

## From Authority to Trusted Advisor: the Utility's Changing Role

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## **Short Abstract**

Many utilities haven't prepared their customers to choose rates, programs, or methods of energy management. However, transition to choice is a transition many utilities are pursuing and providing to their customers. To enable customers to make good choices, utilities need to move from being a central authority to being a trusted advisor. By being more credible, reliable, intimate, and customer oriented, a utility can engage customers to understand and choose the products and services that are in the customer's best interests.

## **Short Summary**

This article introduces utilities to the practice of trusted advisor. As a trusted advisor, a utility helps customers and educates customers to be able to make decisions regarding utility products, services, and programs that are in the customer's best interest. This often involves choosing the best pricing plan and may evolve into the customer making significant energy efficiency investments. Trusted advisors educate, persuade, and deliver services to customers in-person, online, through media, and through automated self service channels. By helping customers make the best choices, a utility strengthens the relationship between the utility and the customer.

# From Authority to Trusted Advisor: the Utility's Changing Role

## Introduction

The transition to choice is a transition many utilities are now pursuing and providing to their customers. The tools, technologies, information, messages, and options that utilities are showering on their customers are meant to increase customer convenience and control. Rates, programs and service levels are also proliferating, with the same goal in mind. Meanwhile, utilities are struggling to accept unusual customer lifestyle choices, such as opting out of smart metering. While the choice of a utility is still closed to many customers, the choice of how to engage with their utility is a choice many customers are being offered.

We believe utilities are at a crucial point in the transition to customer choice, and few utilities are where they would like to be at this point. While utilities have been investing in new plants, smart grid systems, software systems, and databases, they haven't prepared their residential and small business customers to choose rates, programs, or methods of energy management. A few utilities have prepared themselves to be able to provide the education and knowledge to be trusted advisors. However, the smart metering challenges other utilities have experienced show what happens when neither utilities nor customers are prepared for the transition to customer choice: customers reject the utility's plans and advice, and exercise their freedom to make decisions, often seen as ill-informed and even bad.

Much has been written about how to prepare customers for their roles in the Smart Grid, and we do not seek to add to that literature in this article. Rather, we are focused on an important utility task: becoming a trusted advisor. The utility that moves directly from being a central authority to being a pipes and wires company will put its retail customers at risk. The utility that moves instead to being a trusted advisor will be looking out for the best interests of its customers.

## Trust vs. Transactions

The idea of trusted advisors is a familiar concept across many industries. More than a decade ago, in *The Trusted Advisor*, Maister, Green and Galford (2000) cataloged the many benefits firms were realizing from building trusting relationships with their customers. Account representatives in the electric utility industry have long recognized the opportunities arising from becoming trusted advisors to large commercial and industrial accounts. Account executives solve customer problems with their electric service, introduce customers to new products, services, and programs that reduce energy costs, and facilitate the installation of additional infrastructure to help the customer save money or energy. Account executives uncover needs, educate, sell, and service. Their work has served as a starting point for developing trusted relationships between utilities and their residential and small business customers.

Maister, Green & Galford (2000) describe the qualities of a trusted advisor as *credible* (one can trust what they say), *reliable* (one can trust them to do), *intimate* (one feels comfortable in discussions with them), and *customer oriented* (one can trust they have the customer's interests at heart). These interpersonal qualities are critical to being perceived by others as a trusted advisor. Many of the account executives we have interviewed enjoy these types of relationships with their customers. And most (but

not all) have had direct conversations and multiple meetings with their customers to establish the trusted advisor position.

Yet Maister (2005) also points out that displaying these qualities does not come naturally to every representative, or every company. Many companies, he notes, have a transactional view of their customers, seeking to provide immediate, short-term gratification and reward according to established contracts. These companies and their employees shy away from emotional bonds and long-term commitments. They prefer to keep a certain distance from their customers. They enjoy being the experts, getting paid for skillfully solving the customers' problems. We term these experts *prime movers* because they enjoy being in charge, deciding what the customer needs and determining who should be responsible for what.

There are utilities and utility regulators who are very comfortable with being in charge. From their point of view, customer engagement is largely a matter of persuading the customer to pay attention (Honebein, Cammarano, and Boice, 2011). Indeed, the electric utility industry has been dominated by the prime mover, take-charge model, where customers are reduced to momentary, real-time transactions and utilities are focused on how to tell the customer what to do (e.g, in demand-response programs).

The take-charge utility has things to say; if only customers were better listeners, many problems would be avoided. In the take-charge model, the utility isn't particularly interested in building any kind of long-term relationship with particular customers. The utility may build a long-term system and a long-term organization, but customers come and go for the take-charge utility. Most of their customer relationships don't go much beyond credit histories. For the take-charge utility, electricity is a commodity – but the customers are commodities as well.

It is very important to emphasize that taking charge has its place and advising has its place. Utilities, like all companies, need both kinds of skills, but as Maister (2005) notes, where companies get into trouble is by confusing the two. We need to recognize that *being an authority* and *being an advisor* are very different roles, and the utility that has always been very good at taking charge may run into trouble when it decides the time for advising has come. The take-charge utility may assign some of its best authorities to become advisors, and, confusing instruction with advice, may provide prescriptive, firm instruction on whatever topics it believes deserve customer attention. The take-charge, authoritative utility staff is often irritated at customer interference with this process. The advisors are there to give a clearly-defined stream of instruction, and the customers should be prepared to take it.

A better service model is to have advisors begin with the Voice of the Customer. A trusted advisor begins by listening. Because the customer is in charge, the advisor has to begin by understanding the customer. Once the advisor understands the customer, the advisor can recognize what kind of advice would be appropriate. However, moving beyond instruction to advice is very difficult for many utilities. Customers differ from one another and some may not seem to know what is in their best interests. Customers want their long-term best interests to be taken into account (not just their monthly bills) and they have particular view about what those long-term interests are.

Furthermore, customers want more than an explanation about why utilities do what they do. Customers want evidence that the utility has recognized that customers are the prime movers and customer objectives come first. Take-charge utilities who would argue that customers have no business designing the grid are probably right; customers accept that manufacturers design their own plants and

equipment. But manufacturers in other industries wouldn't get very far designing their products and services merely based on their own preferences. Many manufacturers will stand their organizations on their heads just to deliver features or functions that customers want, just because they want them. So naturally customers would prefer that utilities were equally receptive. From customer service to rate design to the balance of generation fuel sources, customers have their own ideas. This opens the possibility for a new state of mind that is available and accessible.

## A New State of Mind: Why Bother?

The transition from a take-charge model to a service-oriented model is less difficult than it looks, because one of the best things about becoming a trusted advisor is that it benefits the advisor at least as much as the advisee. The utility that learns how to be trusted, and give advice, becomes a healthier, stronger, more productive organization. To see why that's true, let's look at the primary activities of trusted advisors: education, persuasion, and service delivery.

### Education

First and foremost, trusted advisors are educators. As advisors, they need to have subject matter expertise, know how best to disseminate that expertise, and know how to guide learners in the acquisition of that expertise, through practice and feedback. In any learning relationship there is a *zone of proximal development*. This is the distance between one's current skill and one's potential skill "...in collaboration with more capable peers." (Vygotsky, 1978, p.86) In other words, one can most efficiently increase skill with an advisor.

Being an educator is more than being an expert: the educator has the communications skills to pass on expertise, by engaging the student and keeping their attention. The educator begins by understanding where the student is, and where the student wants to go, and then the educator contributes something new and valuable along that path.

Every educator knows that teachers (especially beginning teachers) learn from other teachers, and from students. The focus on educating makes the teacher more receptive to learning. For utility staff, this means that practicing being an adviser and being guided by the external metric of what the students want to learn and are learning, makes common cause with the customer. The engagement with customers will not only identify those staff who can tolerate becoming advisors, it will also develop empathy, receptivity, and listening skills in these advisors. It will introduce take-charge utility staff to the winding roads of long-term relationships. The engagement with other utility staff undertaking the same journey will further develop these skills. Education skills are vital in building any organization: they provide the utility with the resilience to network, change, and grow.

### Persuasion

Second, trusted advisors need to be persuasive. They are offering customers more than an opinion; they are helping customers make up their minds. Trusted advisors are salespeople, but a particular kind of salespeople: they are *non-manipulative* (Alessandra, Wexler, and Barrera, 1987). A non-manipulative salesperson is *customer oriented*, since they put the customer's interests (lower costs and greatest value) first, whereas a manipulative salesperson is *self oriented*, which means that they put their interests (a quota, commission, or a top salesperson award) first. Customers might acknowledge the expertise of a manipulative salesperson, but the salesperson they trust is the salesperson that place customer interests first.

Note that the successful, non-manipulative salesperson has to understand both the customer and the customer's options in order to match them properly. Once this salesperson recognizes a match, the salesperson's recommendation needs to be framed in the customer's terms, and the salesperson helps the customer make a decision. Whether it is determining the best rate or organizing a construction project, the utility staff member who is on the way to becoming a trusted advisor practices seeing the utility from the customer point of view. These staff members become skilled in recognizing which processes, programs, products, and services are valuable, and which aren't.

Most important, the focus on providing customers with solutions introduces take-charge utility staff to the leverage provided by customer motivation. The need to persuade other utility staff to help develop these solutions emphasizes how important it is to identify the motivations of others. Persuasive skills are vital in building any organization: they provide the utility with the direction to imagine, develop, and improve all of their offerings.

## Service Delivery

Third, trusted advisors need to deliver service. Service occurs after the customer makes a choice and is primarily about facilitating the customer's adoption of a product, service, or program through additional information, education, and advice. However, a trusted advisor also has the ability to recognize when a solution turns out to be wrong for the customer. An example of this is a default critical peak price rate that one of our clients offers large commercial customers. During the first year, the account executive that practices trusted advisor principles will guide customers in making changes that should increase value. After a year of experience on such a rate, the account executive will proactively make their customer aware of the results, and if not favorable, recommend alternatives that may offer greater value. In the service role, trusted advisors help customers unlock value and fix things that go wrong.

Practicing being of service helps the novice advisor recognize that the heart of advice is often seeing one step further down the road than the customer sees. The advisor takes on the responsibility of considering the customer's ongoing cycle of using the utility's offerings, and in doing so, moves the take-charge utility to becoming a steward of the customers' experience.

The role of a trusted advisor is to educate, persuade, and provide service. Utility employees who learn how to educate can focus on others and communicate in terms others appreciate. Utility employees who learn how to persuade can harness the motivations of others and help their organizations move forward. Utility employees who learn to be of service think long-term about relationships and take responsibility for the road ahead. It is clear how developing trusted advisors can help the utility as much as it helps the customer.

The strategy to develop the utility into a service-oriented organization by developing trusted advisors has its risks, notably, that the take-charge utility has to hear the Voice of the Customer very clearly. An insular, us-and-them staff cannot move quickly to trusting customers or being advised by them. The temptation to isolate trusted advisors into small, separate groups will be strong and will create conflicts. Rewarding staff for being credible, reliable, intimate, and customer-oriented will not come naturally. Learning how to trust and advise one another internally, in order to better become trusted advisors for customers, will be very difficult. But the utility that manages its ways through these risks will find itself gradually becoming a much more capable organization.

## How to Begin

For most utility customers, the primary point of personal interaction is with customer service representatives (CSRs). For most utilities, CSRs are primarily transaction-driven bellhops who usher customers from the front desk to their rooms. CSRs are selected for their abilities to take orders, follow processes, and be of good cheer. Their training emphasizes policies, protocols, accuracy, and speed. Most utility customers appreciate the efforts of most CSRs, but most utility customers would not regard the CSRs they encounter as trusted advisors.

There are exceptions. Oncor, San Diego Gas & Electric, Southern California Edison, Entergy, and some other utilities have positioned their CSR staff as trusted advisors. But few utilities have recognized the potential of developing trusted advisors as a way to introduce a service-oriented strategy across the organization.

So what's the difference between a CSR and a trusted energy advisor? Think of it this way, from the perspective of theatre (Pine & Gilmore, 1999). Today's utility CSRs primarily deliver what is called *platform theatre*. This means that the script guiding a CSR is stable and the CSR's performance is stable. Customers who want to follow the scripts typically get a good performance. Customers who want to vary the script (or if the script doesn't exist) typically get a poor performance. For an example of the latter, we direct readers to our [Electricity Journal](#) article, "We Got a New Digital Electric Meter. Our Usage Went Up 123%. Our Bill Went Up 65%" (Honebein, 2010).

We see tomorrow's trusted energy advisors delivering *street theatre*. With street theatre (which is named after the jugglers, magicians, and acrobats that you find performing throughout the world, on the street, in tourist spots) the core script is stable – the show has a beginning and an end. But within this script the actor's performance is dynamic, changing in response to the environment, such as the audience's mood and needs. With a street theatre approach, a trusted energy advisor is guided by a script but is allowed and encouraged to improvise in a way that results in greater value for the customer and the company.

Sometimes street theater comes indoors: we explained the concept of street theatre to one of our utility clients, and she grasped it immediately, recalling a story about a friend of hers who needed a special kind of shoes for a wedding. The friend found the shoes she wanted on Zappos, and called to place the order. The Zappos CSR looked up the shoes, and found that the size was not available and wouldn't be until after the wedding. The Zappos CSR then started searching the web for the shoes in the right size. The CSR found that Nordstrom had the shoes and that they were available at a store near where the customer lived. The CSR then gave the customer this information and advised she get on down to Nordstrom. The value to the customer was huge – the problem was solved.

Zappos didn't make the sale, and they didn't stick to the script, but they got big points for credibility and reliability. This reinforced their positioning as the first place to go for shoes, which is value that will last a lifetime. In addition, Zappos kept building a CSR organization based on education, persuasion, and service.

We recommend that utilities recognize CSRs for who they are, i.e., the primary source of the Voice of the Customer for the utility. We would ask utilities to note that while most utility customers would not regard CSRs as trusted advisors, most customers would prefer that CSRs were trusted advisors. Recruiting new CSRs who have skills in education, persuasion, and service, and/or training existing CSRs

so they acquire those same skills is vitally important. It may be true that today, few CSR staffs are organized to optimize credibility, reliability, intimacy, and customer-orientation. But CSR staffs, including new hires, could be organized against these metrics and whatever levels of performance utilities are now achieving in these respects are deeply dependent on their CSRs.

Furthermore, we all recognize that the arrival of customer choice finds both utilities and their customers unprepared, and the technical sophistication of the Smart Grid only exacerbates the situation. What the CSR organization is, what it does, and how it fits into the utility will all have to change in times to come. Why not change to a service-oriented approach that benefits both the customer and the utility?

## **Automating Advice**

It is clear that while some customers prefer the assistance of a live, personal advisor, whether that advisor is on the phone or online in a live chat environment, other customers prefer advice in other formats. It is well known that customer bills, home energy management reports, and marketing communications media have passively pushed advice to customers for some time on a variety of topics. For algorithmic tasks that have a tangible outcome, such as starting or stopping service, choosing a pricing plan, or setting up a payment plan, an automated trusted advisor (online or through an interactive voice response (IVR) system) is another option. Our research shows that there are three approaches for this: procedural advisor, wizard advisor, and interactive conversation advisor.

### **Procedural Advisor**

The first and simplest approach is the procedural advisor. This trusted advisor is essentially a web page that contains procedural instructions for accomplishing a task. Embedded in these instructions are videos, tools, job aids, and other resources that help a customer complete the task. An example of a procedural advisor is Duquesne Light's (2012) *How to Analyze My Bill* webpage (Figure 1). It advises customers to follow five steps to analyze the root causes of a high bill. These steps are very similar to the steps a CSR follows when advising the customer over the phone. The page starts with a short video that demonstrates the procedure. Then, for each step, there are specific instructions and links to tools that help the customer accomplish the step, such as daily electric usage graphs.

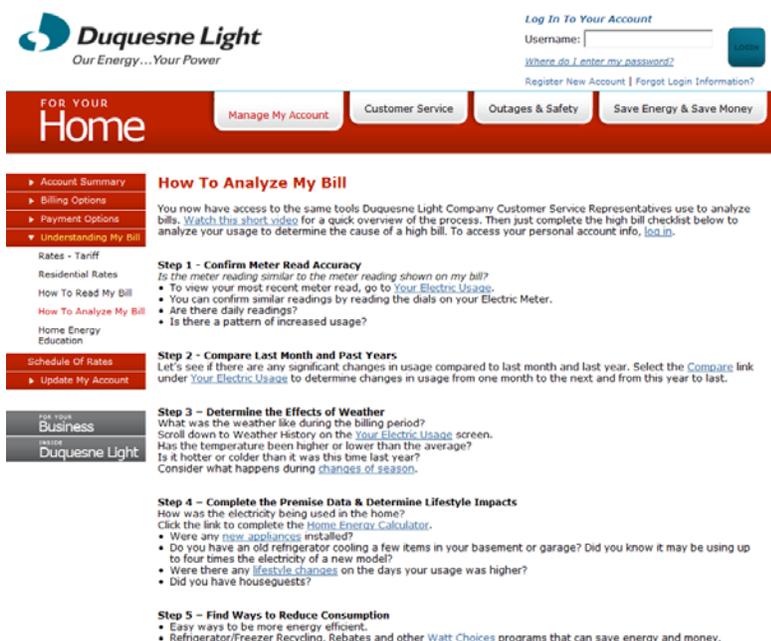


Figure 1: Duquesne Light's How to Analyze My Bill Advisor

## Wizard Advisor

The second approach is the wizard advisor. A wizard is a software tool that helps one complete procedural tasks. If you have installed software on a computer, then you have likely used a wizard to complete the installation process. Arizona Public Service uses a wizard-style advisor to help customers establish service and choose a pricing plan. For the pricing plan task, the wizard is framed as *Choose the BEST Rate Plan for You* (Figure 2). This wizard asks the customer questions about their premises and lifestyle to recommend the best rate plan for the customer and then take the customer's order for that rate plan.

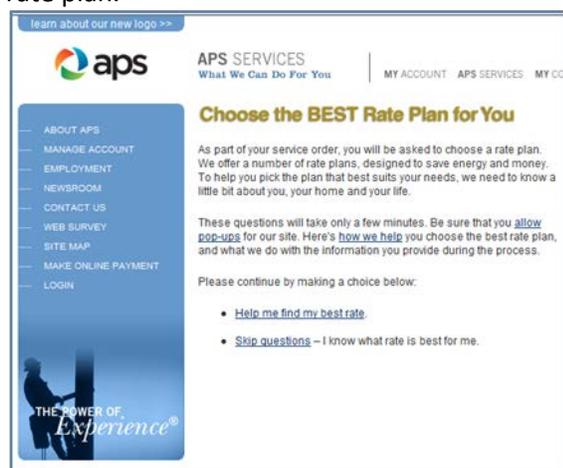


Figure 2: Arizona Public Service's Rate Plan Advisor

## Interactive Conversation Advisor

The third approach is the interactive conversation advisor. The interactive conversation advisor is a lot like the wizard advisor except that it is much more conversational and incorporates richer media. In other words, it is more fun. An example of an interactive conversation advisor is Entergy's (2012) *Tom, Your Entergy Advisor*. When the interactive conversation starts, the voice of Tom introduces himself and

begins asking questions, which the user answers by clicking choices on the screen. Tom isn't a dull guy. He's got a fun, quirky personality that is very conversational as he explains the elements of an energy bill, provides information about payment options, and explores money-saving tips and tools.

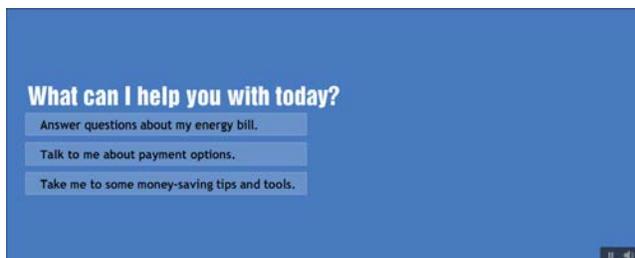


Figure 3: Entergy's Tom, Your Energy Advisor Interactive Conversation

With any of these approaches it is easy to see how such automated advice could be significantly enhanced if integrated with the customer's Green Button-accessible usage data. The advice then becomes more personalized and unique to the customer's specific situation.

## Shaping the Advising Environment

Finally, we should emphasize that succeeding in becoming a trusted advisor requires more than providing a little generic advice. Whether live or automated, the advice from a trusted advisor needs to be sufficient for the customer to make a choice about what to do. The customer may not take the utility's advice, but the advice needs to be personal enough, and complete enough, to prompt a decision.

Many utilities are constrained in this respect, as they face significant restrictions on the information they can use to advise customers. For example, the California Public Utility Commission's rules on electric vehicle customer education limit what utilities can tell customers so as not to create unfair competitive advantages for electric vehicle manufacturers and service providers. While we understand such limitations, we know that rules like this can negatively impact the customer experience if the trusted advisor cannot provide customers the information that helps resolve their problems.

Think back to the Zappos story earlier in the article. What if the advisor in that story wasn't allowed to refer the customer to Nordstrom (a competitor) in order to solve the customer's problem? In those circumstances, is the advisor really an advisor? Regulators and utilities need to realize that effective advising requires advisors to coach customers all the way to what the customer sees as a solution. You can't deliver a great customer experience if you can only take your customer part way and then leave them to figure out the tough choices on their own.

Another classic example of incomplete advising occurs after a customer signs up to have an energy auditor come to their home for an energy audit. The auditor shows up, inspects the home, and hands the customer a sheet of recommendations. The customer thinks the recommendations are great and wants to implement them. So the customer does what any reasonable person would do: asks the auditor who could help them do the work. The auditor then tells the customer that there are numerous licensed contractors who can do the work and that the customer should check the phone book. Now, we all know that this isn't what the customer is looking for. The customer is looking for the auditor (who is now, by default, their trusted energy advisor) to give them a couple of names of contractors who the

auditor thinks do good work. If the auditor can't, because of the rules, the customer is not only dissatisfied, but may lack confidence in the advice that has been provided.

Puget Sound Energy (PSE) developed a strong solution to apply in this kind of scenario. PSE has energy advisors. They are a special group that focuses on helping customers make their homes more energy efficient, increasing reliability (through on-site generators), and adopting solar generation. Recognizing that these energy advisors had to be able to take customers all the way to the goal line while maintaining a competitive and fair marketplace, PSE established the Contractors Alliance Network (CAN). Contractors must submit an application to join CAN and then PSE screens and certifies the contractor (PSE states, "We only certify the best."). When a customer then asks a PSE Energy Advisor for a referral, the Energy Advisor can access the CAN database, pull the names of a few contractors whose skills match the project (the contractor names are pulled in such a way that ensures equal opportunity), and then provide those names to the customer. The customer can interview the contractors, then select one or not. If the customer doesn't like any of the contractors, the customer can ask their Energy Advisor to pull additional names.

Other utilities have fared differently than PSE in proposing similar solutions to their regulators. Utilities also face the additional obstacle that new privacy restrictions may limit utilities in how they personalize solutions. We would suggest that the regulatory effort to provide complete and personal advice to customers will be worth it for utilities, not only because it is the norm in so many other industries, but for another reason. Providing complete and personal advice is how advisors become trusted advisors.

There is an internal dimension to shaping the advising environment as well. We all know that utilities are very risk adverse and for good reason: they sell a product that is dangerous not only to employees but to customers as well. Risk mitigation is part of the utility culture. But sometimes the level of risk mitigation can significantly constrains trusted advisors in terms of what they are required to communicate to customers.

There is a liberating aspect to becoming a trusted adviser that utilities should keep in mind. The take-charge utility expects itself to be right all of the time: incomplete information, performance shortfalls, and mistakes are treated as flaws. Better to say nothing than to risk providing misleading information. Better to do nothing than to risk providing a suboptimal product. However, the service-oriented utility recognizes that it is only part of the answer to any question a customer may have. Something is better than nothing. As best possible, based on the best information on hand, based on as deep insight into the customer as the relationship permits, the trusted advisor provides a point of view. The trusted advisor doesn't have to be right all of the time; the trusted advisor just has to provide the best advice possible in the situation. The customer is responsible for the choice.

Utilities must shape the external and internal environments in order for trusted advisors to thrive. This is not to say that regulatory policy and legal risk mitigation must be scrapped. It means that they need to more effectively balance the interests of customers and reflect good common sense. Approaches like the CAN are among the many creative ways that utilities can shape the advising environment so that the interests of customers and the interests of the marketplace can peacefully coexist.

## Conclusion

The transition from authority to trusted advisor is a process. It is like the relationship parents have with their children. As children grow up they make more of their own decisions as time passes and their

capabilities and experience increase. Wise and lucky parents make the transition from being an authority figure for their children to being respected and trusted advisors. Neither the parents of toddlers nor the toddlers themselves would wish that the shift in roles came early. We don't believe that the parents of a small child should merely offer the child advice against jaywalking into traffic and then leave it up to the child to decide what to do. Nor should the shift in roles come too late: we all smile at older parents who give commands to their middle-aged children.

In many areas of our lives, we see similar transitions: the patient who comes to understand his ailment enough to seek second opinions, the investor who begins to depart from her stockbroker's recommendations, the homeowners who override their architect's selection of materials for a renovation because they have been through renovations before and they know what they like. Perhaps originally, in the emergency room, the patient hung on every word from the doctor, but now, months later, that patient feels confident enough to entertain options about his treatment. As we become more capable and experienced, we move from passively following authority to actively making choices.

Utilities have asked their customers to engage with them more readily as technology proliferates, as workforces turn over, and as budgets get squeezed. Utilities will need more and more capable customers who take greater ownership of their energy and make good decisions with regards to the product, service, and program innovations that enable energy ownership. Trusted advisors, whether live or automated, who are credible, reliable, intimate, and customer oriented, can help customers with these choices in a way that establishes a stronger relationship between customer and utility.

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