E Source study addresses utility adoption of account management best practices

By Sannie Sieper
December 5, 2019

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Every other year, E Source fields the Account Management Assessment, a market research study. The assessment uses the voice of the utility to help participants understand how to implement internal best practices to improve the quality of service provided to business customers.

The 24 utilities that participated in the survey received a score on a scale of 0 to 100 based on their adherence to account management best practices. Congratulations to the utilities that received the top three scores in the 2019 Account Management Assessment:

- DTE Energy
- Southern California Edison
- FPL

E Source used four equally weighted categories to assess how well utilities are serving their business customers. The categories and average scores out of 25 possible points are:

- Business customer experience and satisfaction—15.36
- Account management structure—16.29
- Business customer engagement—16.00
- Account and sector planning—11.98

The structure of the assessment and its weighted scoring helps participants identify areas where they're performing well and areas where they should consider making internal adjustments to benefit customers. DTE earned an overall score of 90.12 and notched a perfect score in account and sector planning.

The overall average score of all utilities that participated in the 2019 Account Management Assessment was 59.64 out of 100. Account and sector planning was the lowest-scoring category, making it the area most in need of participant attention.

Each section of the assessment includes best practices and recommendations for providing excellent service to business customers in order to increase engagement and establish productive partnerships. The study presents practices related to:

- Key account engagement plans and strategic sector engagement plans
- Performance metrics and financial incentives or rewards for individuals and teams
- Overall structure and designation of customer groups (small, midsize, large, and key account customers)
- Customer service segmentation by business type and size
- National account management structure and strategy
- Strategic collaboration with adjacent departments (such as marketing, communications, and engineering)
- Customer relationship management software
- Outage communications
- Business advisory panels and involvement in trade associations and other business-specific organizations
- Business customer experience strategy and execution

E Source is proud of how closely it works with participating utilities to understand opportunities to enhance their relationships with business customers. Participants receive clear recommendations for implementing these best practices within their account management department to improve the overall business customer experience. Via an interactive online dashboard, participants receive customized recommendations as well as an individual consultation with E Source experts to prioritize adjustments, identify variances from the national benchmark average, and gain a clear understanding of how their E Source membership can help them integrate best practices at their utility.

About E Source

For over 30 years, E Source has been providing market research, data, and consulting services to more than 300 utilities and their partners. This guidance helps our clients advance their customer energy solutions and enhance their relationships, while becoming more innovative and responsive in the rapidly evolving market.

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