How do utilities manage customer emails?

An Ask E Source answer
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Q:How do utilities manage their email systems in terms of categorizing, routing, handling requests for secure information, allocating staff resources, and notifying staff of new messages?

A:Here we provide examples of utilities that use web forms to facilitate customer email categorization and routing, describe innovative new call routing strategies that are also relevant for email routing, and outline best practices for customer email verification and requests for secure information. We also discuss customer preferences and perceptions of email as a contact channel, identify case studies and market research regarding utility staffing levels to support email, and list some vendors that advertise email management services.

How utilities categorize and route emails

Many utilities prompt customers to submit a form on the website to reach customer service by email. This type of email communication enables utilities to require certain pieces of authentication information from the customer and also to categorize or route the email based on that information. For example, Xcel Energy's contact information includes an "Email Us" button that allows unauthenticated users to contact the utility through an online form. Users must select a customer type (Residential, Non-residential, Other) and select one of seven subjects—which the utility uses for internal categorization and routing:

- Gas/Electric Outage
- Billing & Payment
- Usage/Billing History
- Average Monthly Payments
- Website Feedback
- Start/Stop or Transfer Service

PPL Electric Utilities offers a similar online form on its Contact Us page, although it also customizes the form display based on the customer-selected category. Out of this utility's list of question topics, the following categories bring up an email form for customers:

- Budget Billing

- Changing a Mailing Address
- Contractor Services
- Electric Choice
- Electric Rates
- Electricity Usage
- Paperless Billing
- Other

If, on the other hand, the customer selects a topic not easily addressed through email, such as Start/Stop Service or Payment Arrangements, the PPL system prompts customers to complete the transaction on the website or over the phone, as appropriate.

Many best practices for routing incoming customer service phone calls may also be applied to incoming emails. In the E Source report Creating Human Connections in the Call Center we wrote about innovations in call routing, which may also be relevant for email routing. These include:

- *Customer retention routing*: Allow the most dissatisfied customers to reach to an agent first.
- *Agent-specific routing*: Connect customers to the last agent they worked with.
- *Skills-based routing*: Match customer issues to the agent best qualified to address those concerns.

How utilities authenticate email addresses

Some email management vendors provide authentication and data security services for utilities. We also found information about email authentication outside the utility industry. For example, Financial Institutions and Customer Information: Complying with the Safeguards Rule from the Federal Trade Commission focuses on financial institutions but would also be relevant for utilities. The article points out that service providers should actively "caution customers against transmitting sensitive data, like account numbers, via email or in response to an unsolicited email or pop-up message."

State Farm Insurance has a web page for educating customers about an Enhanced Customer Verification Process that relies on knowledge-based authentication. The company uses an unidentified vendor to generate verification questions randomly during each customer interaction. If customers are unable to pass the quiz or enter a valid verification code received via email or text, they must instead call State Farm.

How utilities allocate staff for email management

The E Source Omnichannel Survey asks utilities about the number of full-time equivalents (FTEs) dedicated to each of nine customer-facing channels, including email. In our 2015 survey of 41 utilities:

- 19% said they had a salary budget for staff who responded to customer emails (n = 38)
- 21% said they had an operational budget for responding to emails (n = 37)
- 80% said that the customer service department was the primary owner of email communications (n = 41)
- 14% said email ownership was collaborative between more than one utility department—most often customer service and corporate communications (n = 41)

Utilities also reported having six FTEs dedicated to the email channel on average, although a larger group of employees were "occasionally responsible" for the email channel.

How utilities structure their email-response teams

A Canadian utility we talked to has three agents who respond to customer email inquiries and paper letters. On average, the team responds to 1,200 emails per month.

Gainesville Regional Utilities told us it has three customer service representatives (CSRs) who handle all noncall work, including email.

Colorado Springs Utilities has a single agent who responds to emails full-time.

Reliant uses a digital customer response team. The digital response CSRs never take phone calls, but they do respond to emails and, primarily, chats. Due to the popularity of chat, Reliant has about 33 FTEs dedicated to the digital program, which offers chat around the clock, 365 days a year. There are 30 chat CSRs who respond to 500 to 600 chats per day, two supervisors that manage 15 chat CSRs each, and one operations specialist that manages the whole team. Ninety percent of the digital response team works from home.

How customers use email to communicate with their utility

Our Omnichannel Survey revealed that despite widespread use, only 6% of residential customers typically use email first for customer service interactions with a company. Email ranks seventh out of the eight contact channels in terms of the percentage of respondents who say they are always able resolve their reason for contact during the first attempt when using that particular channel.

Email accounts for a fairly low percentage of overall customer service contacts across the industry. The average is 2% of all agent-assisted interactions according to data from the 2016 E Source Contact Center Performance Survey of 28 utilities. This suggests there are likely small teams answering emails across the industry.

How utilities work with email management vendors

We can extrapolate from data from the 2018 E Source Digital Metrics Survey that half of utilities use a third-party vendor for transactional emails. Vendors that target email management services to utility companies include:

- Striata offers a number of customer service solutions including email management. Based on conversations with utility customer experience leaders, the company notes “the vast majority (almost all in fact) acknowledged that there was a significant increase in customer email enquiries over the past 12 months, and that they were handling these on an ad-hoc basis, without a system, strategy and minimal or no reporting.”
- Verint Email Management offers automated email confirmation, status updates, and “sophisticated text-analysis for categorizing and efficiently routing email to the right department or agent-queue.”
- Datamark Multichannel Call Center Technology offers email management and intelligent email autoresponse.
- Oracle RightNow Email Management Cloud Service (now Oracle Service Cloud) “efficiently manages incoming emails and webforms by automatically routing inquiries to agents based on their availability, skill, and performance.”
- EGain Mail “helps companies manage large volumes of customer emails and webforms

responsively and effectively."
- Invenis offers a number of call center services for the energy and utilities Industry, including an email management service.

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