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**PUTTING CUSTOMERS AT
THE HEART: DELIVERING
SEAMLESS EXPERIENCES
THROUGH ARTIFICIAL
INTELLIGENCE AND
DATA**

Putting customers at the heart: Delivering seamless experiences through artificial intelligence and data

Nov. 12, 2025

PG&E received Chartwell's Customer Transformational Leadership Award in recognition of its strategic integration of innovation and advanced technology, most notably the impactful implementation of artificial intelligence. These advancements have kept customers at the heart of PG&E's transformation, resulting in more personalized, efficient, and proactive customer experiences. From enhancing service delivery to modernizing internal processes, every initiative has been anchored in a commitment to understand and exceed customer expectations to deliver "10 out of 10" experiences. PG&E's leadership has demonstrated how technology guided by purpose and empathy can drive meaningful and measurable improvements across the entire customer journey. PG&E's forward-looking approach continues to build trust, elevate the standard of service, and put innovation to work in the communities it serves.

In 2024, Pacific Gas & Electric Company (PG&E) launched the "Customer at the Heart" initiative, a companywide commitment to viewing every decision and action through the eyes of the utility's customers.

PG&E's Customer Experience Chief of Staff Katie Allen explained, "our goal is to anticipate and meet customer needs while building trust to deliver a '10 out of 10' experience in every interaction. It's not a score - it's a mindset, a way of working that defines how PG&E serves its customers every day."



Through Customer at the Heart, PG&E is creating the conditions for coworkers to deliver these “10 out of 10” experiences by ensuring they have the tools, insights, and technologies needed to anticipate customer needs.

“By harnessing the power of data and artificial intelligence (AI) across the company, we are equipping teams with real-time information, predictive capabilities, and smarter systems that simplify work and strengthen decision-making,” said Vincent Davis, PG&E’s Senior Vice President of Customer Experience.

During its November 2024 Innovation Summit, PG&E unveiled its AI strategy designed to bolster the utility’s ability to meet clean energy, climate, and customer experience goals.

PG&E leadership developed a roadmap with the intention of improving customer engagement, staff retention, growth, and loyalty. In addition to AI, the utility launched an enhanced website and implemented a new billing system in 2025.

To spread the word internally about PG&E’s commitment to its customers, Allen’s team facilitated a breakout session highlighting the shared responsibility of delivering “10 out of 10” experiences during eleven Leadership Town Halls, partnering with the utility’s Production System team. The Town Halls demonstrated the end-to-end customer experience and reinforced transparency, alignment, and accountability while modeling how leaders can flow this enhanced way of working to their teams.

Elevating service through AI-driven call handling

In February 2024, PG&E introduced “Peggy,” an AI-powered virtual assistant. According to Chris Zenner, PG&E’s Vice President of Customer Channels and Services, Peggy provides customers with personalized and timely responses, which are resulting in improved customer satisfaction and engagement. Peggy is designed to engage in realistic conversations, removing the fragmented speech or button-pressing that is often encountered in the IVR.

Peggy is also designed to reduce the steps needed to process payments. Previously, 51 pressed numbers were required for this transaction, with interactions that could last as long as seven minutes. With Peggy, payment information can now be spoken, lowering the average interaction time to three and a half minutes.

“We are working to ensure Peggy can connect with every customer to better serve our diverse customer base,” Zenner said. “We’ve already expanded her capabilities to support Spanish, and we are in very early conversations to further expand to Mandarin, but no timeline has been set for that expansion yet. As the technology is refined, we continue to expand her reach to support all types of transactions.”

PG&E also introduced Agent Assist, an AI-driven knowledge management system tool, to streamline information retrieval and dissemination for customer service representatives (CSRs). This tool was piloted in April 2025 and includes a broad catalog of knowledge base articles containing key content about PG&E’s call handling processes. Agent Assist has reduced the need for CSRs to navigate multiple links, resulting in improved average handle time, transfer rates, and customer satisfaction scores.



Stronger platforms, “10 out of 10” experiences

In June 2025, PG&E rolled out a refreshed website that lays the groundwork for a more comprehensive digital self-service roadmap. Through its website, the utility is tailoring the user experience to address individual customer needs.

Additionally, the new platform increases customer privacy and the security of their data through multi-factor authentication and the ability for customers to add an authorized user to their account. The project also improved ADA accessibility and added more ways to pay, such as Apple Pay and Google Pay, while laying out a framework for improved personalization, according to Lori Geoffroy, PG&E’s Senior Director of Digital Channels.

PG&E’s Billing Modernization Program is upgrading and merging its billing platforms into a single system in an effort to improve the overall user experience for both coworkers and customers. “By adopting a phased approach, we are ensuring a smooth transition and addressing regulatory commitments, financial constraints, and system stability,” said PG&E’s Senior Director of Infrastructure & Operations Vanessa Barbarisi.

Other key benefits of the utility’s consolidated billing system include:

- reduced billing errors and expedited resolution of billing issues and inquiries;
- heightened security to protect customers’ data and privacy; and
- more effective and efficient customer support delivery.

**AI at the heart of the business**

AI is a key component of PG&E’s endeavors to bolster efficiency. “Artificial intelligence is now used in the automation of customer claims, reducing manual data entry and the potential for errors while also improving processing times and boosting customer satisfaction,” said Mark Seveska, PG&E’s Senior Vice President of Products & Enterprise Solutions. “In addition, AI will soon be incorporated into wildfire and gas safety cost audits, improving productivity, accuracy, and compliance.”

Key insights have been achieved through the automation of coworker feedback and sentiment analysis, providing utility leadership with real-time insights and the opportunity to incorporate operational improvements.

Customer focus starts with coworker experience

PG&E acknowledges that its coworkers’ experience is crucial to delivering a top-notch customer experience. Last year, the utility introduced its CX² initiative, which stands for Coworker Experience x Customer Experience.

The utility is gathering real-time feedback from coworkers, including “always-on” surveys conducted by utilizing AI. Through this approach, PG&E is striving to obtain near-immediate coworker insights to facilitate rapid improvements to the coworker and customer experience.

Allen noted that through a strategic and integrated approach, PG&E is endeavoring to build clarity and shared purpose to facilitate not only value to the customers, but a more joyful and aligned coworker environment.



Measuring what matters

According to PG&E, embracing a customer-first mindset amplified the utility's service-focused culture, and the role of AI is also key to PG&E's customer-first approach. Peggy has handled more than 4.2 million calls and deflected 2.6 million calls since launch. In 2025, more than three million calls have been handled by Peggy and 65.1% of these interactions did not require a live agent for assistance. Peggy's Customer Transaction Score (CTS) surveys, measured in line with IVR and live agent interactions, have improved PG&E's year-over-year CTS score from 7.0 to 7.3. Zenner added, "in our outage experience where Peggy is fully integrated, we have seen an improvement from 5.8 to 7.1 in CTS."

Within the first 45 weeks of its Agent Assist pilot, the tool handled 3,534 CSR-submitted questions, with a 95% positive feedback rate. AI-generated call tagging has also improved compliance adherence and allowed PG&E to process improvement opportunities.

Customer at the Heart Week: Uniting 29,000 coworkers around a shared purpose

This year, PG&E hosted its first-ever Customer at the Heart Week as part of National Customer Service Week from October 6-10. Allen and her team curated daily themes with corresponding activities, content, and events.

Day 1 focused on defining "10 out of 10" with messages from Davis including [Our Customer Are the Heart of Every Action](#) and a video featuring frontline coworkers.

Day 2 focused on listening as the foundation of every "10 out of 10" experience, with a learning series featuring business customers and their PG&E Small and Medium (SMB) Customer Representative. The event was designed to reinforce the business value of listening and the tangible benefits of customer recovery. More than 1,200 coworkers joined the one-hour session with a satisfaction score of 4.89 out of 5.

Day 3 offered a continuation of the utility's 2025 Leadership Town Hall partnership with the Production System to advance operational excellence through six cross-functional steps for getting work done effectively. Coworkers took part in an activity titled "Fix It Forward," providing a step-by-step guide to capturing and acting on ideas to ease workflow from one coworker to the next to deliver "10 out of 10" customer experiences.

On Day 4, coworkers were encouraged to "unlock joy" through PG&E's Lean Operating System, the utility's way of working.

Also in 2025, Customer at the Heart questions were added to PG&E's annual Joy at Work survey for the first time. Early results show that 91% of coworkers understand how their role impacts the customer experience, nine points above the utility's benchmark. That connection ranked as one of the top drivers of joy across PG&E.

And yet PG&E knows that there is still room to grow. While most PG&E coworkers view keeping customers at the heart as a top priority, the resulting score was six points below the benchmark for that category.

Customer Service Week content also included a video that featured EVP and Chief Customer Officer Marlene Santos reinforcing the correlation between coworker experiences and customer outcomes. It was designed to highlight the importance of Lean to see problems clearly, remove barriers, and create consistent, predictable “10 out of 10” experiences.

The team closed out the week with the first-ever “10 out of 10 Day” that started at 10:10 on the tenth day of the tenth month of the year. With more than 2,200 coworkers in attendance, the event featured an executive panel discussion, “10 out of 10” recognition, and Q&A.

During the week, the team also previewed the new Daily Customer Voice, now reaching more than 12,000 coworkers a day. It brings real customer feedback from PG&E’s CTS and CSS straight into Daily Operating Reviews (DORs), enabling coworkers to see how customer experiences and their performance connect. Some days it sparks a conversation that leads to immediate action; other days it’s a moment of reflection.

If all of this sounds like a comprehensive transformation in the way PG&E seeks to serve customers, that’s the intent. The utility is continually exploring new ways AI and technology can drive innovation, efficiency, and even joy for its coworkers and customers.

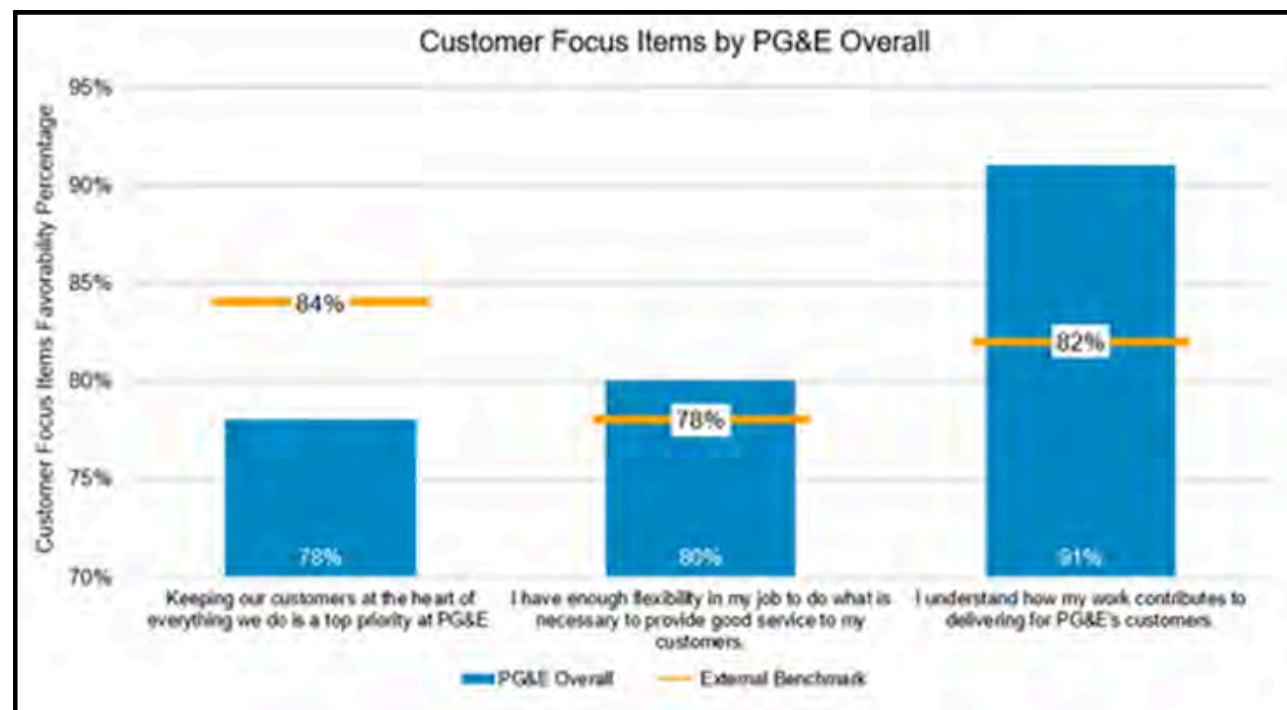
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Company Profile

Pacific Gas and Electric Company (PG&E) is one of the largest utility companies in the United States, serving millions of customers across Northern and Central California.



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