



## Customer Relationship Management (CRM) Job Profile

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| <b>Job Family:</b> Customer Relationship Management (CRM)<br><b>Department:</b> Cross Functional<br><b>Function:</b> Customer Care<br><b>Reports to (title):</b> Supervisor or Manager | <b>Last Updated:</b> June 2011 |
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| <b>Job Summary</b>  | Manage business relationships with assigned or unassigned Commercial, Industrial, and Agricultural (CIA) customers, state and local government customers, trade professionals, and business groups and associations. Act as primary point of contact with customers for service related issues and needs. Actively promote and sell PG&E products and services to customers along with the coordination of appropriate economic attraction/retention or competitive issues. Inform and advise customers on regulatory and legislative issues and other matters that have a direct impact. Communicate with customers on planned and unplanned outages. Act as the Company's representative responsible for developing a positive business relationship with ALL classes and their communities providing high quality energy services and programs. |   |  |   |  |
| <b>Job Title</b>  | Customer Relationship Manager, Associate   | Customer Relationship Manager   | Customer Relationship Manager, Senior  | Customer Relationship Manager, Expert   | Customer Relationship Manager, Principal   |
| <b>Position Title</b>                                     | Customer Relationship Manager, Associate   | Customer Relationship Manager   | Customer Relationship Manager, Senior  | Customer Relationship Manager, Expert   | Customer Relationship Manager, Principal   |
| <b>PGE Job Level</b>                                      | Associate  | Career  | Senior   | Expert  | Principal  |
| <b>SAP Job Code</b>                                       | 50419593   | 50419594  | 50419595   | 50419596  | 50419597   |
| <b>FLSA Status</b>  | Exempt   | Exempt  | Exempt   | Exempt  | Exempt   |
| <b>Major Responsibilities</b>                             |  |   |  |   |  |
| <b>Service Respons</b>                                    | Resolves basic billing, reliability and service issues for residential and Small to Medium sized businesses (SMB's). Refers more complex issues to others for resolution as appropriate.   | Resolves billing, reliability and service issues for residential and SMB customers. Participates in identifying solutions and may participate in cross functional teams looking into process improvement. | Resolves complex billing, reliability and service issues that may require close coordination/project management between company and customers. May make recommendations to functional management to resolve these issues   | Works with Directors and Managers from various departments to resolve unique and complex billing, reliability and service issues. Demonstrates and applies a thorough understanding of industry practices in order to resolve unique and complex billing, reliability and service issues. | Works with Senior Management to lead, coordinate and develop unique and innovative solutions for billing, reliability and service issues using network of internal and external resources. Drives development of new tools and process with company wide impact. |
| <b>Service Planning</b>                                   | Learning about service planning processes and other departmental organizations.  | Resolves service planning issues utilizing appropriate methods, approaches and team members. Utilizes peers to resolve issues.  | Solves moderate to complex service planning issues and able to closely coordinate company and customer resources. May provide guidance and training for less experienced reps. Participates in cross functional process improvement initiatives with system wide impact. | Solves complex service planning problems by developing new and innovative solutions utilizing multiple departments, and company and customer resources. May lead a team on service planning initiatives, and provide direction to other reps.   | Provides service planning expertise including large load process. Leads cross function process improvement initiatives that make a system wide impact. Acts as mentor and expert to other reps.  |
| <b>Transmission &amp; Distribution (T&amp;D Knowledge</b> | General knowledge of T&D operations. Ability to recognize critical equipment and its purpose.  | Understands basic internal T&D operating principal including planned shutdowns, switching, etc.   | Thorough understanding of T&D operations including functions of relays, line re-closers, switches, transformers and substations.   | Thorough understanding of system wide T&D operations—local system constraints and issues and associated resolutions. Provides critical field and customer perspective for segment strategies.   | Works with Senior Management to influence system wide T&D operations and resources   |
| <b>Outage Communications</b>                              | Proficient in using basic outage tools and communicating information to customers  | Performs outage communications for assigned accounts; May serve as on-call rep; Learning Customer Care Advocate role and serves as backup to  | Familiar with Customer Care Advocate role in local emergency centers. May be Customer Care Advocate in Operations Emergency Center during emergency events. May be   | Familiar with Incident Command Structure. May be Customer Care Advocate in Regional Emergency Center during emergency events.   | Performs primary role of Customer Care Advocate at any level and is knowledgeable of Incident Command System policy and procedures. Performs the key role of communication lead for internal and external  |



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|  |  | this role for prolonged emergencies during low risk time periods.  | company and/or community resource during emergencies involving the company.  |  | sources during emergency events.  |
| <b>Market &amp; Segment Strategy</b>         | Learning about market and segment strategies.  | Understands market and segment strategy and initiatives and looks for opportunities in interactions and activities with customers to support.  | Understands market and segment strategy and initiatives and develops specific action plans with customers to support.  | Provides critical field and customer perspective in the development of market segment strategies. Provides segment leadership.   | Actively involved in leading the development of market segment strategies, and translating these strategies into action.  |
| <b>Sales</b>                                 | <p>Utilizes basic sales techniques, looks for opportunities and needs for various programs when engaging a customer.</p> <p>Familiar with Small business programs and 3<sup>rd</sup> party programs—Reactive Customer relationships.</p> <p>Follows guidance to pursue sales opportunities as identified by Customer Insight, Marketing and more experienced reps and supervisors.</p> | <p>Utilizes consultative sales techniques and action plans to maximize current and future sales success.</p> <p>Proactively manage ongoing relationships with customers. Ability to identify decision makers and navigate and manage the decision making process. Identifies and understands customer needs and opportunities. Determines potential program or solutions that will benefit customers.</p> <p>Utilizes materials from Customer Insight, Marketing, fellow employees, and knowledge of customers' operations to develop and enhance sales activities with customers.</p> | <p>Utilizes advanced sales skills and develops relationships at various levels within a complex customer organization to overcome obstacles and objections using various sales skills and plans.</p> <p>Actively seeks out opportunities as part of the ongoing relationship management process to build long term sales action plans to maximize current and future sales success.</p> <p>Identify and pursue new market and segment opportunities that impacts large customer groups working with Customer Insight, Marketing, fellow employees, and industry / community representatives.</p> | <p>Uses expert sales techniques and activities while proactively working to understand the intricacies of a customer organization, goals and metrics, decision making authority and internal influences.</p> <p>Shares knowledge of customers with matrixed team beyond personal account assignments to help departmental planning and marketing functions.</p> <p>May utilize industry and association memberships to leverage system wide department results.</p> <p>Provides insight and leadership on cross-cutting service &amp; sales tools, program, and marketing needs.</p> | <p>Develops complex sales techniques and partnerships with a wide range span of influence, to have a broad impact on sales beyond assigned accounts.</p> <p>May develop, execute and evaluate a new pilot CEE program, product or service.</p> <p>Seeks out, evaluates and analyzes information provided through Customer Insight and Marketing to identify industry sales trends and further departmental sales opportunities.</p> <p>May create multiple year energy management and sustainability plans.</p> |
| <b>Community Outreach</b>                    | <p>Participates in Chamber Community events answering questions and representing company.</p> <p>Gives standard presentations to various community groups (i.e. Chambers, Rotaries, and Business Associations).</p>  | <p>Participates in Chamber/Community events answering questions and representing company.</p> <p>Gives customized presentations to various community groups (i.e. Chambers, Rotaries, and Business Associations).</p> <p>May help to coordinate an event and specify needs from other team members.</p>  | <p>Participates in Chamber/Community events answering questions and representing company.</p> <p>Develops new or unique presentations and presents to various community groups (i.e. Chambers, etc.).</p> <p>Organizes communication and outreach for industry sectors and/or campaigns.</p>   | <p>Works directly with City officials, community groups to develop department strategies and assist with reducing their Greenhouse Gas (GHG) emissions through the implementation of the energy portion of their Climate Action Plan. May work with large corporate customers and business or industrial organizations partnering on energy events, or, presenting at industry specific functions and events. Functions as participant of a Gov Rel lead team which includes support from CEE, DR, Renewable Energy, and others.</p>   | <p>Collaborate with appropriate internal and external contacts to influence and shape government relationships, regulatory policies and actions.</p> <p>Provides input to internal company departments (committees/task forces) on strategic outreach to cities and communities. Partners with GovRel to address community issues. May work with large corporate customers and business or industrial organizations partnering on energy events, or, presenting at industry specific functions and events.</p>  |
| <b>Typical Account Size &amp; Complexity</b> | Typically single site/location customers or single / standard issue working to resolve.  | Accounts are typically 200-500 kW or may have many sites/locations. Issues often require multiple meetings and contacts, partnering with other PG&E  | Accounts are typically >500 kW or have hundreds of sites/locations.  |  |   |



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|  |  | resources to resolve.  |   |  |  |
| <b>Supervisory Responsibility</b>      |  |  |   | No direct supervisory responsibility. Provides active guidance, support, consultation, coaching and training to other AMs.   | No direct supervisory responsibility. Provides active guidance, support, consultation, coaching, and training to other AMs. May serve as back-up to the Supervisor or Manager.   |
| <b>Education</b>                       | Bachelor's degree or equivalent experience.  | Bachelor's degree preferred, or 4 or more years of industry related experience required.   | Bachelor's degree preferred, or 6 or more years of industry related experience required. Masters degree desired.  | Bachelor's degree preferred or 8 or more years of industry related experience Masters degree desired.  | Bachelor's degree preferred or 10 or more years of industry-related experience required. Masters degree desired.   |
| <b>License/ Certification</b>          |  |  |   |  |  |
| <b>Experience</b>                      | Typically requires 1 or more years of relevant experience.   | Typically requires 3 or more years of relevant experience  | Typically requires 6 or more years of relevant experience   | Typically requires 8 or more years of relevant experience  | Typically requires 10 or more years of relevant experience   |
| <b>Knowledge, Skills and Abilities</b> |  |  |   |  |  |
| <b>Programs</b>                        | <ul style="list-style-type: none"> <li>Basic understanding of programs and technological solutions.</li> <li>Display good judgment when matching programs with customer needs.</li> </ul>  | <ul style="list-style-type: none"> <li>Full understanding of programs and associated technological solutions.</li> <li>Able to use good judgment to match programs and solutions with customer needs.</li> <li>Knowledge and understanding of how other companies have used various programs and solutions based on their unique needs.</li> <li>Organizes and presents comprehensive recommendations to customers and peers.</li> </ul> | <ul style="list-style-type: none"> <li>Able to develop a bundle of products, programs and technological solutions based on the needs of the customer and their industry and present them in a comprehensive and compelling manner.</li> <li>Able to organize and present comprehensive recommendations to customers and peers.</li> <li>Able to identify program and process enhancement opportunities.</li> </ul>  | <ul style="list-style-type: none"> <li>Able to develop and manage productive working relationships and partnerships with program, product and marketing experts and resources and frequently calling on them to address/develop complex and unique needs/solutions on behalf of customers.</li> <li>Able to keep up with industry trends and technological advancements and is able to determine / translate how those might affect company's existing programs.</li> <li>Skilled at proactively sharing program and product knowledge and expertise with others.</li> </ul> | <ul style="list-style-type: none"> <li>Able to lead efforts with demand-side management programs, renewable programs, marketing to influence and impact strategy and major program, product, marketing and regulatory decisions.</li> <li>Skilled at representing PG&amp;E with outside organizations as a subject matter expert.</li> <li>Able to keep up with industry trends and technological advancements and able to determine/ translate the impact on company's existing programs.</li> <li>Skilled at proactively sharing new and/or unique program and product knowledge with others.</li> </ul> |
| <b>Industry</b>                        | <ul style="list-style-type: none"> <li>General knowledge of many customer segments.</li> <li>Able to assimilate information to develop deeper understanding of customers &amp; segments.</li> <li>Basic understanding of company's operations and how company delivers its energy services to customer.</li> <li>Understands when there is a need for help from a subject</li> </ul> | <ul style="list-style-type: none"> <li>Thorough understanding and expertise in one or more industries or segments, and associated technical knowledge.</li> <li>Skilled at sharing knowledge and expertise with business partners</li> <li>Identify industry trends, opportunities, need for tools, process or documentation to improve upon service, sales and programs.</li> <li>Effective understanding and use of</li> </ul>         | <ul style="list-style-type: none"> <li>Develops and manages relationships within the company and external to company to effectively understand and provide advice on trends, innovative / best practices and matters of industry importance.</li> <li>Skilled at sharing industry knowledge and expertise with others across service &amp; sales organizations.</li> <li>Works with others to develop case studies, provide documentation, and share best practices.</li> </ul> | <ul style="list-style-type: none"> <li>Full knowledge of and involvement in complex regulatory and political issues affecting one or more industries.</li> <li>Skilled at proactively sharing best practices related to programs or regulatory changes affecting one or more industries with customer groups, and others in Service &amp; Sales.</li> <li>Develops industry case studies, best practices, involving &amp; soliciting input from others.</li> <li>Shares industry news, trends &amp; best practices.</li> </ul>   | <ul style="list-style-type: none"> <li>Extensive and thorough understanding of regulatory, economic, and political issues impacting both company and in one or more complex industries.</li> <li>Adept at analyzing industry or regulatory trends, identifying customer impacts, and suggesting opportunities for customers.</li> <li>Able to garner customer support and advocacy on behalf of company on matters of importance to company, specific industries, and/or the State.</li> <li>Able to develop case studies/white papers addressing multiple energy-, or industry-related</li> </ul>         |



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|                                 | matter expert, Supervisor, or Manager.  | industry case studies to support internal business activities. |  | initiatives while disseminating input from a team of internal and external experts. |
| <b>Working Conditions</b>       | Company office environment combined with visits to customer/account field facilities and locations and community events (varies based on customers/accounts supported). |  |  |   |
| <b>Supplemental Information</b> | Travel required (varies by customers/accounts supported), need valid CA drivers license.  |  |  |   |

| Technical Competencies             | Technical Competency Descriptions  | Proficiency Level* |            |            |          |           |
|------------------------------------|--|--------------------|------------|------------|----------|-----------|
|                                    |  | Associate          | Career     | Senior     | Expert   | Principal |
| Active Listening                   | Demonstrates skill in giving full attention to what other people are saying, taking time to understand the points being made, asking questions as appropriate, not interrupting at inappropriate times                       | Proficient         | Advanced   | Advanced   | Master   | Master    |
| Workload / Time Management         | Organizes multiple assignments, sometimes of a complex nature or involving competing priorities, to produce work products that are accurate, thorough, and on time   | Proficient         | Advanced   | Master     | Master   | Master    |
| Service Orientation                | Actively looks for ways to help people; demonstrates skill in providing customer service   | Proficient         | Proficient | Advanced   | Master   | Master    |
| Facilitating Groups                | Coordinates and leads small groups, creates a cooperative and productive environment in which to resolve problems or develop and implement plans   | Novice             | Novice     | Proficient | Advanced | Master    |
| Utility Industry Knowledge         | Knows the business and its environment; is knowledgeable about key issues and trends including emerging best practices and technology; is familiar with the industry language and terminology                                | Novice             | Proficient | Advanced   | Advanced | Master    |
| Consultative/ Solution Based Sales | Effectively links products and/or services to the address the customer's business needs; articulates and positions solution implications, options, and approaches to meet customer objectives.                               | Novice             | Proficient | Advanced   | Advanced | Master    |
| Customer Account Management        | Demonstrates an understanding of types of customer accounts and service levels; knows how to promote company products and services to customers, and how to increase customer awareness of rules, regulations, and policies. | Proficient         | Advanced   | Master     | Master   | Master    |
| Relationship Building              | Develops and maintains work relationships, contacts, and networks; demonstrates skill in achieving cooperation from others in order to achieve a goal  | Proficient         | Advanced   | Master     | Master   | Master    |
| Organizational Savvy               | Grasps the workings of the total organization as a formal and informal system; aligns and maneuvers organizational resources and internal politics skillfully to solve problems or accomplish goals                          | Proficient         | Proficient | Advanced   | Master   | Master    |
| Communication Management           | Manages communication activities to ensure all communication pieces clearly and accurately describe information in common, understandable terms and are consistent with company guidelines, policies, and procedures.        | Proficient         | Proficient | Advanced   | Master   | Master    |
| Proactive Customer Service         | Anticipates, identifies and mitigates potential customer issues before they escalate into a significant problem.   | Novice             | Proficient | Advanced   | Master   | Master    |
| Community Relations                | Advocates, builds relationships, and develops channels for dialogue with key community influencers and organizations.  | Proficient         | Advanced   | Advanced   | Master   | Master    |
| Professional Impact                | Presents self as a positive representative of the organization; projects confidence, alertness, and energy; grasps the nuances of appropriate behavior for the situation   | Proficient         | Proficient | Advanced   | Master   | Master    |

**\*Proficiency Levels**

**Novice:** Demonstrates general understanding of knowledge, principles, and/or applications of the area; is able to complete routine assigned tasks with minimal guidance or supervision.

**Proficient:** Demonstrates solid understanding of knowledge, principles, and/or applications of the area; is able to complete moderately complex projects, with minimal guidance and supervision.

**Advanced:** Demonstrates advanced understanding of knowledge, principles, and/or applications of the area; is able to understand complex ideas and make recommendations in this area. May function as a Lead or Mentor to other members of the team.

**Master:** Demonstrates mastery of knowledge, principles, and/or applications of the area; is able to lead and direct others in this area.