

# AI in the utility industry: Multiclient study announcement

 E Source

A baseline multiclient study on AI for utility executives



# We help utilities move forward with clarity and confidence

E Source combines research, data, and technology with industry expertise to help utilities **better serve customers, optimize the grid, and strengthen operations.**

Trusted by North American utilities for decades, across diverse markets and regions

Industry-leading research and benchmarking grounded in real-world utility performance

Providing the clarity utilities need to make confident decisions that stand up under scrutiny



Our mission

To shape the future of the utility industry

# E Source team



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# The AI challenges for utilities

- AI is projected to be transformational for utility customer strategy and experience, and most E Source utility clients have ranked it as their number one investment in customers operations over the coming years.
- Utilities are at the beginning of their AI journey, with early applications focused on the contact center and back-office billing and growing external chatter making it hard to know what an AI strategy should involve.
- Utilities need to establish a reliable baseline to support the development of use cases and a roadmap over the next three years to guide the right investments.

**We know utility customer operations—and E Source is a trusted advisor to bring clarity to AI's potential impact and utility readiness.**

# What the AI Baseline Multiclient Study includes

## Peer-to-peer executive research on AI strategy and performance



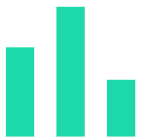
# Value to study participants



Get clarity on the technical, business, and regulatory drivers of AI and deployment strategies.



Compare results against peers and leading practices for deeper insights.



Gain insight, evidence, and peer perspective—and help shape the industry conversation around AI.



Access actionable guidance grounded in primary research across utilities at different stages of AI maturity.

# Customer ops focus

The study will focus on AI implementations in contact center operations, customer-facing applications, meter-to-cash functions, and more.

Our research clearly shows that customer ops will be a primary area of utility AI investment and planning over the next 3–5 years.



# Utility executive questions to be addressed

Each phase of this study will aim to deliver actionable intelligence to your most pressing questions.

## Foundations

- Where should I start my AI journey?
- What are the requirements for an AI project?
- How do we prioritize AI against other operational priorities?
- What does an AI business case entail?
- What do utility-specific requirements look like?

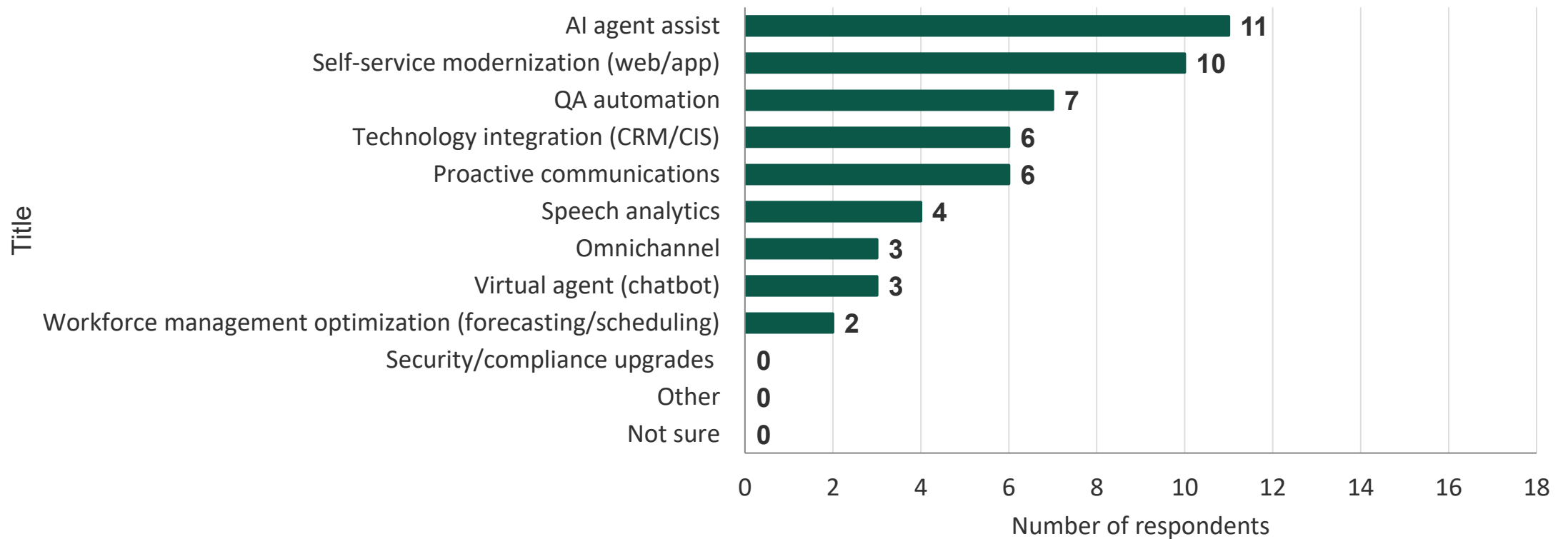
## Implementation

- What does an AI project or pilot plan look like?
- How many resources does it take to deploy?
- How do we test our platform to ensure it protects customer data?
- How do I know my pilot is ready for go-live?

## Continued success

- How do I manage change around AI?
- How will customers react to an AI implementation?
- How do I measure the success of AI tools?
- How do I discuss the success of my project with my regulatory body?

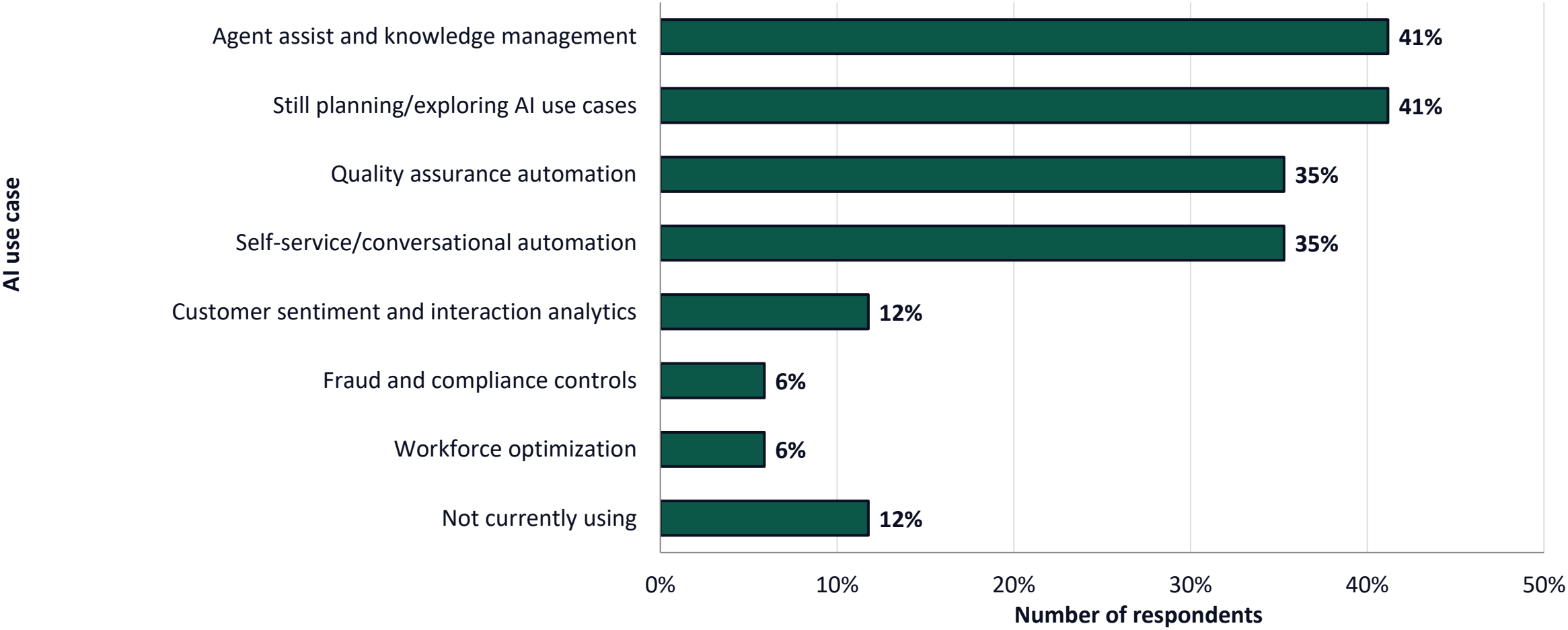
# Top three contact center investment priorities over the next three-to-five years



© E Source (2026 Future Proofing the Contact Center Utility Survey). **Base:** n = 18 utilities. **Question 7:** Please choose your top contact center investment priorities for the next three to five years. Choose up to three.

**Notes:** CIS = customer information system; CRM = customer relationship management system. Use caution with small sample size.

# Current and future AI uses in the contact center



© E Source (2025 Contact Center Performance). **Base:** n = 17 utilities. **Question:** How are you currently using—or planning to use—AI in your contact center operations? **Note:** Use caution with small sample size.

# Obstacles to AI SUCCESS

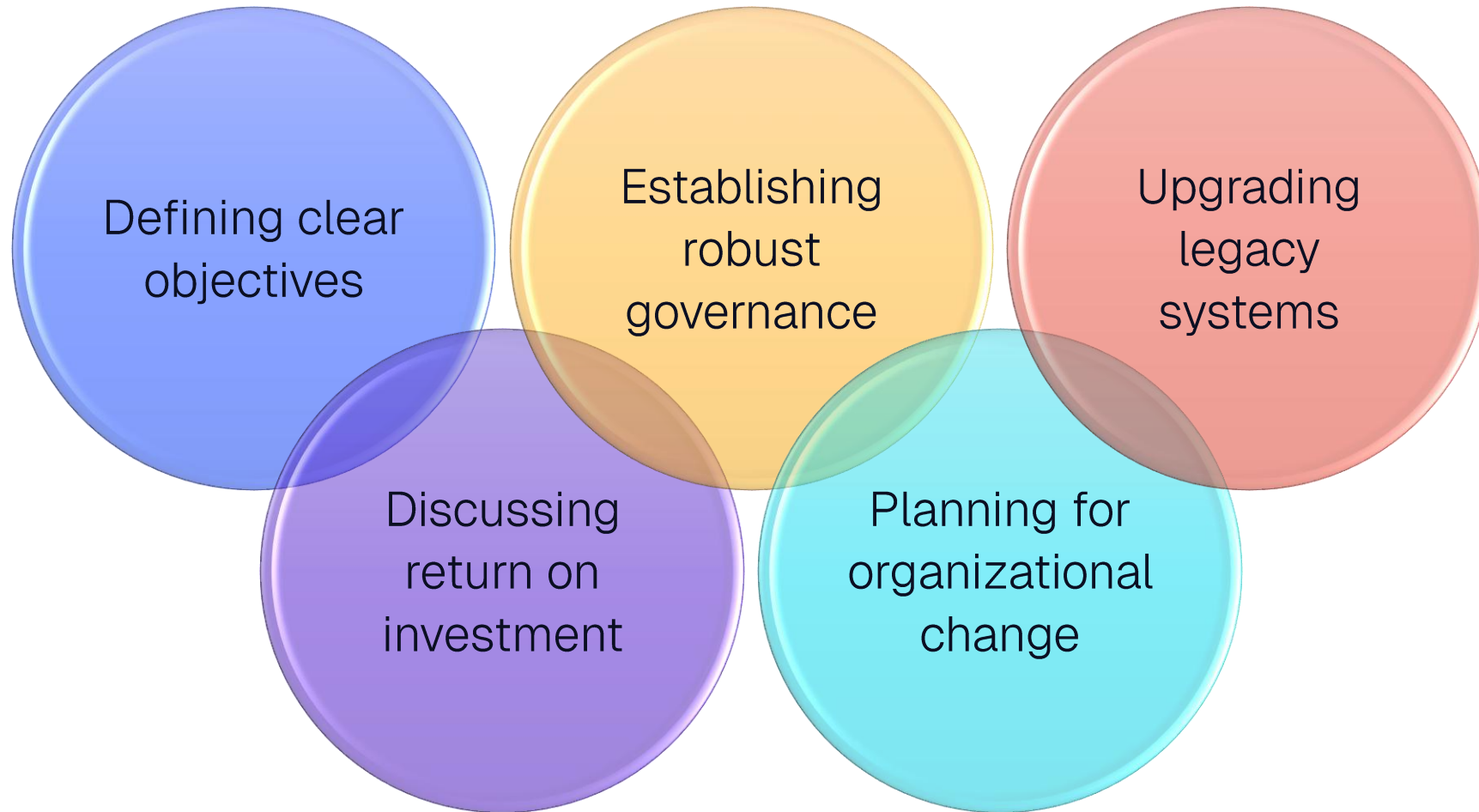
Implementing AI programs can be complicated due to:

- **Regulatory demands.** Based on privacy and other concerns, regulators may block progress.
- **Aging technology.** Implementing AI technology may require expensive upgrades to existing systems.
- **Foundational data architecture.** Implementing AI may require foundational work to be completed for success
- **Lack of preparation for change.** Utilities may not know how to address employee and customer concerns.



# Foundational elements for AI success

Before diving into specific AI projects, utilities should carefully consider foundational elements like:



# E Source leads utility AI research and insights

E Source is a trusted advisor to 150+ utilities and has conducted extensive research on AI, customer operations, and experience. We also lead the following activities:

- **Customer Service Operations.** Stay ahead of contact center technologies and trends to transform your contact center into a customer experience center.
- **Contact Center Optimization benchmark survey.** Industry benchmark survey providing a view of the current state to inform future planning.
- **Future Proofing the Utility Contact Center study.** 2025–2026 multiclient study supporting utilities with expert guidance, data, and market research to improve contact center operations.
- **Utility Customer Research Consortium.** Panel of utility executives across the US focused on identifying opportunities for improvement and innovation in customer service and care.
- **Voice-of-the-utility research.** Ongoing surveys of utility employees across operations, management, and strategy.
- **Quarterly AI roundtable exchange**

# Study deliverables

## Primary research

- Foundational research and landscape review
- Utility interview insights
- Utility case studies
- Longitudinal case studies from other sectors
- Recorded fireside-style interview with AI company leaders

## Strategy development

- Strategy Readiness Assessment and Maturity Results
- Baseline Industry Benchmark
- E Source AI must-have requirements
- E Source vendor landscape review

## Expo and summary reports

- Access to a two-day expo in Dallas (December 2026)
- AI governance templates
- National voice-of-the-customer reports
- Customized research sample, if requested

# AI Vendor Advisory Board

The AI landscape in the utility sector will largely be driven by vendor partners and capabilities. On one hand, the multiclient research is intended to create a vendor agnostic space so utility executives can work with their peers to leverage the research and discuss a framework that makes sense. On the other hand, vendors have valuable insights and recommendations that should be considered.

**The AI vendor advisory board will provide input and advice on:**

- ✓ Trends and AI offerings, customer ops applications, and use cases
- ✓ Business case development, including value drivers and measurement
- ✓ Procurement and request for proposal (RFP) requirements and other considerations to develop a template for AI-related RFPs
- ✓ Customer research and perspective
- ✓ Governance model templates

# Study phases, timeline, and scope (Jul-Dec 2026)

## Phase 1 (Apr–June) Study design & recruitment

- Finalize research scope, interview guide, and qualitative surveys
- Conduct sales and marketing webinar
- Recruitment
- Study kick-off

## Phase 2 (July–Aug) Primary research

- Foundational research and landscape review
- Utility case studies
- Longitudinal case studies from other sectors
- Fireside chats with AI leaders

## Phase 3 (Sept–Oct) Strategy development

- Strategy development framework
- Readiness/maturity statement
- Baseline benchmarking
- Pilot design and scaling
- Analysis of vendor offerings and roadmaps

## Phase 4 (Nov–Dec) Reporting & expo

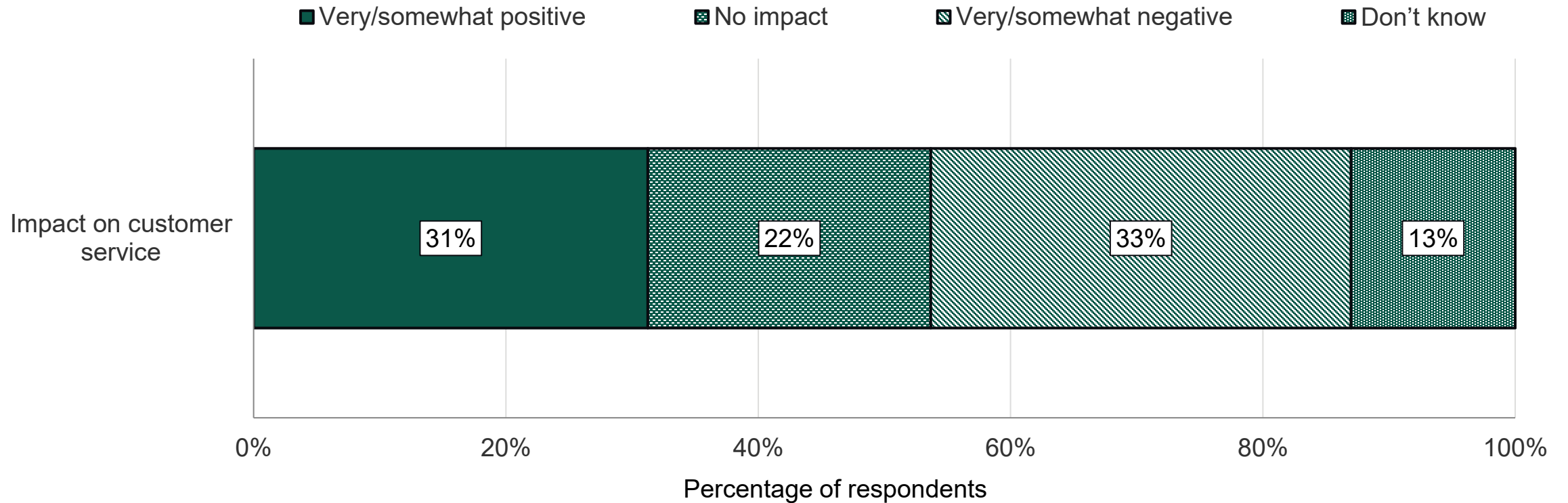
- Governance model templates
- System requirements
- AI Expo (Dec 2026)
- Add-on: customized customer research

# General participation: Pricing and deliverables

Without service territory-specific market research: \$25,000

- **Foundational materials:** Prior AI research and recommendations
- **Current landscape review:** Presentation deck and webinar
- **Utility case studies:** Presentation deck and webinar
- **Longitudinal case studies from other sectors:** Presentation deck and webinar
- **Strategy development framework:** Presentation deck and webinar
- **Readiness/maturity statement:** Presentation deck and webinar
- **Baseline benchmarking:** Presentation deck and webinar
- **Analysis of vendor offerings and roadmaps:** Presentation deck and webinar
- **Governance model templates:** Presentation deck and webinar
- **System requirements:** Presentation deck and webinar
- **Workshop (AI Expo)**

# AI impacts on customer service—customer perceptions



© E Source (2025 State of the Utility Customer Survey). **Base:** Total respondents (n = 1,012). **Question B31e:** What impact do you believe your utility's use of AI will have on customer service? **Note:** Percentages reflect weighted data; sample sizes (n) are based on unweighted data.

# Add-on option: Customized customer research

With service territory-specific market research focused on customer expectations, challenges, and preferences: \$40,000

Exploring challenges around customer perceptions of AI, trust in their utility, tensions between affordability and AI, and more.

All general participation level deliverables, **PLUS:**

- **Custom ethnographic research:** Detailed findings and data
- **Custom customer pulse survey:** Detailed findings and data
- **Custom interviews:** Detailed findings and transcripts
- **Comparative analysis:** Custom versus general
- **Custom report:** Individual utility or vendor report and readout

# Participation commitments

Your commitments for the study:

<b>Executive lead</b>	Director-level or above lead, with support from your team
<b>Information request</b>	Minimal data requests; no expectation to share proprietary company information
<b>SME interview</b>	One-hour interview; guide provided in advance and scheduled based on your availability
<b>Online customer pulse survey (if applicable)</b>	Provide feedback on survey questions
<b>Participant workshop (AI Expo)</b>	One full day of participation at a location determined study design is complete

To inquire about pricing, specific information about the study, or to register as a participant, please contact Katie Ruiz ([katie\\_ruiz@esource.com](mailto:katie_ruiz@esource.com))

# Contacts



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# Thank you

For more information or to register as a participant,  
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