



2021

**THE FUTURE OF UTILITIES REPORT:
WHAT'S MISSING FOR UTILITIES, IS IT CUSTOMERS?**



THE REBOOT SHOW



THE FUTURE OF UTILITIES: ABOUT THIS REPORT

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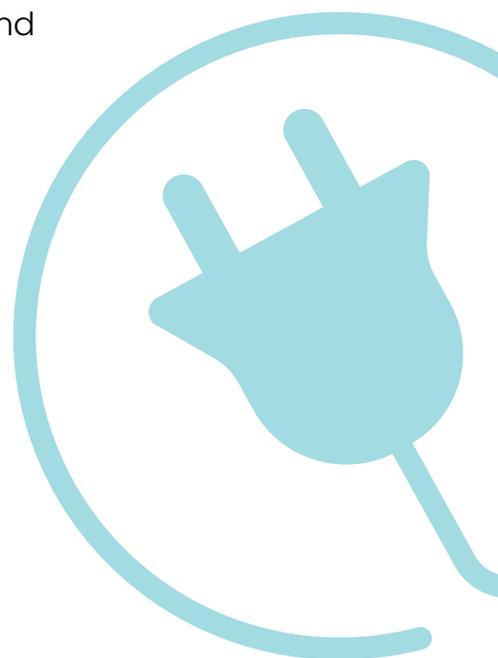
The Utilities sector is undergoing incredible technology transformation as generators, distributors and retailers strive to improve cost efficiencies and enhance the customer experience.

Utilities businesses are under significant pressure to evolve and adapt their operational and service models as they work to support the future of our planet.

Data and insights in the utilities sector is enabling disruptive business improvement in the interests of affordability, sustainability, reliability and security.

Recently we, The Reboot Show, joined forces with Salesforce Industries, formerly Vlocity, and Capgemini to explore **The Future of Utilities** during an exclusive panel discussion.

This report summarises the most crucial aspects of the discussion and is positioned to serve as a reliable and credible reference for leaders, service providers and practitioners in the energy utilities sector.



THE FUTURE OF UTILITIES: ABOUT OUR FEATURED EXPERTS



KELLY JAMES

Kelly is the Vice President and General Manager for Energy & Utilities at Salesforce Industries, formerly Vlocity. Kelly has spent over 20 years building and delivering CIS, billing, and customer experience solutions to utilities worldwide, previously with companies including Oracle, Opower, First Data and Vlocity. Kelly leads the energy and utilities industry practice, delivering solutions for transformative, cloud-based customer and employee experiences to companies worldwide. Kelly is passionate about helping utilities and energy service providers transform the industry for the benefit of their customers and for the future of our planet. Kelly is a creative and accomplished professional who believes strongly in equality and leads by putting people and customers first.



JAN LINDHAUS

Jan is Capgemini Australia's Head of the Energy, Utilities and Chemicals sector and an expert for business transformation, energy transition and digital technologies. With over 20 years of experience in asset-heavy industries across the globe he provides his clients with pragmatic, proven and hands-on advice. Jan has developed focused offerings for his sector clients that help them address their transformational needs in the light of the energy transition. Jan puts a strong focus on leveraging digital technology advancements, progressing IT/OT convergence and achieving step changes in operational efficiency. He helps his clients to balance the need to innovate and take risks, while securing safe and efficient operations of their critical asset base. Jan shares his market insights every year in the Australian chapter of Capgemini's World Energy Market Report (WEMO).



LUKE STOW

Luke Stow is an internationally recognised, customer focussed executive in the technology industry. With extensive experience leading and managing complex business and digital transformations, Luke is regarded as an innovative and talented technology advisor. Luke has a proven track record in business leadership in complex environments, across multiple industries, on an international scale and within various cultures. As one of this region's truly independent business change and technology experts Luke brings his creative and rational thinking to each engagement and is active in the Asian emerging technology community. Luke has a wealth of experience in the Utilities sector as a former CIO and executive with a range of generation, wholesale and retail electricity and water utilities organisations.

THE FUTURE OF UTILITIES:

EXPERT INSIGHTS FROM KELLY JAMES, VP AND GM FOR ENERGY AND UTILITIES, SALESFORCE INDUSTRIES



"Digital transformation is driving many things at the moment and the future of energy distribution is here. There is a need for digital first and service anywhere strategy adoption by key players in the energy utilities sector. Many companies are thinking about ways to manage and balance the grid in this new world.

The goals of the customer are constantly changing and cost savings have always been a prominent theme however now it's also about the customers demand to see value and understand how a supplier can help them to meet their carbon footprint goals now and in the future. There's been a real transformation in which consumers want their energy utilities providers to help them understand their role in the world when it comes to consumption.

For businesses, it means that they need technology platforms that can support them to achieve the level of agility required to meet the goals of the customer. For businesses this includes having access to the right data insights to be able to serve the customers better."

"GREAT TECHNOLOGY DISRUPTORS IN THE SECTOR ARE WORKING ON WAYS TO ENGAGE THE CUSTOMER AROUND THE GOALS OF THE CUSTOMER"

"We're seeing an acceleration in adoption of cloud platforms to enable digital first capability so that businesses have the agility they need to serve and meet the customer anywhere."

"THE NEED FOR DIGITAL FIRST CAPABILITY AND AGILITY TO SERVE AND MEET THE CUSTOMER ANYWHERE HAS BEEN REINFORCED BY COVID19"



THE FUTURE OF UTILITIES:

EXPERT INSIGHTS FROM KELLY JAMES, VP AND GM FOR ENERGY AND UTILITIES, SALESFORCE INDUSTRIES



"THE CHALLENGE OF INTEGRATION HAS BEEN OVERCOME, WITH SERVICES LIKE MULESOFT"

"Traditionally it was considered too difficult, costly and risky to consider integrating ERP's, such as Oracle and SAP, with newer technologies. But this mindset has changed, particularly in competitive open markets, and it is continuing to change and transform amid the realities of what The Future of Utilities actually looks like for all stakeholders.

The challenge of integration has been overcome, with services like MuleSoft, and this legacy mindset has been demystified.

From a regulator perspective, we're seeing some beneficial changes in approach whereby the incentive structures are becoming more considerate to the wants and needs of the customer.

Residential and business customers in this sector are demanding more data insights and this includes expectations in relation to the what, when, where and how of these insights. Players in this sector need to implement competitive and creative data management strategies to ensure they can use the data to better serve customers, in addition to solving critical business challenges such as grid architecture transformation. Business in this sector need the data at their disposal to be able to turn it into insights to then become the right advisor to the customer, be it residential or commercial.

Sustainability, and the way energy utilities businesses approach sustainability, is critical within the context of The Future of Utilities. We're seeing energy retailers across the world re-consider their business strategy amid the need to be sustainability centric in the energies markets."



THE FUTURE OF UTILITIES:

EXPERT INSIGHTS FROM KELLY JAMES, VP AND GM FOR ENERGY AND UTILITIES, SALESFORCE INDUSTRIES



"In the context of sustainability, Salesforce as a business is signed up to the United Nations' sustainability goals which is a fundamental part of our climate equality values.

Continued recognition of convergence in this sector is an important requirement of leadership. One client of ours, in particular, in the energy utilities sector is also one of the largest insurance providers in the UK which is a great example as to how innovative thinking with a customer focus can support the process in which businesses in this sector future proof their business models.

Understanding the customer and aligning all stakeholders is absolutely crucial and for businesses in this sector they need to be very thoughtful about which partners they can procure for strategic growth and management of their business, especially as competition intensifies.

Businesses should consider choosing a strategic platform partner who can allow you to be agile and change at the pace you need along your strategic roadmap. Working with a singular platform that doesn't require you to reinvent and spend all of your money stitching things together is what will allow you to remain competitive in this sector moving forward.

5G is a growing influence on The Future of Utilities which is making convergence in this sector more relevant and valuable."

"BUSINESSES IN THIS SECTOR NEED TO BE VERY THOUGHTFUL ABOUT WHICH PARTNERS THEY CAN PROCURE FOR STRATEGIC GROWTH AND MANAGEMENT OF THEIR BUSINESS"



THE FUTURE OF UTILITIES:

EXPERT INSIGHTS FROM JAN LINDHAUS, VP AND HEAD OF SECTOR FOR ENERGY AND UTILITIES, CAPGEMINI



"Moving away from coal, as a primary energy source, is a transformation that is creating a lot of conversations and some compelling challenges. It's a major task to transform today's grid architecture and therefore changes to transmission and distribution are creating a lot of opportunities for technology disruption. We have a dramatic fragmentation of new renewable energies coming into the market and today's architecture is simply not able to cope with that.

On the retail side, it's all about the fight for the customer. Lowest cost operations, digitisation, service flexibility and protection of market share are the key drivers for retailers in the energy utilities sector at this time.

The ecosystem that businesses in this sector need to be able to manage is more complex - it is not unilateral. A complex CRM capability needs to be established by players in this sector to ensure they're prepared for The Future of Utilities."

"DECARBONISATION AND SUSTAINABILITY ARE THE MOST TOPICAL POINTS OF DISCUSSION"

"Traditionally the industry has been very conservative and asset focussed which has made it challenging for energy utilities businesses to adopt a customer centric mindset which is the catalyst for overcoming legacy technology solution issues in the sector."

"DATA AND DIGITISATION ARE A FUNDAMENTAL ENABLER OF THE TRANSFORMATION REQUIRED TO SUPPORT THE FUTURE OF UTILITIES"



THE FUTURE OF UTILITIES:

EXPERT INSIGHTS FROM JAN LINDHAUS, VP AND HEAD OF SECTOR FOR ENERGY AND UTILITIES, CAPGEMINI



"PROTECTING CRITICAL INFRASTRUCTURE IN THIS SECTOR AND ENSURING SECURITY COMPLIANCE IS ONE OF THE MOST IMPORTANT ROLES OF THE REGULATOR"

"There is a major culture transformation required of the businesses in this sector, especially to allow for new technology adoption such as more advanced CRM capabilities. Having an executive sponsorship for new ways of working will be a key enabler of success as players seek to thrive amid The Future of Utilities.

Legacy technology systems are, in many cases, outdated and poorly integrated which makes it difficult for any business to effectively become digital first and future proof its capability. A plug-and-play cloud solution doesn't work and moving away from such systems is always hard,.

Businesses are looking for nimble-hybrid architectures and systems which means electing a full-stack vendor is no longer the best decision.

Protecting critical infrastructure in this sector and ensuring security compliance is one of the most important roles of the regulator and I believe they do provide decent guidance. Introduction of new compliance requirements can create hurdles for businesses to overcome especially within the context of their digital transformation efforts. It is crucial for the regulator to have open dialogue with the market to discuss and make clear its intended roadmap.

When it comes to renewable energies, balancing the reliability of supply with the needs of the market is a key area of consideration. If communities have a spirit of sustainability and they don't feel like they're receiving the offerings they deserve, they will build their own microgrids and together with suppliers seek out their own supply. I see it as imperative that there is an integrated and collaborative approach to renewable energies."



THE FUTURE OF UTILITIES:

EXPERT INSIGHTS FROM JAN LINDHAUS, VP AND HEAD OF SECTOR FOR ENERGY AND UTILITIES, CAPGEMINI



"If we consider what is required to manage tomorrow's energy system it is a complex hierarchical structure of microgrids that are privatised, and community grids of the renewables of battery storage. Our new grid architecture can only be improved and managed via data and standards that apply across the sector and it is the regulator that needs to drive this level of standardisation.

Previously the end consumer was predominantly focussed on the cost of their energy utilities, which is still the case generally speaking, however we're seeing a growth in concerns around "where my energy comes from" as a result of sustainability awareness. This is elevating the pressure on every stakeholder within the supply chain to collaborate with one another and seriously consider the end customer.

New market entrants and tier two retailers are making the market for the end customer more competitive, which is a good incentive for tier one retailers to consider the changing wants and needs of the end customer.

The move out of coal is happening despite the fact that bilateral agreements haven't been achieved and political direction is unclear. I'm also convinced that electrical vehicle adoption will accelerate in metropolitan areas. I believe we will see a transformation in relation to who the orchestrator of the future of energy becomes."

"WE'RE SEEING A GROWTH IN CONCERNS AROUND "WHERE DOES MY ENERGY COME FROM" AS A RESULT OF END CUSTOMER SUSTAINABILITY AWARENESS"



THE FUTURE OF UTILITIES:

EXPERT INSIGHTS FROM LUKE STOW, RESIDENT EXPERT TECHNOLOGY PANELIST ON THE REBOOT SHOW



"Stakeholder collaboration and engagement is a really important part of this conversation. In particular, the industry needs to be collaborating effectively with the regulators given how influential and critical the regulators are to the performance of this sector. Importantly, the end customer also needs to be engaged because they too have requirements from players in this sector. I think what's happened in recent years is that the pressure on retailers from the end consumer has made all major stakeholders in this ecosystem realise that they actually have customers.

Many of the legacy technology solutions for the sector are rather dated, particularly from a front-end-office engagement perspective so moving away from the traditional approach to digital transformation is really quite key.

The shortcomings of legacy technology systems has meant that it has become commonplace for undue manual intervention with these systems which subsequently drives up the cost to serve."

"THE GROWING
PRESSURE ON
RETAILERS HAS MADE
THE SECTOR REALISE
IT ACTUALLY HAS AN
END CUSTOMER"

"Automation capability needs to be a priority in this sector to ensure that the customer service is competitive and that operational costs are in line with what's possible.

Engaging with a utilities provider has never been something customers look forward to, but the reality is that customers are now demanding an engaging experience"

"MANY OF THE LEGACY TECHNOLOGY
SOLUTIONS FOR THE SECTOR ARE RATHER
DATED, PARTICULARLY FROM A FRONT-
END-OFFICE ENGAGEMENT PERSPECTIVE"



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THE FUTURE OF UTILITIES:

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"PLAYERS IN THIS SECTOR NEED TO CONSIDER HOW THEY ARE DEVELOPING THEIR DIGITAL COMPETENCIES BECAUSE IT IS DATA DERIVED INSIGHTS THAT WILL ENABLE THEM TO SURVIVE"

"Energy utilities businesses have been asset focussed for a very long time and as such 'the customer' has largely been a new phenomena as these businesses have started to realise the power of the customer in the market.

Traditionally in the sector it has been a battle for executives to pitch for customer engagement funding given they've been competing with the engineering department who require significant ongoing investment into the fundamental assets of the business. The customer phenomena is demanding a major mindset transition in these businesses.

This sector has, for a long time, been data rich but insight poor and this is the exact reason as to why players in this sector need to consider how they are developing their digital competencies because it is data derived insights that will enable them to survive The Future of Utilities.

In recent years we've seen growing awareness amongst end consumers and they've really started to question the role of their energy utilities providers and further they've started to think about what other products and services they may like to access via their energy utilities providers - this is placing pressure on energy utilities businesses to become more innovative in relation to their product market fit considerations. Bundling of different products is a big conversation.

Cyber security in the energy utilities sector is becoming an increasing priority, especially as digitisation is a growing reality, and it is the role of local, state and federal governments to collaborate with the industry to understand what the true security risks and opportunities are. Standardisation and testing are particularly critical facets of the cyber security conversations within the sector."



THE REBOOT SHOW

THE FUTURE OF UTILITIES: REPORT WRAP UP

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We trust that this report will help to reboot your thinking on The Future of Utilities. Thank you to Salesforce Industries and Capgemini for their engagement with this critical discussion.

The Reboot Show is the technology industry's most reliable destination for insights, education and entertainment on all things technology. We broadcast weekly segments including Exclusive Panel Discussions, Friday Newsfeed, Tech Talent and The Review. Find us on YouTube and subscribe to our YouTube channel to stay up to date on the most important conversations happening in and around technology.

If you would like to discover how Salesforce Industries and Capgemini can help your business to embrace The Future of Utilities, we recommend contacting them today.

We look forward to seeing you on the next segment of The Reboot Show.

THE FUTURE OF UTILITIES



THE FUTURE OF UTILITIES: ABOUT THE REBOOT SHOW



THE REBOOT SHOW

LAMPS Media is a media solutions company specialising in lead generation and brand edification for technology brands.

The Reboot Show, a LAMPS Media Production, is the technology industry's most reliable destination for insights, education and entertainment on all things technology. The Reboot Show strategically facilitates technology related dialogue, debate and deliberation to support informed and competitive decision making.

LAMPS Media technology clients leverage The Reboot Show strategically within their campaign design to take advantage of brand edification alongside targeted lead generation activities. Our holistic and integrated approach to campaign design, deployment and management ensures that your campaign opportunity is exploited to deliver short and long term return on investment benefits for your technology brand.

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Salesforce Industries, formerly Vlocity, is a leading provider of industry-specific cloud and mobile software for the world's top communications, media and entertainment, energy, utilities, insurance, health, and public sector organisations. Salesforce Industries possesses deep expertise in vertical industries, enabling organisations to digitally transform, simply and seamlessly. Leveraging industry-specific processes and data models across any channel, Salesforce Industries helps customers increase sales and digital adoption, improve service, marketing agility, and operational efficiencies.

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Capgemini's Utilities sector delivers end to end transformation projects.

Transformation and disruption is the new normal, and rapid innovation is forcing a fundamental change in how Energy, Utility and Chemical companies do business. At Capgemini, we have a role to play in transforming businesses for the digital next. We continue to partner with our industry-leading clients to enable the success of their business transformation, help them build deeper customer relationships, reimagine enterprise technology and create new profitable revenue streams.

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THE FUTURE OF UTILITIES



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