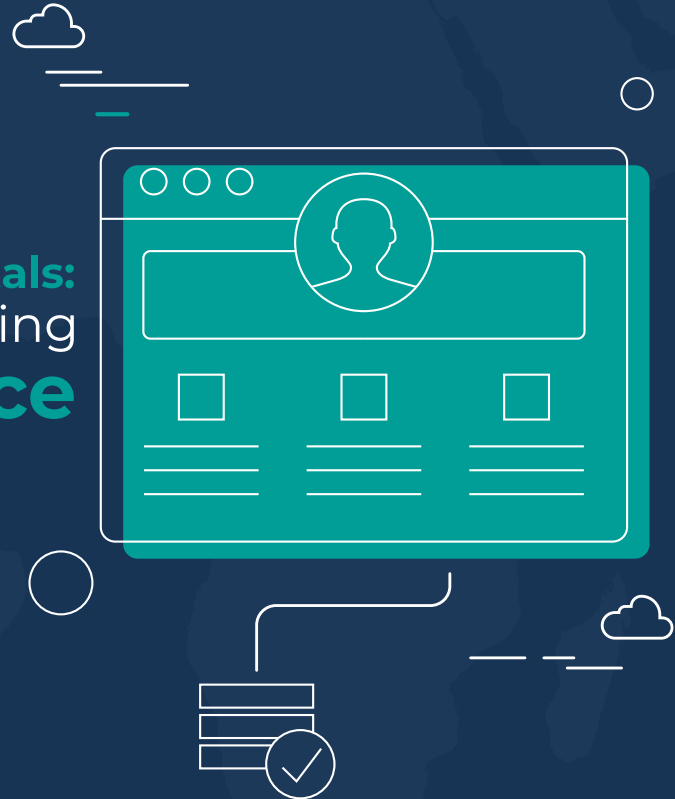


Evolution of self-service portals: the quest for an outstanding digital experience



Utilities are looking for new ways to meet the demanding needs of their customers, who are becoming more self-sufficient and are looking for immediate 24/7 access to information. To accomplish this goal, self-service portals and their evolving customer-centric service features have become key tools, allowing companies to deliver an outstanding customer experience and increase engagement and satisfaction.

Introduction

As the world keeps moving into the connected-customer era, delivering a superior, customized, end-to-end customer experience (CX) has never been more critical. This trend is not a far-fetched reality for service providers whose business traditionally focuses on supplying a reliable service and satisfying operational demands.

Nowadays, utilities have undergone a radical transformation that hinges on developing new strategies to achieve a customer-centric mindset as a necessary condition to thrive in a dynamic and increasingly competitive environment.

In this scenario, Customer Self-Service (CSS) portals have taken a leading role as a tool that enables a differentiating CX. Even though this tool has been used for quite a long time, it has significantly evolved over time by constantly including new ways of interacting and communicating with customers. Thus, utilities have become aware of the great benefits that can be obtained by implementing CSS portals in terms of customer engagement and empowerment, the achievement of CX-oriented goals and the improvement of other relevant key performance indicators.

Utilities implemented many innovations both in processes and systems in the late 90s to solve such limitations and started giving customers online access to basic account data and bill history to fulfill their information needs. However, internet access was limited, and software and hardware upgrades were expensive, making self-service portals costly to implement and maintain. In addition, problems such as data redundancy, manual data collection, and numerous interfaces came up, but despite these initial difficulties, this was a good starting point for boosting CX.

After this first approach, other features such as bill comparison, usage history visualization, and e-billing enrollment were made available for customers alongside a key option with a significant impact on company revenue and customer convenience: the ability to pay bills online.

Although these essential characteristics were useful, utilities kept realizing the need to continuously improve customer-facing processes. To become customer-centric focused, companies understood that they needed to change their processes according to inferred customer feedback and insights (known as the voice of the customer or VoC¹). This information would help them understand customers' interactions and detect pain points along their journey.

The early days of self-service portals

Customers have always expected companies to offer them quick and effective solutions. Unfortunately, this has not always been possible; in the past, customers had to follow slow and non-user-friendly processes to get the information they needed or manage various service situations. As a result, they were not fully satisfied with the utility's support service due to the long and inefficient response times and the lack of different channels to contact the company. At the same time, utilities understood that personalized service was difficult to accomplish due to the large number of specific requests overwhelming the system's capabilities.

21st century self-service portals

Driven by the expectations of newer generations of digital customers that crave for alternatives to manage their relationship with their utility, self-service portals have transcended from the basic features presented at the turn of the century, evolving into a sophisticated, better-integrated and more user-friendly tool. In recent years, several advanced options have been included in these tools to help customers understand their bills and save energy:


1. Gartner. Gartner Glossary. Voice of the Customer (VoC). <https://www.gartner.com/en/information-technology/glossary/voice-of-the-customer-voc>

- Home energy analysis, peak time rebates, and neighbor comparisons.
- Rate comparisons, rate plan insights, and bill forecasts.
- Proactive notifications, real-time outage reports, and personalized alerts.
- A larger set of online requests including start, stop, transfer service, and order scheduling, among others.

According to Gartner, by 2030, personal technologies such as machine learning, artificial intelligence, and virtual personal assistants will become the go-to for user experience delivery.²

All of the above is about customers, but what about service providers?

Self-service portals not only have to adapt to customers' needs but to companies' too. Nowadays, utilities are expanding their portfolios by including non-traditional products and services such as broadband internet, television and phone, allowing business growth and current regulation compliance. Sales of these new services are being made through e-commerce tools that should be natively included in self-service portals in order to deliver seamless and easily accessible experiences to customers. This is a new challenge for utilities, not only in terms of infrastructure, equipment and physical resources, but also in the design of the product offering and time-to-market.



Did you know?

That the live channels such as phone, live chat, and email cost an average of \$ 8.01 per contact, while self-service channels such as company-run websites and mobile apps cost about \$ 0.10 per contact.³

By including these options, portals become an essential tool for customers. These portals are a single point of access available to customers 24/7 to obtain digital support, allowing them to solve most service situations, submit requests and stay informed about the company's products and services, all by themselves. Along this evolutionary path, self-service portals have begun to explore cutting-edge artificial intelligence (AI) applications such as machine learning, artificial intelligence, and virtual personal assistants, capturing the attention of today's digital, self-educated customers.

2. Gartner, Gartner Says the Future of Self-Service Is Customer-Led Automation, 28 May 2019, <https://www.gartner.com/en/newsroom/press-releases/2019-05-28-gartner-says-the-future-of-self-service-is-customer-l>

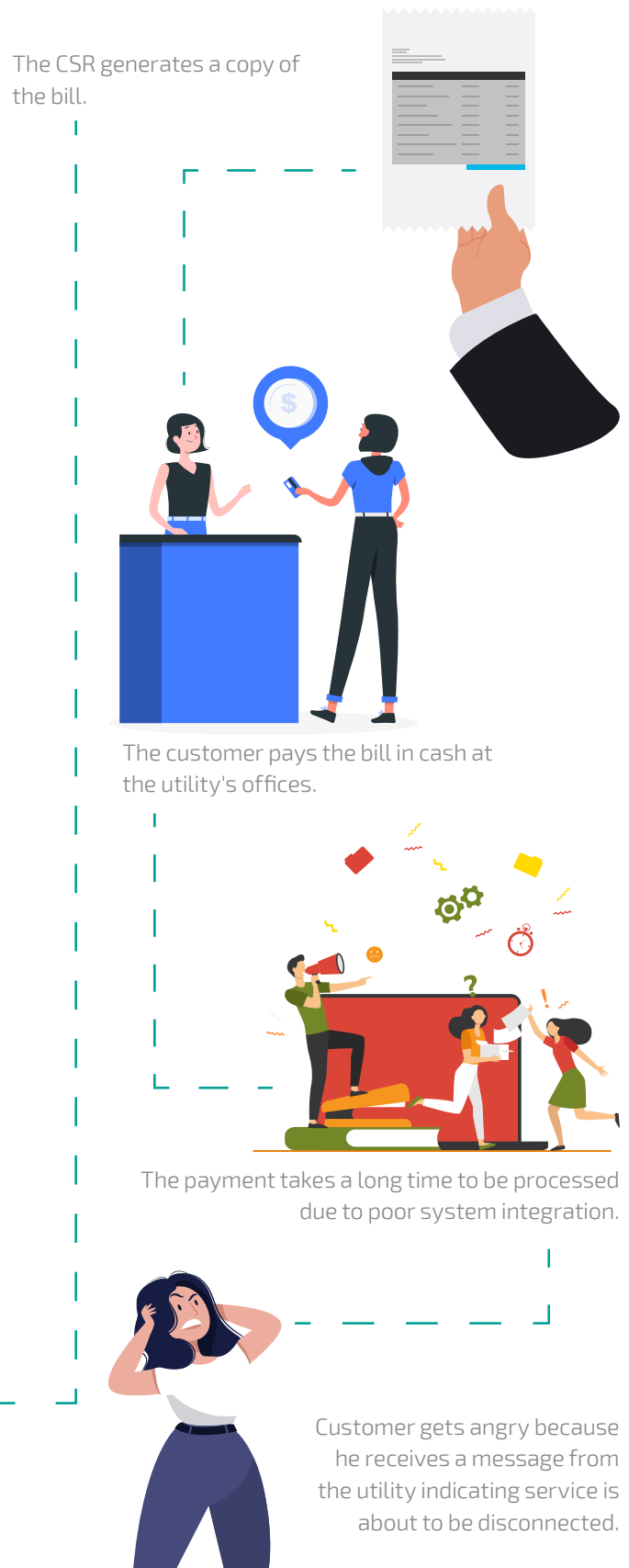
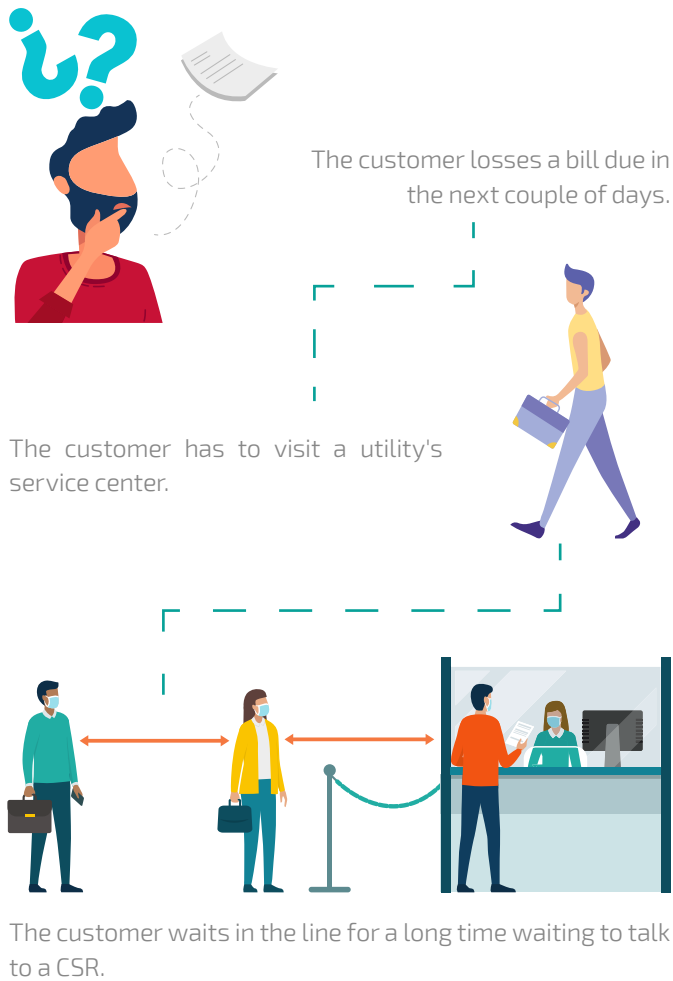
3. Gartner, Gartner Says Only 9% of Customers Report Solving Their Issues Completely via Self-Service, 25 Sep 2019, <https://www.gartner.com/en/newsroom/press-releases/2019-09-25-gartner-says-only-9--of-customers-report-solving-thei>

How self-service portals improve CX in utilities?

Continuously improving painful touchpoints and creating "wow" moments are decisive actions that must be implemented when talking about delivering the best CX.

The following are two examples of a customer who needs to pay a missing/lost bill. The first figure shows a traditional journey where a customer has to follow many unpleasant steps to obtain a copy of the bill and pay it. The second image demonstrates an enhanced journey of the same process enabled by an advanced self-service portal.

Figure # 1: a traditional customer journey

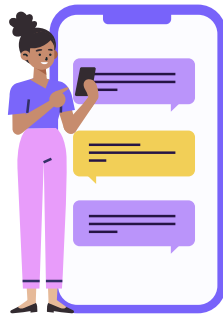


This outdated way of obtaining a copy of the bill is burdensome for the customer and generates attrition along the journey, ultimately harming the overall experience.

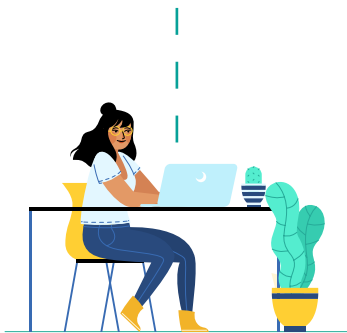
Unlike the journey presented in Figure #1, an enhanced journey eliminates multiple steps and additional actions that a customer must perform to accomplish a relatively simple process as obtaining a copy of a bill.

Figure # 2: an enhanced customer journey

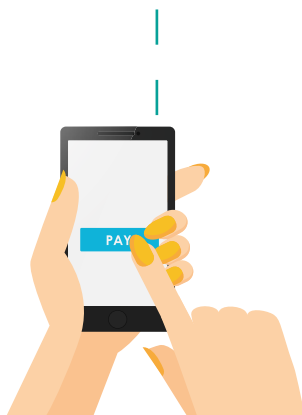
Having different features on self-service portals makes life easier for customers. In turn, utilities will notice that key performance indicators, like customer satisfaction and first-time case resolution, improve, creating a win-win situation derived from an outstanding CX.



The customer receives a notification indicating the bill is due in the next couple of days.



Customer logs in the self-service portal and clicks on the request: "Get a copy of your bill".



Customer gets the bill information and pays it immediately.

Conclusion

From the start, customer self-service has proven to be quite simple. Although the initial features were not enough to reach customer expectations, listening to the VoC has always been the main pillar to build today's self-service portals. Over the years, self-service portal capabilities have evolved to the point of achieving significant improvements on the interactions and communication with customers. Nevertheless, there is always room for more as technology itself continues advancing.

Ultimately, utilities must keep their customers' increasing needs and expectations in mind to improve their experience, engagement, and satisfaction without leaving aside the service supply.

**Learn more about how to empower your customers
with self-service portals**

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Whitepaper "Evolution of self-service portals: the quest for an outstanding digital experience".

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