**UTILITY FORWARD 2025**

**Visioning for Customer Transformation**

DeFG — Customer Insights & Advisory Firm

**A Contact Center Expert's Perspective on How The Pandemic Has Impacted All Utilities 2025 Roadmap And How To Prepare.**

WEBCAST  January 14, 2021

DeFG | Customer Insights & Advisory Firm | ALAMO CLOUD SOLUTIONS

# Overview of the UCRC

A DEFG Consortium

The Utility Customer Research Consortium (UCRC) is a blue-ribbon panel of executives working together to identify opportunities for improvement and innovation in customer service and care. The UCRC members represent large energy utilities and leading vendors from across North America. The current membership represents over 70 million customers.

The UCRC emphasizes peer-to-peer interaction and information sharing. The members meet twice each year to consider customer-facing challenges and opportunities and to plan the UCRC research agenda. In addition, there is regular virtual interaction through "spotlight" calls to investigate emerging customer-facing issues and solutions. Finally, the UCRC is committed to working with the members to conduct collaborative research and consumer surveys, and to develop other content to enrich the dialogue among members and to provide thought leadership in the utility sector.

The UCRC grew out of the Customer Care Research Consortium, which DEFG founded and managed from 2003–2011. As such, members have access to research findings and expertise developed over the years.

The UCRC both focuses on short-term tactical and operational challenges and develops a forward-looking strategic vision for future customer experience and engagement.

# Current Roster of UCRC Members

# Case for Joining the UCRC

*"The UCRC is one of my favorite utility-specific customer groups. The networking with other utility leaders on timely and relevant customer research has been extremely beneficial for American Electric Power. As a leader in the utility customer space there are many organizations out there to participate in but none of them delivers the value I get from the UCRC."*

*Rob Cheripko, Managing Director, AEP*

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# Utility Forward 2025

With our award-winning videos on the future customer experience in the utility sector, the UCRC has always been forward-looking. We expect the next three to five years to be transformative for customer experience in the utility sector. As such, we are launching Utility Forward 2025 to envision what the future customer experience may entail and to begin to plan accordingly.

**Utility Forward 2025 will encompass:**

1) Tracks of discovery and research, including the utility contact center, payment strategy, communications, etc.

2) Webinars with vendor strategists throughout 2021

3) Workshop with Amber Mac and other futurists

# Tim Montgomery

**Tim Montgomery**
**Founder**
**Alamo Cloud Solutions**

Tim is a regular featured presenter at the contact center industry's largest conferences. Tim's firm's grasp of real - world contact center solutions comes from nearly 20 years of hands -on operational and consulting experience. During his career, he's held a variety of leadership and executive positions within some of America's most celebrated and respected companies – USAA, Coca -Cola and The Scooter Store.

# A few of the companies Tim has worked with

# **Lessons Learned in 2020 That Changed The Future of Contact Centers**

# We had to just make it work…

# Admiring Is a Thing of the Past

# FAIL FAST and Learn

"There just might be a different way to do this"

# Leaders Need a Shared Understanding of Disciplines and Functions

| Maturity Level | Q6. Omni Channel (Email, Chat, Voice) Skills-based routing (SBR) | |
|---|---|---|
| | Answer Choices | Result |
| **1** | No SBR in place although opportunity for it exists, or it is in place but hopelessly complex and impossible to understand | 22% |
| **2** | SBR utilized and seems to be working in some instances, but review of data shows that many situations exist where callers are waiting and a resource is available | 27% |
| **3** | SBR working and is effectively improving occupancy rates across some or all lines of business, data is not followed closely and call distribution is not ideal. | 38% |
| **4** | Recognition of value of SBR vs. risks and costs associated with training, AHT. Level of SBR consistent with skill profiles and content management capabilities. Occupancy rates and other data checked to ensure value is being derived from SBR. | 13% |

# Create an Inside-Out Digital Strategy for Seamless Handoffs and Agent Support
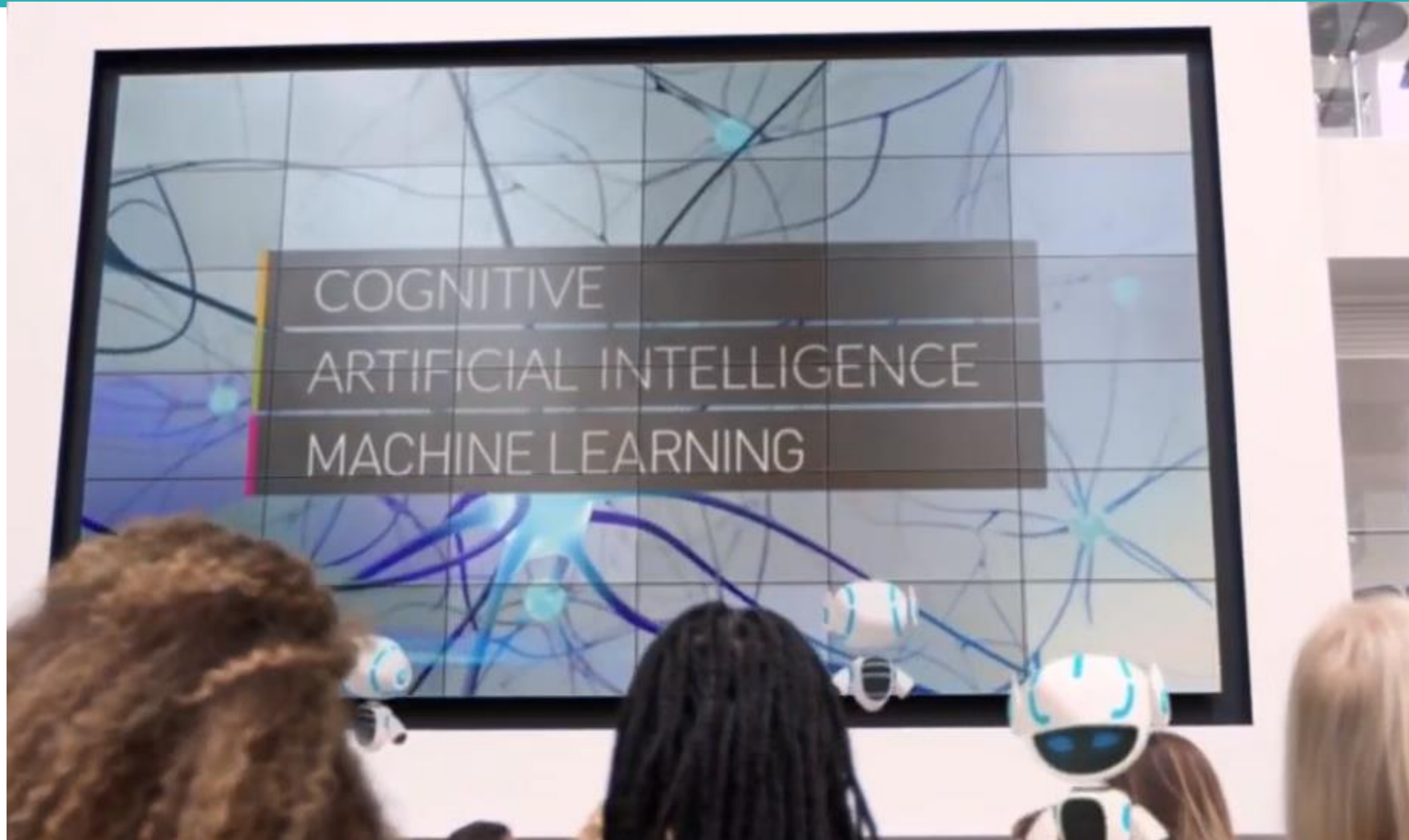
# Streamline Hiring and Training with Cloud-Based Solutions
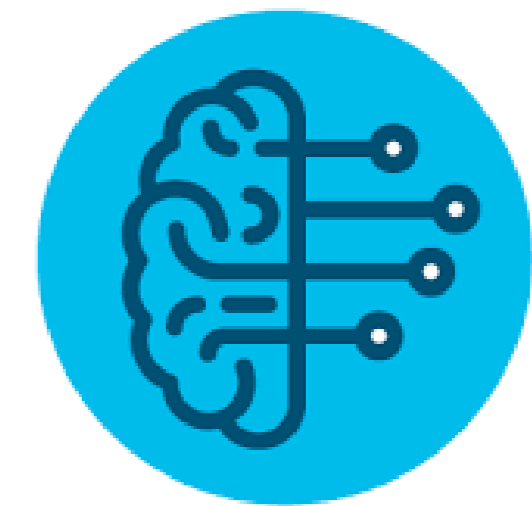
# Work-From-Anywhere
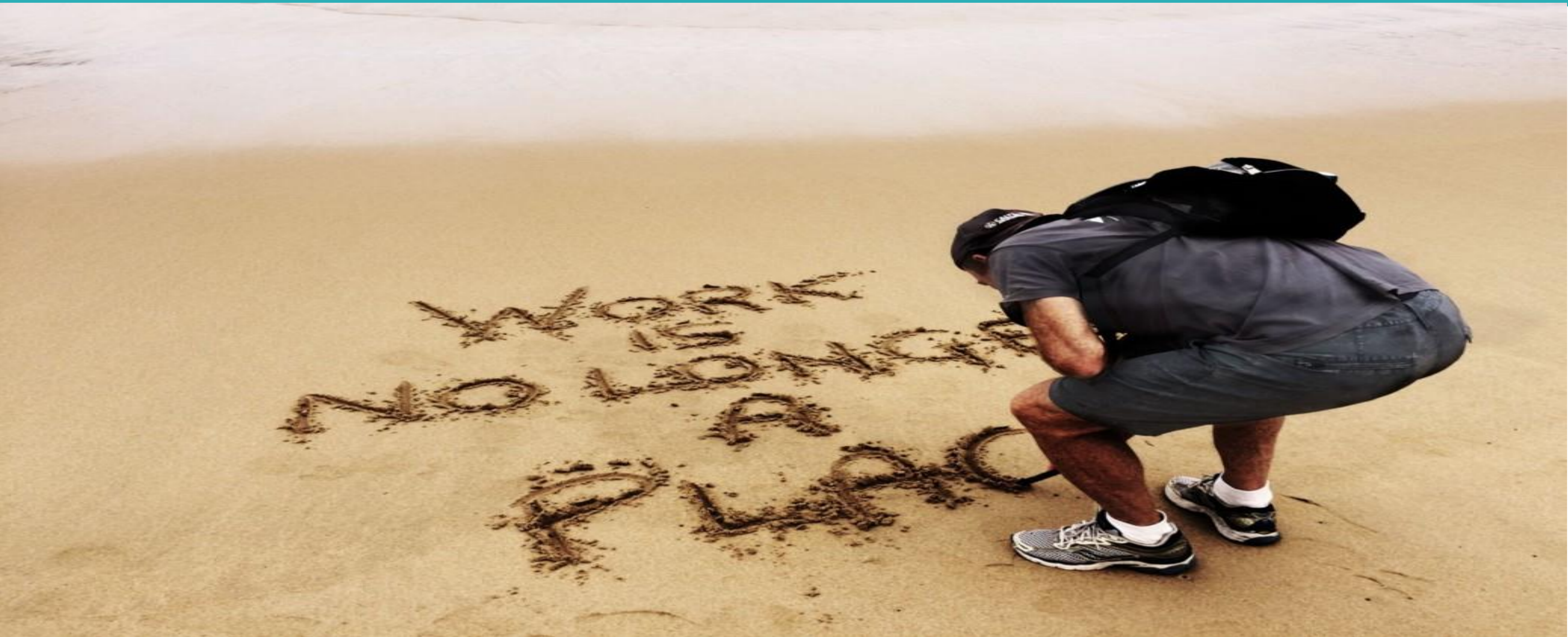
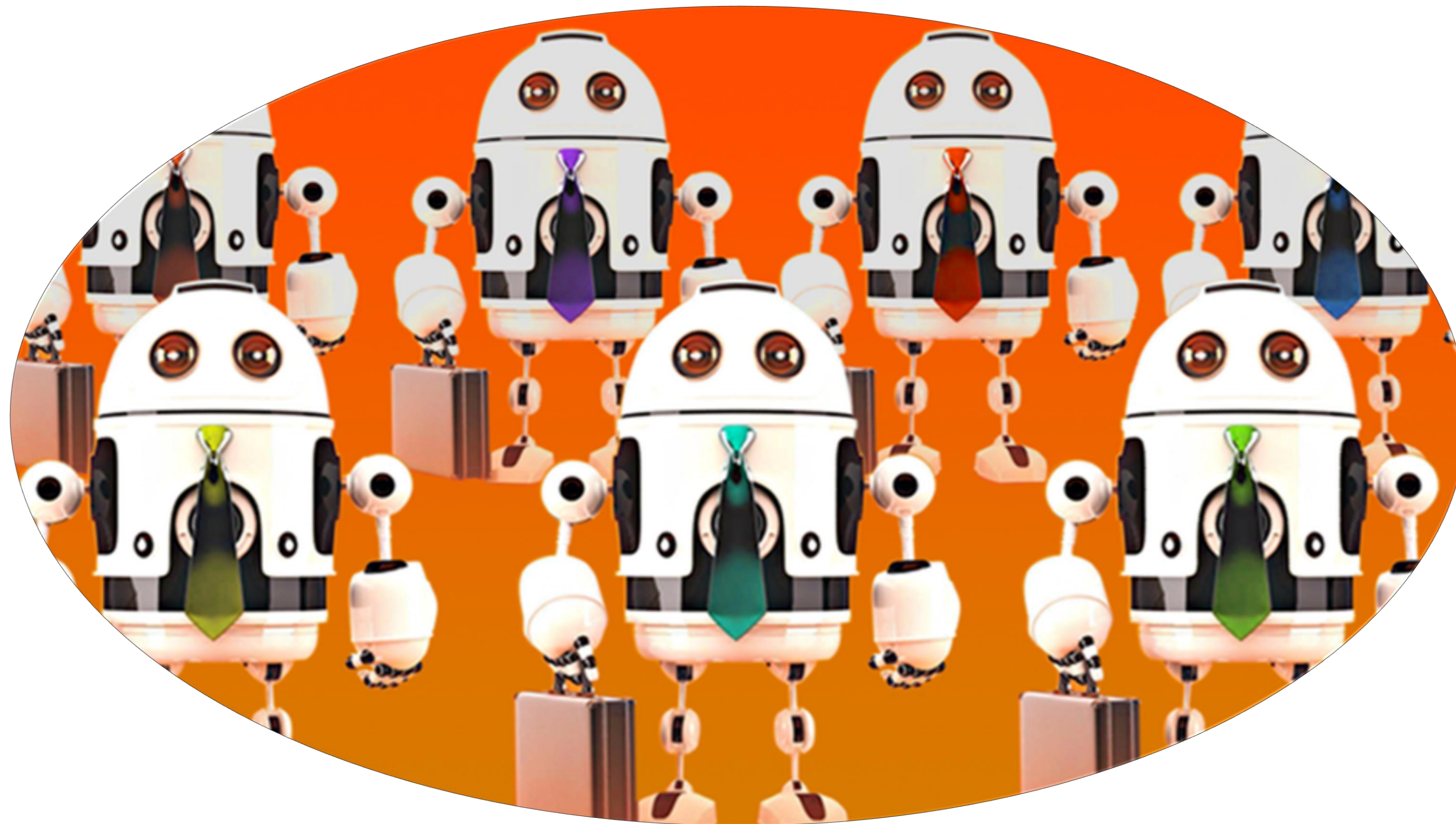# The Way Forward: Leverage the Old Cloud

# The Next Five Years

# The End....Again?



1990 ← → NOW

# Manual vs. Knowledge

# Are we looking in the right direction?

# Available Doesn't Equal Fast Adoption

**Lucent Technologies**
Bell Labs Innovations
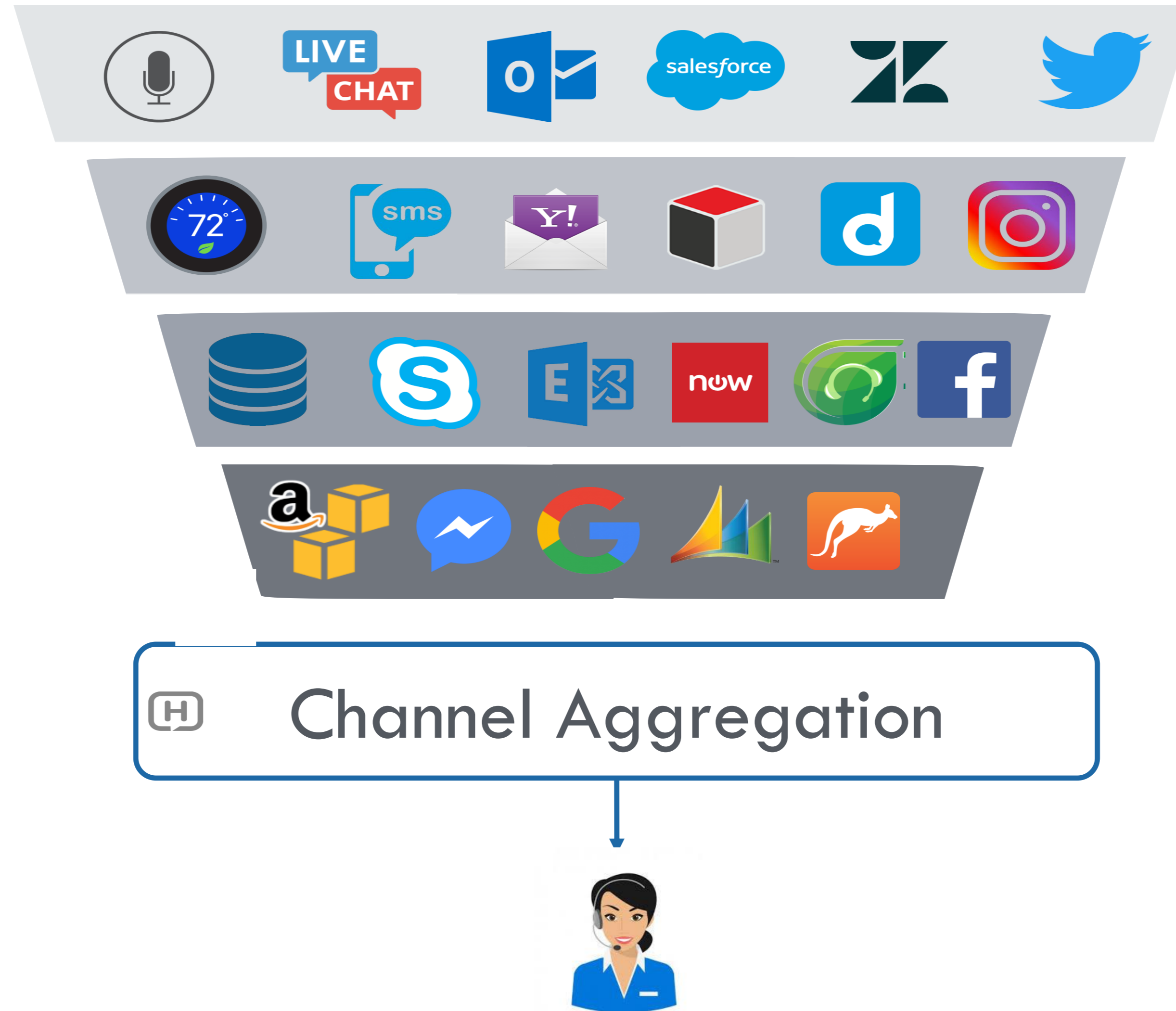
# Most Call Centers Are Still Trying to Get to the Middle



Single Channel

Multi-Channel

Omni-Channel

*Paldesk.com*

# Omni Channel 2.0

# CSAT

# Customers and Industry Demanding Change

# Conventional Wisdom Becomes...

**FCR (First Contact Resolution)**

**RFP (Request for Proposal)**

**Journey Mapping**
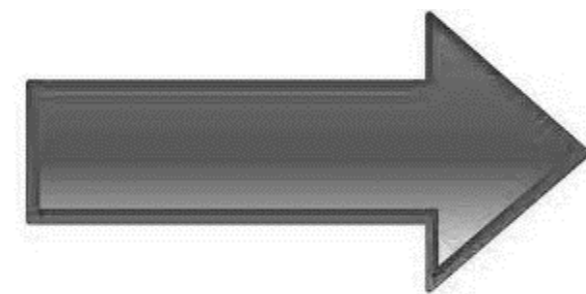
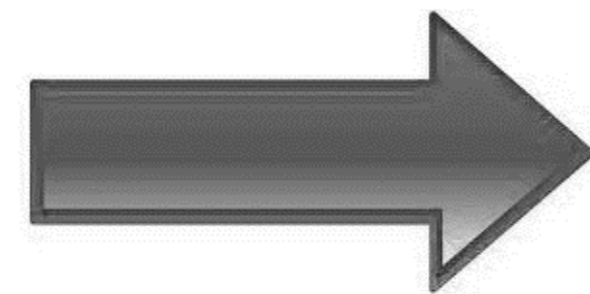**NCR (No Contact Resolution)**

**POV (Proof of Value)**

**Net Margin Path**

# Conventional Wisdom Becomes...

**NPS (Net Promotor Score)**

**CSAT**

**Informational BOTS**

➡️
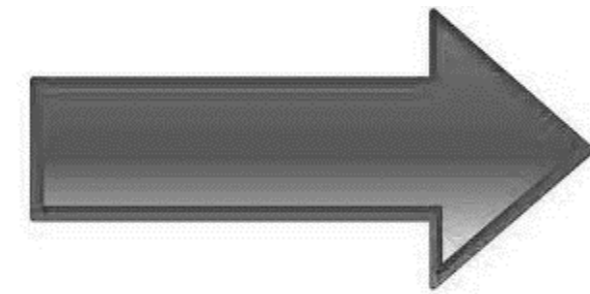
**You Really Did Do It**

**Reaction In Advance**

**"LITTLE ICE"**

# Conventional Wisdom Becomes...

Service Levels → 100%

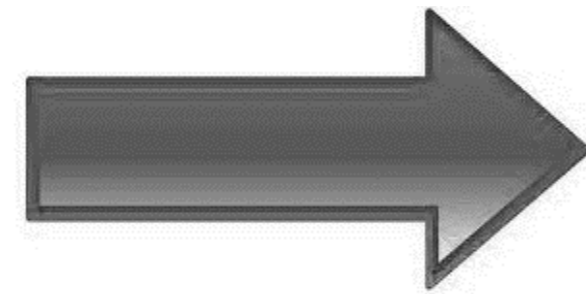Outsourcing Workforce → Tech First Outsourcing

Speech Analytics → Business Process Automation

# Conventional Wisdom Becomes...

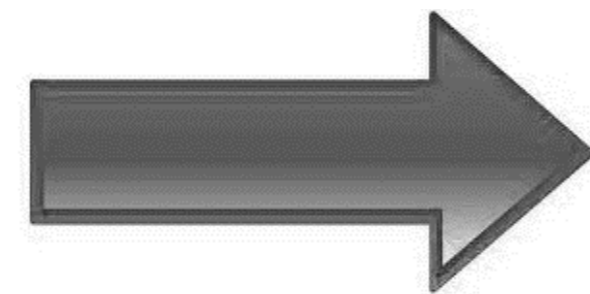| | |
|---|---|
| Manual Quality | Real-time |
| Countless Reports and Numbers | OVT (One Version of the Truth) |
| Background Checks | Complete Profile in Advance |

# Conventional Wisdom Becomes...

Call Center 4 Walls

Workforce Planning

Complete Self-Service

➡️

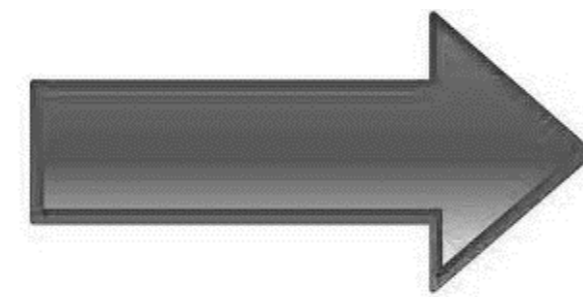All Inbound and Outbound Work

UBER on Demand

Outbound Conversations

# Conventional Wisdom Becomes...

Factory Mentality

Improvement Focused Roadmaps

Cost Per Minute

→

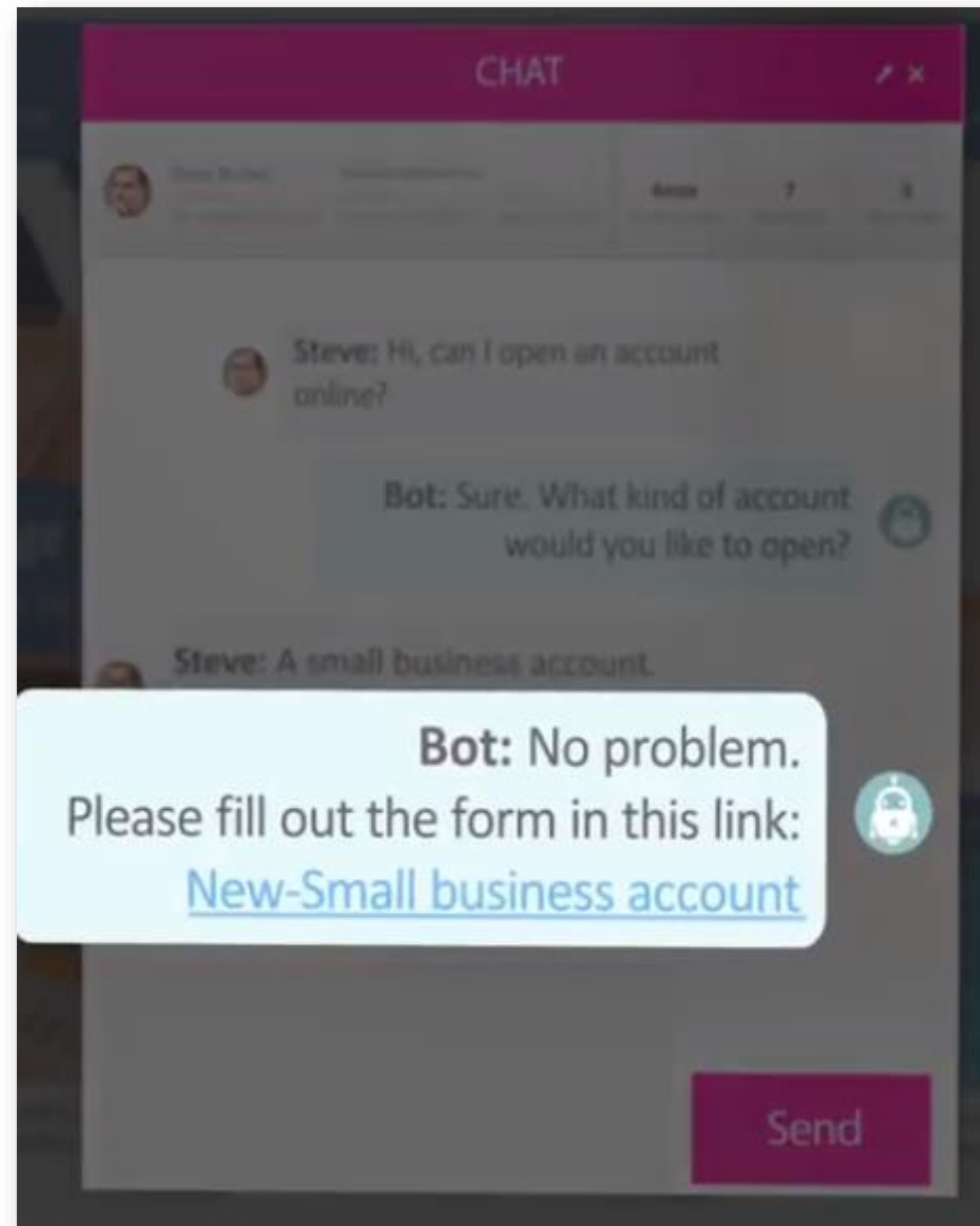Knowledge Based Management

Innovative Focused Roadmaps

Value Per Minute

# Technology Considerations

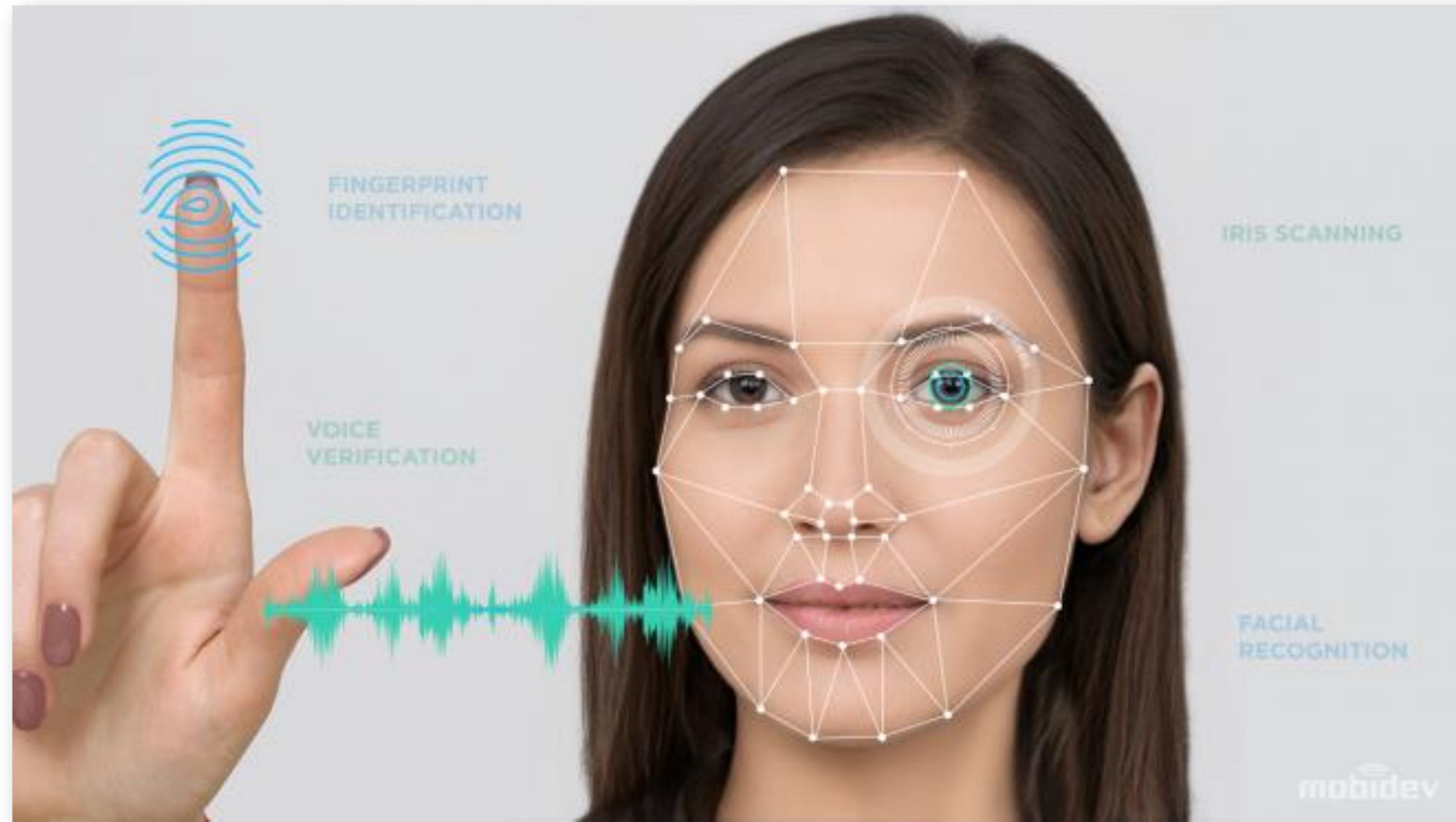# Contact centers are getting more attention

# Robotics in Action

# Customer Driven Skills Based Routing

# Verification Process Made Easy

# Roadmap Questions

- Are you providing service "Anytime with Any channel?"

- Can you see all service touchpoints real-time? (inside and outside the call center)

- Do agents and customers have the ability to pivot across channels?

- Can you make IVR and Routing Changes in 15 minutes?

- Does your current organizational structure allow for a seamless Omni-Channel migration?

- Is your quality program primarily focused on employee retention?

- Can your current Knowledge Management system be quickly connected to automated bots

# Roadmap Questions

- Is your call center strategy focused on a "Digital First" customer experience?

- Can you measure the impact of employee engagement to customer experience?

- Do all customer support areas understand their role and impacts to the creation of the omni-channel roadmap?

- What is the company and call center's definition of AI and impacts to the roadmap?

- Is your WFM program primarily focused on employee flexibility and engagement?

- Does "reacting in advance" drive daily proactive decisions?

Poll Question

Q & A

# Thank You

Tim Montgomery

Alamo Cloud Solutions

timm@alamocloudsolutions.com

(210) 687- 2714