ORACLE

Customer Experience Trends in Utilities

A field service industry report

Executive overview

Consumers have already completed their digital transformation. They bank online, track their pizza delivery on their mobile phones, and can see what a new couch would look like in their apartment before they buy it with an augmented reality app. Their demands for immediate, digital and personalized customer experiences aren't confined to retail or B2C experiences.

Utilities organizations are facing increasing pressure to become customer-centric companies across all touch points. Field service and sales departments are on the front lines of these customer interactions, but not all are empowered to deliver the digital and personalized experiences that their customers expect.

Between October 2019 and January 2020, Gatepoint Research surveyed 99 contact center, operations, sales, and field service executives about the challenges they face when delivering exceptional customer experiences (CX).

The following report reveals that while these companies are looking to improve their CX, they face numerous challenges–from accessing or using customer data effectively to leveraging emerging technologies like bots and IoT.

Results *at a* Glance

13%
of respondents can't measure cross-channel CX consistency

35%
are unable to predict customer behavior

43%
believe that problems with capturing and reporting customer feedback affect their CX

36%
state they're not able to strategically use data in real-time to improve CX

35%
of respondents say increased automation, from operations to self-service is the biggest opportunity to improve CX

1/2
of respondents believe continuous customer lifecycle engagement would help them attain their objectives

#1
Empowering customers with self-service options is the #1 near-term CX objective

# Results: Technical environments

Describe your technical environment for sales and service.

40% of respondents engage separate vendors with integrated systems, while 32% have separate vendors with no integration. The rest (28%) use a single vendor with a common platform for all systems.

Separate vendors
with no integration — **32%**

28% — One vendor with a common
platform for all systems

Separate vendors with
integrated systems — **40%**
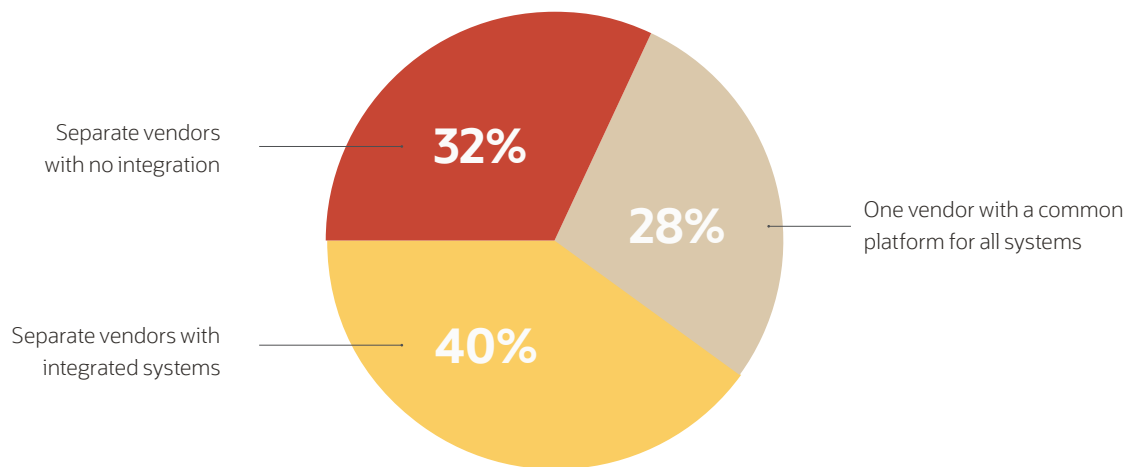
**Are your technical environments automated or manual?**

Just 21% of respondents have a fully automated technical environment. Fewer (10%) have a fully manual system. Most of those surveyed (69%) employ a combined automated and manual environment, using one or the other, depending on the needs of the area.

21% — Automated

10% — Manual

Both automated and manual
depending on the area — **69%**
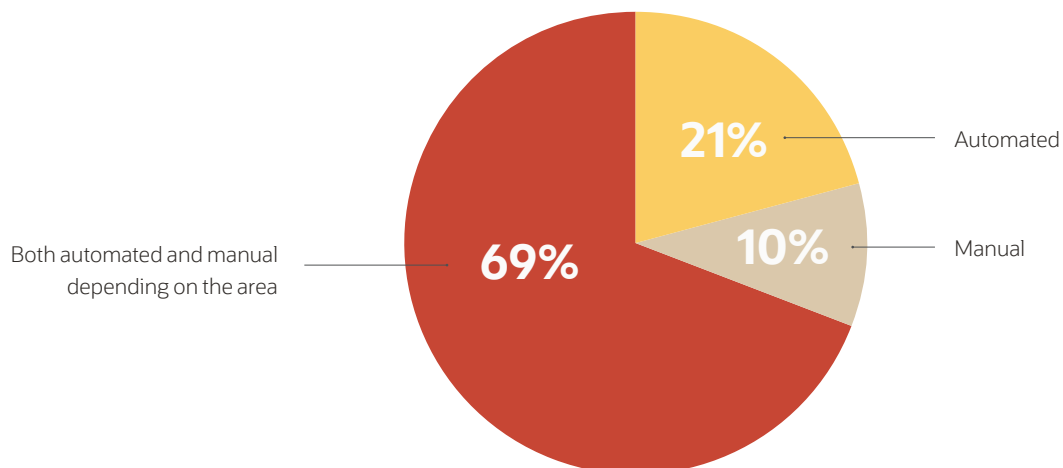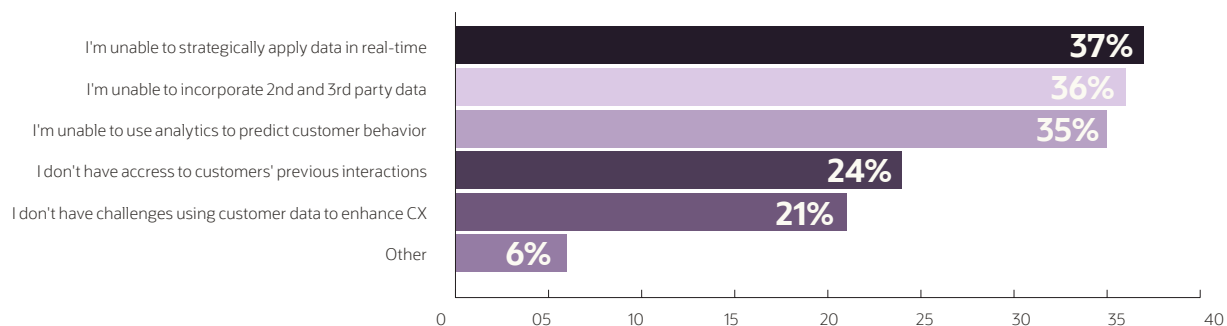
Results: CX challenges

How consistent is the CX you deliver across channels?

Only 13% of those surveyed can brag that they're delivering a very consistent customer experience across channels. While 42% say CX leans toward consistency, 31% say their customers are not experiencing consistency across channels. Perhaps most surprising is the number of respondents who don't know or can't measure cross-channel CX consistency—13%!

Chart: How consistent is the CX you deliver across channels?

Category	Value
Not at all consistent	0%
	4%
	27%
	42%
Very consistent	13%
Don't know	13%
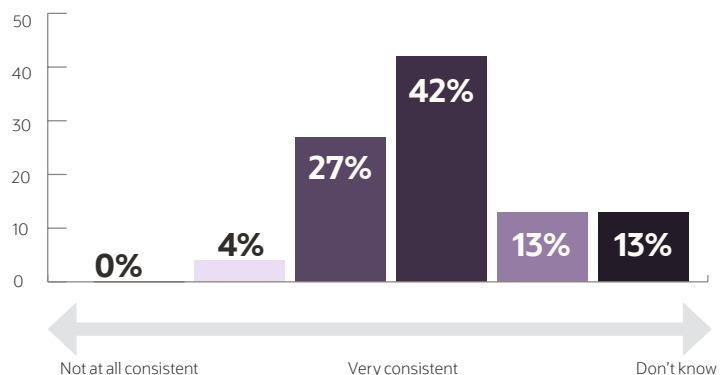
What challenges do you have using customer data to enhance CX?

Three issues are nearly equally troubling for respondents, barring them from using customer data to enhance the customer experience: By a slight 1% edge, the number one problem is not being able to strategically use data in real-time. 36% can't incorporate 2nd and 3rd party data, and nearly as many are unable to predict customer behavior (35%). Significantly fewer respondents (24%) can't access all previous interactions.

Challenge	Percentage
I'm unable to strategically apply data in real-time	37%
I'm unable to incorporate 2nd and 3rd party data	36%
I'm unable to use analytics to predict customer behavior	35%
I don't have access to customers' previous interactions	24%
I don't have challenges using customer data to enhance CX	21%
Other	6%

How do your challenges in trying to use customer data affect CX in your business?

Problems with capturing and reporting customer feedback affect CX for 43% of respondents. Slightly more than a third are unable to deliver proactive customer service, while 23% say they have trouble keeping up with consumer preferences. A small, but significant 16% say field employees are unable to upsell or renew contracts on-site.

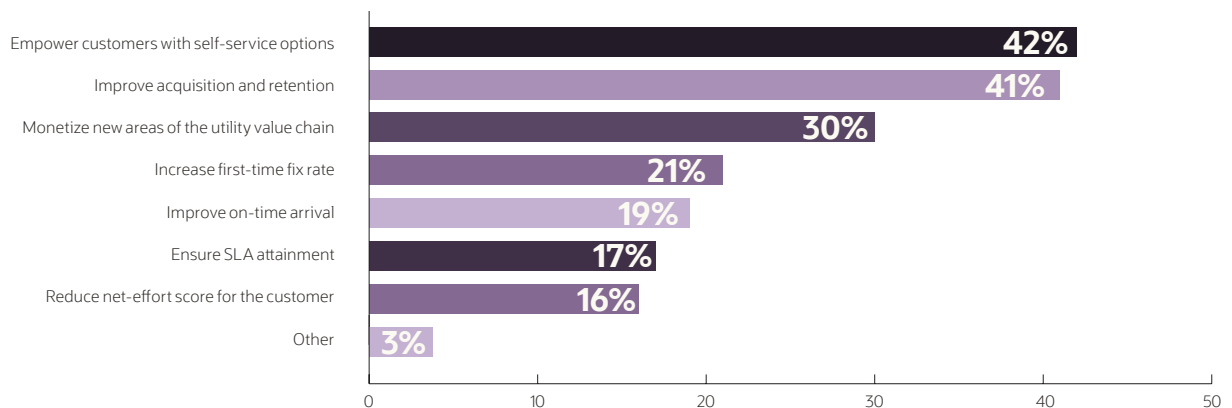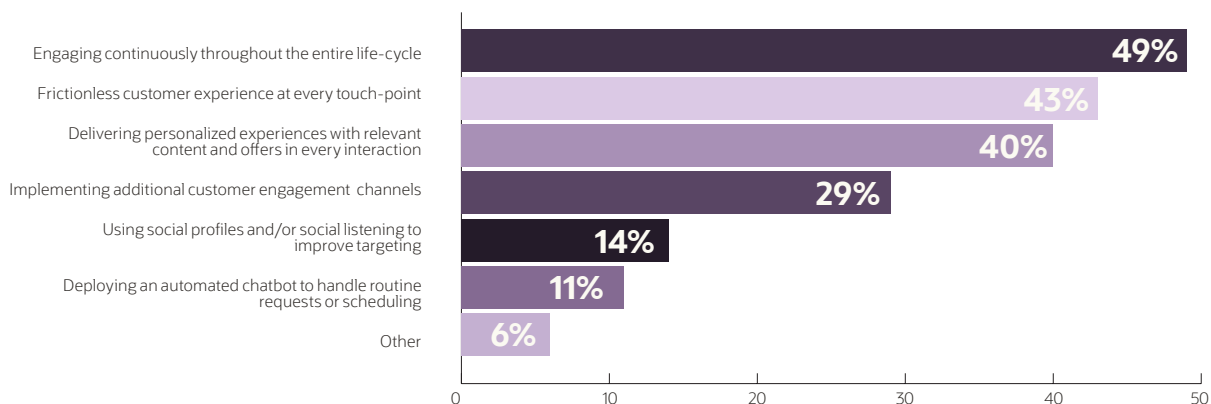| 43%	34%	23%	16%	21%
Difficulty capturing and reporting customer feedback	Inability to deliver proactive customer service	Inability to keep up with changing customer preferences	Impossible for field employees to offer additional products/services or renew contracts on-site	N/A, I don't have challenges using customer data

Results: CX objectives

What are your CX objectives in the next 12 to 18 months?

Across a variety of CX objectives, more than 40% of respondents say the top two are empowering customers with self-service options and acquiring and retaining customers. 30% have a goal of monetizing new areas of the utility value chain.

Objective	%
Empower customers with self-service options	42%
Improve acquisition and retention	41%
Monetize new areas of the utility value chain	30%
Increase first-time fix rate	21%
Improve on-time arrival	19%
Ensure SLA attainment	17%
Reduce net-effort score for the customer	16%
Other	3%

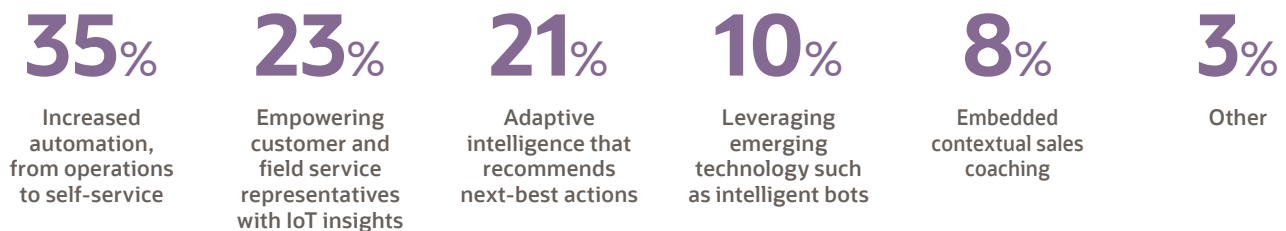**What would help you meet your CX objectives?**

Nearly half of respondents say continuous lifecycle engagement of customers would help them attain their CX objectives. Removing touchpoint friction (43%) and personalizing every interaction with relevant content and offers (40%) round out the top three objective-supporting actions respondents say they need to employ.

Action	%
Engaging continuously throughout the entire life-cycle	49%
Frictionless customer experience at every touch-point	43%
Delivering personalized experiences with relevant content and offers in every interaction	40%
Implementing additional customer engagement channels	29%
Using social profiles and/or social listening to improve targeting	14%
Deploying an automated chatbot to handle routine requests or scheduling	11%
Other	6%

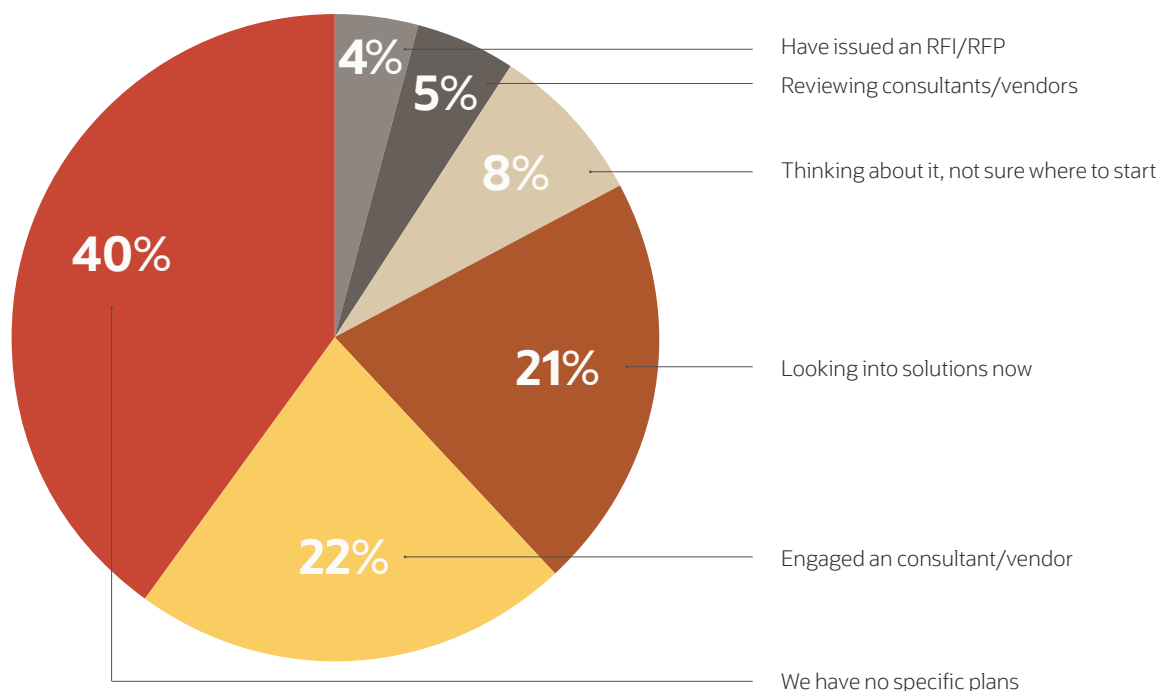# Results: Opportunities & areas of investment

What is the top opportunity for improving CX in your organization?

Asked to cite one standout opportunity for improving CX, respondents voice a variety of ideas, but increased automation, from operations to self-service is most cited (35%). Other opportunities include using IoT in customer and field service areas of the business (23%), adaptive intelligence (21%), bots, and other emerging tech (10%), and embedded sales coaching (8%).

35% Increased automation, from operations to self-service

23% Empowering customer and field service representatives with IoT insights

21% Adaptive intelligence that recommends next-best actions

10% Leveraging emerging technology such as intelligent bots

8% Embedded contextual sales coaching

3% Other

Where are you regarding investing in better CX capabilities?

All but 40% (with "no specific plans") are somewhere on the timeline of improving CX capabilities, from 8% who are "thinking about it" to 21% who are in the midst of discovering what they need, to having already engaged a consultant or vendor (22%).
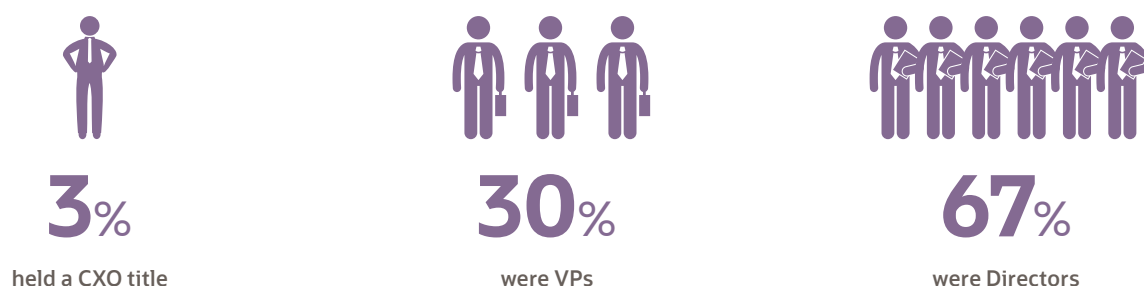
4% — Have issued an RFI/RFP
5% — Reviewing consultants/vendors
8% — Thinking about it, not sure where to start
21% — Looking into solutions now
22% — Engaged an consultant/vendor
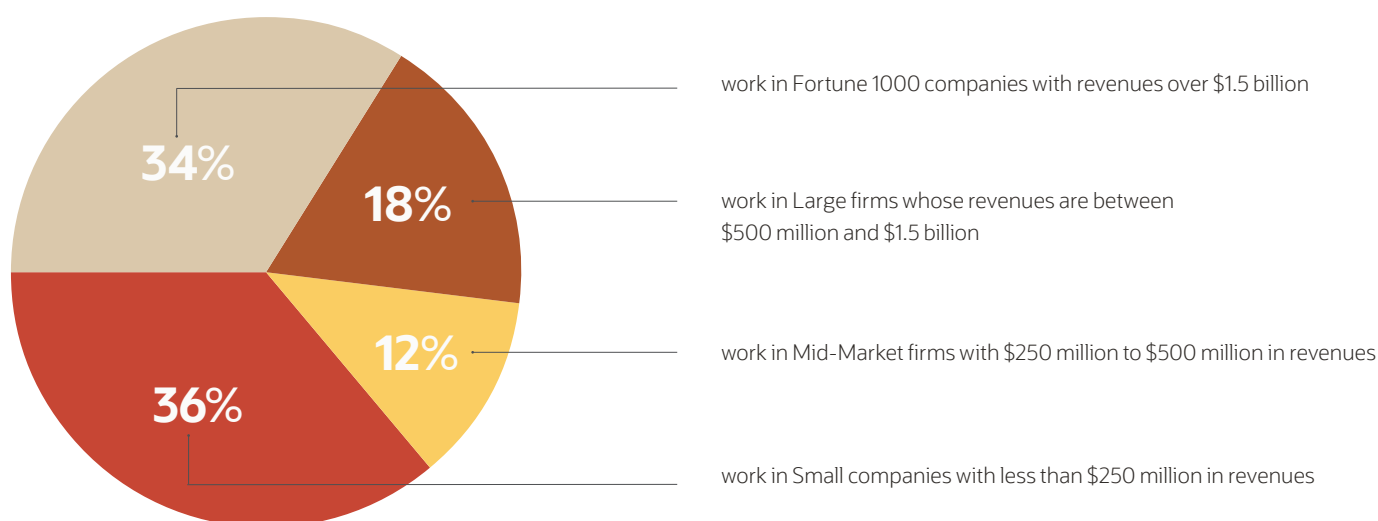40% — We have no specific plans

Methodology

Report: Customer Experience Trends in Utilities

Gatepoint Research surveyed 99 executives across contact center, operations, sales, and field service LOBs between October 2019 and January 2020.

Management levels represented were predominantly senior decision makers:

3%
held a CXO title

30%
were VPs

67%
were Directors

Respondents work for firms across a wide range of revenue levels:

34%

18% — work in Fortune 1000 companies with revenues over $1.5 billion

12% — work in Large firms whose revenues are between $500 million and $1.5 billion

36% — work in Mid-Market firms with $250 million to $500 million in revenues

work in Small companies with less than $250 million in revenues

Get started

For Utilities companies, Oracle offers a cloud-based integrated set of applications that spans the entire customer lifecycle from field service and marketing to sales and through to the back office, so you can meet and exceed customer expectations.

Learn more at https://www.oracle.com/cx/service/field-service-management/

Or, if you're ready for a demo, request one today.

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