

## **GUIDELINE SETTING UP CUSTOMER SUPPORT HOTLINE IN A SMART GRID ENABLED ECOSYSTEM**

### **Abstract**

The hotline and customer support is a primary contact point with the participating consumers and the surrounding community in a smart-grid-enabled energy environment. It should be up and running if possible before the meter installation process. This guideline is meant for project managers who need to assure that the customers that are participating in the smart grid have a dedicated hotline, that can be contacted to clear any doubts that consumers have or any information they might require.

### **What is it?**

The hotline and customer support should serve a number of customer related tasks in a smart grid environment, from providing project information to technical support; it is a vital point of contact with the consumers involved. The primary reason to establish such a hotline should be to provide a direct contact that consumers can use to obtain information on this new energy ecosystem where they are now an active party.

The hotline can be used not only for questions or issues that arise in the consumer, but also for example for making appointments for meter installation, repairs, etc. Similarly the hotline and customer service line can also be used for outbound calls, i.e. calls initiated by the management in order to check on customer satisfaction, etc. However, the focus in this guideline will be on inbound calls for the hotline.

### **When to use?**

Such a customer support line should be set into place when new products or new technologies are introduced to consumers. For instance when smart meters are installed in a city or community such a line will be needed to deal with the technical issues and doubts that the consumers will face with the new technology. It is advisable that the customer support hotline is prepared and ready to operate on the early stages of such a project or initiative. In a first phase (recruiting phase and/or pre-project communication phase) it can be used to provide information to interested consumers, stakeholders and other parties.

The line should operate for as long as the project or initiative is ongoing and in some cases beyond the projects extension. For instance, in case the project implies the installation of a smart meter, the DSO (or another entity who owns the meter) might

opt to keep such a line as a separate line for as long as these technologies are not available for the general population.

### Hotline as a service – InovCity, EDP

The InovCity project established a dedicated line since day one of the project. The inbound line's purpose was to serve as the primordial touch-point with the consumers, stakeholders and community. The line was design to:

- Provide general project information to the community. The customer support team was trained to deal with the most frequently asked questions (FAQs) on a first call resolution basis. These FAQs included 1 – what's a smart meter?, 2 – what happens to the meter reading? How should I proceed?, 3 – Will my bill be based on estimations or on real measurements? 4 – What are the benefits of a smart meter? For me and for my community, 5 – Will I have additional costs with the smart meter? 6 – Will I be able to save on my energy bill?
- Manage claims and requests. In the InovCity project there were two stress factors for the dedicated hotline regarding billing issues: i) the normal problems that derive from the installation of a smart meter (a higher new bill, for instance) and ii) an important rise on the VAT tax on electricity. The last one is an external factor to the project but one that had a big impact on the hotline calls volume.
- Provide specific support to the households who were testing new products and services. Some 1,5k households, from the total sum of 30k participating in the project, tested new products and services, from new tariff structures to home energy management systems. The customer support team had relevant information on every product and service in order to resolve in the first contact, the majority of the issues that might occur.

InovCity also used outbound lines (lines used by customer support team to contact the participating customers) to retrieve Customers satisfaction with the project; the installation process; with the installed home energy management systems.



Figure 1 and 2: Inovgrid magnet and Inovgrid sticker with the customer support line number

More information: [www.inovgrid.pt](http://www.inovgrid.pt)

## What do you need to do?

**1 - Set up a new line** – It is advised to set up a new hotline for the project/initiative instead of using an existing line, for two reasons:

- Smart grid projects, or the introduction of any disruptive technology or tariff system, represent new sets of issues from consumers that cannot be answered by a regular customer support team unless all members of the actual customer care unit receive extensive training on the project;
- It's a branding opportunity for the new project, product or service if the new line is branded with the project or product name, it can use it in all sorts of marketing and communication materials (e.g.: fridge magnet). This will also help the end users to find the number easily and quickly if needed, which contributes to improve consumer engagement.

**2 - Form a team** – The size of the customer support team depends on (i) the number of households that are part of the project or that acquired the new product or service; (ii) the complexity of the project or product. To test the workload and volume of calls, the conduction of small trials is recommended. From these trials, insights on consumer's reactions to different project phases can be extracted– specially the critical ones (see below).

Besides deciding on the number of FTEs (full time equivalents) that will compose your customer's support team the project manager should also consider at least two shifts for the same positions (8 hour shifts) and replacements for sick days and vacations. Most hotlines are open for 12-16 hours straight.



Figure 3: InovGrid contact center team

**3 - Train the team** – the members of the customer support hotline team will need to be trained in several dimensions:

- **General project/product information.** You can expect many calls from participants to understand the project/product and its impact to their daily life and energy bill. If the project/product comprehends the installation of a smart meter to the participating consumers, the customer support team should be aware of the roll-out plan, as well of the most frequently asked questions during the installation phase. For more information, please look at our guideline [Develop FAQs to assist the support staff guidelines](#).
- **Basic and intermediate technical formation.** The customer support team will require training on the tested equipment's, products, smart meters and basic knowledge of the smart grids network functioning. It helps if an actual smart meter, or other tested equipment's are available for the customer support team at their facilities, to ease the step-by-step walk through with the consumers.
- **New billing and tariff systems.** If the project/initiative or product requires the installation of a smart meter, the members of the team will need to be prepared for energy consumption related issues that derive from real time readings and to explain the actual bill as well;
- **Visibility about every end-user interaction.** The customer support team should have information on every customer interaction trough out the project in every stage. For instance, which households did already had their meter exchanged? Which customers are testing products and services? The questions that arise in each interaction are likely to arise again by different customers.

We also recommend that there should be constant feedback and interactions between the customer support team and the project management/supervision team. You can expect a number of unforeseen situations and events in such a project and the customer support team training should be constant trough out the project.

**4 - Create different levels of support** (at least 2) – you should consider different levels of seniority within the customer support team should so that topics that are more difficult can be resolved in one call. The highest level of support should be the project management team themselves. If a question arises, for which no one from the customer support team has information to answer then they should contact the project management team for clarification. Topic specialty within the customer support teams would be a suitable alternative if you want to avoid raising the number of the dedicated resources (FTEs).

**5 - Limit the scope** - When establishing such a line, it is important to limit the scope. For instance, if the project does not imply the test of new tariffs or allows the customer to change their contracted power, the customer support line would mainly be focused in providing information about the project and clearing technical difficulties that might derive from a meter switching. However, if new products and services are to be tested the customer support team should be ready to address doubts, issues and claims that derive from the testing of such products & services. However, different lines must handle technical and retail issues since they correspond to regulated and liberalized activities, respectively.

**6 - Establish Service Level agreements (SLAs)** – Because of its impact on the consumer's satisfaction a certain level of control of the customer support line should be assured by establishing a few indicators. These KPIs should give the project management team a kick view of the quality of the service being provided, see also the S3C guideline [User-centred KPIs for the evaluation of smart grids](#). Some Key Performance Indicators (KPIs) could be:

- First call resolution indicator (FCR)
- Its efficiency with indicators such as average speed to answer (ASA)
- The time service factor (TSF) that measures the percentage of calls answered within a certain timeframe (e.g. 80% in 30 seconds).

### **7- Be aware of critical project phases and its impact to the hotline**

Installation of smart meters – a peak of calls is to be expected in this phase of the project. In order to mitigate the volume of calls we recommend the following set of actions:

- Send a letter to all participants explaining the meter exchange process and its implications. Also ask them to proactively book an appointment for the meter exchange through the customer support hotline;
- The customer support team should take advantage of every interaction to offer additional information about the project. It is a major opportunity to engage end users with the project.
- Also, an outbound contact center team could be used to call all participants who failed to schedule an appointment for their meter exchange, in order to assure greater participation;
- This external outbound team could also play a part in the quality control of the meter installation by calling all participants and inquire their satisfaction with the overall process;

Billing issues - The first bill in a new smart grid project is always a moment that represents a peak volume of calls to the customer support lines. The reasons behind it is the fact that the billing is now accurate, based on real time readings, which might represent a higher figure depending on e.g., the time of the year. In addition, there might be small adjustments to the bill that derive from the fact that the last bill was based on estimated readings. This adjustment might also lead to an increase on the total that is being billed to the customer.

Our recommendation is that the customer support team should have access to all relevant customer information in order to provide an accurate answer. This implies having the last meter reading (if possible with a photo proof), the first smart meter reading and the consumers billing history. In addition, the customer support team needs to be ready to explain all changes made to the bill itself. In order to prevent a higher call peak and end user discontent, project management should consider to start billing the participating end users based on monthly reading (with smaller room for error than annual readings) for at least 3 months before the meter exchange.

As a final note, the customer support team must have access beforehand to all communication materials. It is desirable that they are aware of the amount of information that the participating customers have access to, in order to refer to it or to deepen the subjects addressed in such communication materials.

### Do's & Don'ts

- **Size the team wisely.** When setting up the teams the project manager needs to take into account that there are some phases of the project that are more demanding in terms of call volume than others. For instance the meter installation phase.
- **Set up a team from day one of the project.** The customer support team is useful from day one. Not only to engage consumers but also engage stakeholders and the community.
- **Continuous training of the staff.** As the project proceeds it is likely that there is an evolution in the technical requirements or that the project communication key messages are revised. No matter what the reason, the customer support team will need to be up to date with the latest changes in the project.
- **Keep a separate project line.** It would be an error not to have a dedicated project hotline. The project related issues are unique and it is advisable to have a customer support team trained that is specialized in those issues.
- **Prepare for difficult issues.** Some things are worth anticipating and preparing for, such as the meter installation and the first billing. Train the customer support team in these particular issues providing them all the relevant information so they can rapidly respond to the consumer inquiries. The second thing is to work upstream, with all of the evolved parties (suppliers, employees, installers) to assure that the meter installation process is optimized and the relevant information regarding the changes in the billing procedures are passed through to the consumers.

### Further reading

- S3C, Deliverable 3.4
- Ecogrid project: [www.eu-ecogrid.net/](http://www.eu-ecogrid.net/)
- InovCity project: <http://www.inovgrid.pt/en.>

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This guideline was developed in the S3C project, and is freely available from [www.smartgrid-engagement-toolkit.eu](http://www.smartgrid-engagement-toolkit.eu).

S3C paves the way for successful long-term end user engagement, by acknowledging that the "one" smart consumer does not exist and uniform solutions are not applicable when human nature is involved. Beyond acting as a passive consumer of energy, end users can take on different positions with respective responsibilities and opportunities. In order to promote cooperation between end users and the energy utility of the future, S3C addresses the end user on three roles. The *smart consumer* is mostly interested in lowering his/her energy bill, having stable or predictable energy bills over time and keeping comfort levels of energy services on an equal level. The *smart customer* takes up a more active role in future smart grid functioning, e.g. by becoming a producer of energy or a provider of energy services. The *smart citizen* values the development of smart grids as an opportunity to realise "we-centred" needs or motivations, e.g. affiliation, self-acceptance or community.

S3C (2012-2015) performed an extensive literature review and in-depth case study research on end user engagement in smart grids, resulting in the identification of best practices, success factors and pitfalls. The analysis of collected data and experiences led to the development of a new, optimised set of tools and guidelines to be used for the successful engagement of either Smart Consumers, Smart Customers or Smart Citizens. The S3C guidelines and tools aim to provide support to utilities in the design of an engagement strategy for both household consumers and SMEs. The collection of guidelines and tools describe the various aspects that should be taken into account when engaging with consumers, customers and citizens. More information about S3C, as well as all project deliverables, can be found at [www.s3c-project.eu](http://www.s3c-project.eu).