



UTILITY C&I CX DATA & AI GUIDE

1 HARNESS INTERNAL DATA

Leverage the comprehensive internal data you possess, such as load shapes, billing records, program enrollment, and payment behavior. This data is unique as it covers 100% of your customers and provides invaluable insights into their usage patterns and interactions.



2 INTEGRATE EXTERNAL DATA

Supplement your internal data with external information. This can include NAICS codes, credit scores, expenditure data, estimated revenue, employee count, building size, and more. Remember, data availability may vary, especially for smaller businesses, making your internal data even more crucial.

3 ESTABLISH CLEAR OBJECTIVES

Before diving into data analysis, clearly define what you aim to achieve. Are you looking to boost enrollment for a specific program or better understand your mid-market accounts? Examples could be driving initiatives around EV, Demand Response, Energy Efficiency, and more. Ensure that you have enrollment data for the programs you're aiming to promote.



4 PROPENSITY & SEGMENTATION

Use AI to build models that predict customer behaviors and segment customers based on their potential to meet your objectives. These dynamic models enable you to target customers effectively, offering them the most suitable programs in a way that truly engages them.



5 ACTIVATE YOUR INSIGHTS

It's time to put your data into action. This could mean launching personalized, AI-driven campaigns, equipping your key account managers with valuable data to improve their performance, or leveraging data insights in your sales process. Knowing a C&I customer's situation and potential savings from your program can significantly enhance your engagement strategy.

[Click here](#) to see how ATCO, a Canadian utility covering the province of Alberta, was able to follow this process to model and segment its C&I customers and identify over **200,000 businesses and institutions to engage for its EV programs**, including Public Charging, Private Charging, and Fleet Electrification.

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