

Skill Standards for Utility Customer Service Representatives

2012

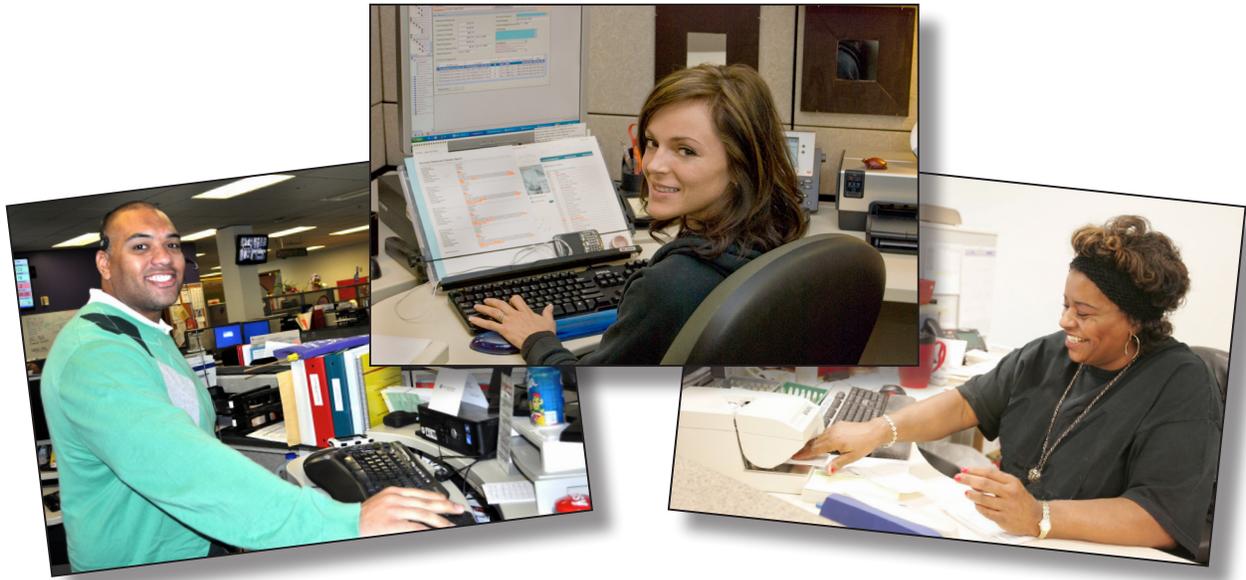


Pacific Northwest
Center of Excellence
for Clean Energy/
"A Centralia College
Partnership"

WASHINGTON STATE UNIVERSITY
 EXTENSION ENERGY PROGRAM

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Skill Standards for Utility Customer Service Representatives

2012

A cooperative effort of the
Pacific Northwest Center of Excellence for Clean Energy/
"A Centralia College Partnership"
and the
Washington State University Energy Program



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Center of Excellence
for Clean Energy/
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Partnership"

WASHINGTON STATE UNIVERSITY
 EXTENSION ENERGY PROGRAM

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Advisory Committee

Members of the project Advisory Committee met in 2011 to design, oversee and review the project from startup through completion of the final document. Many thanks to the following committee members for contributing their expertise and resources, and for providing leadership in support of this project:

- Darrin Belgarde, Avista
- John Cunningham, IBEW 77
- Rachel geBauer, IBEW 77
- Lindy Gillis, Puget Sound Energy
- Aundrea Jackson, Puget Sound Energy
- Janice Pieper, Tacoma Power
- Diane Quincy, Avista
- Frank Spangler, NorthWestern Energy
- Bonnie Stuart, Lewis County PUD

Focus Group Participants

The focus group participants consisted of 10 front-line workers, first-line supervisors and subject matter experts in customer service within the Pacific Northwest region. They met over a two-day period at Tacoma Power, and determined the critical work functions and key activities performed by Customer Service Representatives. They then identified the performance indicators, technical knowledge, skills and abilities, and employability skills required to succeed in this field. Their insights were an invaluable contribution and formed the foundation of this work. Participants included:

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- Tori Hobbs, Tacoma Public Utilities
- Kathleen Lara, Avista
- Cherrie Stone, Lewis County PUD

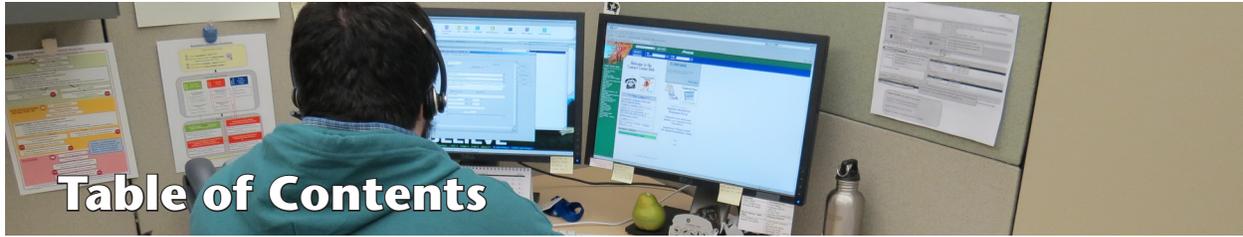


Special Thanks

Special thanks to Avista, Puget Sound Energy and Snohomish County PUD for providing the photos of Customer Service Representatives in action used throughout this document.

Acronyms Used in this Publication

CIS Computer Information System
CSR Customer Service Representative(s)
IBEW..... International Brotherhood of Electrical Workers
NSSB National Skill Standards Board
PUD..... Public Utility District
SCANS... Secretary's Commission on Achieving Necessary Skills
WSU Washington State University



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Perspectives



Industry Perspective

The utility industry in the United States is undergoing a transformation. The industry as we have known it is on the precipice of change and the question so frequently asked is: "What will the U.S. utility industry look like in the future?"

Faced with impacts of a sluggish economy and an aging infrastructure, the U.S. energy and utility industry is under great pressure to improve and expand their capabilities while pursuing new ways to give customers greater access to information and control over their energy use.

Advancements in modern technology and mobile communications are now enabling utilities to provide greater choice and deliver safe, dependable service to customers.

As utility consumers apply new technologies to better manage their energy use, successful utility Customer Care organizations will play a vital role in transforming the customer experience from business-as-usual to integrating new tools, and providing education and expertise across the industry.

The need for a framework to address, educate and empower the utility consumer remains a priority. Education and empowerment underscore the significance of the Customer Service Representative Skills Standards program.

The skill sets needed to educate, serve and empower the consumer will not only provide a career path for Customer Service Representatives, but also become the foundation for changing the relationship between the utility and the consumer.

Puget Sound Energy is honored to collaborate on this important program and be actively involved in the development of the skill sets needed to enable a well-trained workforce for the future.

Efforts such as these will advance the utility from *Where We Were to The Way We Will Be*. The dedication and tireless efforts of researchers and the workforce will take the industry to new and unexpected heights.

Aundrea Jackson

CIS Project Manager
Customer Access Center Manager
Puget Sound Energy



Labor Perspective

The International Brotherhood of Electrical Workers 77 is proud to endorse the work that has been done to complete a set of skill standards that will lead to better-prepared customer service representatives for the electric utility industry. The participation of employers and the workers in the development of these standards has provided real-time insights about the required skills and the need for better training in this very important occupation, as the industry modernizes our energy infra-

structure and implements smart grid technologies.

We encourage and support the use of these standards for the education and training of utility customer service representatives, and we look forward to continuing our work to build strong partnerships with postsecondary education and achieving an outcome that will benefit our workers and their employers.

In solidarity,

Don Guillot
Business Manager
IBEW Local 77
Seattle, WA



**Background on the 2012 Utility
Customer Service Representatives
Skill Standards Project**

Background on the 2012 Utility Customer Service Representatives Skill Standards Project

This project was undertaken as part of a three-year, five-state Department of Energy Smart Grid Workforce Training grant managed by the Pacific Northwest Center of Excellence for Clean Energy/"A Centralia College Partnership". The project goal was to ensure that a standards-based approach will be used as a foundation for defining competencies and measurable skills of Customer Service Representatives (CSRs) in utility companies, an occupation that is expected to change significantly in the coming years. The standards also help to ensure that proposed training and degree programs for CSRs incorporate current foundational skills.

National Context

The National Skill Standards Board (NSSB) was established by Congress in 1994 to encourage the creation and adoption of a national system of voluntary skill standards that would enhance the ability of the U.S. to compete effectively in a global economy. By the time the NSSB sunset in 2003, several national voluntary skill standards projects were developed by various industries in full partnership with education, organized labor and community-based organizations. The intent was to have voluntary skill standards that are flexible, portable, and continuously updated and improved.

Washington state was an early leader in the development and use of industry-defined skill standards, contributing to the development of a national model and creating skill standards to align the needs of industry with the provision of workforce education and training.

What Are Skill Standards?

Skill standards are performance specifications that identify the knowledge, skills and abilities an individual needs to succeed in the workplace. They are critical to improving workforce skills, raising living standards and improving the competitiveness of the U.S. economy. To be effective, skill standards must reflect the consensus of customer service professionals. Skill standards provide measurable benchmarks of skill and performance achievement. They answer two critical questions: What do workers need to know and be able to do to succeed in today's workplace? And how do we know when workers are performing well? Without this fundamental information, employers do not know whom to hire or where to focus their limited training dollars; employees and new entrants to the workforce do not know what they need to do to improve their performance; and educators do not know how to prepare students for the challenge of the workplace.

Why Are Skill Standards Important?

In today's workplaces, the only constant is change. Jobs that once were relatively simple now require high-performance work processes and enhanced skills. Because skill standards reflect changing workplace realities, they are a tool that can be used by applicants and employees to access greater career opportunities.

National recognition of skill standards in career fields provides a common basis for certifying achievement against those standards, thereby allowing for the portability of skills across geographic areas, companies and careers.

Updating skills and knowledge is now a lifelong endeavor, causing many employers and employees to spend more effort, time and money on education and training. Skill standards provide benchmarks for making education and training decisions, shaping curricula and directing funds toward highest value education and training investments.

The Benefits and Uses of Skill Standards

Skill standards benefit all of the stakeholders – business, labor, educators, government, students and employees. The success of a skill standards development project and its usefulness to the community is dependent on the full participation and commitment of all stakeholders. These benefits can be used as a benchmark for evaluating the effectiveness of collaborative efforts.

How Skill Standards Benefit Employers

Employers can use skill standards to establish personnel qualification requirements. Interviews, performance reviews and productivity can be assessed to a higher degree of accuracy and efficacy. Employers are also able to identify core competencies and workers' abilities to demonstrate competencies. By matching competencies to critical work functions and key activities, employers can significantly improve efficiencies and productivity. Performance-based skill standards also provide a vehicle for varying degrees of job certainty and the structure for establishing competency-based pay scales.

In addition, employers use skill standards to:

- Align personnel qualification requirements with nationally adopted certificates of competence.
- Modify employee training.
- Simplify measurement of employee training effectiveness.
- Assess employee skill levels based on industry standards.
- Match employee skills to the work needed.
- More easily document employee skills, training needs and performance criteria.
- Improve consumer satisfaction and confidence through better developed evaluation skills for customer contact personnel.
- Improve employee satisfaction and morale by clarifying expectations.
- Improve quality, productivity, time-to-market and competitiveness.
- Achieve business goals.
- Partner with education and labor in developing school-to-work initiatives.

How Skill Standards Benefit Labor Unions

Labor unions can use skill standards to gain support for company-sponsored worker training programs and to identify career paths for workers within companies and industries. Unions can provide this information to union members and develop strategies to improve career mobility and stability.

Skill standards help unions to:

- Improve member value to the company.
- Provide a greater worker voice in the company.
- Link skill standards to increased training and upward career mobility for union members.
- Help employers match employee skills to the work needed.

- Develop skills-based training and certification initiatives that complement union apprenticeship programs.
- Communicate effectively with employers about worker training and retraining needs.
- Cooperate with education and industry in developing school-to-work initiatives.

How Skill Standards Benefit Educators

Educators can identify core competencies and assessments based on the skill standards and implement them in their curricula. Students can then be required to demonstrate competency throughout their coursework. Academia and industry can build a cohesive relationship through a like-minded expectation of student competencies and work readiness. This enhances an instructor's ability to teach information consistent with industry's entry-level expectations and needs.

In addition, educators use skill standards to:

- Partner with business and labor in developing school-to-work initiatives.
- Provide effective, targeted instruction.
- Develop benchmarks for certificates of competence earned by students.
- Communicate what companies expect of employees.
- Develop new and evaluate existing curriculum and programs based on industry needs.
- Develop assessments to evaluate skills, knowledge, and abilities in classrooms and internships.
- Develop a common language on workforce preparation with business and labor.
- Improve relationships with local businesses, labor unions, other educators and agencies.
- Provide students with relevant career education and counseling.

How Skill Standards Benefit Government

Government can provide information that will ensure a better skill match between workers and employers and initiate education reform to better educate future members of the workforce. Skill standards better enable agencies to provide options for career and job mobility and link learning to the needs of the workplace.

In addition, government can use skill standards to:

- Assist in the development of a highly skilled and competitive workforce.
- Evaluate the effectiveness of publicly funded education and training.
- Increase opportunities for under-represented populations by releasing the information that defines the skills required for success and by facilitating the national adoption of those definitions and their use.
- Support the creation of high-performance organizations that improve living standards for all members of the organization.
- Facilitate collaboration between educators and industry.
- Communicate the need and basis for education reform to business, education, labor, and the public at local and national levels.

How Skill Standards Benefit Students and Workers

Skill standards assist students in making career choices by providing industry expectations for success in the workplace. In addition, standards-based curriculum and assessments provide students with credentials that certify work-readiness. Work-ready students can anticipate being hired at higher rates of pay and can experience faster advancement in their chosen fields.

Workers can accurately assess their skills against those required for career advancement and plan effectively for their career pathways. They can determine the skills and abilities needed for advancement or transfer within industries, and determine the continuous learning and training they need to upgrade their skills.

In addition, students and workers can use skill standards to:

- Achieve clarity regarding what they are expected to learn and how to prepare for work.
- Enter and re-enter the workforce with better understanding of the skills required to attain high-paying jobs.
- Accurately assess business expectations of the skills needed for positions and careers of their choice.
- Improve mobility and portability of their credentials.
- Obtain certification of competence of the skills they gain through experience, school, training, or self-study.
- Enhance their performance and achievement by self-evaluation against known standards.
- Be active contributors to the activities that make their organizations successful.

Skill Standards to Training: A Continuous Development Process

The skill standards generated in this project are designed to be used by:

- Participating utility partners to develop or modify training modules; or
- Educators to develop curriculum at the high school and community college level.

By providing the necessary input from industry, this skill standards document is a first step in the development of training materials to serve the utility industry in particular, and to demonstrate what can be done across industries.

In order to keep current with a rapidly changing workplace, standards need to be re-evaluated and updated regularly, with full partner participation at each step. New technological developments impact the ways that workers organize and apply their skills, including time management and interpersonal relationships. Increased technological complexity may simplify some of the job tasks but make others more intricate. Today's successful customer service representatives are challenged to acquire a broader range of decision-making and customer service skills, as well as keep current with emerging technologies. Ongoing changes like these must be reflected in curriculum to meet the needs of industry, where expectations for workers are evolving.

A Model of Continuous Improvement for Economic Development: Using Skill Standards

A continuous updating process is necessary: all partners must revise and verify skill standards regularly. For national economic development success, curriculum and current training methods must be updated to meet workplace standards. Individual workers must have access to clearly stated competency goals and direct access to skill development assistance. With cooperative effort on local and national levels, we can begin to resolve the current workforce skill shortages in the utility industry.

Step 1: Skill Standards Identification

- Compile and research existing standards in related jobs and careers.
- Conduct focus groups to identify critical work functions and key activities, define key activity performance indicators and identify technical knowledge, foundation skills and personal qualities.
- Conduct a survey of current workers to determine level of SCANS (Secretary's Commission on Achieving Necessary Skills) skills required for each job.
- Develop work-related scenarios to place the skill standards in the context of the work environment.
- Verify the data gathered from focus groups.
- Disseminate skill standards information to involved parties from industry, education and labor for their review and revision.

Step 2: Assessment

- Develop assessments through the collaboration of industry and education to reflect competent performance as defined by the skill standards.
- Collect evidence of a person's ability to perform at the levels determined by the skill standards.
- Determine present skill level through direct and indirect evidence by assessing a student, trainee, apprentice, prospective worker or worker seeking additional training.
- Use products and items produced by the person being assessed as direct evidence.
- Gather supporting information to use as indirect evidence.
- Assess results using the criteria of validity, currency, authenticity and sufficiency.
- Demonstrate validity using tangible items or records of action.
- Demonstrate authenticity by having the individual being assessed produce the item or specific piece of a team effort.
- Demonstrate sufficiency by providing enough evidence to match key tasks and performance criteria of the skill standards.

Step 3: Training and Curriculum Development

- Identify necessary competencies based on the skill standards information and assessments.
- Develop program outcomes for specific academic and training programs, including Tech Prep, two-year, pre-apprenticeship and apprenticeship programs.
- Perform gap analysis to determine changes or additions to be made to curriculum.
- Revise existing curriculum to better meet the current and future needs of the industry.
- Develop new curriculum and establish new training programs based on these competencies.

Step 4: Articulation

- Develop models to support the articulation of program outcomes and competencies between academic and training systems.
- Establish articulation agreements between existing programs to ensure portability of skills.
- Connect competencies and Certificates of Competence with benchmark documentation to build national portability systems.

Pyramid of Competencies

The Pyramid of Competencies is a depiction of skill standards in three broad skill categories.

Tier I

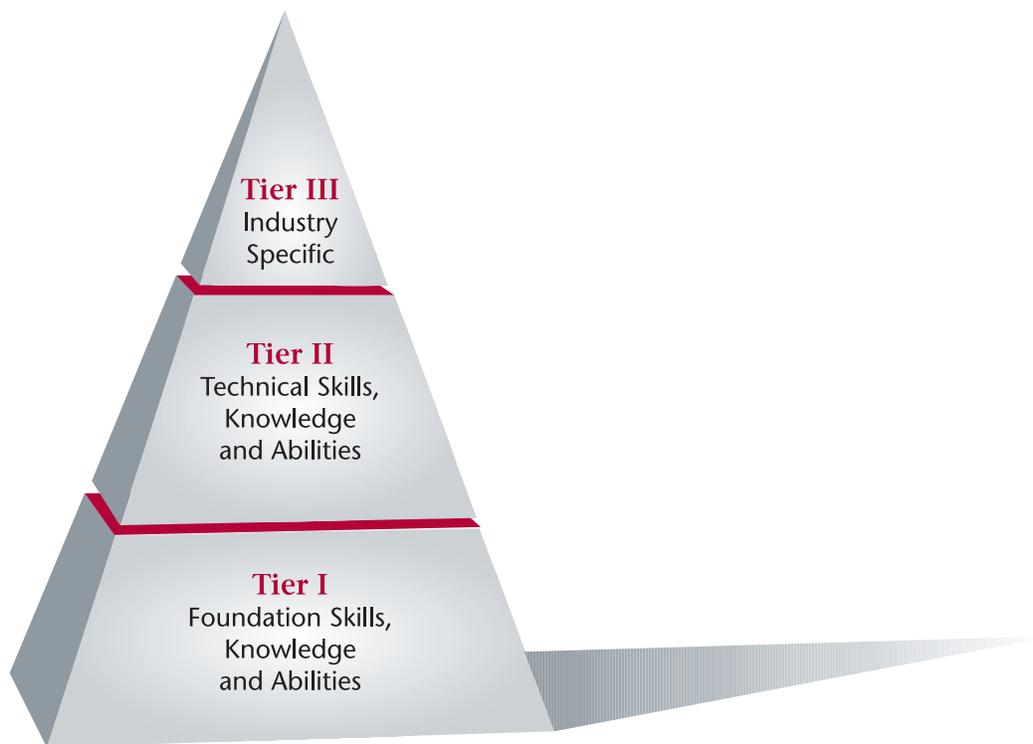
Tier I represents the broadest level of competencies, and is the set of employability (SCANS) skills, knowledge, abilities and personal qualities required of all workers to be successful in today's workplace. These are the universal skills that are needed to apply technical knowledge and tools effectively.

Tier II

Tier II represents technical skills, knowledge and abilities common to jobs within a cluster across all industries or industry sectors.

Tier III

Tier III represents industry-specific technical skills, knowledge and abilities that are unique to individual jobs or clusters and are the most prone to rapid change. For example, many workers need to upgrade their skills based on sudden market shifts.





Skill Standards Process

Skill Standards Process

Initial Focus Group

An Advisory Committee consisting of customer service managers and leaders from utilities across the five-state region was convened by Alan Hardcastle of WSU to provide oversight to this project. The Advisory Committee nominated participants for the focus group process. The initial two-day focus group, which was led by Terryll Bailey of The Allison Group, included ten experienced CSRs representing different utilities in different states. There was broad diversity in terms of members' years of experience in the industry and their gender, age and ethnicity.

The first step in the focus group process was to identify the primary functions and key activities that constitute the work of a competent, entry-level CSR. Working with a draft of sample critical work functions that were prepared from background research and input from the Advisory Committee, the group revised and adapted functions and tasks to meet the needs of CSRs throughout the five-state region. Participants freely made changes and recommendations, and crafted six critical work functions with corollary key activities.

Performance Criteria

The second step was to identify the performance indicators for each key activity, answering the question: "How do you know when this is performed well?" The group also identified the tools, knowledge and foundation skills required to meet the performance criteria. The draft skill standards generated through the focus group process were reviewed by members of the Advisory Committee with respect to current industry trends and requirements.

Survey Verification

Third, a survey of SCANS skills and personal qualities for CSRs was administered to focus group members, and later to a larger sample of CSRs from utilities across the region. SCANS are foundation employability skills required of workers in all occupations at varying levels specific to their jobs.* A total of 62 SCANS competency surveys were returned; survey results are provided on pages 24-26.

Finally, a verification survey of critical work functions and key activities derived from the standards was sent to CSRs at utilities across the region. All critical work functions and key activities were verified, and each key activity was rated for its level of importance. Response data were compiled and averaged to find the level of importance of each critical function. Surveys were returned from 62 participants from seven employers. The results of all the focus groups, surveys and feedback were compiled and analyzed, and a draft of the document was reviewed by the Advisory Committee (see list of members on page ii).

* See: <http://wdr.doleta.gov/SCANS/whatwork/>

Employability Skills: SCANS Profile

During the data-gathering process of this project, employability skills for CSRs were identified. Employability, or workplace skills, are basic academic and foundation skills needed to build more advanced competencies. The foundation skills are based on broad workplace categories, known as SCANS (*Secretary's Commission on Achieving Necessary Skills*, U.S. Department of Labor). This federal report issued in 1991 identifies 37 foundation and workplace competencies required for work readiness.

SCANS are comprised of a three-part foundation of skills and personal qualities and five workplace competencies needed for successful job performance in today's workforce as listed in Table 1. Professionals currently working in the field were asked to identify the level of difficulty for each of the 37 SCANS skills most often required for successful workplace performance. The information in the charts on pages 24-26 was compiled by taking a weighted average of the responses. This summary information provides a general view of the key workplace skills deemed relevant and necessary for the front-line worker in customer services and defines the foundation for the employability skills within the skill standards.

The *ADVANCE™ Workplace Standards Skill Inventory* from Advanced Educational Spectrums, Inc., was used to capture industry views on foundation skills for CSRs. Industry professionals ranked the relative importance of each SCANS skill using a five-

Table 1
SCANS Skills

Basic Skills	Thinking Skills	Personal Qualities	Worksite Competencies
Reading	Creative Thinking	Responsibility	Utilizing Resources
Writing	Decision Making	Self-worth	Interpersonal Skills
Arithmetic	Problem Solving	Sociability	Utilizing Information
Listening	Visualization	Self-management	Using Systems
Speaking	Knows/Learns	Integrity/Honesty	Using Technology
	Reasoning		

point scale, from “Not Important” to “Critical” (see Figure 1). The SCANS bar chart (Figure 2, see page 51) shows the average survey scores for each skill area. This summary information provides a general view of the key foundation skills deemed relevant and necessary for CSRs.

Figure 1
**Sample Survey Questions from the
 ADVANCE™ Workplace Standards Skill Inventory**

Exhibiting Leadership	Negotiating
<div style="border: 1px solid black; padding: 2px; display: inline-block; text-align: center; width: 20px; height: 20px; margin-bottom: 5px;">1</div> Understands standards Adheres to standards <input style="width: 15px; height: 15px; margin-top: 5px;" type="checkbox"/>	<div style="border: 1px solid black; padding: 2px; display: inline-block; text-align: center; width: 20px; height: 20px; margin-bottom: 5px;">1</div> Understands negotiations process Recalls basic rules/principles Identifies conflicts <input style="width: 15px; height: 15px; margin-top: 5px;" type="checkbox"/>
<div style="border: 1px solid black; padding: 2px; display: inline-block; text-align: center; width: 20px; height: 20px; margin-bottom: 5px;">2</div> Encourages others to adopt new concepts Demonstrates commitment to excellence Leads by example Interprets positions on issues <input style="width: 15px; height: 15px; margin-top: 5px;" type="checkbox"/>	<div style="border: 1px solid black; padding: 2px; display: inline-block; text-align: center; width: 20px; height: 20px; margin-bottom: 5px;">2</div> Moderates discussion Demonstrates composure Interprets complaints/concerns <input style="width: 15px; height: 15px; margin-top: 5px;" type="checkbox"/>
<div style="border: 1px solid black; padding: 2px; display: inline-block; text-align: center; width: 20px; height: 20px; margin-bottom: 5px;">3</div> Motivates others to extend their capabilities Displays enthusiasm/positive attitudes Develops minority/majority views <input style="width: 15px; height: 15px; margin-top: 5px;" type="checkbox"/>	<div style="border: 1px solid black; padding: 2px; display: inline-block; text-align: center; width: 20px; height: 20px; margin-bottom: 5px;">3</div> Analyzes group dynamics Distinguishes between facts and inferences Detects underlying issues <input style="width: 15px; height: 15px; margin-top: 5px;" type="checkbox"/>
<div style="border: 1px solid black; padding: 2px; display: inline-block; text-align: center; width: 20px; height: 20px; margin-bottom: 5px;">4</div> Persuades others to reverse negative attitudes/behaviors Maximizes strengths/minimizes limitations Consolidates varied viewpoints/positions <input style="width: 15px; height: 15px; margin-top: 5px;" type="checkbox"/>	<div style="border: 1px solid black; padding: 2px; display: inline-block; text-align: center; width: 20px; height: 20px; margin-bottom: 5px;">4</div> Summarizes/paraphrases both sides of issues Analyzes underlying issues Resolves technical issues <input style="width: 15px; height: 15px; margin-top: 5px;" type="checkbox"/>
<div style="border: 1px solid black; padding: 2px; display: inline-block; text-align: center; width: 20px; height: 20px; margin-bottom: 5px;">5</div> Empowers individuals/teams to achieve excellence Judges leadership styles Justifies positions/policies <input style="width: 15px; height: 15px; margin-top: 5px;" type="checkbox"/>	<div style="border: 1px solid black; padding: 2px; display: inline-block; text-align: center; width: 20px; height: 20px; margin-bottom: 5px;">5</div> Appraises negotiated outcomes Resolves critical and emotionally charged issues <input style="width: 15px; height: 15px; margin-top: 5px;" type="checkbox"/>



**Results:
Skill Standards for
Utility Customer Service Representatives**

Customer Service Representative Sample Job Description

Summary

The Customer Service Representative (CSR) is an entry-level position that works in a high- performance, customer-focused team environment and is responsible for a number of customer-oriented tasks in a call center environment. These responsibilities include: responding to customer open/close requests, customer inquiries, and requests for account information; negotiating collections arrangements; coordinating service requests; determining the most effective resolution to customer issues, and maintaining customer accounts.

Primary Duties

A CSR may perform any combination of the following tasks:

- Credit negotiations (payment extensions, arrangements, turn-ons and turn-offs).
- Respond to billing inquiries and handle customers' high bill complaints.
- Provide information about company programs, products and services.
- Report electric and gas emergencies and outages.
- Provide data to customers requesting new services and/or construction.
- Seek resolution of customer complaints.
- Open and close accounts at request of customer.
- Refer customers to network of agencies able to provide financial assistance.
- Respond to utility commission and agency inquiries.

Minimum Qualifications

Typically requires two- to four-years of customer service-related work experience. Previous computer experience required. High level of direct customer contact requiring strong communication (oral and written) and negotiation skills. Working knowledge of company policies, practices and customer credit-related matters, as well as public utilities commission rules and regulations, is helpful. This position may require shift work.

Definitions

Each chart in the following skill standards template contains the following components:

Critical Work Functions

Critical work functions represent the general tasks that a fully competent CSR with at least one year of experience would perform.

Employability Skills

Employability skills are basic academic and personal skills that are needed to build more advanced competencies. They are required by all workers to obtain meaningful work and to participate in the modern workplace.

Key Activities

Key activities are the tasks related to the critical work functions, composed of work activities that are measurable and observable and that result in a decision, product or service.

Level of Importance

Professionals who are actively working in this occupation rated the level of importance for each critical work function and key activity, ranging from not important to critical. All critical work functions were rated as important, very important or critical.

Performance Indicators

Performance indicators are specific behavioral evidence of a worker's achievement of skills, knowledge and tasks. Performance indicators provide the standard of performance required to produce the necessary outcomes of key activities, and help answer the question: "How do we know when this key activity is performed well?"

Technical Skills, Knowledge, Abilities and Tools

Technical skills, knowledge, abilities, and tools are those areas of expertise that workers must have in order to perform a given occupational task with excellence. A collection of skills, knowledge, abilities and tools comprise competencies.

- **Skills** refer to proficiency in an applied activity. This activity could be physical, mental or interpersonal in nature.
- **Knowledge** is information and skills acquired through experience or education; the theoretical or practical understanding of a subject.
- **Abilities** are broad human characteristics that result from natural talent, training or experience.
- **Tools** are materials, equipment and implements a worker must be able to use competently to meet the requirements of the job.

Skill Standards for Utility Customer Service Representatives

Critical Work Functions	Key Activities				
A. Initiate a positive customer experience and relationship	<i>A1 Establish rapport with customer</i>	<i>A2 Gather information to assess customer's needs and customer's knowledge of products or services</i>	<i>A3 Respond to customer's comments and questions</i>		
B. Educate the customer	<i>B1 Explain services, options and rates to customer</i>	<i>B2 Identify alternative or additional products, services, options and solutions</i>	<i>B3 Offer alternatives to the customer if applicable</i>	<i>B4 Inform customer about services and policies (service plans and options)</i>	
C. Respond to customer's needs and provide ongoing support	<i>C1 Coordinate with or refer to other services, departments and vendors, as needed</i>	<i>C2 Handle customer inquiries and complaints</i>	<i>C3 Respond to customer requests to start or stop services</i>	<i>C4 Address credit needs with customers</i>	<i>C5 Document, verify and maintain information</i>
D. Interact with customers	<i>D1 Communicate with customers verbally and in writing</i>	<i>D2 Negotiate resolutions and solve problems</i>	<i>D3 Engage in conflict resolution</i>	<i>D4 Escalate issues when necessary</i>	
E. Participate in continuous learning	<i>E1 Achieve and maintain proficiency in current and new technologies</i>	<i>E2 Participate in company-provided training and continuing education</i>	<i>E3 Stay current on new products, services and processes</i>		
F. Ensure a safe, secure and productive work environment	<i>F1 Meet safety standards</i>	<i>F2 Meet security standards</i>	<i>F3 Identify and report unsafe conditions and take corrective actions</i>	<i>F4 Participate in emergency drills</i>	<i>F5 Participate in team environment</i>

SCANS Survey Results: Utility Customer Service Representative

Foundation Skills and Personal Qualities	Key: 1 = Basic Competency Level; 5 = Advanced Competency Level.					Critical Competencies
	1	2	3	4	5	
Basic Skills						
Demonstrates Effective Reading Strategies						Identifies relevant details, facts, specifications, follows set of instructions, probes to gain knowledge/information and qualifies/analyzes information.
Demonstrates Effective Writing Strategies						Completes forms, writes simple documents and summarizes/paraphrases information.
Applies Arithmetic Processes						Performs basic computations; records and interprets numerical data.
Applies Mathematics Processes						Utilizes mathematical formulas and processes, summarizes and translates mathematical data.
Demonstrates Effective Listening Skills						Listens attentively, confirms information and interprets, clarifies and influences communication.
Demonstrates Effective Speaking Skills						Communicates appropriate messages, presents complex ideas and information; analyzes individual responses.
Thinking Skills						
Applies Creative Thinking/Generates Ideas						Paraphrases/summarizes existing ideas, demonstrates creative thinking while problem solving and develops creative solutions.
Applies Decision-Making Strategies						Applies rules and principles to the situation; gathers information and analyzes the situation and information.
Recognizes and Solves Problems						Understands and appropriately refers the complaint or discrepancy; examines information, analyzes possible causes and recommends action plan.
Demonstrates Visualization						Applies appropriate principles to situation and uses previous training and experience to predict outcomes.
Knows How to Learn						Draws upon experiences and prior knowledge, interprets and applies new knowledge and experience.
Applies Reasoning Skills						Identifies facts, principles, problems; applies rules/principles to procedure, uses logic to draw conclusions.

SCANS Survey Results: Utility Customer Service Representative – *Continued*

Foundation Skills and Personal Qualities	Key: 1 = Basic Competency Level; 5 = Advanced Competency Level.					Critical Competencies
	1	2	3	4	5	
Personal Qualities						
Demonstrates Responsibility						Performs assigned tasks, pays attention to details, works with minimal supervision, demonstrates enthusiasm, optimism and initiative.
Demonstrates Belief in Self Worth						Responds assertively, defends own beliefs and viewpoints, accepts constructive criticism and responsibility for own behavior and understands own impact on others.
Demonstrates Sociability in Groups						Responds appropriately to others; willingly helps others and establishes rapport with co-workers and customers, modifies behavior to environment and shows understanding/empathy for others.
Demonstrates Self-Management						Maintains self control, demonstrates commitment to self improvement, and applies self-management skills.
Demonstrates Integrity/Honesty						Demonstrates honesty and trustworthiness, accepts responsibility for own behavior, demonstrates commitment to personal improvement and recommends ethical course of action.
Management of Resources						
Manages Time						Starts on time; performs a given set of tasks, efficiently manages time and adjusts schedule as required by supervisor.
Manages Money						Reconciles daily receipts and payments; performs routine recordkeeping.
Manages Materials/Facilities						Maintains job-specific supplies and equipment.
Manages Human Resources						Recognizes job tasks and may distribute work assignments.
Management / Use of Information						
Acquires and Evaluates Information						Selects and obtains information relevant to the task; predicts outcomes and analyzes data.
Organizes and Maintains Information						Interprets information and applies processes to new information.
Interprets and Communicates Information						Recognizes accuracy of information, interprets information, and prepares basic summaries.
Uses Computers to Process Information						Performs basic data entry; utilizes integrated/multiple software tools; locates information and retrieves stored data.

SCANS Survey Results: Utility Customer Service Representative – *Continued*

Foundation Skills and Personal Qualities	Key: 1 = Basic Competency Level; 5 = Advanced Competency Level.					Critical Competencies
	1	2	3	4	5	
Interpersonal Skills						
Participates as Team Member						Actively participates in team activities and assists team members; demonstrates commitment and works to improve team skills.
Teaches Others						Models proper performance and attitudes; identifies training needs and conducts task-specific training.
Serves Customers						Demonstrates sensitivity to customer concerns and complaints; analyzes customer needs and demonstrates commitment to customer; relates to customer fears and concerns.
Exhibits Leadership						Adheres to standards; encourages others to adopt new concepts; demonstrates commitment to excellence and leads by example.
Negotiates Agreements						Understands negotiations process; identifies conflicts and demonstrates composure; interprets complaints and concerns.
Works with Diversity						Understands the legal aspects of discrimination; respects the rights of others and demonstrates awareness of diversity.
Understanding/Management of Systems						
Understands System						Understands the organization and system hierarchy, follows procedures, and recognizes system strengths and limitations.
Monitors/Corrects System Performance						Monitors system performance, analyzes system operation, and distinguishes trends in performance.
Improves/Designs Systems						Suggests system modifications/improvements and determines system components to be improved.
Use of Technology						
Selects Appropriate Technology						Knows available technology and understands the requirements of the task and technological results.
Applies Technology to Task						Understands technology applications and follows proper procedures; understands the operation/interaction.
Maintains/Troubleshoots Technology						Identifies symptoms and follows maintenance procedures.

Utility Customer Service Representatives

Critical Work Function:

A. Initiate a Positive Customer Experience and Relationship

Key Activity	Performance Indicators	Technical Knowledge	Employability Skills
	How do we know when the task is performed well?	Skills, Abilities, Tools	SCANS Skills and Foundational Abilities
A1 Establish rapport with customer	<ul style="list-style-type: none"> • Effective written and verbal communications are polite, clear and completed in a timely manner. • Communications are carried out with correct grammar and proper use of utility and power industry terminology, appropriate to the audience while avoiding jargon. • Company policies and procedures are followed. • Prompt greeting or acknowledgement and offer of assistance are provided to customer. • Customer is asked if there is anything else they can be helped with. • Tone of voice and pace are monitored to ensure that trust is built. 	<ul style="list-style-type: none"> • Knowledge of company policies and procedures. • Knowledge of utility and power industry terminology. • Ability to modulate tone of voice and pace to meet customer needs. • Knowledge of credible sources of information. 	<ul style="list-style-type: none"> • Listening skills • Serves customers • Speaking skills • Sociability skills • Honesty/integrity

A. Initiate a Positive Customer Experience and Relationship – Continued

Key Activity	Performance Indicators	Technical Knowledge	Employability Skills
	How do we know when the task is performed well?	Skills, Abilities, Tools	SCANS Skills and Foundational Abilities
<p>A2 Gather information to assess customer’s needs and customer’s knowledge of products or services</p>	<ul style="list-style-type: none"> • An effective and efficient line of questioning is used. • Customer needs are correctly identified in a timely manner. • Customer’s objectives and concerns related to the product or service are identified. • Techniques used are personalized to meet the needs of customers with different cultural backgrounds and demographics, including age and disability status. • Account is reviewed and analyzed to understand the history of services and payments to determine what to offer to customer. • Effective written and verbal communications are polite, clear and completed in a timely manner. • Communications are carried out with correct grammar and proper use of utility and power industry terminology, appropriate to the audience while avoiding jargon. • Company policies and procedures are followed. 	<ul style="list-style-type: none"> • Knowledge of questioning protocols. • Knowledge of techniques to identify customer needs. • Knowledge of diverse cultural backgrounds and their relevant communications styles. • Knowledge of procedures for accommodating disabilities. • Knowledge of communication styles within a variety of generations/ ages. • Knowledge of the content of account histories and the ability to analyze the information and draw correct conclusions about the customer’s needs. • Knowledge of utility and power industry terminology. • Knowledge of company policies and procedures. • Knowledge of products and services available to customer. • Knowledge of credible sources of information. 	<ul style="list-style-type: none"> • Listening skills • Analyzes information • Applying technology • Sociability skills • Reading skills • Works with diversity

A. Initiate a Positive Customer Experience and Relationship – Continued

Key Activity	Performance Indicators	Technical Knowledge	Employability Skills
	How do we know when the task is performed well?	Skills, Abilities, Tools	SCANS Skills and Foundational Abilities
A3 Respond to customer's comments and questions	<ul style="list-style-type: none"> • Appropriate explanation/solutions/options are determined for the customer's situation. • Customer communications are paraphrased to confirm understanding. • Customer needs are recognized and acknowledged. • Information about requests and actions taken are communicated to appropriate personnel effectively and in a timely manner. • Oral and written communications are polite, clear and completed in a timely manner. • Communications are carried out with correct grammar and proper use of utility and power industry terminology, appropriate to the audience, while avoiding jargon. • Company policies and procedures are followed. • Issues are escalated or advice is solicited from appropriate departmental staff when necessary to meet customer needs. 	<ul style="list-style-type: none"> • Ability to match solutions to customer situations. • Knowledge of the requirements of company departments and personnel regarding requests from customers. • Knowledge of sources of information regarding changes to the industry at large and how to apply that information when serving customers. • Knowledge of utility and power industry terminology. • Knowledge of company policies and procedures. • Ability to determine when and how to consult with appropriate departmental staff and escalate when necessary. • Knowledge of products, services and solutions available to customer and sources of information for staying current about them. • Knowledge of credible sources of information. 	<ul style="list-style-type: none"> • Serves customers • Interprets information • Negotiates agreements • Honesty/integrity • Uses information technology • Solves problems

B. Educate the Customer

Key Activity	Performance Indicators	Technical Knowledge	Employability Skills
	How do we know when the task is performed well?	Skills, Abilities, Tools	SCANS Skills and Foundational Abilities
<p>B1 Explain services, options and rates to customer</p>	<ul style="list-style-type: none"> • Clear, accurate and complete explanations of products or services are provided to customers. • Information about the complete range of products or services appropriate for the customer is provided. • Information about other products or services that are necessary or desirable is offered. • Internet and intranet research protocols are followed and are completed in a timely manner. • When serving customers in person, on the phone or electronically, systems are comfortably and competently utilized. • Supplemental documentation or resources (brochures, links, etc.) are provided when applicable • Effective written and verbal communications are polite, clear and completed in a timely manner. • Communications are carried out with correct grammar and proper use of utility and power industry terminology, appropriate to the audience while avoiding jargon. • Company policies and procedures are followed. • Issues are escalated or advice is solicited from appropriate departmental staff when necessary to meet customer needs. 	<ul style="list-style-type: none"> • Knowledge of Internet and intranet research protocols and ability to use them efficiently. • Ability to demonstrate comfort with systems when serving customers in person, on the phone or electronically. • Knowledge of company computer technology and ability to use technology proficiently. • Knowledge of procedures to obtain support from staff. • Knowledge of supplemental documentation resources available and procedures for providing them to customers. • Knowledge of utility and power industry terminology. • Knowledge of company policies and procedures. • Ability to determine when and how to escalate issues and consult with appropriate departmental staff. • Knowledge of products, services and relevant options and rates available to customer. • Knowledge of credible sources of information. • Ability to calculate billing information for customers. • Ability to explain rates and rate schedules. 	<ul style="list-style-type: none"> • Selects appropriate technology • Serves customers • Math skills • Arithmetic skills • Applies technology • Uses information technology

B. Educate the Customer – Continued

Key Activity	Performance Indicators	Technical Knowledge	Employability Skills
	How do we know when the task is performed well?	Skills, Abilities, Tools	SCANS Skills and Foundational Abilities
<p>B2 Identify alternative or additional products, services, options and solutions</p>	<ul style="list-style-type: none"> • Clear, accurate and complete explanations of products or services are provided to customers. • Credible and applicable resources are selected and used. • Effective written and verbal communications are polite, clear and completed in a timely manner. • Communications are carried out with correct grammar and proper use of utility and power industry terminology, appropriate to the audience, while avoiding jargon. • Company policies and procedures are followed. • Issues are escalated or advice is solicited from appropriate departmental staff when necessary to meet customer needs. • Internet and intranet research protocols are followed and are completed in a timely manner. • When serving customers in person, on the phone or electronically, systems are comfortably and competently utilized. 	<ul style="list-style-type: none"> • Ability to demonstrate comfort with systems when serving customers in-person, on the phone or electronically. • Knowledge of company computer technology and ability to use technology proficiently. • Knowledge of credible sources of information. • Knowledge of utility and power industry terminology. • Knowledge of company policies and procedures. • Ability to determine when and how to consult with appropriate departmental staff and escalate when necessary. • Knowledge of products, services and relevant options and rates available to customer. • Knowledge of Internet and intranet research protocols and ability to use them efficiently. 	<ul style="list-style-type: none"> • Solves problems • Serves customers • Acquires information • Selects appropriate technology • Applies technology

B. Educate the Customer – Continued

Key Activity	Performance Indicators	Technical Knowledge	Employability Skills
	How do we know when the task is performed well?	Skills, Abilities, Tools	SCANS Skills and Foundational Abilities
<p>B3 Offer alternatives to the customer if applicable</p>	<ul style="list-style-type: none"> • Account is reviewed and analyzed to understand the history of services and payments to determine what to offer to customer. • Clear, accurate and complete explanations of products or services and related policies are provided to customer. • Complete and accurate information about federal, state and local regulations is provided when necessary. • Effective written and verbal communications are polite, clear and completed in a timely manner. • Communications are carried out with correct grammar and proper use of utility and power industry terminology, appropriate to the audience while avoiding jargon. • Company policies and procedures are followed. • Issues are escalated or advice is solicited from appropriate departmental staff when necessary to meet customer needs. • Internet and intranet research protocols are followed and are completed in a timely manner. • When serving customers in person, on the phone or electronically, systems are comfortably and competently utilized. 	<ul style="list-style-type: none"> • Knowledge of the content of account histories and the ability to analyze the information and draw correct conclusions about the customer’s needs. • Knowledge of utility and power industry terminology. • Knowledge of company policies and procedures. • Knowledge of services, policies and relevant service plans and options available to customer. • Knowledge of federal, state and local regulations. • Knowledge of Internet and intranet research protocols and ability to use them efficiently. • Ability to demonstrate comfort with systems when serving customers in person, on the phone or electronically. • Knowledge of company computer technology and ability to use technology proficiently. • Ability to determine when and how to consult with appropriate departmental staff and escalate when necessary. • Knowledge of industry rules and regulations. • Knowledge of credible sources of information. 	<ul style="list-style-type: none"> • Creative thinking skills • Solves problems • Serves customers • Negotiates agreements • Interprets information • Sociability skills

B. Educate the Customer – Continued

Key Activity	Performance Indicators	Technical Knowledge	Employability Skills
	How do we know when the task is performed well?	Skills, Abilities, Tools	SCANS Skills and Foundational Abilities
<p>B4 Inform customer about services and policies (service plans and options)</p>	<ul style="list-style-type: none"> • Industry rules and regulations and company policies and procedures are followed. • Clear, accurate and complete explanations of product or service policies are provided to customers. • Complete and accurate information about federal and state rules pertaining to service plans is provided when necessary. • Issues are escalated or advice is solicited from appropriate departmental staff when necessary to meet customer needs. • Effective written and verbal communications are polite, clear and completed in a timely manner. • Communications are carried out with correct grammar and proper use of utility and power industry terminology, appropriate to the audience while avoiding jargon. • Internet and intranet research protocols are followed and are completed in a timely manner. • When serving customers in person, on the phone or electronically, systems are comfortably and competently utilized. 	<ul style="list-style-type: none"> • Knowledge of industry rules and regulations. • Knowledge of utility and power industry terminology. • Knowledge of company policies and procedures. • Knowledge of services, policies and relevant service plans and options available to customer. • Knowledge of Internet and intranet research protocols and ability to use them efficiently. • Ability to demonstrate comfort with systems when serving customers in person, on the phone or electronically. • Knowledge of company computer technology and ability to use technology proficiently. • Ability to determine when and how to consult with appropriate departmental staff and escalate when necessary. • Knowledge of credible sources of information. 	<ul style="list-style-type: none"> • Serves customers • Organizes information • Demonstrates responsibility • Writing skills • Knows/learns

C. Respond to Customer's Needs and Provide Ongoing Support

Key Activity	Performance Indicators	Technical Knowledge	Employability Skills
	How do we know when the task is performed well?	Skills, Abilities, Tools	SCANS Skills and Foundational Abilities
C1 Coordinate with or refer to other services, departments and vendors, as needed	<ul style="list-style-type: none"> • Information is timely, accurate and appropriate to the situation. • Customer issues are accurately and thoroughly discussed and solutions are defined. • Oral and written communication is concise, courteous and completed in a timely manner. • Proper terminology is used to communicate with internal and external organizations and personnel. • Appropriate staff members are informed of customer interactions, requests and complaints as required. • Company policies and goals are clearly communicated and supported. 	<ul style="list-style-type: none"> • Knowledge of other services, departments and vendors and their roles regarding delivery of products or services. • Knowledge of industry, department, vendor and personnel terminology. • Knowledge of company policies regarding communication with other services, departments and vendors. • Ability to locate and use communications devices such as telephones, email and postal system. • Knowledge of procedures to identify and report customer issues. • Knowledge of credible sources of information. 	<ul style="list-style-type: none"> • Selects appropriate technology • Reasoning skills • Solves problems • Creative thinking • Understands organizational system • Interprets information

C. Respond to Customer's Needs and Provide Ongoing Support – Continued

Key Activity	Performance Indicators	Technical Knowledge	Employability Skills
	How do we know when the task is performed well?	Skills, Abilities, Tools	SCANS Skills and Foundational Abilities
C2 Handle customer inquiries and complaints	<ul style="list-style-type: none"> • Clear, accurate and complete explanations of products, services and/ or policies are provided to customer. • If customer is not satisfied, complaints and inquiries are expedited/referred in an appropriate and timely manner. • Customer needs are recognized and acknowledged. • Information about requests and actions taken (such as service orders, notifications and investigation requests) are communicated to appropriate personnel effectively and in a timely manner. • When additional follow-up is required, a clear explanation is provided to the customer detailing how and when follow-up or call back will occur. • Customer data screen is completed thoroughly, completely and in a timely manner. • Documentation of the customer contact is completed accurately and submitted in accordance with policies and procedures. • Effective written and verbal communications are polite, clear and completed in a timely manner. • Communications are carried out with correct grammar and proper use of utility and power industry. 	<ul style="list-style-type: none"> • Ability to help customer navigate through applicable services and information. • Knowledge of the company's public website. • Knowledge of procedures to expedite/refer inquiries and complaints. • Knowledge of company policies and procedures. • Knowledge of requirements of company departments and personnel regarding requests from customers. • Ability to use data screen and knowledge of updating procedures. • Knowledge of information required to document customer contact and policies and procedures for submitting it. • Knowledge of utility and power industry terminology. • Knowledge of products, services and relevant options and rates available to customer. 	<ul style="list-style-type: none"> • Serves customers • Acquires information • Reasoning skills • Sociability skills • Honesty/integrity • Decision-making skills • Manages time
		<ul style="list-style-type: none"> • Knowledge of Internet and intranet research protocols and ability to use them efficiently. • Ability to demonstrate comfort with systems when serving customers in person, on the phone or electronically. • Knowledge of company computer technology and ability to use technology proficiently. • Ability to determine when and how to consult with appropriate departmental staff and escalate when necessary. • Knowledge of credible sources of information. 	<ul style="list-style-type: none"> • Internet and intranet research protocols are followed and are completed in a timely manner. • When serving customers in person, on the phone or electronically, systems are comfortably and competently utilized.

C. Respond to Customer's Needs and Provide Ongoing Support – Continued

Key Activity	Performance Indicators	Technical Knowledge	Employability Skills
	How do we know when the task is performed well?	Skills, Abilities, Tools	SCANS Skills and Foundational Abilities
<p>C3 Respond to customer requests to start or stop services</p>	<ul style="list-style-type: none"> • Information provided is accurate. • Computer technology is used in a proficient manner. • Issues are escalated or advice is solicited from appropriate departmental staff when necessary to meet customer needs. • Accounts are properly opened, closed or changed. • Customer data screen is completed thoroughly and in a timely manner. • Suspicious behavior and suspected fraud are documented in accordance with company policies and procedures. • Effective written and verbal communications are polite, clear and completed in a timely manner. • Communications are carried out with correct grammar and proper use of utility and power industry terminology, appropriate to the audience while avoiding jargon. • Company policies and procedures are followed. • When serving customers in person, on the phone or electronically, systems are comfortably and competently utilized. 	<ul style="list-style-type: none"> • Knowledge of procedures to open and close accounts and start and stop services. • Ability to use data screen and knowledge of updating procedures. • Ability to recognize suspicious behavior and knowledge of associated documentation requirements and procedures. • Knowledge of utility and power industry terminology. • Knowledge of company policies and procedures. • Ability to demonstrate comfort with systems when serving customers in person, on the phone or electronically. • Knowledge of company computer technology and ability to use technology proficiently. • Ability to determine when and how to consult with appropriate departmental staff and escalate when necessary. • Knowledge of procedures to obtain support from supervisor, lead or co-worker. • Knowledge of credible sources of information. 	<ul style="list-style-type: none"> • Serves customers • Manages money • Honesty/integrity • Selects appropriate technology • Applies technology

C. Respond to Customer's Needs and Provide Ongoing Support – Continued

Key Activity	Performance Indicators	Technical Knowledge	Employability Skills
	How do we know when the task is performed well?	Skills, Abilities, Tools	SCANS Skills and Foundational Abilities
<p>C4 Address credit needs with customers</p>	<ul style="list-style-type: none"> • Information provided is accurate. • Computer technology is used in a proficient manner. • Payment information is collected in accordance with company policies and procedures. • If applicable, process is initiated to suspend credit action (disconnects, late fees, late notices, etc.) by placing a hold or setting credit terms (payment arrangements). • Records are submitted in a timely manner to appropriate personnel and departments. • Oral and written communications are polite, clear and completed in a timely manner. • Communications are carried out with correct grammar and proper use of utility and power industry terminology, appropriate to the audience while avoiding jargon. • Company policies and procedures are followed. • Supervisor or co-worker support is solicited when necessary to meet customer needs. 	<ul style="list-style-type: none"> • Knowledge of utility and power industry terminology. • Knowledge of company policies and procedures. • Ability to demonstrate comfort with systems when serving customers in person, on the phone or electronically. • Knowledge of company computer technology and ability to use technology proficiently. • Ability to determine when and how to consult with appropriate departmental staff and escalate when necessary. • Knowledge of credit risks and company guidelines. • Knowledge of credit suspension actions and available credit terms, if any. • Ability to ask for payment. • Knowledge of credible sources of information. 	<ul style="list-style-type: none"> • Manages money • Solves problems • Speaking skills • Creative thinking • Serves customers • Self management

C. Respond to Customer's Needs and Provide Ongoing Support – Continued

Key Activity	Performance Indicators	Technical Knowledge	Employability Skills
	How do we know when the task is performed well?	Skills, Abilities, Tools	SCANS Skills and Foundational Abilities
<p>C5 Document, verify and maintain information</p>	<ul style="list-style-type: none"> • Documentation is accurate and complete. • Documentation is filed in the proper location. • Records are submitted in a timely manner to appropriate personnel and departments. • Records are maintained in accordance with policies. • Security and retention protocols are accurately followed. • Information is completely verified with customer. 	<ul style="list-style-type: none"> • Knowledge of and ability to use company computer system. • Knowledge of reporting requirements. • Knowledge of policies regarding documentation and records. • Knowledge of security and retention protocols. • Knowledge of verification procedures. • Knowledge of Microsoft® Office Suite or equivalent. • Ability to demonstrate efficient keyboarding and 10-key skills. 	<ul style="list-style-type: none"> • Writing skills • Uses information technology • Understands the organizational system • Selects appropriate technology • Demonstrates responsibility • Manages time

D. Interact with Customers

Key Activity	Performance Indicators	Technical Knowledge	Employability Skills
	How do we know when the task is performed well?	Skills, Abilities, Tools	SCANS Skills and Foundational Abilities
D1 Communicate with customers verbally and in writing	<ul style="list-style-type: none"> Information provided is accurate. Alternative forms of communication are identified as required. Appropriate method of communication is used. Oral and written communications are polite, clear and completed in a timely manner. Communications are carried out with correct grammar and proper use of utility and power industry terminology, appropriate to the audience while avoiding jargon. Company policies and procedures are followed. Internet and intranet research protocols are followed and are completed in a timely manner. 	<ul style="list-style-type: none"> Knowledge of alternative forms of communication available for following up with customers. Ability to identify customer disabilities and knowledge of procedures for accommodating people with disabilities. Knowledge of utility and power industry terminology. Knowledge of company policies and procedures regarding communication with customers. Knowledge of products and services and relevant options and rates available to customer. Knowledge of company computer technology and ability to use technology proficiently. 	<ul style="list-style-type: none"> Writing skills Speaking skills Demonstrates responsibility Manages time

D. Interact with Customers – Continued

Key Activity	Performance Indicators	Technical Knowledge	Employability Skills
	How do we know when the task is performed well?	Skills, Abilities, Tools	SCANS Skills and Foundational Abilities
<p>D2 Negotiate resolutions and solve problems</p>	<ul style="list-style-type: none"> • Company policies and procedures are followed. • Steps are taken to confirm the resolution. • Information provided is accurate. • Customer communications are paraphrased to acknowledge issues and ensure understanding of customer issue. • Issues are accurately and thoroughly discussed and solutions are defined. • Communication is clear, respectful and relevant. • Action items are carried out in a timely manner. • Issues are escalated or advice is solicited from appropriate departmental staff when necessary to meet customer needs. 	<ul style="list-style-type: none"> • Knowledge of the company-approved negotiation process and how to confirm the resolution. • Knowledge of paraphrasing techniques. • Knowledge of utility and power industry terminology. • Knowledge of company policies and procedures regarding communication with customers. • Ability to determine when and how to consult with appropriate departmental staff and escalate when necessary. • Knowledge of procedures to obtain support from supervisor or co-worker. • Knowledge of credible sources of information. 	<ul style="list-style-type: none"> • Self worth • Self management • Negotiates agreements • Decision-making skills • Interprets information • Solves problems

D. Interact with Customers – Continued

Key Activity	Performance Indicators	Technical Knowledge	Employability Skills
	How do we know when the task is performed well?	Skills, Abilities, Tools	SCANS Skills and Foundational Abilities
<p>D3 Engage in conflict resolution</p>	<ul style="list-style-type: none"> • Customer receives clear and accurate information regarding resolution procedures. When additional follow-up is required, a clear explanation is provided to the customer of how and when follow up or call back will occur. • Customer communications are paraphrased to acknowledge issues. • Customer feedback indicates satisfaction with employee actions and behavior. • Composure is demonstrated. • Conflicts are accurately identified and complaints are accurately interpreted. • Supervisor, co-worker or lead support is solicited when necessary to meet customer needs. 	<ul style="list-style-type: none"> • Knowledge of conflict resolution process. • Ability to identify underlying issues. • Knowledge of company policies regarding conflict resolution with customers. • Knowledge of paraphrasing techniques. • Ability to determine when and how to consult with appropriate departmental staff and escalate when necessary. 	<ul style="list-style-type: none"> • Reasoning skills • Creative thinking • Self management • Uses information technology • Visualization skills • Acquires and evaluates information

D. Interact with Customers – Continued

Key Activity	Performance Indicators	Technical Knowledge	Employability Skills
	How do we know when the task is performed well?	Skills, Abilities, Tools	SCANS Skills and Foundational Abilities
<p>D4 Escalate issues when necessary</p>	<ul style="list-style-type: none"> • Situation is properly assessed. • Escalation procedures are followed. • Information about the issue is communicated in a concise and timely manner and includes all relevant available information concerning the customer and the service. • When additional follow-up is required, a clear explanation is provided to the customer of how and when follow-up or call back will occur. 	<ul style="list-style-type: none"> • Knowledge of utility industry and company terminology. • Ability to accurately describe customer situation. • Knowledge of escalation procedures. • Knowledge of follow-up actions and how they take place. 	<ul style="list-style-type: none"> • Understands the organizational system • Solves problems • Reasoning skills • Speaking skills • Self worth

E. Participate in Continuous Learning

Key Activity	Performance Indicators	Technical Knowledge	Employability Skills
	How do we know when the task is performed well?	Skills, Abilities, Tools	SCANS Skills and Foundational Abilities
<p>E1 Achieve and maintain proficiency in current and new technologies</p>	<ul style="list-style-type: none"> • Technical trainings are attended with full participation. • Initiative is demonstrated to participate in continuous learning opportunities. • Technical instruction manuals, guides and website are reviewed as required to stay current and proficient. • Training needs are communicated to the supervisor. • Materials pertaining to current and new technologies are reviewed on a regular basis as required. 	<ul style="list-style-type: none"> • Ability to access training provided by the organization. • Knowledge of location of technology manuals and how to use them. • Knowledge of the public website structure and how to locate information on it. • Knowledge of intranet and ability to perform research. • Knowledge of credible sources of information. 	<ul style="list-style-type: none"> • Knows/learns • Maintains technology • Improves system performance • Monitors and corrects system performance • Manages materials • Organizes information

E. Participate in Continuous Learning – Continued

Key Activity	Performance Indicators	Technical Knowledge	Employability Skills
	How do we know when the task is performed well?	Skills, Abilities, Tools	SCANS Skills and Foundational Abilities
<p>E2 Participate in company-provided training and continuing education</p>	<ul style="list-style-type: none"> • Trainings are attended with full participation. • When applicable, attendance records show the employee has completed required training. • Documentation (test results, checklists, and instructor or manager evaluations) indicates satisfactory performance in trainings. • Participation in continuous learning opportunities is self-initiated. • Customer service instruction manuals, guides and website are reviewed as required to meet customer needs. • Training needs and skill gaps are communicated to and followed-up with appropriate staff. 	<ul style="list-style-type: none"> • Ability to locate schedule and access trainings offered by the organization. • Knowledge of location of customer service instruction manuals, guides and website and how to use them. • Knowledge of process to request new training classes. • Knowledge of the public website structure and how to locate information on it. 	<ul style="list-style-type: none"> • Applies technology • Participates as a team member • Knows/learns • Self management • Acquires information • Manages time

E. Participate in Continuous Learning – Continued

Key Activity	Performance Indicators	Technical Knowledge	Employability Skills
	How do we know when the task is performed well?	Skills, Abilities, Tools	SCANS Skills and Foundational Abilities
<p>E3 Stay current on new products, services and processes</p>	<ul style="list-style-type: none"> • Information from training is applied on the job to ensure retention and improve effectiveness. • Initiative is demonstrated to participate in continuous learning opportunities. • New product, service and process instruction manuals and guides are reviewed as required to stay current and proficient. • Information on new products, services and processes is maintained and kept current. • Location of new product, service and process information is kept current. • Materials pertaining to new products, services and processes are reviewed on a regular basis and as required. • Trainings on new products, services and processes are attended with full participation. • When applicable, attendance records show the employee has completed required training. • Training needs are communicated to the supervisor. 	<ul style="list-style-type: none"> • Ability to access training provided by the organization. • Knowledge of location of new product, service and process manuals and how to use them. • Knowledge of the underlying purpose of processes. 	<ul style="list-style-type: none"> • Organizes information • Knows/learns • Applies technology • Manages materials

F. Ensure a Safe, Secure and Productive Work Environment

Key Activity	Performance Indicators	Technical Knowledge	Employability Skills
	How do we know when the task is performed well?	Skills, Abilities, Tools	SCANS Skills and Foundational Abilities
F1 Meet safety standards	<ul style="list-style-type: none"> • Safety laws and regulations are supported and followed. • As required, safety training is attended with full participation. • Safety violations are recorded and filed with appropriate offices in accordance with company policies and in a timely manner. • Ergonomic injury prevention practices are followed. • Illegal and inappropriate behaviors are avoided. • Ethical guidelines are followed. 	<ul style="list-style-type: none"> • Ability to identify unsafe conditions. • Knowledge of safety laws and regulations. • Knowledge of safety training requirements. • Knowledge of procedures for reporting safety violations. • Knowledge of ethical guidelines, company policies and legal consequences related to aiding or participating in illegal or inappropriate behavior. • Knowledge of location of safety instruction manuals and guides and how to use them. • Knowledge of ergonomic needs and injury prevention practices. 	<ul style="list-style-type: none"> • Demonstrates responsibility • Solves problems • Visualization skills • Monitors and corrects system performance • Manages materials • Manages time

F. Ensure a Safe, Secure and Productive Work Environment – Continued

Key Activity	Performance Indicators	Technical Knowledge	Employability Skills
	How do we know when the task is performed well?	Skills, Abilities, Tools	SCANS Skills and Foundational Abilities
F2 Meet security standards	<ul style="list-style-type: none"> • Proper protocols regarding access to customer information are followed. • Company policies are followed. • Breaches of customer confidentiality and company policy are promptly and accurately reported to appropriate personnel. • Suspicious behavior on the part of customers or employees is promptly and accurately reported to appropriate personnel. • Security and confidentiality of customer information is ensured. • Illegal and inappropriate behavior is avoided. • Ethical standards and guidelines are followed. • Discussion of confidential customer information is avoided at all times unless required to serve the customer. 	<ul style="list-style-type: none"> • Knowledge of company policies regarding deterring and preventing unauthorized access to, use or theft of property or resources. • Knowledge of privacy laws and company standards for obtaining, using and protecting information obtained from a customer or another employee. • Knowledge of reporting requirements and procedures regarding breaches of customer confidentiality and company security policy. • Ability to identify suspicious behavior. • Knowledge of ethical standards and guidelines, company policies and legal consequences related to aiding or participating in illegal or inappropriate behavior. 	<ul style="list-style-type: none"> • Demonstrates responsibility • Solves problems • Visualization skills • Monitors and corrects system performance • Manages materials

F. Ensure a Safe, Secure and Productive Work Environment – Continued

Key Activity	Performance Indicators	Technical Knowledge	Employability Skills
	How do we know when the task is performed well?	Skills, Abilities, Tools	SCANS Skills and Foundational Abilities
F3 Identify and report unsafe conditions and take corrective actions	<ul style="list-style-type: none"> • Conditions that present a threat to health and safety are corrected and documented immediately where possible and if not, identified and reported. • Appropriate parties are consulted about corrective actions. • Follow-up procedures are conducted and documented. 	<ul style="list-style-type: none"> • Ability to identify unsafe conditions. • Knowledge of corrective actions. • Ability to implement corrective actions. • Knowledge of documentation and reporting procedures for unsafe conditions. • General knowledge of roles and responsibilities of offices, organizations and personnel at the company. 	<ul style="list-style-type: none"> • Monitors and corrects system performance • Helps others learn • Visualization skills • Demonstrates self management • Demonstrates responsibility

F. Ensure a Safe, Secure and Productive Work Environment – Continued

Key Activity	Performance Indicators	Technical Knowledge	Employability Skills
	How do we know when the task is performed well?	Skills, Abilities, Tools	SCANS Skills and Foundational Abilities
<p>F4 Participate in emergency drills</p>	<ul style="list-style-type: none"> • Emergency response complies with company and regulatory policies and procedures. • Full participation is demonstrated. 	<ul style="list-style-type: none"> • Knowledge of emergency policies and procedures. • Knowledge of emergency responses. • Knowledge of location of emergency phone numbers and address/ locations within facilities. 	<ul style="list-style-type: none"> • Participates as a team member • Manages materials • Demonstrates responsibility • Manages time • Exhibits leadership

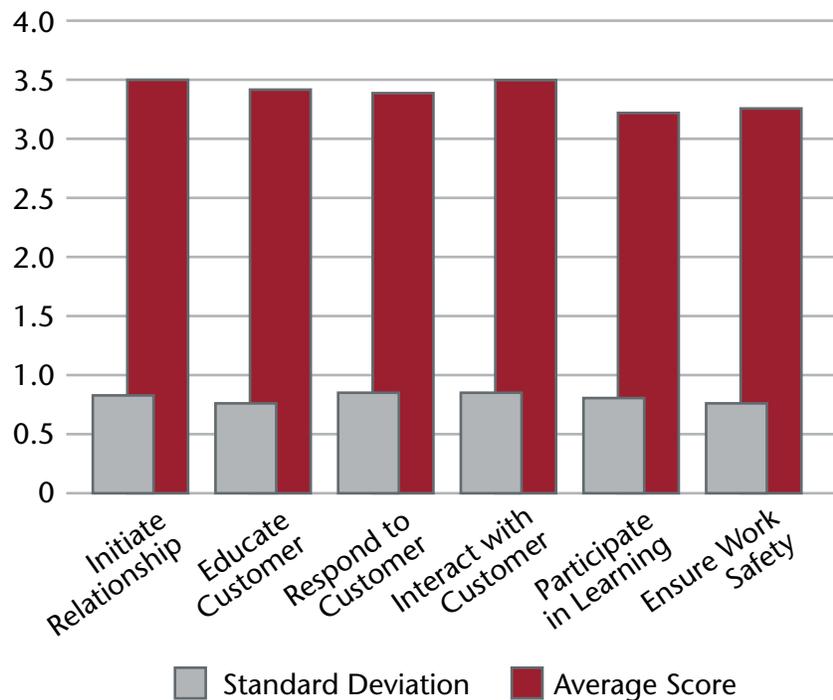
F. Ensure a Safe, Secure and Productive Work Environment – Continued

Key Activity	Performance Indicators	Technical Knowledge	Employability Skills
	How do we know when the task is performed well?	Skills, Abilities, Tools	SCANS Skills and Foundational Abilities
<p>F5 Participate in team environment</p>	<ul style="list-style-type: none"> • General information and customer feedback is shared with appropriate staff. • Team meetings and activities are engaged in with full participation. • Team members are assisted in a respectful and timely manner. • Conflicts are resolved in accordance with company policies. • Encouragement and support of team members is demonstrated. • Enthusiasm and initiative are demonstrated. 	<ul style="list-style-type: none"> • Knowledge of team expectations. • Knowledge of procedures for assisting fellow team members. • Knowledge of utility and power industry terminology. • Ability to demonstrate proper company practices. 	<ul style="list-style-type: none"> • Exhibits leadership • Manages materials • Manages time • Works with diversity • Participates as a team member • Helps others learn

Verification Survey Results

Figure 2 shows the average importance and standard deviation (variation) among each function, rated on a scale from 0 (not important) to 4 (critical). These results generally verify that the critical work functions included in the skill standards document are relevant to the industry at large. The results show that Critical Work Function A, Initiate a Positive Customer Experience and Relationship, and Critical Work Function D, Interact with Customers, had the highest average scores (3.50) among all critical work functions. The lowest-rated critical work function was C, Participate in Continuous Learning (3.25). The standard deviation scores for all items show a modest amount of variation among respondents. It should be noted that no critical work function had an average value of less than 3.25, which generally confirms that respondents view all six of the critical work functions as important or very important to the work of CSRs.

Figure 2
**Utility Customer Service Representative:
Importance of Critical Work Functions**



Future of Customer Service in Utilities

The process of creating the 2012 Skill Standards for Utility Industry CSRs also underscored how ongoing modernization of the energy grid will alter the skill requirements and expectations of CSRs in the future. Consumers' access to energy information will increase markedly with the new grid technologies, as will their expectations about the levels of service and knowledge from their point of contact with their utility: CSRs are customers' main – and sometimes only – interface with their utility service provider. Many customers will need support to learn how to use new technology options for the first time, while sophisticated technology users will require advanced support that CSRs will be expected to provide. Discussions with the Advisory Committee, focus group participants and industry thought leaders have forecast that the following changes are imminent:

- **CSRs will need to be able to use a variety of software programs.**

Many utilities are upgrading or replacing their existing customer interface software to enable greater data access, analysis and integration of utility and customer information. Just as smart grid technologies add new capabilities for customers to review and use utility data, the new information technology systems required to support a two-way, nearly real-time exchange of data and communications between customers and customer service professionals have become more advanced and complex. CSRs must be able to upgrade their own software and systems skills and knowledge through training to ensure that these new tools and capabilities can be supported, to address customer inquiries effectively, and to educate users with a broad range of analytical abilities and computer/application skills.

- **CSRs will need to understand the connection between house, modem and meter.**

Because smart grid technologies do not limit utilities to receiving and analyzing a one-way flow of information from the customer's meter, CSRs will need to understand the function and operation of technologies that enable two-way communication between customers and the utility. Sensors, controls and applications that integrate household electrical systems will require CSRs to understand how these components interact and the ability that customers have to monitor and influence their own energy use.

- **Customers will have greater access to more complex information and, therefore, will have more questions.**

Two-way communication technologies and tools enable customers to play a bigger role in deciding how they will use energy resources. Access to account and general utility information helps empower consumers, who by their own actions can help support energy efficiency through everyday energy use, reflected in the choices they make about household appliances and home heating and cooling systems. While some customers are technology and data savvy, and utilities have strived to create user-friendly websites to support customer questions, most users will require personal support to learn, understand and effectively use the information that is available to them. Utilities in advanced stages of smart grid implementation have noted a significant increase in the number of customer inquiries, most often to help clarify and teach consumers how to access and use their own energy information, web-based tools and data.

- **CSRs will need to know about – and be able to do – remote switching.**
 Utilities are now using advanced metering technologies to remotely connect/disconnect customer meters, especially where meters are hard to access; or for highly-transient populations and high-turnover rental premises, such as for college students. Remote connect/disconnect modules enable CSRs to efficiently handle service orders and delinquent accounts, and enhance customer service capabilities by remotely connecting/disconnecting services to rental and seasonally occupied premises. Using remote switching effectively requires CSRs to integrate knowledge of the technologies with established procedures and professional judgment.
- **Troubleshooting skills will be increasingly important for CSRs.**
 Smart grid systems and components are complex, with more opportunities for complicated systems problems to occur. CSRs will need to be able to work through data, user and systems problems on their own, and with staff from other departments, and to work as consultants with customers who are experiencing problems. CSRs will need the ability to identify and isolate causes and initiate solutions to resolve component and systems-related problems, or refer complex issues to appropriate technical support staff.
- **CSRs will need to understand and translate technical language into common terms that are not intimidating to customers.**
 Smart grid systems are designed, manufactured and operated using scientific principles. CSRs will need to understand these technical systems sufficiently and receive training so they can communicate with customers using plain-spoken language that is appropriate to non-technical audiences. This ability will help de-mystify the technologies and promote users' understanding, buy-in and effective use of the technologies.
- **Smart grid-related changes may require even more employee support for customers than currently exists.**
 Smart grid technologies may lead to additional automation and less need for some types of customer support, but because of its complexity, customers are likely to need more support in a fully implemented smart grid environment. As more technologies are phased in, the level and types of customer support needed may change, but as more technologies and systems are installed, CSRs will require ongoing retraining to keep pace with technical changes and shifting responsibilities.
- **CSRs will need to possess or develop the ability to manipulate and understand complex data.**
 The sheer amount of information available to CSRs will grow as more smart grid technologies and systems are implemented. CSRs will be expected to navigate across different databases and applications, apply analytical skills to identify and understand important relationships between variables, track and respond to consumer inquiries, and troubleshoot and resolve problems. With greater access to utility information and customers' energy and financial information, the need for data security, confidentiality and accountability by CSRs will become even more critical.

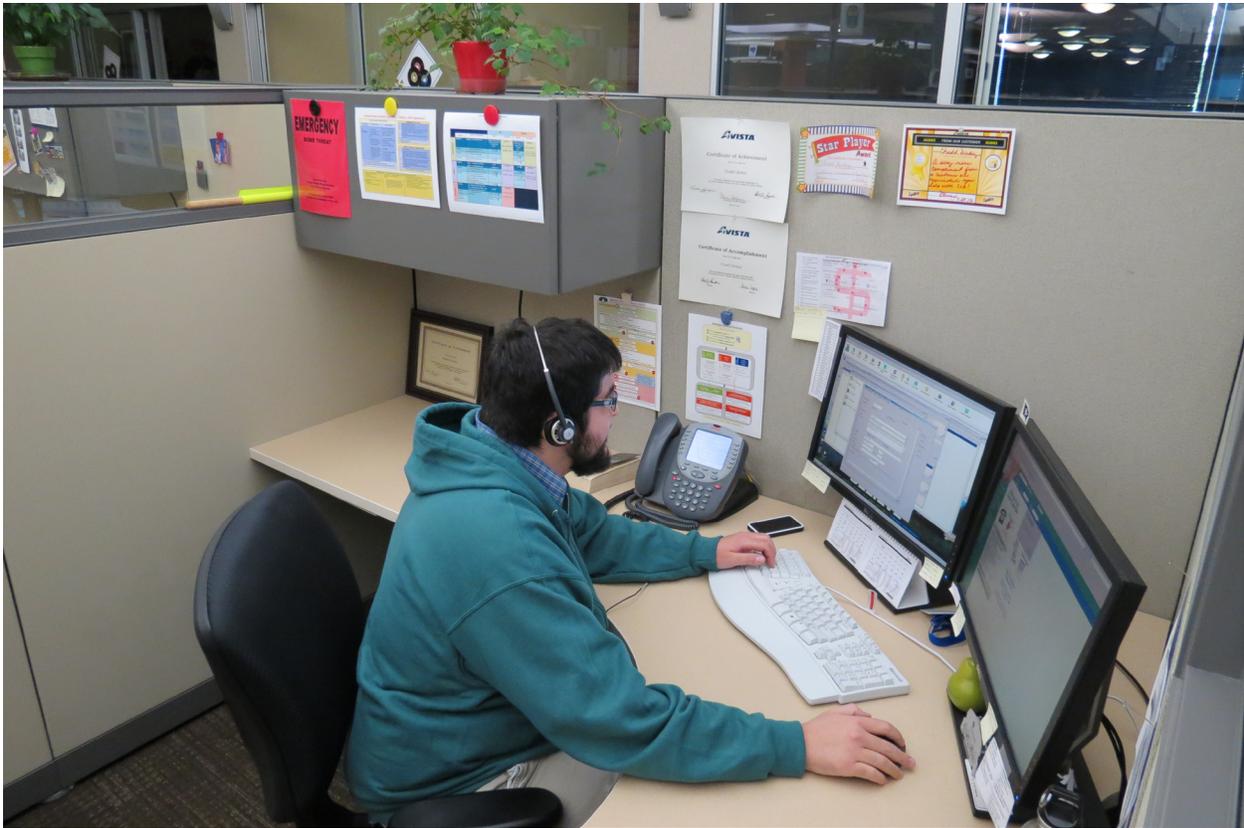
- **The role of a CSR may evolve into more of an Energy Advisor in a consultant-level role.**

Answers to many of the common, straight-forward inquiries made by customers are already being automated, and customers are often able to solve problems on their own using tools provided on utility websites. This means that the calls that do come in are becoming increasingly complex and take more time to handle. To respond effectively, CSRs must have the ability to provide a broad range of services and support, such as providing help-desk solutions and training in how to use web-based tools, educating and advising consumers about ways to conserve energy, reviewing and helping customers understand account billing and usage data, identifying actions consumers can take to reduce energy use and costs, and consulting with users on energy-efficient products and services.

- **The CSR role in a utility is already more complex than that of a CSR in many other industries, and with the addition of advanced technologies, it is likely to become even more complicated over time.**

Employers indicate that implementing smart grid technologies has increased the baseline of skills required of CSRs, which in turn has raised their expectations of new applicants and existing employees. Employers report that more extensive preparation and more up-front training will be required of new CSRs, while more frequent and intensive upgrade training will be needed for incumbent workers so they are equipped to use new technology tools and support customer inquiries and requests.

CSRs no longer have the luxury of incrementally learning on the job over an extended time period; they will be required to have higher levels of education and training at entry, be prepared to learn and apply new technologies and systems enhancements quickly and more frequently, and to engage with customers who have a broader range of technical, financial and behavioral questions and support needs.



Customer Service Representative Scenarios

Routine Scenario for CSR in Utility Call Center Setting

Customer calls to discuss an unusually high bill. I pull up the account number or service address in the system and verify the necessary identification information, phone number and update any missing account information such as employer and secondary phone number. I make sure that the customer has two forms of identification present on the account, updating if necessary.

I proceed with the call making sure to listen carefully to the concerns of the customer while reviewing account information with regard to usage comparison, meter read types, possible meter check orders, billing adjustments, etc. I determine that the usage has increased dramatically and that previous and current reads are actual which rules out over-estimated reads.

I proceed by asking the customer further questions to help establish what may have changed within the billing cycle that could explain the increased use: Were there new appliances purchased? Were additional people staying in the home during the bill cycle? Have the outdoor temperatures changed? Is it possible there is a malfunction in an appliance such as a water pump, outside outlets, or an electric hot water tank?

As per our conversation, the customer insists that nothing has changed within the home.

I offer to calculate the expected usage of the home by using the appliance worksheet tool, being careful to include every possible appliance that could be present in the household. I also explain to the customer that the appliance worksheet is available at our website for the customer's future reference. After completing the worksheet, the customer remembers that two livestock water heaters were used 16 days each during this time period. After determining the voltage of the water heaters used and the number of hours they were used per day, I determine the increased kilowatts per hour for this period.

The increased use on the bill is now justified and the customer offers to mail payment in full today. The customer now requests information concerning the budget billing program.

I determine after looking at the usage for the past twelve months, that adequate usage is available and the budget amount can be determined by using the system calculation. The budget bill amount is determined to be \$200.00 a month. The customer requests being added at this amount. I add the customer to the program explaining the guidelines and making the necessary contact information on the account. The contact information is then forwarded to the billing department.

I ask if there is anything further that I can assist with. Customer has no further questions.

Primary Tasks and Functions Involved in Routine Scenario

Critical Work Functions	Key Activities				
<p>A. Initiate a positive customer experience and relationship</p>	<p><i>A1</i> Establish rapport with customer</p>	<p><i>A2</i> Gather information to assess customer's needs and customer's knowledge of products or services</p>	<p><i>A3</i> Respond to customer's comments and questions</p>		
<p>B. Educate the customer</p>	<p><i>B1</i> Explain services, options and rates to customer</p>	<p><i>B2</i> Identify alternative or additional products, services, options and solutions</p>	<p><i>B3</i> Offer alternatives to the customer if applicable</p>	<p><i>B4</i> Inform customer about services and policies (service plans and options)</p>	
<p>C. Respond to customer's needs and provide ongoing support</p>	<p><i>C1</i> Coordinate with or refer to other services, departments and vendors, as needed</p>	<p><i>C2</i> Handle customer inquiries and complaints</p>	<p><i>C3</i> Respond to customer requests to start or stop services</p>	<p><i>C4</i> Address credit needs with customers</p>	<p><i>C5</i> Document, verify and maintain information</p>
<p>D. Interact with customers</p>	<p><i>D1</i> Communicate with customers verbally and in writing</p>	<p><i>D2</i> Negotiate resolutions and solve problems</p>	<p><i>D3</i> Engage in conflict resolution</p>	<p><i>D4</i> Escalate issues when necessary</p>	
<p>E. Participate in continuous learning</p>	<p><i>E1</i> Achieve and maintain proficiency in current and new technologies</p>	<p><i>E2</i> Participate in company-provided training and continuing education</p>	<p><i>E3</i> Stay current on new products, services and processes</p>		
<p>F. Ensure a safe, secure and productive work environment</p>	<p><i>F1</i> Meet safety standards</p>	<p><i>F2</i> Meet security standards</p>	<p><i>F3</i> Identify and report unsafe conditions and take corrective actions</p>	<p><i>F4</i> Participate in emergency drills</p>	<p><i>F5</i> Participate in team environment</p>

Crisis Scenario for CSR in Utility Call Center Setting

Throughout the course of my day, I receive a multitude of emails regarding customer accounts, updates to pertinent processes, and the technology and tools I use in my day-to-day duties. It's not only pertinent to check my email throughout the day, but it's also an expectation.

After a fairly slow day with only a few phone calls trickling in, I notice an urgent email pop up on my computer. It says that our phone system has gone down. Our customers are not able to reach a live customer service agent. This poses a great risk because we provide both electric and natural gas service and it's imperative that any emergency report from our customers be responded to. I start to feel a bit of panic, but know I have to keep my composure. It's essential that I stay ready and available to take those calls as soon as we are back up and running.

There is always plenty of back-office paperwork to complete, which I continue to work on. Then I see my Supervisor walking quickly toward me, hopefully with some good news.

It appears the phone system is still down; however, I'm being asked to temporarily relocate to a new workstation. I'm needed to help run the back-up phone system and field any emergency calls that may come through. I gather only the key items I'll need to take calls: my headset, a small notepad and a pen. All the other items I use will be on the computer. I find an open workstation in the area I was directed to and sit down. I can hear the desk phones ring as agents around me answer the calls with the designated emergency services greeting.

I'm provided instruction on how to login to the desk phone and plug in my headset. This is all new to me – the phone system I'm used to is fully operated on my computer.

I'm logged in and ready to take calls. After about 45 minutes of back-to-back electric emergency and natural gas emergency calls, I notice an urgent email pop up.

HOORAY! Our phones are back up and running and I can head back to my own workstation. It appears all systems are go. I gather my belongings and ensure the workstation was just as I found it.

As I settle into my desk and resume taking customer calls, I feel a sense of calm. I know that I did exactly the right thing by staying focused on the task at hand. I've also shown my ability to be flexible and roll with the changes.

The ability to respond quickly is key to succeeding in the utility industry, whether it is in the customer access center or in the field. A key piece of providing great customer service is realizing your expectations and knowing how to adapt to change quickly.

Primary Tasks and Functions Involved in Crisis Scenario

Critical Work Functions	Key Activities				
<p>A. Initiate a positive customer experience and relationship</p>	<p><i>A1</i> Establish rapport with customer</p>	<p><i>A2</i> Gather information to assess customer's needs and customer's knowledge of products or services</p>	<p><i>A3</i> Respond to customer's comments and questions</p>		
<p>B. Educate the customer</p>	<p><i>B1</i> Explain services, options and rates to customer</p>	<p><i>B2</i> Identify alternative or additional products, services, options and solutions</p>	<p><i>B3</i> Offer alternatives to the customer if applicable</p>	<p><i>B4</i> Inform customer about services and policies (service plans and options)</p>	
<p>C. Respond to customer's needs and provide ongoing support</p>	<p><i>C1</i> Coordinate with or refer to other services, departments and vendors, as needed</p>	<p><i>C2</i> Handle customer inquiries and complaints</p>	<p><i>C3</i> Respond to customer requests to start or stop services</p>	<p><i>C4</i> Address credit needs with customers</p>	<p><i>C5</i> Document, verify and maintain information</p>
<p>D. Interact with customers</p>	<p><i>D1</i> Communicate with customers verbally and in writing</p>	<p><i>D2</i> Negotiate resolutions and solve problems</p>	<p><i>D3</i> Engage in conflict resolution</p>	<p><i>D4</i> Escalate issues when necessary</p>	
<p>E. Participate in continuous learning</p>	<p><i>E1</i> Achieve and maintain proficiency in current and new technologies</p>	<p><i>E2</i> Participate in company-provided training and continuing education</p>	<p><i>E3</i> Stay current on new products, services and processes</p>		
<p>F. Ensure a safe, secure and productive work environment</p>	<p><i>F1</i> Meet safety standards</p>	<p><i>F2</i> Meet security standards</p>	<p><i>F3</i> Identify and report unsafe conditions and take corrective actions</p>	<p><i>F4</i> Participate in emergency drills</p>	<p><i>F5</i> Participate in team environment</p>

Long-Term Scenario for CSR in Utility Call Center Setting

Training for CSRs is provided months prior to implementation of any new computer information system. The CSRs continue to work in the current system most of the time, and are given instructor-based training on the future system in a classroom setting. There are continuous changes being made to the future CIS system (even after training has been provided), and very little hands-on practice time is available. Very few trainers have experience as a Customer Service Representative, and they have difficulty providing specific answers to the questions asked by CSRs.

After training is completed, implementation of the new CIS system is delayed for a few months. This delay combined with lack of additional training and hands-on practice jeopardizes the CSRs retention of new information.

Once the new CIS system is implemented, the old system is available in a read-only format for reference. CSRs struggle to learn the new system on the job with only instruction manuals and limited staff resources. Due to the learning curve and new system problems, providing customer service takes much more time than in the previous CIS system. Customers have to wait longer for service and are often upset about this delay. The high volume of customers waiting for service results in higher stress levels for the CSRs.

Eventually, as the CSRs work in the new system, they gain knowledge and their confidence builds. The CSRs become more efficient. They are able to more effectively handle the customer volume, and therefore have more time to explore within the system. The CSRs become the experts, and are able to suggest more efficient processes.

Primary Tasks and Functions Involved in Routine Scenario

Critical Work Functions	Key Activities				
<p>A. Initiate a positive customer experience and relationship</p>	<p><i>A1</i> Establish rapport with customer</p>	<p><i>A2</i> Gather information to assess customer's needs and customer's knowledge of products or services</p>	<p><i>A3</i> Respond to customer's comments and questions</p>		
<p>B. Educate the customer</p>	<p><i>B1</i> Explain services, options and rates to customer</p>	<p><i>B2</i> Identify alternative or additional products, services, options and solutions</p>	<p><i>B3</i> Offer alternatives to the customer if applicable</p>	<p><i>B4</i> Inform customer about services and policies (service plans and options)</p>	
<p>C. Respond to customer's needs and provide ongoing support</p>	<p><i>C1</i> Coordinate with or refer to other services, departments and vendors, as needed</p>	<p><i>C2</i> Handle customer inquiries and complaints</p>	<p><i>C3</i> Respond to customer requests to start or stop services</p>	<p><i>C4</i> Address credit needs with customers</p>	<p><i>C5</i> Document, verify and maintain information</p>
<p>D. Interact with customers</p>	<p><i>D1</i> Communicate with customers verbally and in writing</p>	<p><i>D2</i> Negotiate resolutions and solve problems</p>	<p><i>D3</i> Engage in conflict resolution</p>	<p><i>D4</i> Escalate issues when necessary</p>	
<p>E. Participate in continuous learning</p>	<p><i>E1</i> Achieve and maintain proficiency in current and new technologies</p>	<p><i>E2</i> Participate in company-provided training and continuing education</p>	<p><i>E3</i> Stay current on new products, services and processes</p>		
<p>F. Ensure a safe, secure and productive work environment</p>	<p><i>F1</i> Meet safety standards</p>	<p><i>F2</i> Meet security standards</p>	<p><i>F3</i> Identify and report unsafe conditions and take corrective actions</p>	<p><i>F4</i> Participate in emergency drills</p>	<p><i>F5</i> Participate in team environment</p>



Integration

Assessment and Certification: A Vital Connection

Skill standards, while useful on their own, are just one part of a much larger equation. Skill standards establish the standard of competent performance, but they do not tell a person whether he or she has succeeded in meeting that standard.

For this reason, developing skill standards does not end with publication. Next steps should include developing voluntary assessments and certifications, which will make it possible for students, workers and any interested persons to determine their strengths and weaknesses based on the standards, and to earn certification showing that they can perform work competently as established by the skill standards.

In today's fast-moving technological economy, assessments and certification are crucial. The demand for both technical and employability skills are escalating as work becomes more complex. The workforce is more mobile, with workers moving freely between jobs and industries. This job mobility requires that workers must be able to communicate their qualifications to potential employers. They must keep up with technological change through continuous learning and worker retraining, and must be able to prove they have kept pace. All of these factors mean more training and education for individuals, and the ability to show evidence that this training translates to performance on the job.

Voluntary assessments and certifications based on skill standards will help us address all these needs because of the guiding principles upon which skill standards are based, and because of the stakeholders – employers, labor, educators, workers, students, and government – who have needs that skill standards are designed to meet.

A step toward a statewide system of assessments and certifications is developing assessments that measure an individual's ability to perform work competently as defined by the skill standards. Once these assessments are developed, curriculum can be reviewed to determine that all necessary topics and practicums sufficiently cover the items in the assessment. As gaps are identified, learning activities and content adjustments can be made, and post/summative assessments can be administered.

Finally, it is critical that industry be involved every step of the way, and that standards are continuously reviewed and updated. Figure 3 provides a summary of this process.

Figure 3
Integrating Skill Standards



Please Note: To ensure that the use of standards and related assessments and certifications do not contradict U.S. employment law, employers will need to conduct an internal validation of the standards before using the skill standards to make hiring and promotion decisions. The purpose of this validation is to ensure that the knowledge, skills and performance described by the standards are needed for competent performance in an employer's organization. The need to validate the standards internally is a key requirement of U.S. employment law, which seeks to protect individuals from discrimination in hiring and promotion.

Assessment Strategies

Upon completion of skill standards development, performance assessments can be created to assess the criteria identified (see Table 15). Sample assessments and standards may be distributed to instructors and curriculum developers who will be educated on the skill standards elements.

Assessments based on the skill standards may include pre- and post-evaluations of the student to measure skill progression and to track the success rate of obtaining certification, where applicable.

Within a skill standards or competency-based system, assessment is the generation and collection of evidence of performance that can be matched to specified explicit standards that reflect expectations of performance in the workplace. There are two main forms of evidence:

- Evidence of actual performance
- Evidence of underpinning knowledge, skills and abilities

The types of evidence may vary and will include:

- Direct evidence (products and items produced by the performer)
- Indirect evidence (supporting evidence and information about the performer)

Evidence can be collected in a wide variety of educational or business settings. To a large extent, the range of opportunities available for demonstration will determine the most appropriate setting. Often it is difficult to actually perform the task in the authentic work setting. In this case, evidence generated during an educational course or an in-house training session can be collected by individuals and added to their overall portfolios.

By requesting that the student or trainee produce tangible results in the form of take-away products (videos, tapes, paper, and electronic products), the participant will have created real evidence, which can be shown to human resource personnel, hiring managers, supervisors or assessors. When assessing these products, the trained assessor will seek:

- Validity
- Currency
- Authenticity
- Sufficiency

Therefore, when designing a skill standards-based assessment for an educational course or training session, the assessment process and results will meet four criteria:

Validity: The assessment instrument/process clearly relates to the relevant standards.

Currency: The assessment instrument/process calls for a demonstration of the current standards in the industry.

Authenticity: The individual being assessed produces the assessment results; it is his or her own work. Team activities will be useful to demonstrate the skills and abilities to work effectively with others, but not necessarily the end results. The individual can, if possible, identify his or her part of the team project to demonstrate evidence of his or her own results.

Sufficiency: Enough evidence is collected to match the key task and the performance criteria included in the skill standards.

When designing/revising the curriculum for weatherization careers, students will be assisted in generating high-quality evidence of performance or of underpinning skills, knowledge and abilities, which will help them to be successfully assessed as fully competent.

The preceding section was adapted from *Skill Standards Volume 2: Assessment*, 1999, Washington State Board for Community and Technical Colleges, and *Designing Competency-Based Training*, Shirley Fletcher, 1991, Pfiffer & Company, p. 86-88.

Table 2
Assessment Design

Type of Authentic Assessment	Description of Authentic Assessment Strategies
Project	Hands-on demonstration of knowledge, skills and attitudes that reveals a student's ability to plan, organize and create a product or an event.
	Documentation of process of development from initial steps to final presentation.
Portfolio	Collection of pieces of evidence of a student's knowledge, skills and attitudes.
	Showcase of best work, work-in-progress.
	Record of student's progress over time.
	Content selection by student in collaboration with the teacher. Centerpiece for parent conferences.
On-Demand Demonstrations	Hands-on performance by a student, which illustrates levels of knowledge, skills and attitudes.
	Typically involve a "real life" problem or situation to solve.
	Focus on the application of knowledge and skills learned in one situation as it connects to a new and different one.
Case Studies	Analysis of events and individuals in light of established criteria.
	Synthesis of evidence to support generalizations based on individual cases.
Paper/Pencil Tests	Multiple-choice, essay, true-false questions that rely on extended responses to further clarify a student's understanding of the knowledge being assessed.
	Graphic representations that reveal a student's understanding of connections among ideas.
Structured Observation	Observation of events, groups and individuals that focuses on the salient traits of the skill or attitude being observed.
Scenarios	A problematic or challenging situation presented in the context of a career-technical perspective.
	Study required to analyze or evaluate a situation.
	Apply relevant knowledge or skills. Prepare and justify a reasonable solution.
Critical Incident	An interview where the assessee is asked to describe past experiences that demonstrate skill standards.

From Center for Occupational Research and Development, November 1996, and *Skill Standards Volume 2: Assessment*, 1999, Washington State Board for Community and Technical Colleges.

