



Industry Relationship Management (IRM)

Job Family: Industry Relationship Management (IRM) Department: Customer Engagement Function: Customer Care Reports to (Job Title): Industry Relationship Management Supervisors and Managers	Effective Date of Job Profile: Last Updated: 09/21/11
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Job Family Summary	Proactively recruit and establish relationships with program vendors, Retailers, Manufacturers and/or Distributors supporting company programs and services. Services being rendered by the IRM include: outreach and training; day-to-day support; opportunity identification, strategic and functional support; and in select cases, assistance with selling company offerings as well as deal closure with sales.		
Job Title	Industry Relationship Manager, Associate	Industry Relationship Manager	Industry Relationship Manager, Senior
Position Title	Industry Relationship Manager, Associate	Industry Relationship Manager	Industry Relationship Manager, Senior
PGE Job Level	Associate	Career	Senior
SAP Job Code	50422890	50422891	50422892
Major Responsibilities	<p>Recruitment and Relationship Building – Recruit and establish long term relationships with Industry Professionals that conduct business in company territory to increase participation and cost effectiveness of existing programs. Create a cost effective, extended sales force by establishing and maintaining close relationships with key industry professionals to increase participation in program rebate and incentive programs as well as to help inform future directions for programs and marketing opportunities. Serve Industry Professionals as their trusted advisor for company programs and self generation programs.</p> <p>Sales – Work with internal business partners to develop and execute sales strategies with Industry Professionals. Influence Industry Professionals to sell products and increase program participation with their customer base. When appropriate participate in local/regional trade industry organizations to initiate sales leads for company personnel and establish sales partnerships with industry participants.</p> <p>Collaboration – Collaborate with sales personnel to provide an understanding of enrolled vendors and other industry participants who serve residential, commercial, industrial and Agricultural customers across the company territory. Collaborate with internal & external stakeholders to analyze and improve existing rebate and incentive offerings and to develop and launch additional offerings that deliver cost effective energy savings. Advocate process improvements to better meet vendor/customer needs. Leverage industry relationships for research and marketing opportunities.</p> <p>Technical Knowledge – Be familiar with complex systems and have in-depth knowledge of market segments, industry trends, decision making processes, challenges and opportunities in order to address the needs of customers. Work with Industry Professionals to identify emerging technology opportunities and track market trends. Maintain knowledge on rebates and incentive programs for eligible technologies.</p> <p>Presentations and Training – Deliver company presentations and trainings to industry organizations and trade networks, along with internal stakeholders.</p> <p>Issue Resolution – When necessary, escalate industry participant issues or customer issues with industry participants through appropriate channels for further follow-up, investigation and resolution.</p> <p>Contract Management – Industry Relationship Managers with responsibility for Mid & Upstream programs may be responsible for contract, budget and invoice management – IRM Supervisor will make that determination.</p>		
Distinguishing Characteristics	<ul style="list-style-type: none"> Basic understanding of company Rebates and incentive offerings and operations/processes. Basic knowledge on one or more products eligible for rebates. Select IRMs will need to have a basic knowledge of technology measures eligible for calculated programs. Understands the needs of customer base, typically small to medium business or residential customers. Assist in maintaining existing relationships as well as proactively establishing relationships with other important industry professionals as directed by the IRM Supervisor. Provide day-to-day support to Industry professionals supporting our programs and services. Respond to Industry Professional requests for information, works with more Senior IRMs on unique needs outside of normal process. Assist Industry Professionals with the sale and completion of all programs when appropriate. 	<ul style="list-style-type: none"> Full understanding of company Rebates and incentive offerings and operations/processes. Select IRMs will need to be proficient in understanding Non-Residential Retrofits (NRR)-Demand Response (DR), New Construction, and Technology Incentives programs. Select IRMs will need to be proficient in Retro-Commissioning (RCx) and New Efficiency Options programs. As directed by the IRM Supervisor, full knowledge of specific products eligible for rebates. Select IRMs will need to have full understanding of technology measures eligible for calculated programs. Select IRMs will need to be familiar with building control systems. Understands and responds to the needs of customer base, typically small to medium business or residential customers. Select IRMs will need to understand and respond to the needs of larger customers within a given customers segment. 	<ul style="list-style-type: none"> Advanced understanding on all applicable company rebate and incentive offerings and operations/processes. Select IRMs are required to have advanced understanding of 3P programs & Local Government Partnerships and how they can be bundled with other company offerings. Select IRMs are required to have advanced understanding of Demand Response, Technology Incentive Program and Auto DR. As directed by the IRM Supervisor, advanced knowledge of products eligible for rebates. Select IRMs are required to have advanced knowledge of technology measures eligible for calculated programs. Select IRMs are required to have advanced knowledge on building control systems, and other DR enabling technologies. Considered subject matter expert for a given industry and is an expert on the technologies associated with a customer's operations. Understands load shedding capabilities for different customer



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	<ul style="list-style-type: none"> Deliver educational presentations to Trade Professionals outlining applicable offerings or how they can more effectively work with the company to deliver the optimum messaging for our customers. 	<ul style="list-style-type: none"> Select IRMs work with vendors and contractors that sell/install products eligible for rebate and incentive program offerings Partners with internal business partners to address the unique needs of our unassigned customers. Partners with products organization to deliver feedback on existing products and introduce potential products for future programs. Works with some sales personnel 	<ul style="list-style-type: none"> operations. Select IRMs work with industry professionals who focus on building systems and automated controls. Works with internal business partners to address the needs of our customers and developing comprehensive solutions/offerings that address complex needs across all customer segments. Works with internal business partners on developing enabling technology products. Mentors and trains other team members to gain programs, technology, industry knowledge and other skills. Works with Supervisor to develop and implement lead generation and other department strategies where appropriate.
Supervisory Responsibility			<ul style="list-style-type: none"> Provides active support, mentorship and training for less experienced IRMs and may be asked to fill-in for the Supervisor.
Education	Bachelor's degree strongly preferred, or 2 or more years of industry related experience required.	Bachelor's degree strongly preferred, or 4 or more years of industry related experience required.	Bachelor's degree strongly preferred, or 6 or more years of industry related experience required.
License/ Certification			
Experience	Prior related experience preferred	Minimum of 2 years of related experience	Minimum of 4 years of related experience
Knowledge, Skills, and Abilities	<ul style="list-style-type: none"> Ability to be a self-starter who can work independently Relationship building capabilities Organization skills and detail-oriented Proficient with Microsoft Office Suite Communication skills (written & verbal) 	In addition to those for Associate: <ul style="list-style-type: none"> Ability to close a sale Knowledge of company operations, organizational structure and political savvy required Knowledge of company sales tools Presentation and public speaking skills Customer service and account management capabilities 	In addition to those for Career: <ul style="list-style-type: none"> Ability to influence others to close a sale Ability to present to large groups and management Ability to understand strategy and translate into action plans, operations Ability to recognize opportunities and develop into realities. Ability to lead and influence cross-functional work activities and initiatives Project management skills desired
Working Conditions	Travel within assigned territory up to 75%.		
Supplemental Information	Industry Relationship Managers may be assigned regionally or by technology. Regionally assigned IRMs must be willing to live within assigned territory and Technology assigned IRMs must be centrally located based on location of the concentration of Distributors and manufacturers by technology.		



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Technical Competencies	Technical Competency Descriptions	Proficiency Level*		
		Associate	Career	Senior
Business Acumen	Presents self as a positive representative of the organization; projects confidence, alertness, and energy; grasps the nuances of appropriate behavior for the situation	Novice	Proficient	Advanced
Oral/Written Communication	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.	Novice	Proficient	Advanced
Advocacy and Persuasion	Effectively influences others to achieve understanding, acceptance, and commitment to act in support of ideas, programs or causes.	Novice	Proficient	Advanced
Relationship Building	Develops and maintains work relationships, contacts, and networks; demonstrates skill in achieving cooperation from others in order to achieve a goal.	Novice	Proficient	Advanced
Quality Assurance	Diligently attends to details and quality; shows a high level of care and thoroughness in handling the details of the job; maintains focus and quality under distracting working conditions and high workload.	Proficient	Advanced	Master
Decision Making	Demonstrates the ability to efficiently and effectively make decisions by determining the available options, weighing the pros and cons of each option, choosing the best course of action, and committing to that decision.	Novice	Proficient	Advanced
Problem Solving	Demonstrates skill in identifying complex problems and reviewing related information to develop and evaluate options and implement solutions.	Novice	Proficient	Advanced
Develop and Manage Alliances	Identify opportunities to improve company's position through the establishment of mutually beneficial alliances. Interfaces with alliance partner, ensures business needs (immediate and future) are communicated and articulated with alliance partner.	Novice	Proficient	Advanced
Presentation Skills	Demonstrates skill in delivering clear, understandable oral presentations to groups; effectively organizes and tailors presentation to meet the needs of the audience.	Novice	Proficient	Advanced
Proactive Customer Service	Anticipates, identifies and mitigates potential customer issues before they escalate into a significant problem.	Novice	Proficient	Advanced
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.	Novice	Proficient	Advanced
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	Novice	Proficient

***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 guide efforts of others on the team.

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