

# DOE Smart Grid Workforce

## *Defining the Customer Service Representative*

### *Energy and Construction Best Practices Summit*

Alan Hardcastle, moderator



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*Solar Panels at Sunrise*  
Photo courtesy of Puget Sound Energy

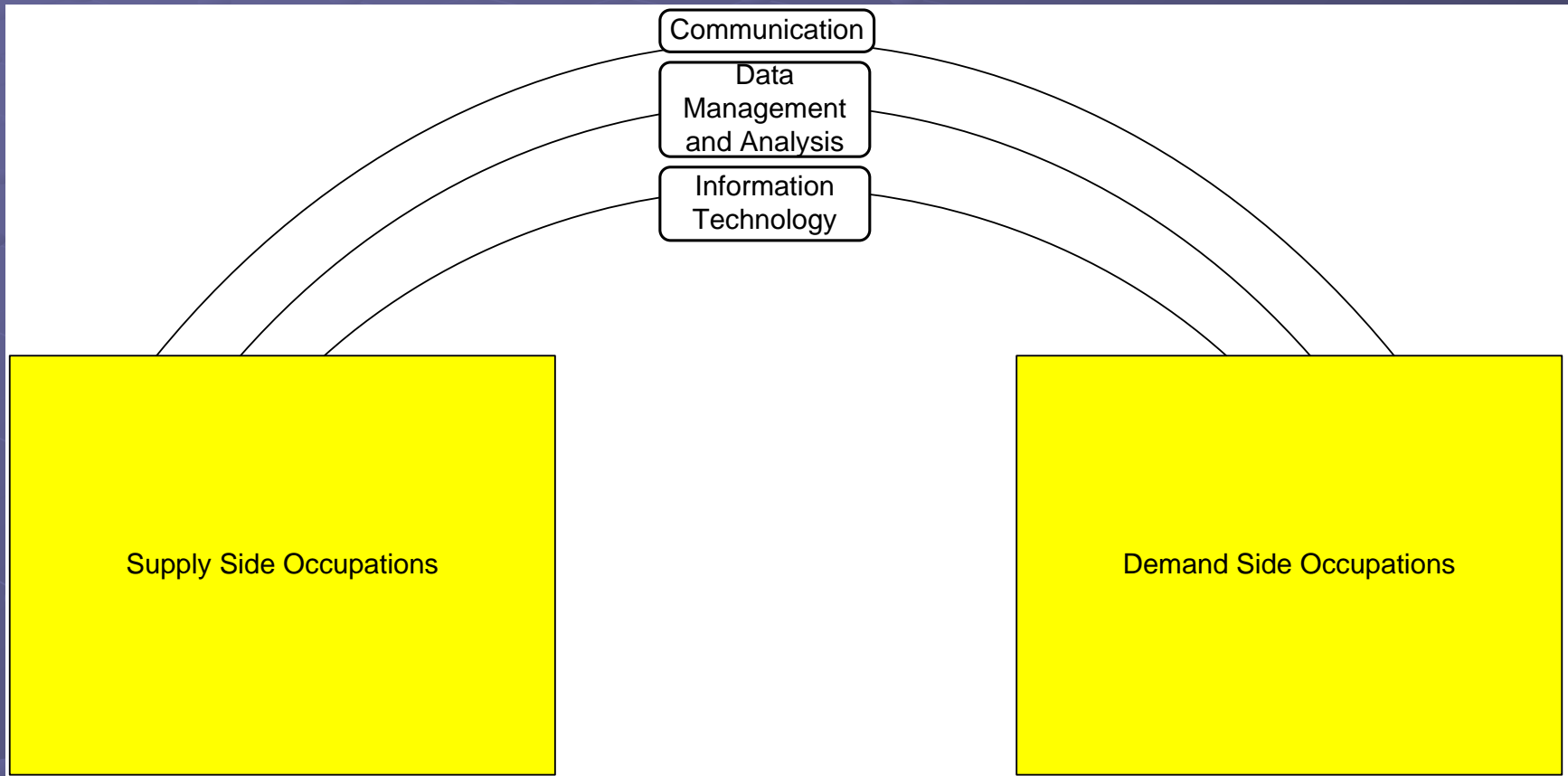
# Supply and Demand-Side Jobs

- Sub-Station Operator
- Power Plant Operator
- Sub-Station Electrician/Mechanic
- Line Worker
- Instrument Control and Relay Specialist
- Ground Crew
- Customer Service Rep
- Meter Technician
- Energy Conservation Program Manager
- Energy Advisor
- Resource Conservation Manager
- Energy Auditor

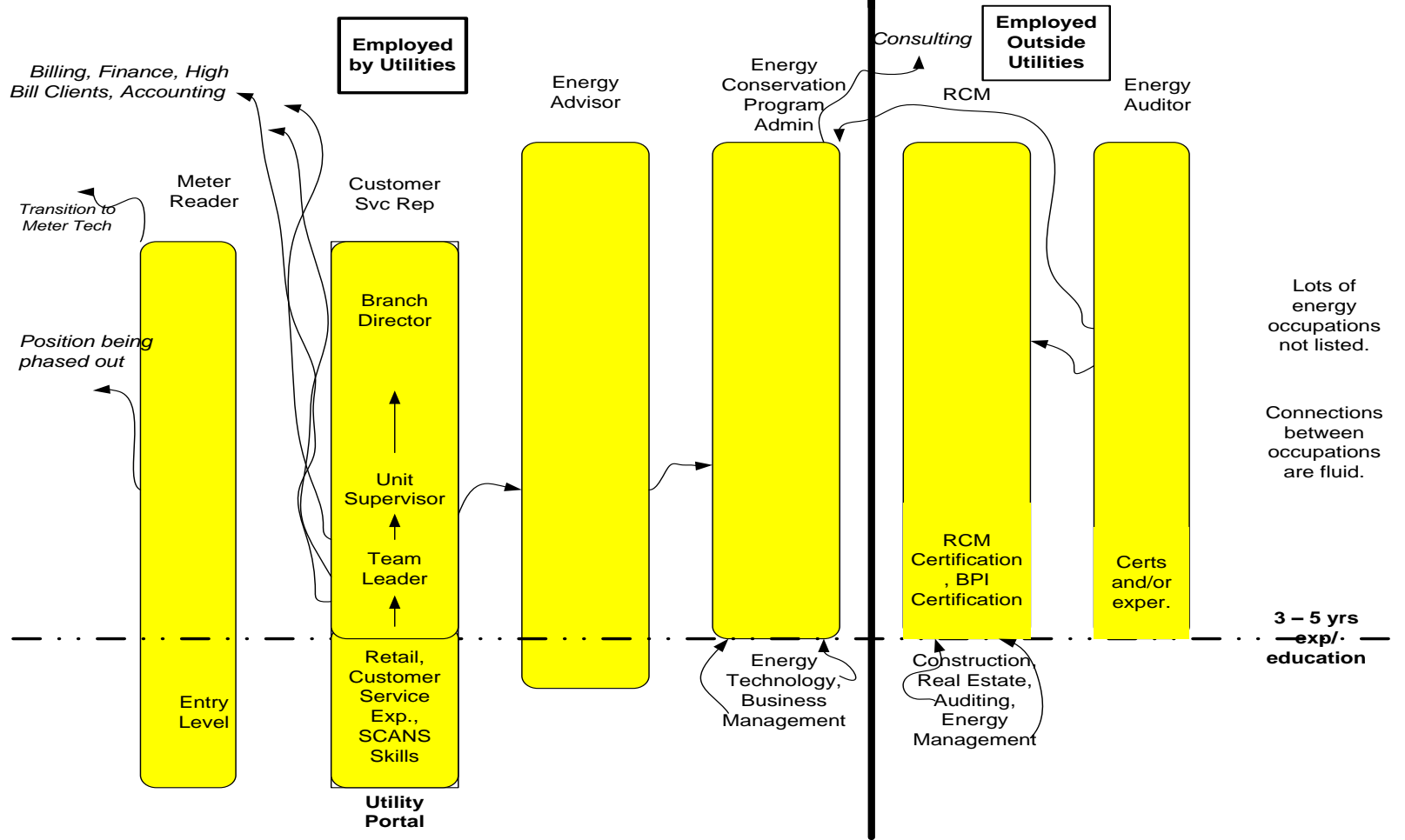
# Career Lattice Research and Employer Interviews: Findings

- Jobs are Distinct
- Jobs are Changing
- Occupations vary among employers
- Smart Grid will require more IT, Data Management & Analysis, and Communication skills

# New Skills/Functions Connect Occupations



# Demand Side Connections





# Skill Standards for Utility Customer Service Representatives (CSRs)

## *Why CSRs?*

- Portal into utility employment and careers
- Large functional area and workforce
- Many connections/career options
- Customer-Smart Grid interface
- No standards currently exist
- Standards relevant to other industries, functions, occupations, programs

# What are Skill Standards?

- Defines the knowledge, skills and abilities required to succeed in specific occupations, including performance indicators.
- Industry-defined, by subject matter experts—front-line employees
- Used by education and industry to identify program gaps, and to develop/improve curriculum

# DRAFT CSR Skill Standards

## Critical Work Functions

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



# DRAFT CSR Skill Standards- Key Activities

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

# Looking Ahead

## Smart Grid: future trends and implications for education/training

- Expert interviews
- Data & trend analysis

## ● Year 3: Define specific IT, Data Management-Analysis, and Communication skills

- Start with CSR, expand to other areas, occupations.

# Next Steps

1. CSR Standards verified by regional employers
2. Complete research on Smart Grid trends
3. Design template to implement standards in industry training programs



*McNary Substation, Umatilla, OR*  
Photo courtesy of Bonneville Power Administration

# Panelists

- ***Delphene Armstrong***, Utility Service Rep  
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