



Automation Excellence Essentials in 2025:

A Playbook for Utility Organizations



Automation Excellence Essentials in 2025

The Case for Automation in Utilities

Think about the last time a frustrated customer called your utility company with a question about their bill or to report an outage. Chances are, the agent handling that call had to navigate multiple systems, toggling through screens to access scattered data. For many in the utility sector, these scenarios are all too familiar, causing delays, customer frustration, and rising operational costs.

The demand for utilities is evolving—customers expect fast, reliable service, and regulatory pressures are increasing, yet legacy systems and manual workflows are holding companies back. Studies show that companies with automated workflows reduce operational costs by up to 30%* while improving customer satisfaction and compliance rates.

In this eBook, we'll dive into how automation can help various roles in your organization, from Customer Operations to Compliance, offering specific solutions and action steps to help utility leaders like you build smarter, more resilient operations.



The Case for Automation in Utilities

Common Challenges in Utility Operations

Utility companies often face the same set of issues: legacy systems, manual processes, and tight budgets. These factors create isolated data silos that prevent seamless information sharing across departments. The result? Bottlenecks, slow service, and high costs.

Whether it's a customer-facing team struggling to access current information or a compliance department manually tracking regulatory updates, these challenges can significantly impact efficiency and customer satisfaction.

But Why Should You Automate?

Automation isn't just a technology upgrade; it's a game-changer for utility companies looking to operate smarter and more efficiently. Here's what you can expect when you bring automation into your workflow:



- **Optimized Operational Costs through Workflow Automation**

By automating routine service requests, account management tasks, and maintenance workflows, utility companies can significantly reduce manual processing demands. For example, automating service workflows and outage notifications keeps customers informed and enables faster response times, enhancing both operational agility and customer satisfaction.

- **Enhanced Customer Satisfaction with Self-Service and Real-Time Data**

Low-code automation technology platforms support customer-facing portals, giving customers access to self-service options such as billing inquiries, usage reports, and outage updates—all with real-time data. With Veriday's guidance, utilities can implement these portals to provide quick resolutions, reduce call volumes, and enhance customer satisfaction.

The Case for Automation in Utilities

- ***Proactive Compliance and Regulatory Tracking***

Utility companies are subject to complex regulations, from environmental standards to safety protocols. With the help of modern automation solutions, compliance tracking can be automated through data integration, alerts, and audit trails. Veriday can customize these workflows to track regulatory deadlines and streamline reporting, reducing human error and enabling teams to meet requirements without manually monitoring each regulation.

- ***Seamless Data Integration for Cross-Departmental Collaboration***

Automation allows utilities companies to break down data silos, unifying customer service, billing, and operations. With Veriday's support, utility companies can implement cross-departmental workflows where all teams access consistent, up-to-date information. This integration enhances collaboration, reduces redundancies, and improves service quality by ensuring that each department works with synchronized data.

- ***Improved Responsiveness with Automated Case Management and Issue Resolution***

Through case management capabilities that modern automation tools have, utilities firms can automate issue tracking and escalation processes. Whether it's a service request, outage report, or compliance case, automated workflows ensure timely notifications and seamless handoffs between teams. Veriday can configure these workflows to ensure that service issues are prioritized and resolved quickly, improving customer response times and overall operational agility.

- ***Data-Driven Decision Making and Operational Insights***

These tools even offer analytics and insights capabilities, allowing utility companies to track process efficiency, customer engagement, and compliance performance. Veriday helps utilities set up dashboards and reporting tools that provide data-driven insights for better decision-making. For example, by tracking real-time metrics such as response times and error rates, utilities can continuously optimize their workflows and proactively address bottlenecks.

Automation Excellence Essentials in 2025

Let's dive into how each department can use automation to tackle specific issues and see real results.





Customer Experience Managers: Elevate Every Interaction

The Challenge

Utility customers expect quick responses, especially during service interruptions or high-bill seasons. However, fragmented systems often mean that customer service reps must toggle between screens to piece together information, leading to long wait times and frequent call escalations.

The Solution

Automation allows utilities to deliver faster, consistent service. Self-service portals let customers independently manage tasks like bill inquiries, checking outage status, or reporting issues without waiting on hold. Automating data integration across CRM, billing, and support means agents access up-to-date information, streamlining every interaction.

Action Plan



Implement Self-Service

Portals: Enable customers to check outages, billing inquiries, and usage through a portal, decreasing call volumes and agent workload.



Automate Data Syncing:

Use low-code automation to unify CRM and billing data so agents see real-time information when a customer calls.



Deploy AI-Powered

Bots: Chatbots handle routine inquiries, like bill due dates or outage status, freeing agents to focus on complex cases.



Customer Operations Managers: Cut Call Volumes & Boost Efficiency

The Challenge

High call volumes and disjointed systems challenge customer operations daily. For instance, agents may receive frequent calls about meter readings, billing adjustments, or service restoration updates, forcing them to jump between multiple systems to find answers.

The Solution

Automating service requests and integrating data across customer service, billing, and support reduces inbound call volumes and speeds up response times. Agents can focus on complex issues, while routine inquiries are handled through automation, improving efficiency and customer experience.

Action Plan



Automate High-Frequency Inquiries:

Implement automation for billing inquiries, usage updates, and account changes.



Integrate Key Systems:

Create a unified platform linking CRM, billing, and service logs for consistent data.



Deploy Chatbots for Routine Requests:

AI-powered bots can manage simple inquiries, with escalation paths for complex issues.



Compliance Managers: Simplify Compliance Management

The Challenge

Compliance in the utility industry is especially complex in North America, where companies must navigate environmental, safety, and operational regulations from entities like the Federal Energy Regulatory Commission (FERC), the North American Electric Reliability Corporation (NERC), and regional authorities. These regulatory bodies enforce standards across areas such as grid reliability, cybersecurity, environmental impact, and data privacy. Additionally, with growing climate mandates, utilities are required to track and report on greenhouse gas emissions, sustainability measures, and climate adaptation initiatives.

For many utility companies, compliance involves scattered data across departments like customer service, billing, and field operations, often stored in incompatible legacy systems. Without centralized data access, tracking and reporting becomes time-intensive and susceptible to human error. Manual processes not only slow down response times but also increase the risk of missed deadlines, leading to potential fines and reputational risks.

The Solution

With Veriday's automation solutions, utilities can implement automated workflows to consolidate compliance data, set up proactive alerts, and generate audit-ready reports, streamlining compliance management across all departments. By centralizing and automating data handling, Veriday enables utilities to stay ahead of regulatory requirements, minimizing the chance of costly oversights and freeing up teams to focus on proactive compliance strategy rather than manual tracking.



Compliance Managers: Simplify Compliance Management

Action Plan



Integrate Compliance Data Systems: Given the need to comply with standards like NERC CIP, FERC, and EPA regulations, centralizing data is critical for North American utilities. A unified compliance data hub, powered by data integration capabilities, allows real-time visibility across systems. This centralized view reduces the risk of non-compliance by ensuring all compliance data is updated and easily accessible from one place, helping utilities stay agile in response to regulatory demands.



Automate Deadline Alerts for Compliance Tracking: Use an automation platform to set reminders for regulatory deadlines tied to NERC and FERC standards, as well as environmental compliance targets under the EPA. Automated alerts help teams stay ahead of important compliance dates, such as emission reporting or cybersecurity updates, and prevent the high costs associated with missed deadlines. This automated tracking system also makes it easier to adjust workflows quickly if regulations change.



Enable Real-Time Monitoring and Alerts for Data Discrepancies and Regulatory Changes: Real-time monitoring of compliance metrics and automated alerts for data inconsistencies are essential. For example, if data related to emission levels or cybersecurity protocols deviates from regulatory thresholds, immediate notifications can prevent potential non-compliance. Automated case management also streamlines the process of addressing these issues, ensuring all steps are logged, accessible, and auditable, making regulatory audits less disruptive and more efficient.



Customer Success Managers: Reduce Churn and Drive Engagement

The Challenge:

For Customer Success Managers in utilities, fragmented systems and manual processes make it difficult to deliver seamless onboarding, maintain regular follow-ups, and engage customers proactively. This leads to delays, missed engagement opportunities, and, ultimately, higher customer churn. With rising customer expectations for responsiveness and personalized service, utilities need solutions that ensure smooth interactions throughout the customer lifecycle.

The Solution:

By implementing automation for onboarding and follow-up processes, Customer Success Managers can ensure customers receive timely responses and stay engaged. Automated workflows allow for seamless onboarding, scheduled check-ins, and proactive customer support. With these tools, utilities can reduce churn and build long-term customer loyalty by creating a more consistent, supportive customer experience.

Action Plan:



Automate Onboarding

Tasks: Integrate workflows for account setup, billing information, and data synchronization across departments. This ensures new customers have a seamless experience from day one, reducing onboarding times and minimizing errors.



Set Engagement

Touchpoints: Use automation to create a schedule of follow-up notifications, targeting key stages in the customer lifecycle, such as service anniversaries or billing cycles. These automated touchpoints help keep customers informed and engaged at moments that matter.



Deploy Health Monitoring for At-Risk

Accounts: Implement data-driven customer health monitoring to track behavior and flag accounts that show signs of disengagement. By setting triggers for outreach, Customer Success Managers can engage at-risk customers proactively and reduce the likelihood of churn.



Business Process Improvement (BPI) Managers: Enhance Cross-Departmental Efficiency

The Challenge

In utilities, manual workflows and disconnected systems often cause delays, particularly during high-demand periods like outages. Without automation, departments like customer service and field operations can struggle to coordinate, leading to redundant work and inefficiencies.

The Solution

Implementing an end-to-end automation strategy allows BPI managers to connect workflows seamlessly between departments. Automation minimizes manual hand-offs, reduces errors, and ensures that all teams are working with up-to-date information. Integrating workflows across departments like customer service and billing, and using automated triggers and notifications, enhances collaboration and speeds up response times.

Action Plan



Identify High-Impact Workflows: Map out processes with the most potential for efficiency gains, such as service request approvals and data entry across departments like billing and operations.



Automate Routine Approvals and Notifications: Configure workflows to handle approval requests, data updates, and notifications in real-time. This eliminates manual follow-ups and reduces redundancy.



Centralize Data Access Across Departments: Implement integration that ensures CRM, billing, and operational data is accessible to all relevant departments. This shared visibility eliminates isolated data silos and supports cross-functional collaboration.



Track Efficiency Metrics: Use metrics like task completion time, error rates, and task hand-offs to continuously measure and refine improvements across departments.

Case Study

One North American energy provider worked with Veriday's automation solution partner to overhaul its complex compliance tracking process. Before automation, compliance involved manually coordinating regulatory data across departments, often taking up to three weeks to complete reporting and auditing requirements. This time-intensive, manual approach increased the risk of human error and made it challenging to meet strict regulatory deadlines reliably.

With automation, they centralized their compliance data, enabling real-time tracking across departments and automating key elements like deadline alerts, data validation, and report generation. The streamlined process allowed this energy provider to reduce compliance completion time from three weeks to just 33 hours, giving teams the ability to respond proactively to regulatory requirements rather than reactively. This shift to automation resulted in an estimated \$15 million in annual savings and an additional \$22 million in net-back revenue due to faster, more accurate reporting and minimized compliance risks.

Automated compliance tracking also freed up valuable time for their teams to focus on strategic tasks rather than routine data entry and oversight, creating a more agile compliance management approach.

Getting Started with Automation: A Pilot Approach

Starting small reduces risk and provides quick wins, helping your team see the benefits of automation firsthand. Begin with a pilot project in one high-impact area, like customer onboarding or compliance alerts. Track the outcomes, then expand automation to other areas based on those insights.

Measuring Success and Scaling Automation

Success metrics like time saved, error reduction, and customer satisfaction help you gauge the impact of automation. As your team becomes comfortable, you can gradually expand automation to more departments, creating a cohesive, data-driven operation.

Building a Future-Ready Utility Organization

Automation is more than a solution to immediate problems—it's a foundation for growth. By implementing these strategies, utility leaders can create a resilient, customer-focused organization prepared to meet future demands.

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