



Customer Success Management Leadership - Job Profile Matrix

Line of Business: Customer Care / Customer Service Job Family: Customer Success Management Leadership Reports to (Job Title): Varies	Effective Date of Job Profile: October, 2016 Last Updated: October 2015
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Job Family Summary	Manage critical and complex customer issue resolution through work involving various internal partners. Manages and leads a team of Customer Success Managers (CSM) that partners with Customer Relationship Managers (CRM) assigned to various Large, Commercial, Industrial, Agriculture (LCIA) and Mid-Market Advisor (MMA) customer segments to support sales and service activities. Identifies and implements process improvements and shares best practices to improve customer experience.	
Job Title	Supervisor, Customer Success Management	Manager, Customer Success Management
Position Title	Supervisor, Customer Success Management	Manager, Customer Success Management
PGE Job Level	Supervisor	Manager
SAP Job Code	51810216	51810215
Job Responsibilities	<ul style="list-style-type: none"> Monitors trends, hazards, incidents and near misses, and directs staff to take corrective actions Maintains a safe work environment by providing assistance and encouraging others to act safely. Integrates safety into work processes and measure results. Monitors expenditures to ensure compliance with operational budget. Resolves day-to-day operational issues such as program issues, employee issues, client-satisfaction issues, and coordinating employee schedules. Partners with the CSM Strategy Principal to ensure the development and success of metrics that can identify service issue trends that should be considered for process improvement opportunities. Helps to break down cross-department silos and continually assists in process improvement efforts as well as resolving complex escalated issues. Escalates appropriate customer/process issues through leadership teams Evaluates operation and recommends departmental improvements. Fulfills emergency response role as the Customer Strategy Officer as requested. Provides leadership and coaching to CSM employees to deliver superior customer service for both Customer Relationship Managers and more directly with external PG&E customers. Supports proactive outreach and education on customer impacting initiatives as needed. Ensures accountability between CSMs and their customers and escalates if trending shows that current metrics/goals are not helping to foster accountability. Plans out regular communications to share common challenges, best practices, and opportunities for escalation. 	<ul style="list-style-type: none"> Drives safety performance using training, tools, initiatives and other resources provided to improve safety. Ensures compliance with all company work procedures and safe work practices. Identifies and mitigates unsafe work conditions. Manages budgets, expenses and resources to ensure that services are provided at the lowest possible cost consistent with client expectations and safety considerations. Translates Company and Customer Energy Solutions strategy and goals into actions and initiatives for the CSM teams. Monitors customer satisfaction, service and sales performance and takes actions to maximize and improve results vs. goals. Ensures the development and success of metrics that can identify service issue trends that should be considered for process improvement opportunities. Breaks down cross-department silos and continually assists in process improvement efforts as well as resolving complex escalated issues. Identifies, addresses and elevates issues requiring senior review and action. Drives best practice sharing across the segments and divisions. Fulfills emergency response role as the Customer Strategy Officer as requested. Communicates regularly with PG&E senior management and key stakeholders regarding regularly occurring process issues in other departments affecting our customers. Develops goal alignment, metrics, tools, and incentive structures to enable successful partnership between CSMs and ES&S CRMs. Builds integrated teams and fosters teamwork at all levels. Links across other functions and coordinates cross-unit staffing. Ensures regular communications exist between CSM positions reporting to the DLT organizations and all other CSM positions reporting within the CSM organization.
Supervisory	<ul style="list-style-type: none"> Manages Professional and Support employees. 	<ul style="list-style-type: none"> Recruits/selects, communicates expectations, fosters employee engagement, coaches, develops, mentors,



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Responsibility	<ul style="list-style-type: none"> Recruits/selects, communicates expectations, fosters employee engagement, coaches, develops, mentors, recognizes and rewards employees in order to drive performance and results. Trains mentors, develops and rewards subordinates. Provides or assists in finding the technical support needed by the segment-based and local CSMs. 	<p>recognizes and rewards employees in order to drive performance and results. Trains mentors, develops and rewards subordinates.</p> <ul style="list-style-type: none"> Develop and implement robust succession planning Ensures CSM Supervisors are able to provide or assist in finding the technical support needed by the segment-based or local CSMs.
Education Minimum	<ul style="list-style-type: none"> BS or BA degree in an business discipline, sciences, engineering, business, or related discipline; or equivalent experience 	<ul style="list-style-type: none"> BS or BA degree in a business discipline, sciences, engineering, business, or related discipline; or equivalent experience.
Desired	<ul style="list-style-type: none"> Bachelor's degree in Business, Engineering, Construction Management, or related discipline or equivalent experience 	<ul style="list-style-type: none"> MBA or MS in business discipline, sciences, engineering, related discipline, or equivalent experience.
License/Certification Minimum	<ul style="list-style-type: none"> Driver's License 	<ul style="list-style-type: none"> Driver's License
Desired	<ul style="list-style-type: none"> Project/program management training Formalized Lean Six Sigma Training 	<ul style="list-style-type: none"> Project/program management training Registered professional auditor training Formalized Lean Six Sigma Training
Experience Minimum	<ul style="list-style-type: none"> Five years of relevant experience 	<ul style="list-style-type: none"> Eight years of relevant experience Previous leadership experience with customer base generating \$800M or more in revenue
Desired	<ul style="list-style-type: none"> Prior supervisory experience 	<ul style="list-style-type: none"> Two years of supervisory/managerial experience
Knowledge, Skills, Abilities Desired	<ul style="list-style-type: none"> Ability to create, promote and manage a safe work environment Ability to understand, review, and manage dept. budgets, expenses, variances Ability to communicate and support company and organization policies, procedures, goals, objectives, vision and values Ability to manage day-to-day operations, identify and implement operational changes and improvements in support of the business Ability to develop working relationships with customers and business partners where operations, service, support or other inter-dependencies exist Ability to encourage employees to identify work process and system improvements, champion and overcome resistance to and facilitate change. Ability to convey credibility, confidence and sense of authority. Conveys messages simply, concisely and at right pace and tone for audience. Remains calm, controlled and productive when confronted by opposition or work stress. Ability to foster a learning environment and to develop employees to ensure backfills and successors. Has an understanding of PG&E's business to maximize results, limit risks and effectively lead group. Knowledge of Root Cause Analysis Knowledge of process improvement discipline Ability to work effectively in a team oriented environment Working knowledge of Utility construction practices and operations 	<ul style="list-style-type: none"> Ability to create, promote and manage a safe work environment Ability to develop and manage dept. budgets, expenses, variances Ability to communicate and support company and organization policies, procedures, goals, objectives, vision and values Has knowledge and skills to develop and implement short and medium-term strategy in support of company and organizational objectives that affect multiple teams or a large work unit representing multiple disciplines Has knowledge and skills to develop and implement work plans in support of dept. goals that affect multiple teams or a large work unit representing multiple disciplines Has knowledge and skills to develop operating policies and procedures; ability to monitor operations, identify and implement metrics, operational changes and improvements in support of business strategies, goals and objectives Ability to develop working relationships with customers and business partners ensuring that work plans and operations are coordinated, aligned and support department and company goals and objectives Ability to persuade higher levels of leaders and leadership peers to change positions or approach based on situational need Ability to encourage employees to identify work process and system improvements, incorporate benchmarking and best practices, champion and overcome resistance to and facilitate change. Ability to convey credibility confidence and sense of authority. Conveys messages simply, concisely and at right pace and tone for audience. Remains calm, controlled and productive when confronted by opposition or work stress.



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	<ul style="list-style-type: none"> Excellent and highly professional communication skills. 	<ul style="list-style-type: none"> Ability to foster a learning environment and to develop employees to ensure backfills and successors. Has an understanding of PG&E's business to maximize results, limit risks and effectively lead group Convening and leading a cross-functional teams to drive local collaboration of internal teams to solve internal and customer issues Problem solving skills Knowledge of Root Cause Analysis Knowledge of process improvement discipline Working knowledge of Utility construction practices and operations Excellent and highly professional communication skills .Knowledge of California and Federal regulatory programs Familiar with SAP Strong strategic thinker, able to make linkages between projects and lines of business Working knowledge of gas and electric utility operations and facilities Familiarity with regulatory compliance concepts
Supplemental/ Other Minimum		
Desired	<ul style="list-style-type: none"> May Travel 40% of the time Overnight travel may be required Work before and after normal work hours may be required <p>Conference or workshop attendance to represent the company's leadership role externally is required. Typical internal interactions are with employees, supervisors and managers</p>	<ul style="list-style-type: none"> May Travel 40% of the time Overnight travel may be required Work before and after normal work hours may be required <p>Conference or workshop attendance to represent the company's leadership role externally is required. Typical internal interactions are with supervisors, senior managers, directors and senior directors. May interact with officers.</p>