How to deflect calls and improve self-service

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Key takeaways

- Getting utility customers to self-serve is a great way to deflect calls to the contact center and improve customer satisfaction (CSAT).
- Utility customers who use self-service features are almost always more satisfied with their electric utility.
- To deflect more calls, utilities should improve their first-contact resolution (FCR) rate, improve their self-service features, make it easy for customers to enroll in high-bill alerts, and implement chatbots on their website.
- Use data and customer feedback to make sure you're offering customers the right self-service transactions.

Call deflection is an important part of your contact center operations. By reducing the number of calls your contact center receives, you'll likely:

- Reduce operating costs
- Increase CSAT
- Increase employee satisfaction

Through the E Source 2023 Contact Center Performance study, we know customers overwhelmingly choose to contact their utility by phone. We also know that live-agent phone calls are more expensive than interactive voice response (IVR) system calls, a self-service option.

How E Source can help with self-service and call deflection

Fill out this short form to start a conversation about your needs and how we can help.

And even further, we know that if a customer can't resolve an issue via another channel, like the website, then they'll likely follow up by phone, according to the E Source 2018 Residential Utility Customer Survey.

With an effective call-deflection strategy, contact center agents can spend more time focusing on the customer experience rather than rushing to get through a backlog of calls. But how do you get there?

Improve FCR

Improving your FCR rate will help deflect calls. FCR is the measure of a utility's ability to resolve a customer's issue during the first contact, regardless of channel.

By improving your FCR rate, especially for self-service transactions, you'll see fewer calls come into the contact center because your customers will be getting what they need through other channels.

Learn more about this important metric in our blog post Why FCR is a valuable metric for utility contact centers.

Improve your self-service options

Self-service transactions are crucial to your call-deflection strategy. If you don't offer the right transactions or if you make it difficult for customers to find and use self-service options, then you're missing a huge opportunity. Inefficiency on one channel negatively affects CSAT.

Self-service features can result in higher CSAT

Using data from the E Source US Residential Customer Insights Center, we looked at 15 online activities to see if there was a difference in CSAT for each task between those who self-served and those who didn't. We found that customers who used self-service features typically had higher satisfaction with their electric utility than those who didn't use self-service features.

This was especially true for two online activities:

- Ordering new products or services
- Checking the status of a service order or repair

Interactions with higher satisfaction for self-service customers

For most activities, customers are more satisfied with their electric utility when they complete the task on their own through a self-service feature.

Online activity	Activity adoption rate (n = 30,256)	Satisfaction with electricity provider; top-2 box (excellent or very good)		Top-2 box satisfaction gap	Ease of interaction; top-2 box (9–10 ratings)
		Have self-served	Have not self-served		
Ordered new products or services	5%	72%	61%	11%	NA
Checked status of service order or repair	5%	71%	62%	9%	NA
Connected/established/transferred service	6%	68%	61%	7%	60%
Obtained product/service information	7%	68%	61%	7%	NA
Scheduled service appointment	4%	68%	62%	6%	NA
Found energy efficiency information/resources	6%	67%	61%	6%	NA
Enrolled in an energy efficiency program	5%	67%	61%	6%	57%
Set up notifications/alerts	10%	67%	62%	5%	67%
Submitted customer service question	7%	66%	61%	5%	NA
Monitored energy consumption/use	28%	62%	61%	1%	NA
Chatted with service rep online	8%	62%	61%	1%	NA
Viewed account status/bill	61%	62%	62%	0%	65%
Reported a power outage/emergency	14%	60%	61%	–1%	59%
Viewed a power outage map	20%	60%	62%	–2%	55%
Applied for billing assistance program	6%	55%	62%	–7%	46%

© E Source (US Residential Customer Insights Center; data from the 2023 Claritas Energy Behavior Track survey). **Base:** Respondents of electricity or dual-fuel providers. Sample size for "have self-served" and "have not self-served" varies by transaction. **Question A6:** In the past 12 months, have you done any of the following with your electricity provider online? (Select all that apply) **A12:** Taking into account your overall satisfaction as a customer of your electricity provider, how would you rate them? **A6NEW:** Please rate the ease of viewing your account status or bill online with your electricity provider. **Notes:** NA = not applicable. Respondents were allowed to select more than one answer. Some options were available only to those who pay a bill or have an online account. Percentages shown in the charts reflect weighted data; sample sizes (n) are based on unweighted data.

Even though 11 of the 15 online activities showed higher CSAT scores when the customer self-served, many of these features had low usage rates.

To increase CSAT, make sure your customers know which utility activities they can complete via self-

service. For more on the benefits of self-service, members of certain E Source services can check out our report How does website self-service improve customer satisfaction?

The E Source US Residential Customer Insights Center compiles data from the Claritas Energy Behavior Track annual online survey of about 32,000 residential customers in the US (conducted in partnership with E Source). Utilities rely on this tool to understand their residential customers' behaviors and attitudes around energy consumption.

In fact, we know self-service correlates to higher satisfaction. Through the E Source US Residential Customer Insights Center, we found that customers who used self-service features almost always had higher satisfaction with their electric utility than those who didn't use self-service features.

But it's not just about offering self-service. You have to do it right. If a customer has an excellent experience in a specific channel, that's the channel they'll return to. For example, if they try the website, get frustrated, and then get help from the contact center, they'll return to the contact center.

Here are some ways you can improve your utility's self-service options:

Start simple. Paying bills and reporting outages are often the easiest places for utilities and customers to start with self-service. Payment arrangements, which can be a sensitive topic for customers, are also an excellent self-service candidate.

Use customer feedback. Ask customers what self-service transactions they want. You can also use posttransaction surveys to ask customers how they tried to resolve their issue before calling. This will help point you to where you need to improve the self-service journey.

Use data. Look at your contact center data to figure out the most common call types. Then determine whether the IVR or website can manage them.

You can also use data analytics and journey mapping to understand what customers are trying to do at various stages of a transaction and see where they're failing.

Utilize hold messages. You can direct callers on hold to the website to complete their transaction. But note that this will drive up abandonment rates.

Offer incentives. Waive deposits and offer rebates to customers who complete online transactions such as signing up for an online account, paperless billing, budget billing, and other programs.

Design the website for usability. Consider the user experience and user interface of your website. If it's easy to use, customers will use it. But if it's difficult and confusing, customers will choose other channels.

Keep these four elements in mind when designing the utility website:

- *Appearance.* Does the design look appealing?
- *Findability.* Can customers easily find the self-service feature?
- *Functionality.* Does everything work correctly or are customers running into errors?
- *Content.* Is everything the customer needs to know there and is it easy to understand?

For design advice on specific website features, check out the E Source Utility Website Design Center, available to members of the E Source Digital Self-Service subscription. This tool includes design guides on 11 utility website features, including some that are prime candidates for self-service such as reporting outages, making payments, and managing energy usage.

Get the latest guidance on utility website design

We evaluate the appearance, findability, functionality, and content of utility websites through the E Source Website Benchmark. The study gauges the success of roughly 100 US and Canadian utility websites by rating their usability and accessibility. Our study is the industry standard for assessing website improvements as they relate to customers' contact preferences.

Not a member of the E Source Digital Self-Service subscription? Contact us to see how your utility can get access to these results.

Make it easy for customers to enroll in high-bill alerts

Billing issues are a common reason customers call their utility contact center. When they call because of high bills, they're often stressed and looking to their utility for help. But you could deflect some of these calls with a well-designed program for high-bill alerts.

Our report 5 tips for creating an effective high-bill alert program explains multiple strategies for getting more program participation, including making enrollment simple with a preference center. A good preference center is so easy to navigate that your customers can self-enroll in your high-bill alerts program. Giving customers the ability to enroll and customize notifications in one place empowers them to make decisions without calling your contact center.

Needs hands-on help with your billing experience? E Source Management Consulting is your answer. To see how E Source helped Ameren develop a digital billing and payment strategy, check out our case study Billing and payments with Ameren.

Implement chatbots on your website

As we mentioned earlier, when a customer fails to complete a transaction on their own, they'll likely call your contact center. Chatbots can deflect some of these calls, guiding customers through using self-service tools and directing them to the resources they need.

Watt: A chatbot success story

In 2021 Con Edison won the E Source Achievement in Customer Experience award for its virtual assistant, Watt. The utility launched Watt to help customers complete transactions and answer their simple questions. This customer-first approach saved Con Edison's customers and contact center agents time and effort.

Launching Watt involved a cross-departmental team of experts. The team produced a list of 10 potential names for the chatbot. Then the team sent a survey to employees and asked them to rank their top 3

names.

Watt was the most popular name, and the name helped the team form the persona for the chatbot. According to Gregory DeBellas, supervisor at Con Edison, “We wanted customers to feel like they were chatting with a friend who’s helping them through a process that might seem intimidating. Watt needed to come across as approachable, clear, sympathetic, and most of all, helpful, without sounding wooden or robotic.”

Some of the things Watt helps Con Edison customers do on the utility website include:

- Viewing and paying their bill
- Enrolling in payment agreements
- Making payments for another customer
- Requesting payment extensions
- Requesting to chat with a live agent

Customers who need more support can smoothly transfer to a live agent who can pick up the conversation without asking for redundant information from the customer. Future upgrades for Watt include integration with the IVR and Spanish language support.

If your utility isn’t already using chatbots, you’re going to need high-level support for this initiative. Frame the chatbot as a complementary channel that can answer customers’ simple questions and free up agents to handle more-complex interactions.

For example, one of the interactions your chatbot could help customers with is moving service, a relatively straightforward request. Through the E Source 2021 Digital Metrics Survey, we found that customers successfully started service online only 36% of the time on average, according to data from six utilities. This means customers failed starting service online roughly two-thirds of the time. Having a chatbot available during these interactions could increase the success rate.

Before you implement a chatbot, you need to figure out where your contact center needs the most help. Use this information to build your business case for how a chatbot could solve some of these problems. Ask yourself these questions:

- Why, when, and how are customers contacting us?
- Are our existing channels handling customers’ needs?
- Do some customers need extra attention?
- What are the most obvious cases where a chatbot could help us respond to customer questions?
- Do we see high-volume or recurring customer service issues, like bill payment, moving, or outages?

As you answer these questions, you’ll find the high-volume, low-complexity interactions that chatbots are perfect to assist customers with. Then, review your contact center data to see how many calls you can eliminate if the chatbot helped customers complete these interactions.

Become a member of the E Source Digital Self-Service subscription

As a member of the E Source Digital Self-Service subscription, you’ll gain access to the support and

resources you need to ensure your online presence can keep up with customers' rising demands. We'll help you develop successful business cases for upgrading your website and self-service offerings. With the service, you get:

- Guidance on improving the customer experience across web, mobile, chat, and other common digital channels
- Help measuring the performance of your digital channels, optimizing digital self-service, and evaluating existing and emerging digital channels
- Support and resources you need to make sure your online presence can outpace what customers expect
- A better understanding of how your website compares to more than 80 other utilities with data from our exclusive E Source Digital Metrics Survey to help you investigate how customers engage with your digital platforms

Contact us to learn more about an E Source membership.

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