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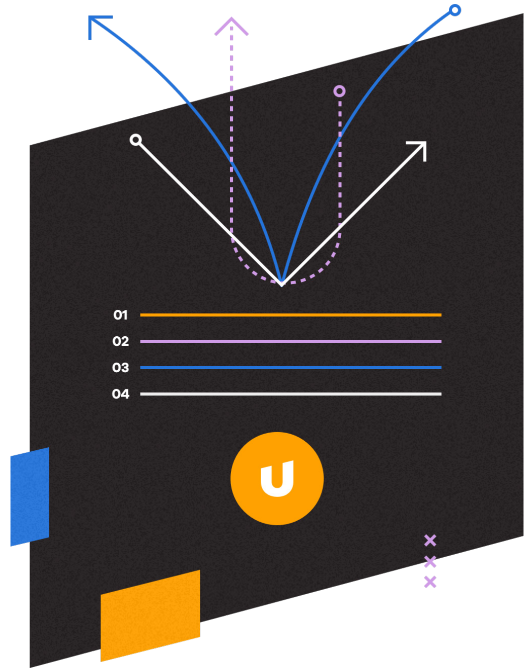
Energy Companies Light the Way with Panviva



In the highly complex, regulated, and competitive energy sectors of the U.S. and Australia, the key service drivers are keeping customers engaged and happy.

Unlike the United States, Australian consumers can switch their energy retailer at a click of a button during a weekend TV program.

While it may not be as easy to switch energy companies in the US, energy companies in both countries face special challenges as they try to balance the competing interests required to deliver their products and services. They are caught between federal, state and local agencies, customer service expectations and their own internal metrics.

They also must grapple with digital transformation, resilience mandates, new generations of homeowners expecting to utilize every device, and the growing importance of distributed energy.

All of this is causing utility company executives to rethink the way they do business, especially their ability to keep customers happy and, in Australia, from changing energy retailers in a flash.

Energy companies must contend with:

Being highly regulated. In the US, state and local municipalities have an array of confusing, rigid and often conflicting rules and regulations. This creates a compliance nightmare for governance groups to ensure consistent compliance adherence with all the different policies and procedures.

Complexity. Most energy retailers sell all fuel types (electricity and gas), with multiple options for each (green energy, solar electricity, natural and liquid propane gas).

State-based consumer protection. Targeted consumer legislation adds further complexity by causing price offers, service offers, processes, and procedures to vary by state.

Increasing global demands. There are more stringent privacy laws and changes to data collection capabilities that require both technology and policy adjustments.

Competing ownership models. Energy companies support multiple ownership models: municipalities, cooperatives or by investors. Those in private hands are subject to market whims such as mergers and acquisitions.

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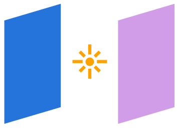
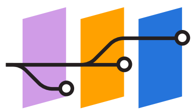
All of this has a direct impact on customer experience.

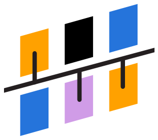
Energy companies must manage customer expectations, concerns and questions about:



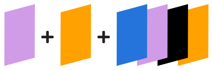
Outage management and service interrupt issues. The most visible in the US is California-based PG&E which has responded to wildfire dangers by arbitrarily (and often without advanced warning) shutting off power to millions of California residents for days at a time.



Technical field services, installation and repair needs responding to aging power grids and outdated infrastructure. After storms and bushfires, ensuring utility workers dispatched from other georgraphic areas can operate as if they are a regular employee.



Managing global, multi-state and offshore operations Inability to meet Customer Service Level metrics. High staff turnover impacts customer service and increases onboarding costs for energy providers.



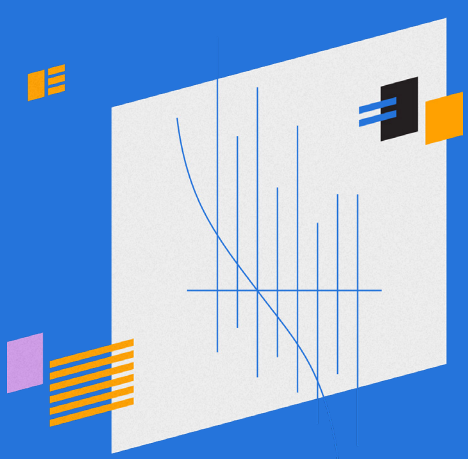
Billing questions, particularly around seasonal weather changes.

Customers are demanding more renewable energy sources and smart home capabilities.

In 2025, renewable energy sources accounted for about 24% of U.S. electricity generation. Australia's rooftop solar market added nearly 3 gigawatts (GW) of new capacity in 2024, bringing total installed rooftop photovoltaic (PV) system capacity to more than 25 GW (1).

Check out below for more impactful renewable energy facts.

- In 2026, renewable energy and battery storage are expected to account for 99% of all new electricity capacity added to the US grid, illustrating a major shift in the nation's power infrastructure.(2)
- Global energy demand grew by 2.2% in 2024, much higher than the annual average of 1.3% documented each year between 2013 and 2023.(5)
- In the US, total clean energy investment hit a record $378 billion in 2024, covering renewables, batteries, electric vehicles and other transition technologies, even as anti-renewable policies in the US created new hurdles.(3)
- Australia has the resources and capability to reach 82% of electricity generated by renewable energy resources by 2030.(6)
- Growth in solar PV met more than one-quarter of global primary energy demand growth. This marks the first time on record that a modern renewable source contributed the largest share of the growth in global energy demand. Natural gas followed, meeting around 17% of global demand growth.(4)



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Renewable energy growth trends

The global, multi-billion-dollar shift toward renewables.

Smart Grids

The global smart grid market is valued at approximately $60 billion USD and is projected to scale to over $250 billion by 2035.(7)

Automated Metering

The global smart and automated metering market is currently valued at over $37 billion. This growth has been driven by grid modernization and the adoption of internet-connected smart meters and sensors, and the market is now expanding at a 15% annual rate, reflecting a massive shift toward real-time utility monitoring.(8)

Battery Energy Storage Systems (BESS)

The global market for energy storage is projected to double by 2030—from $50 billion to over $100 billion! As governments and utilities invest more heavily in decarbonization and energy transition, BESS is rapidly becoming a cornerstone technology for the energy sector, optimizing power systems overall.(9)

Energy Management Systems

Energy management systems (EMS) enable an organization to collect real-time information on localized energy use through monitoring, assessment, and visualization. The Global Energy Management Systems market size is expected to reach $158.6 billion by 2033, growing at a Compound Annual Growth Rate (CAGR) of 12.7%.(10)

Prosumers

Meaning those that both consume and produce energy (like owners of solar-powered homes) now represent their own category in the global energy market. The US Department of Energy continues to invest in its Energy Grid Modernization Initiative (GMI) by partnering with both public and private stakeholders to support two-way power flow and expand consumer choice.

Customer Expectations: A Moving Target

With all thats going on, customers don't want any more headaches. They are looking for their energy companies to provide a seamless, consistent and almost invisible service, meaning that customers do not want to think about water, power and gas. They simply expect it to be there, working flawlessly when they need it. **Too often, that is not the case. Instead customers are voicing numerous complaints about their service experience:**

Billing

Prices, billing errors, payment arrangements, debt recovery practices and disconnections.

Overall customer service

Failure to respond to complaints, and health and safety issues.

Excessive call transferring

Timeliness of transfer, disruption of supply due to transfer and billing problems directly associated with a transfer.

Marketing

Sales practices, advertising, contract terms and misleading conduct.

Balancing customer expectations and experience with governance, compliance regulations and market constraints is hardly unique to the energy sector. Companies in health care, financial services, telecommunications, pharmaceuticals, life sciences and manufacturing all face similar challenges.

In many ways, customer expectations and the corresponding experience of the Australian energy market mirrors that of the US telecommunications market. The US telecom market is also highly regulated and highly competitive with consumers able to switch carriers easily – even keeping their same phone number. This market has also been upended with mergers and acquisitions and is fraught with complaints of unauthorized transfers.

Promotional advantages and lucrative switching offers also drive demand. The Australian energy retailers try to lock customers into contracts, similar to the way US telephone companies do, but in reality there are low barriers to consumer switching, driving up the cost of new customer acquisition and of supporting customer moves. For example, just to facilitate a new connection may require a customer service agent to access up to 27 different applications while on the phone to a customer.

That's why energy leaders in Australia have chosen to manage this complex web of competing governance requirements, technology changes and market pressures by transforming their knowledge systems with Upland Panviva. Here's how they did it.

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A Real-World Energy Retailer Story

A major energy retailer in Australia struggles with each of these challenges on a daily basis. When this retailer analyzed its customer service delivery, the company realized it was bombarding its customer service agents with information in a way that was preventing them from delivering good service.

The energy retailer discovered that:

- While standard operating procedures (SOPs) were available on the company intranet, many customer service agents did not regularly access them during the call, increasing their information and process error rate.
- The SOPs were very long, complex documents that tried to address all possibilities a customer might have. They were difficult for agents to read and absorb during the call while also actively participating in the conversation with the customer. Those agents who did use the SOPs during customer calls invariably missed cues in the conversation that caused stilted or ineffectual customer interactions.
- SOPs were slow and hard to access, causing long silences in customer conversations, or worse, long hold times while agents first searched for the information needed. All the while, they tried to quickly read the content to identify what section addressed the customer question.

The energy retailer concluded that these factors were causing an unacceptably high agent training cost, a long time to competence following initial training and more agents than should have been necessary for effective customer support. The company decided to reduce the number of agents while at the same time focus on improving customer experience (CX).

Less Complexity, Better Service with Upland Panviva

The energy retailer implemented Panviva, a cloud-based knowledge management system that restructures the way information is created, delivered and consumed, to provide a single source of truth to their agents. Panviva enabled the company to reformulate its SOPs into bite-sized chunks and layers that agents could find and read quickly during the customer call. Agents used the process to reduce the reading complexity of the online information. The company used Panviva's content authoring and its review and approval workflow functionality to streamline the process for creating and updating online content, so agents always had access to only the most up to date information.

The retail division now uses Panviva across its consumer and commercial energy retailing business units to provide guidance to its 2,300 sales, service and billing agents. In total, the company realized:

25%

improvements in NPS

20%

reduction in customer complaiants

52%

reduction in time for agents to access information

32%

reduction in the number of clicks to access information

The Panviva Framework for Operational Excellence

Transforming Teams

Your people are the heart and soul of your organization and the most important asset in your CX success. They are the voice to and from the customer. When people are untrained and unprepared, they become so focused on reading their script that they are not engaging with a customer conversation. Customers feel like they are talking to a robot. With Panviva as their "Guide on the Side" they can seamlessly step through approved workflows so that even the most junior representatives provide the highest level of customer experience.

Transforming Systems

Most organizations struggle with a patchwork of siloed information and governance systems that fail to communicate or enable each other. This creates an overwhelming information management requirement across the enterprise and beyond. With each new channel acquired (the intranet, website, CRM, chatbots, virtual digital assistants), the system's infrastructure becomes more fragmented. The risk of misinformation to customers is multiplied.

Panviva takes you from disconnected systems to a unified knowledge, communication and delivery infrastructure that delivers an exceptional, seamless customer experience regardless of channel or device.

Choosing Panviva is choosing to do more than meet today's challenges. It is a choice to future-proof your customer service strategy and teams for the demands of digital transformation.

Transforming Processes

Transforming your systems from multipoint connections to a single unified system infrastructure must be matched with a process transformation. The inability to communicate new and changed content; the need to increase employee productivity and reduce compliance errors; challenges with onboarding, training and time to competency are all signs that the process is broken.

With Panviva, your internal processes are integrated and streamlined so you can slash training times and improve processes of all types, from legal compliance to software implementations for frontline and backend employees.

Transforming Knowledge

Knowledge is the fundamental enabler of all CX. Knowledge brings answers to customers, skills to employees, and capability to digital agents such as chatbots and virtual digital assistants. To be useful, knowledge must move from where it is stored to where it is needed – into the hands of customers.

Panviva supports the entire omnichannel from a telephone call to a chatbot, to an Alexa-style virtual digital assistant. All channels, all sources through one knowledge base and one delivery system.

That's how Panviva delivers customer excellence for the energy sector and beyond.

Companies in Complex Industries Rely on Panviva

50% REDUCTION IN TRAINING TIME

3-5 MINUTE AVERAGE DECREASE IN HANDLING TIME

ACCELERATED AGENT COMPETENCY BY 2 MONTHS

90% OF CALLS NOW ANSWERED WITHIN 30 SECONDS

15% REDUCTION IN CALL ABANDONMENT

59% REDUCTION IN AGENT TURNOVER

More competent and qualified agents mean many other bottom-line benefits.

Companies in these complex industries rely on Panviva to help their front and back office become competent more quickly by providing 'moment of need' information at the agents' fingertips. With Panviva, no matter how many applications an agent has to access, ***they can get to the relevant information in three clicks or less.***

That's because Panviva skillfully addressed the four critical enterprise functions that impact all industries balancing competing governance, regulatory and compliance demands with customer service and digital transformation initiatives. They are: people, systems, process and knowledge.

These four enterprise functions can make or break your customers' experience. The way you implement, develop and support your people, systems, processes and your knowledge base can make you a CX leader or they can kill your CX initiatives.

Future-Proofing Customer Service Excellence

Panviva's Digital Orchestrator eliminates information silos, managing content from a single repository to ensure agents, chatbots, and digital channels always deliver a consistent, compliant experience, giving every agent the accurate information they need, exactly when they need it.

Empower Every Employee with Panviva Sidekick

In a sector defined by regulatory complexity, agents can't afford to lose time hunting for answers. Panviva Sidekick — a Google Chrome extension — delivers AI-powered guidance directly where agents work:

- **Smarter search:** Azure AI Search surfaces the right answer, fast.
- **AI conversational search:** Ask questions naturally and get concise, accurate answers without scanning full documents.
- **One-click copy:** Send answers directly to Notes or Case, keeping every interaction compliant.

Together, Digital Orchestrator and Sidekick deliver a connected knowledge ecosystem that boosts agent confidence and elevates CX.

Sources

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Knowledge Delivered Differently

Panviva combines the power of AI with the trust of compliant knowledge to exceed your customer's expectations.

Tap into the power of gen-AI curation that is approved by business experts, delivering real-time recommendations when your agents and customers need it most.

Used by top utilities companies

alintaenergy · AURORA Energy Research · EnergyAustralia · origin · south east water

Ready to get things done?

Let us show you what Upland Panviva can do.

Request a Demo

Upland Panviva: AI-powered real-time guidance for compliant, competitive organizations. With Gen-AI curation approved by business experts, deliver real-time recommendations for agents and customers. Deliver trust, productivity & CX excellence to highly regulated industries.