

Automation for Efficiency

Summer 2025



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CCMA Leadership Forum Series

The Leadership Series is the documented output from the CCMA's (Contact Centre Management Association) Leadership Forum meetings. These take place at the House of Lords and provide an exclusive opportunity for senior contact centre leaders to get together and explore the factors that are driving change in their industry.

These meetings also provide a valuable platform to discuss continuing innovation in the contact centre, and how to unlock further value for the benefit of the customer, colleagues and for businesses.

Leadership Forum attendees:

Paul Stretton, Operations Director - Leading Net-Zero Communities, Amber

Michael Lapper, Head of Customer Experience, Cadent Gas

Jo Hetherington, Head of Customer Experience, CityFibre

Carly Freeman, Head of Customer Services, Insite Energy

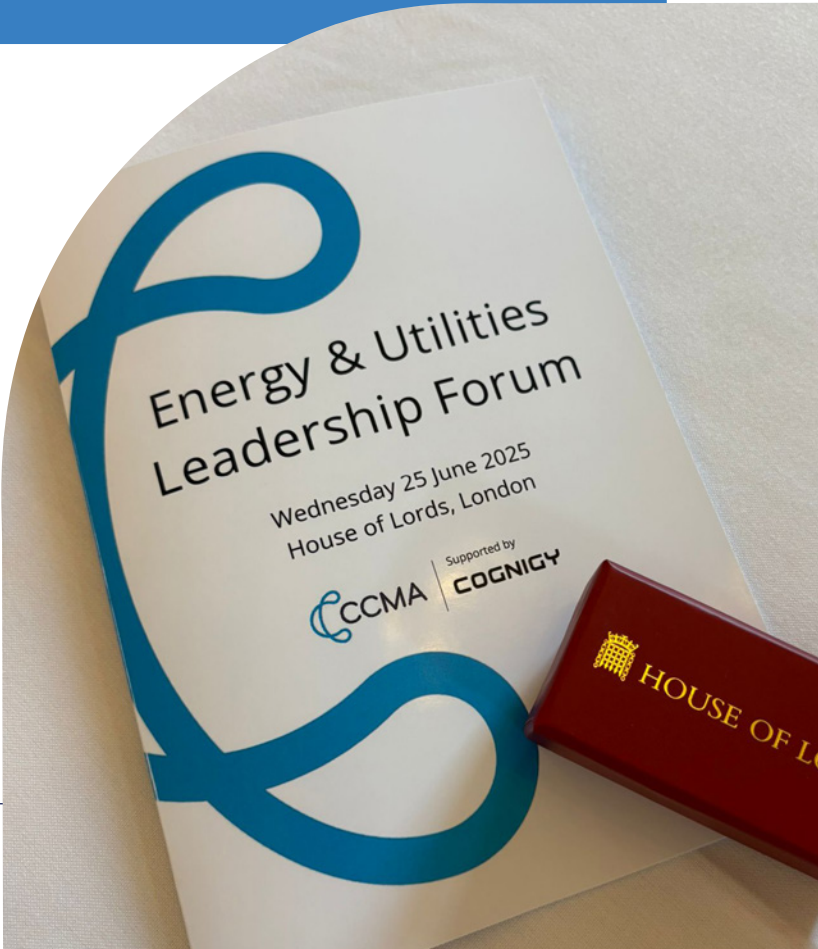
Jessica Ham, Senior Customer Experience Manager, National Grid

Kathryn McNab, Head of Customer Service, Npower Business Solutions Powered by Eon

Ketan Hindocha, Director of Customer Care, Pennon Group

Alex Williams, Head of Customer Contact Centre, UK Power Networks

Daljeet Kaur, Operations Director, Valda Energy

A photograph showing event materials for the Energy & Utilities Leadership Forum. It includes a white card with a large blue stylized 'E' logo, a red House of Lords box, and a white envelope. The card text reads: 'Energy & Utilities Leadership Forum', 'Wednesday 25 June 2025', 'House of Lords, London', 'Supported by CCMA COGNIGY'.

Energy & Utilities Leadership Forum

Wednesday 25 June 2025
House of Lords, London

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HOUSE OF LORDS

Where Are Energy and Utilities Sector Leaders on Their Automation Journey?

Automation – and the strategic approaches being used to drive operational efficiency – is a priority focus for contact centre leaders in the energy and utilities sector. Key themes explored during the Leadership Forum include:

Levels of Automation Vary Greatly. Leaders are cautious in their estimations about how far along the road they are with automation and AI. While some have adopted artificial intelligence (AI) to assist colleagues with customer interactions (e.g. Robotic Process Automation (RPA) and chatbots), some are still reliant on manual processes and are in the early phases of their automation journeys.

Efficiency is the Main Driver for Automation, but Growth Plays a Key Role. Crucially, supporting revenue growth without increasing headcount, while also improving the colleague experience, were seen as key. Leaders are aiming to support colleagues, reduce human error and increase consistency while meeting rising customer expectations.

Successful Automation Starts with Foundational Work. This includes fixing broken processes, improving data quality and involving frontline colleagues in identifying pain points. Attendees cautioned against rushing into AI without first understanding and addressing these fundamentals.

There's a Strong Focus on Agent Assist Technologies. These tools and processes are helping frontline advisors to become 'superagents' by improving quality, reducing friction and helping with interactions such as vulnerable customer support.

Proactive Service is a Future Target. Leaders are driven by the prospect of switching their contact centre capabilities from being 'reactive' to being 'proactive', and automation is fundamental to getting there. Some leaders already have proactive processes in place, such as alerting customers via specific engagement channels when a service outage might be coming up in their local area.

Automation Is Not Seen as a Job Reducer. Most attendees reported maintaining or even increasing headcount while adopting AI, with automation helping teams do more rather than replacing them.

Leaders Agree Small Wins and Clear Business Cases Are Key. Collectively it was agreed that a best approach to automation – and specifically AI – is starting small, learning fast, involving customers and colleagues and using automation to enhance, not replace, human service.



Can Automation Ever be a Silver Bullet?

The energy and utilities sectors are under growing pressure to reduce costs, increase efficiency, and meet rising customer expectations – all while maintaining high-quality service delivery and adhering to an ever-changing regulatory landscape. During this meeting, contact centre leaders from across the sector reflected on the role of automation in helping them meet these challenges and where they are on the journey.

Automation maturity varied widely across organisations, with most rating themselves between 2 and 5 on a scale of 1 to 10. While some have invested in technologies such as robotic process automation (RPA), agent assist tools or AI-enabled quality monitoring, many are still reliant on manual or workflow-driven processes. Factors such as legacy systems, budget constraints and industry-specific regulation have slowed progress.

“We’ve recently moved to a new telephony platform and that’s been a huge modernisation for us,” said Insite Energy’s Carly Freeman. “AI is currently too expensive for what we’re budgeted for. We’re also mindful not to rush into AI.

“That being said we’re aware that automation has to be a part of our future, because having too many manual processes puts a lot of pressure on the contact centre environment.”

Doing Automation the ‘Right’ Way

Despite the obstacles, the appetite to do more is clear.

Leaders agreed that automation should not be pursued for its own sake or purely to cut headcount. Instead, it must be tied to meaningful outcomes such as improving customer experience (CX), supporting the front line, enhancing accuracy and enabling growth without increasing operational costs.

One consistent theme among attendees was the importance of starting small and proving value. Organisations that had seen success emphasised the need to understand the root causes of inefficiency before applying technology. A strong foundation – clean data, clear processes and engaged people – was considered critical to long-term success. Many warned against “putting AI on top of something that’s broken”, stressing the need to fix core systems first.

“CityFibre is a challenger business that’s scaled quickly,” said Jo Hetherington, the fibre network provider’s Head of Customer Experience. “The foundations and the customer intent data management had to be there, otherwise it would be a mess.

“So many people want AI and so they inevitably put the application on top of something that’s not in order underneath. That’s why we focussed our reactive AI capability in one area of the business where we could heavily guardrail the data used for the response match. Fixing business problems through automation must be done in the right way.”



Guided by Colleague Feedback

Among attendees, automation was acknowledged as being used in a variety of ways, from simplifying internal tasks to the early stages of enabling proactive service – including proactive alerts and message delivery. AI tools are helping identify sentiment, monitor call quality, and even predict customer behaviour – reducing call dropouts and increasing conversion rates. Technologies like ChatGPT have also proven useful in tasks like drafting customer responses, especially in improving inclusivity for colleagues with different communication needs.

Automation is shifting the nature of frontline roles. Rather than replacing staff, tools such as generative AI and agent assist are aimed at helping employees with handling more complex, valuable interactions. Far from reducing headcount, many leaders reported that automation was enabling growth without additional recruitment, while improving job satisfaction and reducing churn.

“We’re constantly looking at core systems – and some innovations fail,” said UK Power Networks’ Alex Williams. “But sentiment analysis is an example of a tool that does great things with language solutions – especially in a CSAT-led business like ours that’s driven by the regulator.

“There are huge gains to be had in having an automated tool that reads for sentiment and provides summarisation – things that you didn’t know were a problem. And customer behaviour changes all the time. You can do heavy lifting with AI.

“We still have the same number of people, even as our calls have reduced as a result of automation. Instead, we have our people doing more outbound, focusing more on vulnerable contact and complex needs. It’s further support to our customers.”

There was strong consensus among energy and utilities leaders that customer and colleague feedback must guide automation strategy. Customers want fast, frictionless service, but not at the cost of empathy or relevance. The challenge is finding the right balance between automation and human support.

Ultimately, attendees agreed that automation is not a silver bullet – it’s a tool that, when used correctly, can enable smarter working, better service and sustainable growth.

The key is knowing the purpose, involving your people, and continuously learning from results.

As Amber’s Paul Stretton explained, automation should be “for business growth, not for cuts”, with human connection remaining at the heart of great customer experience.



Start small and learn fast

What advice do utilities and energy sector leaders give to their peers about why, how and when you should automate?

Daljeet Kaur, Operations Director, Valda Energy:

Organising 'hackathons' can be useful to identify the types of problem you're chasing and how to prioritise what to tackle. If you're looking at AI specifically, it helps to start small but crucially – get started. Prove the concept, show investors and staff where the benefits are, then that will give you confidence to get people on board to scale it up.

Jessica Ham, Senior Customer Experience Manager,

National Grid: Start with speaking to your frontline advisors because the frontline knows your friction points. Then when it comes to implementation, don't be afraid to fail. Ideas are great, but there's a danger of over-polishing those ideas and by the time they're in they can be out of date. Learn fast and fail quickly.

Alex Williams, Head of Customer Contact Centre, UK

Power Networks: Listen as much as you can – listen to your colleagues, because they'll tell you what processes they don't like and if you can fix the thing they don't like, you'll get buy-in from them for automation projects. Listen to your customers. Use a Natural Language Processing (NLP) tool, turn it on and listen. It gives you a vast amount of data which you can then plug into AI and start the process of learning by asking it – what are our customers calling us for? It's a great starting point.

Jo Hetherington, Head of Customer Experience, CityFibre:

Know your transactions. You can't automate if you don't know what you're trying to automate. It's about identifying three different buckets – automate, eliminate and higher touch. Put all of your transactions and activities into those three buckets. Find the data through CRM, listening, analytics etc, then get an 80/20 view and build use cases from that. You can't put AI over everything, so agree digital service principles amongst multiple stakeholders. What do you want your service profile to look like? Even topics like opening times – it helps everyone to identify what they want the service profile to be and work from there.

Kathryn McNab, Head of Customer Service, Npower

Business Solutions Powered by Eon: Don't wait on a big shiny project to land. Any automation can help alleviate

friction points if they're the right automations. That then allows you to put forward use cases for further automations. Survey your frontline to understand the themes that are coming through and let that drive improvements and give them the scope to provide ideas.

Niall Carter, Assistant Vice President, UK and Ireland,

Cognigy: The trick is to start with the 'why?' Why are you choosing automations? What do you want to solve that needs AI? If you can't answer the why, you're wasting time. It's a rapidly accelerating technology landscape – so find partners that will listen and who will tell you if something isn't a good fit.

Paul Stretton, Operations Director – Leading Net-

Zero Communities, Amber: There's a danger with any automation project that you do it because you think you have to. Understanding customer data, where the value lies and whether a project's going to work is vital.

Ketan Hindocha, Head of Customer Services, Pennon

Group: Force the business to think through three lenses – the customers, the colleagues and the business. Identify success factors across those three areas. Automation programmes are often big, so if you don't do that, you won't have success. Then it's all about getting the automation in and just doing it – deflection is the enemy! Procrastination is a risk when programmes are so big.

Carly Freeman, Head of Customer Services, Insite Energy:

As leaders there's always pressure to reduce, automate and introduce AI. Build from the bottom up. Customer purpose sessions have been good for us – understanding why people are contacting you, what they need from you, what their expectations are. Automation isn't going to fix any fundamental flawed processes underneath. There's usually lots of work required and you have to manage the expectations of your board.

Michael Lapper, Head of Customer Experience, Cadent

Gas: Don't overpromise with anything! Keep projects short and succinct because it's so easy to go too big with any automation plans.

About the CCMA

For more than 30 years, the CCMA has been absolutely dedicated to supporting contact centre professionals. We're constantly pushing ourselves to do more for our thriving community, which happens to be the largest community of contact centre professionals in the UK. The CCMA was founded with the goal of sharing best practice and networking to improve skills and knowledge in order to progress contact centre operations – and we live by that to this day.

We give those that work in contact centres the chance to discuss ideas and share experiences through member-only Special Interest Groups and online and in-person events.

Members are invited to become Accredited through the Contact Centre Standards Framework and get independent guidance on where to focus for improvements. There is also the opportunity to benchmark the operation against 25+ KPIs.

The CCMA Academy gives everyone a structured learning opportunity to support both personal and professional development for the benefit of their operation.

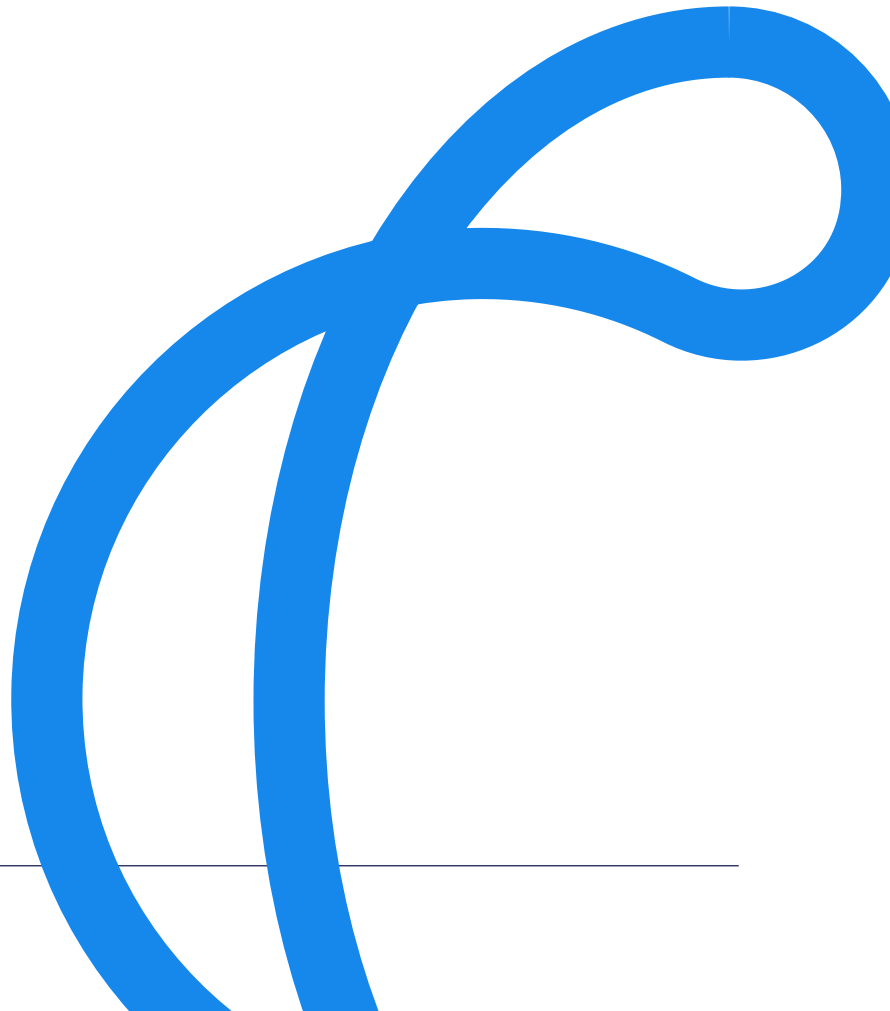
And of course, we celebrate the progress our industry is making through the UK National Contact Centres Awards. Those that win go on to share their stories through channels such as the UK National Contact Centre Conference, Best Practice Visits and CareerTalk. They are invited to input into the Special Interest Groups and other events.

www.ccma.org.uk

About Cognigy

Cognigy is transforming the customer service industry with the most advanced AI Agent platform for enterprise contact centres. Its award-winning solution, Cognigy AI, empowers enterprises to deliver instant, hyper-personalised, multilingual service on any channel. By integrating Generative and Conversational AI to create Agentic AI, Cognigy delivers AI Agents that redefine customer experiences, drive satisfaction, and support contact centre employees in real-time.

www.cognigy.com





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