UX DISCOVERY CASE STUDY

PG&E My Business

Rebuilding the SMB Digital Experience

How a five-week discovery engagement turned scattered stakeholder pain and messy site analytics into a prioritized, evidence-backed redesign roadmap for PG&E's small & medium business customers.

AGENCY	CLIENT	PHASE	DELIVERED
Razorfish	**PG&E (Pacific Gas & Electric)**	**Discovery & UX Brief**	**August 3, 2012**



01 — THE CHALLENGE

A trusted brand, undermined by its own site

pge.com's My Business section had the ingredients to be a genuine service touchpoint for small and medium business customers — rich content, useful tools, real programs. But that value was getting lost behind confusing navigation, content organized around PG&E's internal structure rather than customer needs, and pages that had simply gone stale. SMB users routinely couldn't self-serve, and left the site dissatisfied — driving them straight back to the call center the redesign was partly meant to relieve.

Over five weeks, Razorfish was engaged to diagnose why, benchmark what "good" looks like elsewhere, and turn both into a prioritized roadmap — explicitly framed as a discovery brief, not a final design or IA spec.

Organizational goal

Establish PG&E as a trusted advisor to SMBs through exceptional customer service — streamlined transactions, relevant content and tools, and an ongoing dialog on issues that affect their business.

Project goals

- Improve CSAT for SMB users
- Reduce call volume to PG&E call centers
- Increase My Energy registrations & participation
- Ensure success on six core activities (below)

> **The six core activities every SMB visitor needs to complete:** Start/Stop Service, Rate & Time-Varying Pricing info, Rebates & Energy Savings, Pay Bill, View Usage, and Pay Plan.

02 — METHODOLOGY

Five research streams, one synthesis

Rather than starting from a blank page, the team triangulated existing research, fresh stakeholder input, hard analytics, and outside benchmarks before drawing a single recommendation.

STREAM	WHAT IT COVERED
Audience Research Review	Prior PG&E and Razorfish studies, including a 2010 SMB ethnographic study and a 2012 Foresee satisfaction review
Stakeholder Interviews	Three one-hour interviews across TVP program marketing, energy savings customer relations, and call-center operations
Site Analytics Review	SMB multi-account transaction data by type, volume, and month-to-date trends
Site Structure, Navigation & Content Review	Every Level 1–3 page in My Business, plus hidden pages, PDFs, and video, assessed for categorization, nomenclature, tone, and relevance
Comparative Review	21 experiences across utilities and other SMB-facing digital leaders, scored against the six core activities

03 — KEY FINDINGS

Four lenses, one consistent story

Stakeholders, customers, the content itself, and the competitive landscape all pointed the same direction: an organization-oriented site asking user-oriented customers to do the translation work themselves.

From Stakeholders

- Universal desire for a simpler site
- Real dedication to service, despite the site
- Publishing process is slow & unclear
- Live Chat was strongly endorsed
- Little coordination between outreach and call centers

From Audience Research

- Digital experience falls short of in-person/call service
- Paths to content are long and non-intuitive
- SMBs feel they lack control over energy costs
- Users are time-strapped, won't puzzle through problems
- PG&E gets no credit for third-party program wins

From Content & Structure

- Simply too much content in My Business
- Structure is org-oriented, not user-oriented
- Whole subsections duplicated elsewhere on site
- No central help/FAQ repository
- Site search is largely ineffective

> **Competitive finding:** No best-in-class web experience leader exists anywhere in the utilities sector — a genuine market opportunity, not just a catch-up exercise. User expectations are set by Apple, Mint, and AT&T, not by other utilities.

04 — DIAGNOSING THE CURRENT EXPERIENCE

Three pages, three symptoms of the same disease

The team walked three representative templates end-to-end to make the abstract findings concrete.

MY BUSINESS SECTION LANDING PAGE

The front door leads nowhere in particular

- 40% navigation, 30% irrelevant promotion, only 30% actual action/info — and that's split across just two items
- No visual confirmation the user is even in the My Business section
- No path or context offered for new vs. returning customers

MY ENERGY PROGRAM LANDING PAGE

A sign-up page with no reason to sign up

- Generic stock photography reads as clutter, burying the login/sign-up CTAs beneath it
- Real program benefits (usage charts customers love) exist elsewhere but aren't shown here
- Sign-up requires an unnecessary extra click to a form that could sit on the page itself

START, STOP & MOVE SERVICE PAGE

A title that promises something the page doesn't deliver

- 75% of the page is irrelevant — stock photography, generic nav, promos
- The one real instruction (log into My Energy) is never explicitly stated, so users default to calling in
- "Start" is misleading: no new customer can actually start service here — only pause/restart an existing account

05 — COMPETITIVE BENCHMARKING

Borrowing patterns from outside the utility sector

Twenty-one experiences were reviewed and scored against the six core SMB activities. The strongest performers weren't utilities at all — Verizon and Apple led the comparative scoring — which reframed the opportunity: PG&E wasn't competing against Southern California Edison, it was competing against every other digital experience an SMB owner uses in a day.

Scottish Power

Self-identification modal at landing — asks "new customer?" and business size, then cookies the answer to tailor every future visit.

AT&T

A recommendation tool filters services down to what a specific business actually needs, rather than showing everything at once.

Mint

Data-driven visual design turns raw usage numbers into something a time-strapped owner can scan and act on in seconds.

The comparative feature chart scored each site 2–6 out of 6 core SMB activities offered. Verizon and Apple topped the list; most peer utilities (British Gas, Southern California Edison, Ausgrid) scored in the 2–5 range, reinforcing that PG&E had room to leapfrog its actual category rather than just match it.

06 — RECOMMENDATIONS

From findings to a roadmap

ORGANIZATIONAL GOAL	RECOMMENDED MOVE
Streamlined, intuitive transactions	Filtered, cookied landing experience letting Residential/Small/Medium/Large self-identify by size and industry to serve relevant content on return visits
Rich, relevant content & tools	Explicit benefit framing for My Energy sign-up; text alerts for time-critical events; clear escalation rules for when a call is genuinely required
Ongoing dialog with SMBs	Peer testimonials and ratings on tools/programs; social channels for SMB-specific alerts; explicit PG&E co-branding on third-party program wins

A parallel content-strategy track was recommended to make the structural fixes stick: restructure My Business around Small/Medium/Large business needs rather than PG&E's internal topic model, delete anything that doesn't support the six core activities, shorten long-scroll copy, standardize tone and formatting across templates, and establish real content governance and workflow so fixes don't regress.

07 — OUTCOME

From brief to build, in under a week

The discovery brief was scoped to hand off cleanly into design — a fast turnaround from approval to IA/UX kickoff.

Mon, 8/6	PG&E provides feedback on the Experience Brief
Wed, 8/8	Razorfish delivers a revised brief for approval
Wed, 8/8	PG&E approves the Experience Brief
Thu, 8/9	Razorfish kicks off IA/UX design

08 — WHAT THIS CASE SHOWS

Discovery takeaways

1. **Triangulate before recommending**

   Five independent research streams — stakeholders, audience history, analytics, content audit, and competitive scan — meant every recommendation traced back to more than one type of evidence.

2. **Diagnose at the page level, not just the strategy level**

   Walking three real templates line-by-line made abstract findings ("organization-oriented structure") concrete and actionable for a design team picking this up next.

3. **Benchmark outside your own category**

   Comparing PG&E to Apple, Mint, and AT&T — not just other utilities — reset the bar to match actual customer expectations, not merely industry parity.

4. **Tie every recommendation back to a stated business goal**

   Each recommendation was mapped explicitly to one of PG&E's three organizational goals, making the roadmap easy for stakeholders to prioritize and approve quickly.

Source: Razorfish's "PG&E SMB Site Redesign — User Experience Brief," dated August 3, 2012, prepared for Pacific Gas & Electric's My Business digital team. This case study summarizes and reframes the brief's documented findings and recommendations for portfolio presentation.