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

Supply Side Occupations

- Communication
- Data Management and Analysis
- Information Technology

Demand Side Occupations
Demand Side Connections

Employed by Utilities:
- Meter Reader
- Customer Svc Rep
- Branch Director
- Unit Supervisor
- Team Leader
- Retail, Customer Service Exp., SCANS Skills

Energy Advisor
- Energy Conservation Program Admin
- Energy Technology, Business Management
- Construction, Real Estate, Auditing, Energy Management

Employed Outside Utilities:
- RCM Certification
- BPI Certification
- RCM, BPI Certification
- Certs and/or exper.

Consulting
- Energy Auditor

Lot of energy occupations not listed.

Connections between occupations are fluid.

3 – 5 yrs exp/education

Billing, Finance, High Bill Clients, Accounting

Transition to Meter Tech

Position being phased out

Entry Level

Utility Portal

Employed by Utilities

Lot of energy occupations not listed.
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
## Critical Work Functions

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

<table>
<thead>
<tr>
<th>KEY ACTIVITY</th>
<th>Performance Indicators</th>
<th>Technical Knowledge Skills, Abilities, Tools</th>
<th>Employability Skills SCANS Skills and Foundational Abilities</th>
</tr>
</thead>
<tbody>
<tr>
<td>A2</td>
<td><strong>Gather information to assess customer’s needs and customer’s knowledge of products or services</strong></td>
<td>• Knowledge of questioning protocols.</td>
<td>• Listening</td>
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<td></td>
<td>• An effective and efficient line of questioning is used.</td>
<td>• Knowledge of techniques to identify customer needs.</td>
<td>• Analyzing information</td>
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<td>• Customer needs are correctly identified in a timely manner.</td>
<td>• Knowledge of diverse cultural backgrounds and their communications styles.</td>
<td>• Applying technology</td>
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<td>• Customer’s objectives and concerns related to the product or service are identified.</td>
<td>• Knowledge of procedures for accommodating disabilities.</td>
<td>• Sociability</td>
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<td></td>
<td>• Techniques used are personalized to meet the needs of customers with different cultural backgrounds and demographics including age and disability status.</td>
<td>• Knowledge of communication styles within a variety of generations/ages.</td>
<td>• Reading</td>
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<td>• Account is reviewed and analyzed to understand the history of services and payments to determine what to offer to customer.</td>
<td>• Knowledge of the content of account histories and the ability to analyze the information and draw correct conclusions about the customer’s needs.</td>
<td>• Working with diversity</td>
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<td>• Oral and written communications are polite, clear and completed in a timely manner.</td>
<td>• Knowledge of utility and power industry terminology.</td>
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<td>• Communications are carried out with correct grammar and proper use of utility and power industry terminology, appropriate to the audience, while avoiding jargon.</td>
<td>• Knowledge of company policies and procedures.</td>
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<tr>
<td></td>
<td>• Company policies and procedures are followed.</td>
<td>• Knowledge of products and services available to customer.</td>
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<td></td>
<td></td>
<td>• Knowledge of credible sources of information.</td>
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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
  Tacoma Public Utilities

- **Rachel geBauer**, Business Rep
  IBEW Local 77

- **Aundrea Jackson**, CIS Project Manager
  Puget Sound Energy

- **Diane Quincy**, Director of OD & Training
  Avista