


USING PERSONALIZATION FOR THE NEW CUSTOMER CHOICE JOURNEY



“ OPTIMIZING THE CUSTOMER CHOICE JOURNEY CAN HAVE MULTIPLE BENEFITS FOR BOTH THE UTILITY AND THE CUSTOMER. ”

A very common refrain coming from utility customer organizations is the desire to increase customer engagement. It is well documented, however, that the vast majority of current utility customer interactions are either to pay the bill or start or stop service. This dichotomy is particularly problematic for utilities and policy makers as they look to leverage Smart Grid and Smart Meter investments to offer customers a variety of new rates and programs. The growth in the number and complexity of new rate plans has made the need to provide personalized and compelling messages paramount.

New rates and programs, such as time of use, connected device DR programs, and community solar, are providing customers with an unprecedented number of choices and creating a new customer journey – the customer choice journey. The customer choice journey should be an orchestrated multi-channel journey helping the customer select the best rate plan and programs to match the customer’s lifestyle. It should provide proactive offers, based on the customer’s consumption pattern and, by guiding the customer through a holistic journey, investigating all relevant rates and programs.

To meet policy goals and increase satisfaction, utilities are rolling out new choices at a rapid pace. Many utilities,

however, are challenged to provide an optimal customer choice journey and struggle to adequately market the new products and educate customers. Often, this is because they do not have the ability to generate personalized rate and program bill impacts for their whole customer population. Such analysis enables the utility to tailor specific marketing and outreach plans based on customer segmentation.

Of course, if the utility is not armed with this data, it also will not have the ability to proactively identify which rate and program best match a customer’s consumption pattern. Further, a growing number of consumers are adopting EVs and rooftop solar and/or are incented by the time of use prices to change their usage behavior. These changes create even more challenges.

An [Enterprise Rating Engine](#) (ERE) is a sandbox billing engine that sits outside the utilities CIS but also has the ability to completely replicate the calculations made by the CIS. Using individual customer interval data, the ERE can reframe the usage data to apply to all eligible rate options provided by the utility. With this level of fidelity, the utility can depend on the ERE to create a fully comprehensive and highly accurate set of what-if rate analysis and bill impact results.

Therefore, an ERE is an invaluable tool for enhancing the Customer Choice Journey. Here are 3 ways to leverage its capabilities to that point:

- Generate a [whole population bill impact study](#) that analyzes all customers on all eligible rates. Use the results to determine key segments for marketing and education. These segments will include structural winners and losers; extreme winners and losers; and high-profile customer groups such as low-income customers
- Provide customers with proactive offers, based on their unique consumption history. Include specific details on how the offer matches their consumption style. Include a bill impact analysis showing how their bills will change based on new rate/program enrollment and their usage. Proactively notify customers through multiple channels including web and mobile.
- Enable the customer, either through online self-serve tools or through the call center to investigate the impact of behind the meter technologies such as solar and EV and behavioral changes such shifting load. For TOU rates, recommend specific load-shift changes the customer can make.

Optimizing the customer choice journey can have multiple benefits for both the utility and the customer. Enhancing the customer choice journey promises to increase program enrollments, helping to achieve the multiple goals of each program, many of which have huge rewards related to peak shaving and increasing the ability to employ renewable energy sources.

[Customer satisfaction](#) increases as customers are presented with personalized offers that match their lifestyle and are enabled to investigate programs holistically. Combining recommendations and a holistic approach empowers customers to select their best rates and programs. A true win-win for the utility and the customers.



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