E Source customer experience glossary

By Akila Sarathy, Jeffrey Daigle, Eryc Eyl
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Resources to help you communicate in the utility industry

Every industry, every discipline has its own language. People in the know, know it. But if you're a novice, you're on the outside. E Source editorial resources can get you in the loop.

The E Source customer experience (CX) glossary can help you understand the terminology utility CX professionals use in their everyday interactions. Bookmark this page and come back to it when you're feeling lost in a conversation with CX colleagues or you want to improve your CX vocabulary.

You can also use the E Source style guide and word list to further enrich your industry lexicon and understand how to spell, capitalize, hyphenate, and abbreviate industry terms.

A

abandoned interactions
The number of interactions that customers give up on while they're waiting in a queue to speak to an agent.

absenteeism
The percentage of unscheduled days off.

adaptive design
A mobile design approach that adjusts a website to fit a predetermined set of screen and device sizes.

See also responsive design.

AI (artificial intelligence)
The capability of computer systems or algorithms to imitate intelligent human behavior.

See also generative AI, hallucinations, large language model (LLM), and natural language processing (NLP).

average handle time (AHT)
The time it takes a customer service rep at a contact center to answer a call, handle the call, and finish the paperwork after the call.

See also average speed of answer (ASA).

average speed of answer (ASA)
The time it takes a customer service rep to answer an incoming call.

See also average handle time (AHT).

B

balanced scorecard (BSC)
A performance management tool that includes financial and nonfinancial measures to provide a concise, holistic view of organizational performance.

brand perception survey
A survey that helps a utility understand how the market views its brand, which brand attributes customers prefer, and how they rank different products and services in the marketplace.

brand pillars
The key attributes or adjectives that describe and define a utility's identity in the marketplace.

brand promise
A short statement that describes the experience customers can expect to have when they interact with a company.

breakpoints
Predefined thresholds in a performance indicator that, when encountered, trigger an intervention, corrective action, or other kind of response.

budget billing
Also known as levelized billing or equalized billing (a Canadian term).

A billing program in which a customer's bills are averaged over a period of time—usually a year—so that the customer pays the same or similar amount each month. A utility typically recalculates and adjusts a customer's monthly billing amount periodically to reflect actual usage.

C

change management
Using well-defined processes, tools, and methods to manage the human requirements and impacts of organizational or cultural change.

channel
A means through which a utility and its customers interact—for example, mobile app, mobile web, text message, web, phone, interactive voice response (IVR) system, and in person.

channel containment
A measure of a utility's ability to handle a customer transaction within the initiated channel. For example, a customer inquiry that begins with a text message is resolved with a text message and doesn't require phone calls, emails, or other forms of interaction.

See also omnichannel.

chat
A web-based or app-based instant messaging application that lets the customer and customer service rep communicate in real time.

chief customer officer (CCO)
An executive-level role that's responsible for the organization's overall relationship with its customers.

churn rate
The rate at which customers stop doing business with a company, often used as a measure of customer satisfaction and loyalty.

conversion funnel
A visual representation of the percentage of customers who begin and complete a task.

cross-channel analytics
Also known as journey analytics.

A measure of the continuity and consistency of customer experience across channels.

culture
Also known as organizational culture.

Employees' beliefs and assumptions about what's expected of them, created through shared learning and experiences over time.

current state
A snapshot of current operational processes.

See also future state.

customer council
An ongoing advisory council of customers used to get qualitative insights and serve as a sounding board for prioritizing CX initiatives.

customer effort:
The amount of effort it takes a customer to complete a task.

See also Customer Effort Score (CES).

Customer Effort Score (CES)
A CX survey metric, developed by Gartner, that enables service organizations to account for the ease of customer interaction and resolution during a request.

See also customer effort.

customer experience (CX)
The sum of all interactions and touchpoints a customer has with a company or brand across various channels throughout the entire customer journey, encompassing emotions, perceptions, and overall satisfaction.

customer experience management (CXM)
The discipline of systematically understanding and improving customers' rational and emotional perceptions of a utility.

customer information system (CIS)
A system that houses customer data related to billing, customer accounts, and metering that serves as a basis for meter-to-cash operations and customer service interactions.

customer insights
Actionable conclusions derived from analyzing customer behaviors, interactions, and feedback.

customer journey
The end-to-end sequence of interactions and experiences a customer goes through when engaging with a company. This includes awareness, consideration, purchase, usage, and postpurchase support.

See also journey mapping.

customer life cycle
The stages a customer goes through in their relationship with a utility.

customer lifetime value (CLV)
The predicted total value a customer will bring to a company over the course of their relationship, including repeat purchases and referrals.

customer loyalty program
Initiatives designed to reward and incentivize customers for their repeat business, encouraging long-term relationships.

customer relationship management (CRM) system
Software that enables companies to manage and analyze detailed records of customer interactions in all forms.

customer satisfaction score (CSAT)
A measure of how satisfied customers are with their interactions with a utility.

customer service standards
Commitments to the level of service or quality of experience provided relative to the utility's pillars or its promises to its customers.

CX activities
The techniques, tactics, and strategies performed to improve the customer's experience. Typically, activities are externally focused.

See also CX maturity matrix and CX support

CX ambassador
Employees at all levels and in all departments or divisions who advocates for the customer.

CX council
Also known as steering committee.

A cross-functional group of senior leaders, managers, and subject matter experts from throughout the utility. This group brings CX advocacy, engagement, and governance together.

CX intent statement
Also known as customer promise.

A clear articulation of what customers will think and feel throughout their relationship with the utility.

CX maturity matrix
A way for utilities to measure and track their CX efforts. The E Source CX maturity matrix consists of four quadrants, each representing a different state of CX maturity:

- *CX inception*—a state of CX maturity in which a utility engages in less than 50% of recommended CX activities and has less than 50% of the recommended organizational support for CX.
- *CX leader*—a state of CX maturity in which a utility engages in more than 50% of recommended CX activities and has more than 50% of the recommended organizational support for CX.
- *CX opportunity*—a state of CX maturity in which a utility has more than 50% of the recommended organizational support for CX but engages in less than 50% of recommended CX activities.
- *CX scramble*—a state of CX maturity in which a utility engages in more than 50% of recommended CX activities but has less than 50% of the recommended organizational support for CX.

CX strategy
A utility's approach to delivering its desired customer experience. This can include leadership, human resources, technology, management, design, and processes.

CX support
The techniques, tactics, and strategies used to embed customer-centric attitudes, mindsets, behaviors, and outcomes into the culture and operations of the organization. Typically, support is internally focused.

See also CX activities and CX maturity matrix.

D

descriptive metrics
A measurement of what actually happens during a customer's interaction with a utility—for example, time spent on website.

detractor
A survey respondent who gives a rating between 0 and 6 (on a scale of 0–10, where 0 means not at all likely and 10 means extremely likely) to the question: "How likely are you to recommend this company

to your friends and family?”

See also Net Promoter Score (NPS), passive, and promoter.

E

e-bill
Also known as electronic bill or paperless bill.

A bill sent electronically, typically replaces the paper bill.

empathy
The ability to understand and share the feelings and perspectives of customers, leading to more-meaningful interactions.

empathy maps
Visual depictions of customers’ needs and values; condensed user personas.

employee council
Includes employees with direct experience in delivering services to customers. The council brings these employees together to serve as CX ambassadors.

employee engagement
The degree to which employees feel connected and committed to their work and to the mission and strategy of their organization.

employee experience
The rational and emotional perceptions employees develop as they work at an organization.

energy burden
The percentage of gross household income (before taxes) spent on energy costs.

See also energy equity.

energy equity
Understanding peoples’ unique circumstances and working with them to identify solutions to address their needs. Energy equity aims to minimize the negative impacts of our energy systems and maximize the benefits for all utility customers.

See also energy burden.

enterprise feedback management (EFM)
The holistic, closed-loop process of listening to, analyzing, and acting upon the implied and expressed needs, desires, hopes, and preferences of customers and employees for the purpose of designing and delivering an optimal customer and employee experience.

F

feedback loop
A continuous process of gathering, analyzing, and acting upon customer feedback to improve products, services, and overall customer satisfaction.

first-call resolution (FCR)
A performance metric relating to a contact center's ability to resolve a customer's problems, questions or needs the first time they call, whether via interactive voice response (IVR) system or live agent, with no follow-up required.

See also first-contact resolution (FCR).

first-contact resolution (FCR)
A performance metric relating to a contact center's ability to resolve a customer's problems, questions or needs the first time they contact the contact center (via email, chat, etc.), with no follow-up required.

See also first-call resolution (FCR).

FTE (full-time equivalent)
FTE doesn't refer to the number of individual employees; 1 FTE is equivalent to one person working full time. For example, two people each working 20 hours per week equals 1 FTE.

future state
A forward-looking picture that envisions how a journey or process should operate to provide an improved customer experience.

See also current state.

G

gap analysis
An examination of the steps needed to move from current state to future state.

generative AI
Artificial intelligence that's capable of creating new content in response to a submitted prompt by learning from a large reference database of examples.

See also AI (artificial intelligence), hallucinations, large language model (LLM), and natural language processing (NLP).

H

hallucinations
Mistakes in AI-generated text that are plausible but incorrect.

See also AI (artificial intelligence), generative AI, large language model (LLM), and natural language processing (NLP).

I

inbound interactions
Customer-initiated interactions with a utility.

interactive virtual assistant (IVA)
A virtual assistant technology that helps utilities guide customers through the IVR and route calls to the most effective destination.

See also interactive voice response (IVR) system.

interactive voice response (IVR) system
An automated business phone system feature that interacts with callers and gathers information by giving them choices via a menu.

See also interactive virtual assistant (IVA).

J

journey map; **journey mapping**
The visual representation of the entire customer journey, illustrating each touchpoint and potential pain point or area for improvement. Journey maps capture interactions between the customer and the utility, as well as related experiences that lie outside the utility's purview. Journey maps help utilities empathize with their customers because they detail their customers' behaviors, emotions, and preferences.

K

key moment of truth (KMOT)
A key event in a customer journey when an opinion about the brand is formed. These can make or break a utility's relationship with its customers, increase or decrease the utility's brand value, and affect customer satisfaction and the customer experience.

key performance indicator (KPI)
The metrics a utility determines are most closely correlated to achieving organizational goals.

L

large language model (LLM)
An AI algorithm that uses large data sets to predict and construct natural-sounding text. ChatGPT is an example of an LLM.

See also AI (artificial intelligence), generative AI, hallucinations, and natural language processing (NLP).

listening post
A tool used to capture voice-of-the-customer or voice-of-the-employee feedback.

loyalty
A measure of the likelihood that, given a choice, a customer will continue to do business with a utility.

See also Net Promoter Score (NPS).

M

machine learning
The process by which a computer can improve its own performance (as in analyzing image files) by continuously incorporating new data into an existing statistical model.

mobile-specific website
A website designed and formatted for navigation on a mobile device (not a desktop or laptop computer) that's separate from the main website. It may have a different URL than the main website.

mobile-responsive website
A website designed to work across devices of differing screen sizes including mobile, tablet, laptop, and desktop without sacrificing usability.

See also responsive design.

N

natural language processing (NLP)
The ability of a computer program to understand or respond using conversational language.

See also AI (artificial intelligence), generative AI, hallucinations, and large language model (LLM).

Net Promoter Score (NPS)
The percentage of promoters (respondents rating a 9 or 10 on a scale from 0 to 10, where 0 means not at all likely and 10 means extremely likely) minus the percentage of detractors (respondents rating a 0–6). An NPS that falls between 0 and 50 is good, while a score above 50 is excellent.

See also detractor, loyalty, passive, and promoter.

O

omnichannel
A CX strategy that seamlessly integrates multiple channels (e.g., online, in store, mobile) to provide a consistent and cohesive experience across all touchpoints.

outcome metrics
The measure of a customer's rational and emotional reactions to the sum of an entire experience with a brand or service.

See also perceptual metrics.

P

pain points
Interactions, tasks, or processes that customers find frustrating, annoying, or difficult.

passive
A survey respondent who gives a rating of 7 or 8 (on a scale of 0–10, where 0 means not at all likely and 10 means extremely likely) to the question: “How likely are you to recommend this company to your friends and family?”

See also detractor, Net Promoter Score (NPS), and promoter.

perceptual metrics
The measure of a customer’s perception of how well a company performed compared to their expectations.

See also outcome metrics.

persona
A fictional representation of a target customer segment based on demographics, behaviors, and needs. Personas help guide CX design and marketing efforts.

personalization
Tailoring products, services, and communications to meet individual customer preferences and needs, often using data and technology.

phone soft skills
Interpersonal skills such as active listening and empathy that help customer service agents better serve customers.

posttransaction survey
A survey customers take after interacting with the utility through a contact center or walk-in center agent.

See also transactional survey.

preference center
A system that manages customer communication preferences and allows customers to control when and how a utility communicates with them.

promoter
A survey respondent who gives a rating of 9 or 10 (on a scale of 0–10, where 0 means not at all likely and 10 means extremely likely) to the question: “How likely are you to recommend this company to your friends and family?”

See also detractor, Net Promoter Score (NPS), and passive.

Q

QA (quality assurance)
The process of ensuring that an agent's interaction with customers meet quality standards.

See also QA form.

QA form
A checklist or form used to track a customer service rep's compliance with established standards of quality for customer interactions.

See also QA (quality assurance).

R

responsive design
A mobile design approach that allows a website to fluidly change and respond to fit any screen or device size.

See also adaptive design and mobile-responsive website.

roadmap
A plan that aligns short- and long-term projects and initiatives to deliver on the goals defined in the CX strategy.

relationship survey
A survey designed to measure a customer's overall relationship with and perceptions of a company.

ROI (return on investment)
A measure of the financial or nonfinancial benefits of a given investment of resources.

S

service level agreement (SLA)
A documented agreement between a service provider and a customer that identifies the services required and the expected level of service. This can include things like response times, resolution times, and other performance metrics.

speech analytics
Extracting insights from customer interactions by transforming spoken language into usable data. This is usually applied to customer calls.

T

top-2 box
Market research term meaning the top two ratings on a scale, usually 9 and 10.

touchpoints

Any point of contact or interaction between a customer and a company, such as a website visit, phone call, email, social media interaction, or in-person visit.

transactional survey
A survey customers take after completing a transaction with the utility.

See also posttransaction survey.

U

user experience (UX)
The overall experience and feelings a customer has while interacting with a product or service, including ease of use, navigation, and overall satisfaction.

user interface (UI)
The means by which the user and a computer system interact, in particular the use of input devices and software.

V

virtual hold
Also known as callback.

A service that allows customers who are placed on hold to request that the utility call back later.

voice of the customer (VOC)
The implied and expressed needs, desires, hopes, and preferences of a utility's customers that are used by the utility to design and deliver the optimal customer experience efficiently and effectively. Also, the process of gathering these inputs, often obtained through surveys, reviews, and other feedback mechanisms.

voice of the employee (VOE)
The implied and expressed needs, desires, hopes, and preferences of a utility's employees that are used by the utility to design and deliver the optimal customer experience efficiently and effectively. Also, the process of gathering these inputs, often obtained through surveys, reviews, and other feedback mechanisms.

voice of management (VOM)
Managing VOC data across five disciplines to create a holistic understanding of customers and their relationship with a company. These disciplines are listening, analyzing, acting, closing the loop, and sharing.

W

walk-in center
A physical customer-facing location staffed by a utility representative. This could include locations like a district office.

word of mouth
The process by which customers verbally share their experience to encourage others to engage or disengage with a brand, product, or service.

E Source can help you deliver on your CX goals

E Source has been an expert in utility customer experience for more than a decade. Hundreds of CX professionals at dozens of large and small utilities across the US and Canada turn to E Source for guidance on:

- Assessing their CX maturity
- Prioritizing improvement plans
- Launching CX initiatives
- Designing VOC feedback programs
- Engaging employees to adopt and promote a better customer experience

If you're looking for research, market studies, advice, or tools to improve your utility's customer experience, contact us.

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