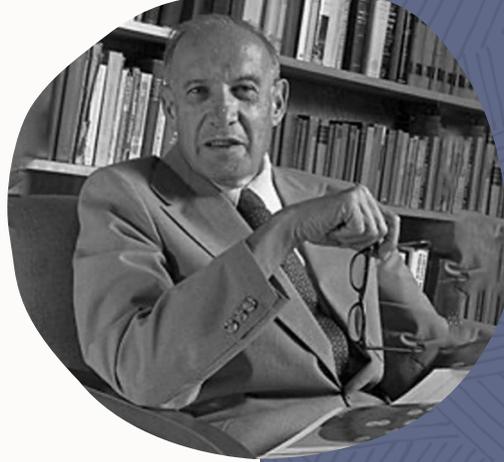


Contextual
Knowledge



Front to
Back
Integration





Today's service

It is **reactive**

It is **static** and one-size-fits-all

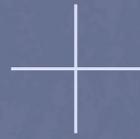
It is designed as **bill centric**

“If you want something new, you
have to stop
doing something old”

Peter Drucker

A new way to serve your customers

A Purpose-Built
User Experience



Automated
Core Process Support

Modern Agent Experience

Unified account, billing and
customer interaction history

Knowledge Management

Omnichannel communication
incl. chat, co-browse, mobile
& messaging

Guided interactions and
process flows

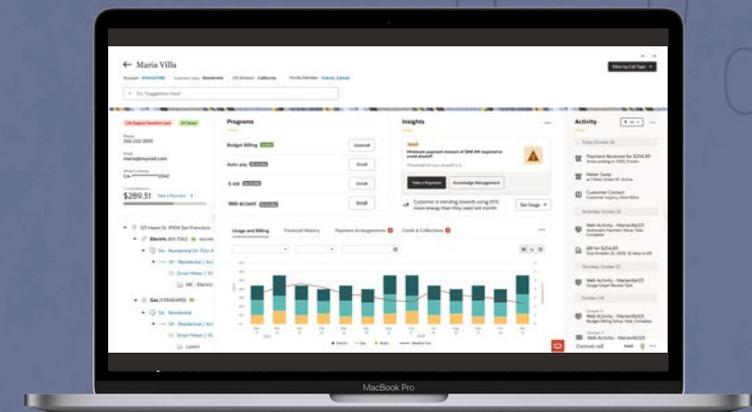
Seamless front to back-office integration

Data consistency

Reliability

Lower costs

Powered by Oracle CIS (CCB, C2M, CCS)



Digital First

Make customer interactions easy and delightful



Thoughtful customer and agent journeys



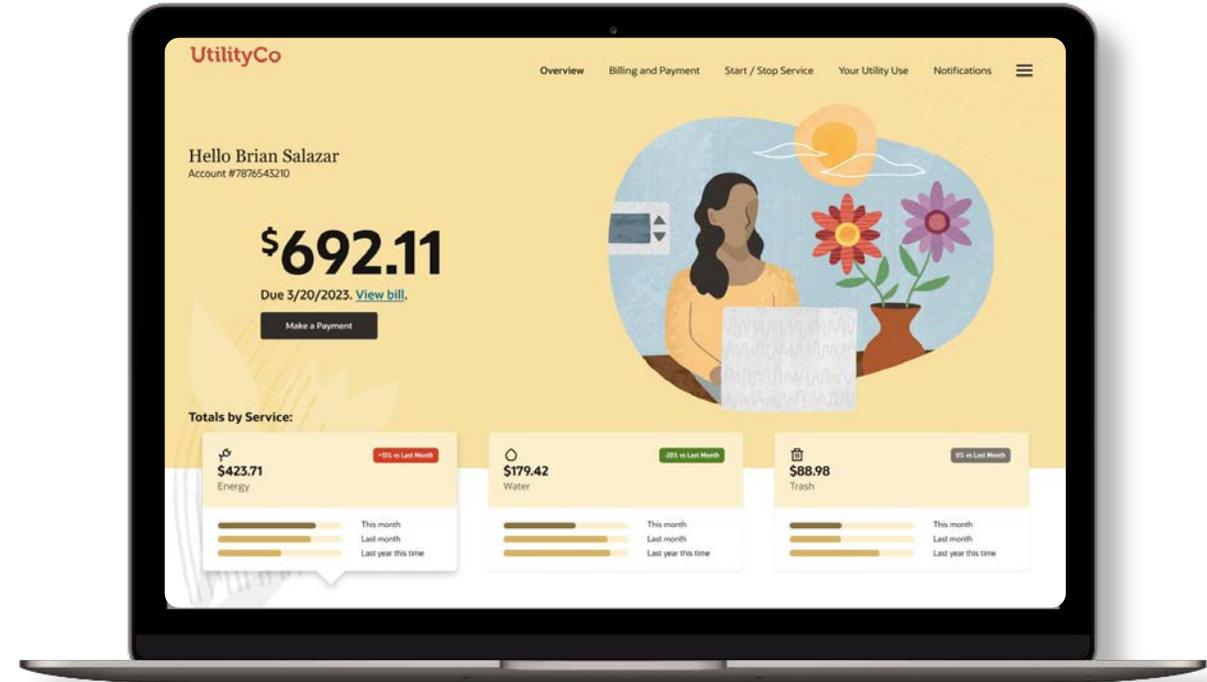
Flexible and extensible



Personalized Insights and knowledge



Business process automation



39%

of customers would rather use self-service options than have to speak to a company using any other channel.

- Freshworks

38%

of customers expect agents to know who they are and the context of their query immediately.

- Gartner

78%

of leaders in the US are investing more in self-service, allowing customers to help themselves with self-help portals and AI-powered chatbots

- Freshworks



Meet Brian

Customer of UtilityCo

Brian is a home owner who has been with UtilityCo for a long time. He is a keen **technologist** and likes to research solutions personally and where possible use **digital channels**. Brian recently relocated to a new home a few months back, which is similar in size and location to his previous residence. However, he has noticed a **significant spike in his utility bill payments** compared to what he used to pay during the same season at his previous home. He is eager to uncover the reason behind this increase.

"I'm interested in green, environmentally friendly initiatives and ways to cut my usage and costs."

Brian's Journey

UtilityCo generates a personalized **home energy report** which is emailed to Brian



1

He is curious to understand more about **why his usage is higher** and clicks on a link which directs him to log into the UtilityCo portal

He is shown a landing page displaying his usage breakdown and **personalized insights**

3



Brian's Journey



Brian sees that his water heating is high and clicks on the **call to action** button to learn more

He reviews a knowledge article with **tips** on how he can **reduce his usage**



He also notices a **call to action** which displays a utility program offering a **loan or rebate** on an equipment upgrade and clicks to get started



Brian's Journey

A chat window opens up and begins walking Brian through a series of interview questions to **determine his eligibility**



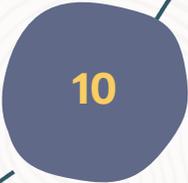
He is informed that he is eligible for a **residential energy efficient initiative** with information on how the program works

Brian is asked about his interest and presented with the opportunity to **take the first step** as required of the program



Brian's Journey

Upon responding with a “yes” he is presented with dates and **available appointment slots**



Brian selects the slot which works **best for his schedule**



Receives a **confirmation email** with his appointment details



Brian, here's your Home Energy Report Inbox x



UtilityCo <oracleuti001@ojo1qsy.oraclersys.com>
to me ▾

6:36 AM (6 hours ago) ☆ ↶ ⋮

UtilityCo

Account #*****9984



How you compare to others

Feb 18 - Mar 17, 2023

Efficient homes



“UtilityCo made it really easy for me to save money and I didn’t even need to pick up the phone.”



Brian

Digitally engaged believer



Meet Sabela

Customer at UtilityCo

Sabela is **comfortable using digital channels** but **prefers live agents** when it comes to financial matters. Sabela is a user that historically has been able to pay her bills easily. Different changes in the economy has brought challenges to Sabela and she **has not been able to pay** her bill in a number of months **despite her best efforts**. Sabela wants to explore what options are available to help her pay her bills.

"I want to understand how I can best manage my payments so that I don't fall too far behind."



Meet Tony

Customer Service Representative, UtilityCo

—
Tony is a CSR in in UtilityCo's call center. He is **passionate about providing excellent customer service**

"I want to address the needs of my customers as efficiently as possible. It helps me if I have all the relevant information about the customer and insights into why they are contacting us"

Sabela & Tony's Journey

Sabela receives her monthly
bill due notification



2

She is curious to understand
more about her payment
options and clicks on a link
which directs her to log into the
UtilityCo portal

She is shown a landing
page with her account
details and different billing
options

3

Sabela & Tony's Journey



Sabela notices a **program for payment arrangements** and navigates to the page to learn more

Upon review of program details she decides to **enroll**



She notices a call to action to learn about additional ways she can **lower her bill** and clicks on the button

6

Sabela & Tony's Journey

A chat window opens up and begins walking Sabela through a series of **interview questions to determine her eligibility** for assistance programs



Sabela is advised that she qualifies for an **Energy Reduction Assistance Program** and provides a knowledge article for her to review



Sabela indicates that she has additional questions and is **transferred to a live agent** for further assistance

Tony reviews all the information that Sabela has already entered and engages her with **full context of who she is and her inquiry**



Sabela & Tony's Journey

Tony reads a knowledge article, explains the key points of the program, and **answers her questions**



Tony completes the steps needed to **schedule a home energy audit**



An **appointment slot is confirmed** in the backend systems

Sabela receives a **confirmation email** with her appointment details



Sabela, your bill is due on March 20th Inbox x



UtilityCo <no-reply@utilityco.com>
to me ▾

4:14 PM (0 minutes ago) ☆ ↶ ⋮

UtilityCo Account #*****3456

Sabela, your bill is due on March 20

This is a quick reminder to let you know your due date is coming up. If you already made a payment, please disregard this message.

Account #: *****3456

Due on: 03-20-2023

Amount due: \$242.85

[Make a Payment Now](#)





“Tony made things easy for me and quickly answered my questions.”



Sabela

Appreciative customer



“I’m really glad I had all the information I needed to help Sabela.”



Tony
Relieved Agent



Meet Tess

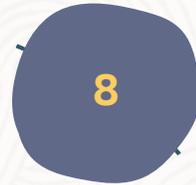
Business Analyst/Product Manager at UtilityCo

Tess is a Business Analyst/Product Manager at UtilityCo. One of her key functions is to **design the business processes** that are used within the customer service teams.

*"I want to provide UtilityCo's customers with **engaging ways to interact with us** so we can build trusted energy advisor relationships. Aligned with this I have targets to help UtilityCo **lower operating costs** and provide **efficient solutions**."*

Tess's Journey

A **new program** has become available which expands the income levels that can qualify for assistance



She uses a business process tool to **expand the eligibility criteria** and provides new interview questions to qualify these customers

Quickly tests her newly configured interview before deploying





Payment arrangement

Payment arrangement spreads out an unpaid balance over future bills, so you can pay it off in manageable amounts.

How it works

Your previously unpaid balance is divided into smaller amounts, and then added to new bills in equal installments.

What you'll get

Smaller amounts to pay off at a time.

Frequently asked questions

- ▶ How does Payment arrangement affect my bill?
- ▶ Who is eligible for Payment arrangement?

Plan details

Remaining balance	\$446.57
Start date	2023-03-08
Initial amount	\$446.57
Monthly amount	\$148.86
Remaining payments	3

✔ Enrolled

Interested in upgrading equipment or appliances?

You may be eligible for loans or rebates. Answer a few questions to confirm your eligibility in less than a minute. No credit check required.

[Learn More](#)

Ask me
CONNECTED

Hi Sabela , I see you may need some help on your bill. If you can answer a few questions we can direct you to programs or services that can help reduce your bill. We will ask you a few questions about your home, your appliances, and some household information to determine your eligibility for some of our assistance programs.

Wed Mar 8, 8:51 PM

[Type a message]



“I’m glad I have the tools to quickly respond to our ever changing customer needs.”



Tess

Satisfied employee

Capabilities Recap

- Outbound engagement
- Personalized insights
- Automated end-to-end transactions
- Self-help knowledge
- AI chatbot
- Guided workflows and interviews
- Agent handoffs

Hello Sabela Mason
Account #7874323456

\$242.85

Due 3/20/2023. [View bill.](#)

Make a Payment



Totals by Service:



Your highest energy use this period:

Laundry
21% of your total energy use

Your clothes washer and dryer account for a significant portion of energy consumption for major appliances. Make the most of your energy use. There are several easy ways to save energy and money in the laundry room.

Tips to Save on Laundry

Positive experiences for customers and employees



Brian

Digitally engaged believer



Sabela

Appreciative customer



Tony

Relieved agent



Tess

Satisfied employee



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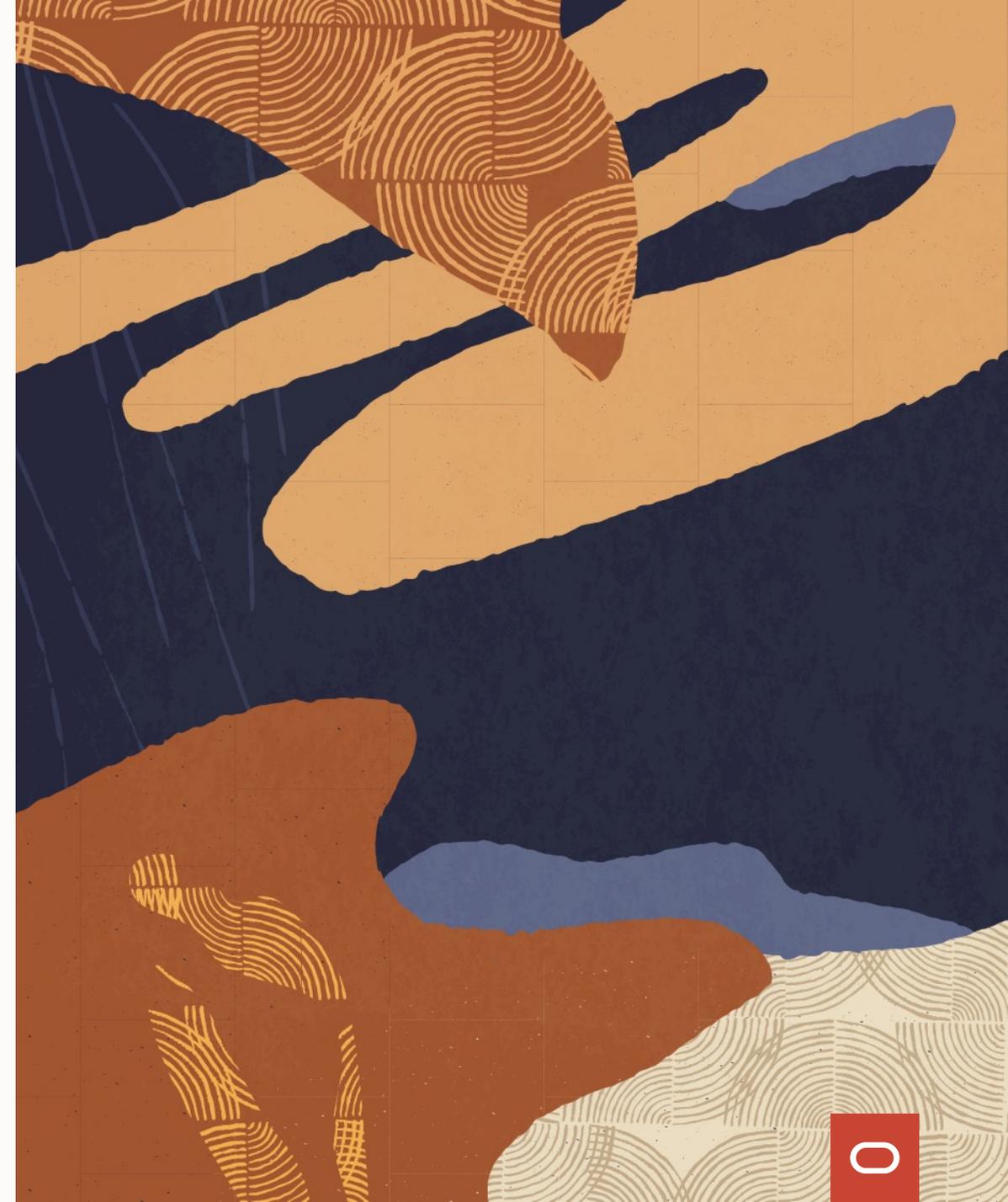
CX Industry Framework

Adaptive Data Mastering – API Orchestration

Oracle Cloud Infrastructure



Thank you



What's Next in Here?

Transitioning to the Cloud One Size Does Not Fit All

Cloud computing has become a fact of life for information technology leaders in utilities. From tech-savvy municipalities to large investor-owned organizations, IT is leading conversations about why, how, and when to transition business-critical applications to the cloud. Red Clay will be having a panel discussion with customers, so please join us!

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

