



Customer Data Management Job Profile

Job Family: Customer Data Management Department: Customer Engagement Department: Customer Care Reports to (title): Supervisor or Manager	Last Updated: April 2011
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Job Family Summary	Extract customer data for research and education/marketing efforts and respond to requests for customer data and analyses. Maintain customer database ensuring that it is kept up-to-date using data from various PG&E and external systems. Leverage this customer database as a resource for customer research, customer profiling and analyses, marketing/sales campaigns, performance tracking, product/service opportunity analyses and facilitate the development and deployment of customer insight. <ul style="list-style-type: none"> PROJECT MANAGEMENT: Manage data management projects from initial request to presenting data results ensuring that the project is completed within budget and on-time. DATA PROCESSING: Create automated data routines and processes for reporting and data delivery ensuring accurate data manipulation and data cleansing DATA EXTRACTS AND FILE TRANSFERS: Manage extracting data and transferring the data from customer database to our various research/marketing/sales partners to support our research and marketing/sales efforts DATA ANALYSIS: Analyze data using various statistical tools to develop ad hoc reports, statistics, trends and profiles. REPORTING: Develop and communicate clear, concise and actionable data analyses for clients.
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Job Title	Customer Data Analyst, Associate	Customer Data Analyst	Customer Data Analyst, Senior	Customer Data Analyst, Expert	Customer Data Analyst, Principal
Position Title	Customer Data Analyst, Associate	Customer Data Analyst	Customer Data Analyst, Senior	Customer Data Analyst, Expert	Customer Data Analyst, Principal
SAP Code	50419588	50419589	50419590	50419591	50419592
FLSA Status	Exempt	Exempt	Exempt	Exempt	Exempt
Distinguishing Characteristics	Assist other Data Management Analysts in project management, data analysis, and reporting. Basic knowledge of data analysis techniques. Works on routine assignments with limited scope and complexity.	Manage standard, routine data analysis projects with limited supervision. Work with other Data Management Analysts to process data, analyze data and report findings. Manage standard data extracts and list pulls ensuring accurate data. Full understanding of data processing and analysis techniques.	Manage complex data analysis projects with limited supervision. Design data analysis to achieve business objectives, process data, analyze data, write clear and concise data findings and tailor communications to specific audiences. Manage complex data extracts and list pulls ensuring data accuracy. Advanced knowledge of data processing and data analysis techniques. Provides recommendations to enhance customer database with new data sources and improved data processes	Manage complex data analysis projects with limited supervision on only the most complex projects. Design data analysis to achieve business objectives, process data, analyze data, write clear and concise data findings and tailor communications to specific audiences. Manage very complex data extracts and list pulls ensuring data accuracy Act as team lead and provides direction to less experienced employees. Broad expertise in data processing and data analysis and applies this knowledge to a number of different issues. Provides new and innovative solutions and recommendations to enhance customer database with new data sources and improved data processes	Manages very complex data analysis projects with very limited supervision. Act as a thought leader applying extensive data processing and data analysis expertise in the development of strategy or resolution to complex data issues. Manage major and complex cross functional customer data projects that have broad company implications. Act as team lead and provides direction to less experienced employees. Work with Senior Management to develop customer related strategy and leveraging customer data in decision making.



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Minimum Education and Experience Required	BA/BS Degree in Marketing, Business, Computer Science or other related field or equivalent work experience Prior related work experience desired	BA/BS Degree in Marketing, Business, Computer Science or other related field or equivalent work experience Minimum of 2 years or related work experience Familiarity with utilities, operations, energy efficiency and demand side management concepts and programs (preferred).	BA/BS Degree in Marketing, Business, Computer Science or other related field or equivalent work experience Minimum of 4 years of related work experience Familiarity with utilities, operations, energy efficiency and demand side management concepts and programs (preferred).	BA/BS Degree in Marketing, Business, Computer Science or other related field or equivalent work experience Masters Degree preferred Minimum of 6 years of related work experience Familiarity with utilities, operations, energy efficiency and demand side management concepts and programs (preferred).	BA/BS Degree in Marketing, Business, Computer Science or other related field. Masters Degree preferred Minimum of 8 years of related work experience Familiarity with utilities, operations, energy efficiency and demand side management concepts and programs (preferred).
License / Certification	NA	NA	NA	NA	NA
Knowledge, Skills, and Abilities	<ul style="list-style-type: none"> • Skilled in Microsoft Excel/Access (complex formulas, graphing, VBA) • Skilled writing SQL queries using Oracle or Business Objects • Familiar with base-SAS • Familiar with a programming language such as Visual Basic, Perl, C • Able to understand basic technical and business concepts 	<ul style="list-style-type: none"> • Skilled in Microsoft Excel/Access (complex formulas, graphing, VBA) • Skilled writing SQL queries using Oracle or Business Objects • Experience in UNIX shell programming (csh, awk, sed, vi). • Experience with base-SAS • Experience with a programming language such as Visual Basic, Perl, C • Able to analyze and interpret data and effectively communicate findings. 	<ul style="list-style-type: none"> • Advanced skill in Microsoft Excel/Access (complex formulas, graphing, VBA) • Advanced skill in writing SQL queries using Oracle or Business Objects • Proficient in UNIX shell programming (csh, awk, sed, vi). • Solid experience with base-SAS • Advanced experience with a programming language such as Visual Basic, Perl, C • Strong organizational skills, ability to effectively prioritize work, meet deadlines and work on multiple tasks independently. • Able to present findings and make recommendations to stakeholders. • Ability to lead data projects 	<ul style="list-style-type: none"> • Advanced skill in Microsoft Excel/Access (complex formulas, graphing, VBA) • Advanced skill in writing SQL queries using Oracle or Business Objects • Advanced skill in UNIX shell programming (csh, awk, sed, vi). • Strong experience with base-SAS • Strong experience with a programming language such as Visual Basic, Perl, C • Strong organizational skills, ability to effectively prioritize work, meet deadlines and work on multiple tasks independently. • Able to solve complex data issues. • Work with Directors and Managers across functions to influence decisions. • Ability to lead cross functional project teams • Advanced project management skills 	<ul style="list-style-type: none"> • Advanced skill in Microsoft Excel/Access (complex formulas, graphing, VBA) • Advanced skill in writing SQL queries using Oracle or Business Objects • Advanced skill in UNIX shell programming (csh, awk, sed, vi). • Strong experience with base-SAS • Strong experience with a programming language such as Visual Basic, Perl, C • Strong organizational skills, ability to effectively prioritize work, meet deadlines and work on multiple tasks independently. • Able to present highly complex data and findings to Sr. Management • Able to lead company data initiatives and develop concise data findings for Sr. Management. • Ability to lead large and complex projects involving stakeholders from across PG&E



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Technical Competency	Technical Competency Description	Data Management Analyst, Associate	Data Management Analyst	Data Management Analyst, Senior	Data Management Analyst, Expert	Data Management Analyst, Principal
Data Management	Gathers, groups, classifies, or arranges written information or data in some meaningful order or form (e.g., reports, charts, graphs); data management includes determining what data to gather; and accurately maintaining data files.	Proficient	Advanced	Advanced	Master	Master
Database Administration	Designs, develops, implements, and supports applications from a database perspective.	Novice	Proficient	Advanced	Master	Master
Problem Solving	Demonstrates skill in identifying complex problems and reviewing related information to develop and evaluate options and implement solutions.	Novice	Proficient	Advanced	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.	Novice	Proficient	Proficient	Advanced	Master
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.	Novice	Proficient	Advanced	Master	Master
Consulting Skills	Uses expertise to counsel or guide individuals with regard to problems to be resolved on legal, financial, scientific, technical, or other professional principles.	Novice	Proficient	Proficient	Advanced	Master
Project Management	Effectively structures and controls work on a project; integrates all aspects, ensures that work progresses on schedule and that work meets specification or required standard.	Novice	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	Novice	Proficient	Advanced	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	Novice	Proficient	Proficient	Advanced
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.	Novice	Novice	Novice	Proficient	Advanced
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.	Proficient	Proficient	Advanced	Master	Master
Written Communication	Demonstrates skill in communicating information and ideas in writing so others will understand.	Proficient	Advanced	Master	Master	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	Proficient	Advanced	Master	Master
Proactive Customer Service	Anticipates, identifies and mitigates potential customer issues before they escalate into a significant problem.	Novice	Novice	Proficient	Advanced	Master



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*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.