



Customer Strategy and Planning Job Profile

Job Family: Customer Strategy and Planning Department: Customer Engagement Function: Customer Care Reports to: Manager, Director	Last Updated: April 2011
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Job Family Summary	<p>Leverage marketing research and customer segmentation analyses to define strategies tailored to enhance the customer experience and customer engagement levels, help bring PG&E products and programs to the marketplace and improve customer satisfaction. For given products and programs, identify the appropriate customer audience, their preferred communication channels, and potential customer response benchmarks as well as develop customer strategies to shape marketing/sales efforts for residential and business customers.</p> <ul style="list-style-type: none"> • CREATIVE/INTUITIVE SKILLS: Develop insights-based customer experience strategies by bringing together different data sources and identifying the most relevant, creative, inspiring platforms for these strategies • CONSULTING: Use expertise to recommend how to position products in the market place, which customers are most likely to respond to programs / products and how to message to the target audience. • STRATEGIC PLANNING: Develop customer strategy(ies) based on primary or secondary research and various data analyses for product development and marketing/sales efforts. • PROJECT MANAGEMENT: Manage customer strategy projects from initial request to presenting findings and concrete recommendations with a clear path on how the findings will meet business objectives and ensure project is completed within budget and on-time. • DATA ANALYSIS: Analyze research and customer data to uncover customer needs and preferences, compare and contrast data, identify changes or trends that will enhance all aspects of the customers' interaction with PG&E. • REPORTING: Develop and communicate clear and concise and actionable recommendations and strategies for clients. Facilitate the incorporation of recommendations into actionable marketing and product development plans as well as customer-focused plans. • VENDOR MANAGEMENT: Provide guidance and define vendor tasks and deliverables and manage vendor performance, timelines and project budgets.
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Job Title	Customer Strategic Planner	Customer Strategic Planner, Senior	Customer Strategic Planner, Expert	Customer Strategic Planner, Principal
Position Title	Customer Strategic Planner	Customer Strategic Planner, Senior	Customer Strategic Planner, Expert	Customer Strategic Planner, Principal
SAP Code	50419599	50419600	50419601	50419602
FLSA Status	Exempt	Exempt	Exempt	Exempt
Distinguishing Characteristics	<ul style="list-style-type: none"> • Manage routine strategic planning projects with limited supervision. • Work with other Strategic Planners to design research studies, analyze data, and develop customer experience strategies and recommendations. • Has full understanding of customer research techniques. • Receive little instruction on day-to-day work, and general guidance on new assignments. 	<ul style="list-style-type: none"> • Manage complex strategic planning projects with limited supervision. • Design customer strategies leveraging customer data and research to achieve business objectives. • Identify the appropriate customer audience, their preferred communication channels, and potential customer response benchmarks as well as develop customer strategies to shape marketing/sales efforts for residential and business customers. • Originate, plan, execute and extract insights from research and data and apply insights across product, marketing and customer strategies. • Has broad expertise in customer research and can apply this knowledge to a number of different 	<ul style="list-style-type: none"> • Manage large, complex, cross functional strategic planning projects that have broad company wide impact and implications. • Originate, plan, execute and extract insights from research and data analysis and apply insights across product, marketing, customer and integration strategies. • Develop new and innovative customer strategies and customer insights based on unique research and data analysis. • Present findings and recommendations to Directors and Managers to influence decision making. • Work independently with guidance only on the most complex projects 	<ul style="list-style-type: none"> • Manage the most complex and unique strategic planning projects that are of highest visibility and impact. • Act as a thought leader applying extensive strategic planning expertise in the development of strategy or resolution to complex issues. • Manage major and complex cross functional strategic planning projects that have broad company implications. • Originate, plan, execute and extract insights from research and data analysis and apply insights across product, marketing, customer and integration strategies. . • Works with Senior Management to provide customer insights in decision making regarding customer strategies. • Works autonomously



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		<p>issues.</p> <ul style="list-style-type: none"> Works independently with limited guidance. 		
Minimum Education and Experience Required	<p>BA/BS Degree in Marketing, Business, Communications or other related field or equivalent experience.</p> <p>Minimum of 2 years of experience in marketing, strategic planning, consumer insights or product development</p> <p>Familiarity with utilities, energy efficiency and demand side management concepts and programs. (preferred)</p>	<p>BA/BS Degree in Marketing, Business, Communications or other related field or equivalent experience.</p> <p>Minimum of 4 years of experience in marketing, strategic planning, consumer insights or product development</p> <p>Familiarity with utilities, energy efficiency and demand side management concepts and programs.(preferred)</p>	<p>BA/BS Degree in Marketing, Business, Communications or other related field or equivalent experience. Masters Degree preferred.</p> <p>Minimum of 8 years of experience in marketing, strategic planning, consumer insights or product development</p> <p>Familiarity with utilities, energy efficiency and demand side management concepts and programs (preferred)</p>	<p>BA/BS Degree in Marketing, Business, Communications or other related field or equivalent experience. Masters Degree preferred.</p> <p>Minimum of 10 years of experience in marketing, strategic planning, consumer insights or product development</p> <p>Familiarity with utilities, energy efficiency and demand side management concepts and programs (preferred)</p>
License/Certification	NA	NA	NA	NA
Knowledge, Skills, and Abilities	<ul style="list-style-type: none"> Able to analyze and interpret insights and communicate findings. Able to examine a problem from different perspectives without losing sight of the big picture Ability to think creatively and intuitively; ability to formulate recommendations which inspire internal partners Pragmatic approach to problem solving – able to see alternative strategic routes for a given problem / program / technology Organizational skills, ability to effectively prioritize work, meet deadlines and work on multiple tasks independently. Able to effectively manage multiple projects with demanding time constraints. 	<p>In addition to Customer Strategic Planner,, Senior requires:</p> <ul style="list-style-type: none"> Aptitude for conceptual, and strategic thinking Able to present findings and make recommendations to stakeholders. Manage cross-functional strategic planning projects Personal conviction to create and defend a point of view with diplomacy and flexibility 	<p>In addition to Senior, Expert requires:</p> <ul style="list-style-type: none"> Able to solve complex problems through customer / product strategy recommendations. Aptitude for conceptual, and strategic thinking across product families, industries served, operations, etc. Able to present findings, make recommendations and influence decisions working with Managers and Directors across functions. Manage large cross-functional strategic planning projects May act as team lead and provide direction to less experienced employees. 	<p>In addition to Expert, Principle requires:</p> <ul style="list-style-type: none"> Curiosity about what makes people act and think the way they do – able to find meaningful insights about motivations especially in the area of energy use Pragmatic approach to problem solving – able to see alternative strategic routes for a given problem / program / technology Able to present findings, make recommendations and influence decisions working with Senior Management across functions. Coaches and mentors less experienced employees



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Technical Competency	Technical Competency Description	Customer Strategy Analyst	Customer Strategy Analyst, Senior	Customer Strategy Analyst, Expert	Customer Strategy Analyst, Principal
Information Analysis	Breaks down information into components, identifies underlying principles or facts, and recognizes interrelationships; shows insight into the root-causes of problems or issues.	Proficient	Advanced	Master	Master
Research and Analysis	Monitors, gathers and analyzes information, determines potential impacts, and recommends responses to challenges.	Proficient	Advanced	Master	Master
Vendor Management	Monitors vendor agreements, conducts cost-benefit analysis and communicates with vendor	Proficient	Advanced	Master	Master
Advocacy and Persuasion	Effectively influences others to achieve understanding, acceptance and commitment to act in support of ideas, programs or causes	Novice	Proficient	Advanced	Master
Consulting Skills	Uses expertise to counsel or guide individuals with regard to problems to be resolved or legal, financial, scientific, technical or other professional principles	Novice	Proficient	Advanced	Master
Project Management Skills	Effectively structures and controls work on a project, integrates all aspects, ensures that work progresses on schedule and that work meets specifications or required standard	Proficient	Advanced	Advanced	Master
Needs Analysis	Works with the lines of business to help define business needs, objectives and solutions	Proficient	Advanced	Master	Master
Creative and Innovative Thinking	Develops innovative ideas that provide solutions to all types of workplace challenges	Novice	Proficient	Advanced	Master
Business (Strategic) Application	The ability to think in terms of a strategy; to abstract from detail of daily tasks to a long-term plan and vision.	Novice	Proficient	Advanced	Master
Business & Financial Acumen	Demonstrates understanding about how businesses work and of trends and practices affecting the Company; Has the ability to design and implement a wide-range of financing structures designed for specific purposes.	Novice	Proficient	Advanced	Advanced
Written Communication	Demonstrates skill in communicating information and ideas in writing so others will understand.	Proficient	Proficient	Advanced	Master
Oral Communication	Effectively expresses ideas and information through the spoken word using language that is appropriate to both the complexity of the topic and the knowledge and understanding of the audience.	Proficient	Advanced	Advanced	Advanced
Proactive Customer Service	Anticipates, identifies and mitigates potential customer issues before they escalate into a significant problem.	Proficient	Advanced	Master	Master