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C3 AI CRM | Utilities

AI-First CRM for the Utility & Energy Industries

C3 AI® CRM for Utilities is the only AI-first CRM built for utilities, energy retailers, and energy solution companies. Delivering industry-specific, AI-enabled capabilities for utility and energy enterprises, C3 AI CRM includes the comprehensive sales, marketing, and customer experience capabilities of Microsoft Dynamics 365 and Adobe Experience Cloud. Using C3 AI CRM, utility and energy professionals increase the success of new product and service offerings, increase distributed energy usage, improve customer service and satisfaction, and increase efficiency of power grid operations.

C3 AI CRM integrates all utility enterprise data — on both sides of the meter — and extraprise data sources into a unified customer and grid object model to provide a holistic 360° and near real-time view of customerfacing operations. C3 AI CRM applies artificial intelligence and advanced machine learning algorithms to that data. It enables users to design, price, and promote new and existing products, proactively identify and address customer needs to reduce call center activity and increase customer satisfaction, predictively flag anomalous events such as energy theft, and support trading objectives by forecasting energy demand.

C3 AI CRM for Utilities empowers utilities to deepen their customer relationships as an energy solution provider, more optimally manage distributed energy, reduce cost to serve, and increase the use of more reliable and clean energy.

Figure 1. *C3 AI CRM for Utilities helps build AI-driven strategies to intelligently design, launch, offer, and drive adoption of targeted products across energy markets.*

AI-Driven Use Cases

Revenue Forecasting – Accurately forecast revenue with AI in order to support regulatory and capital planning that supports meeting customer needs, optimizing rates, and operating at the lowest cost to serve

Customer Churn Management – Identify and prioritize customers at risk of churn, understand the churn risk drivers; and enact effective intervention strategies to retain each profitable customer

Next Best Offer – Analyze past customer behavior, predict customer needs, and predict customers' propensity to buy available products, along with actionable recommendations to build marketing strategies

Energy Forecasting – Generate accurate demand/load and price forecasts, while supporting end-to-end operations, balancing generation, validating production plans, and planning expansion projects

Predictive Cost Management – Integrate historical meter data, billing records, and customer service records to identify when bills are likely to trigger customer concerns, and proactively contact customers with information and recommendations to reduce unexpected bills in the future

Offer Design, Launch, & Targeting – Identify customer needs and personalize relevant, high-value products or services to offer them to increase profitable product sales and program participation

Sales & Trading – Provide an accessible overview of a company's supply, demand, and its outlook with integrated price curves and AI capabilities to identify mispricing opportunities to help sales and trading staff make informed decisions
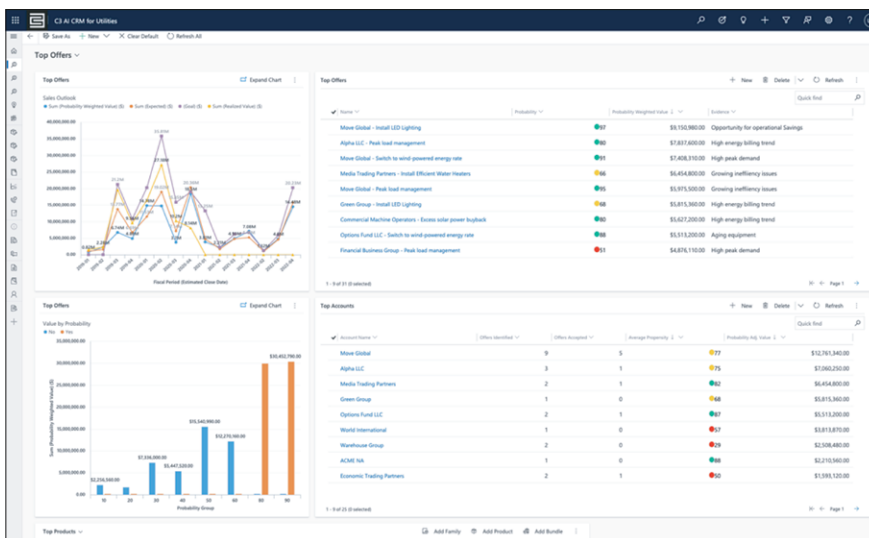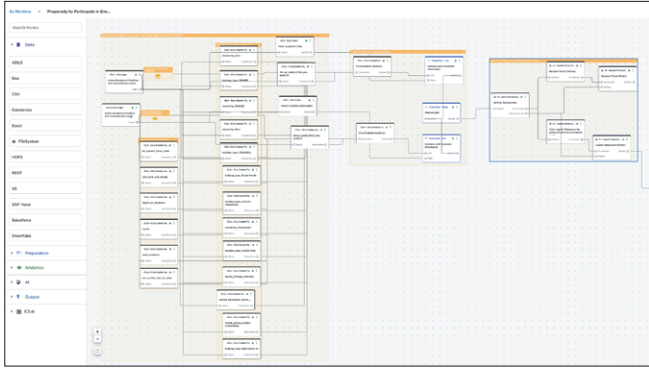
Figure 2. C3 AI CRM for Utilities provides pre-built AI templates that can be rapidly configured and extended using no-code tools

AI-Driven Use Cases (cont.)

Energy & Sustainability Management – Monitor customer energy use and carbon emissions and provide AI-based recommendations on opportunities to reduce costs and carbon footprint in order to expand services and deepen customer relationships

Revenue Protection – Analyze energy meter data and customer characteristics to identify signals of non-technical loss, determine cases of fraud, and proactively engage customers to increase revenue recovery

Customer Engagement – Unify energy customer service experiences across all channels, including call centers, website, direct mail, and email. Receive recommendations on the personalized messaging, its timing, and the best channel

Unify All Enterprise and Extraprise Data to Enable a 360° Customer View

Traditional CRM Data Sources

- Customer data, including firmographic data, relationship history, and interaction history
- Sales/purchase records
- Marketing campaign records
- Customer and supplier contracts
- Customer service records
- Monthly billing data

AI-CRM Data Sources

- High-frequency energy meter data and smart device data
- Asset management, SCADA systems, and grid operational data
- Energy markets and trading platform data
- Distributed energy resources data (solar, storage, EVs)
- Historical and forecasted weather
- Satellite imagery
- News and social media
- Customer website clickstream

Streamline Operations, Grow Revenues, and Maximize Lifetime Value

Grow revenues and maximize lifetime value – Accelerate growth with more data and intelligence on customer activities and markets while leveraging AI-driven insights to prioritize and pre-qualify leads, generate data-driven and targeted offerings, and build smarter hedging strategies

Manage risk across silos – Manage and minimize risk by integrating all available data to build a complete view of energy grids, company operations, and potential avenues for energy fraud while utilizing AI capabilities to support trading teams' positions and hedging strategies

Increase energy efficiency – Increase program participation and conversion by identifying the most relevant and targeted energy programs to offer each customer

Optimize products and services pricing – Uncover the most important factors that drive usage of products and services to enable smarter, more efficient price setting that caters to customer needs while maximizing company profitability

Streamline sales and customer processes – Reduce overhead through less time spent tracking and planning, and benefit from smarter identification of the next best action, when the action should be taken, and how it should be executed

Improve customer satisfaction and loyalty – Improve customer satisfaction and increase loyalty through more meaningful, targeted communications. Guide workflows with AI-driven insights to surface each customer's needs, engagement sentiment, and opportunity health analysis

Proven Results in 8-16 Weeks | Visit c3.ai/get-started