



Customer Success Management - Job Profile Matrix

Line of Business: Customer Care / Customer Service Job Family: Customer Success Management Reports to (Job Title): Varies	Effective Date of Job Profile: October, 2015 Last Updated:
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Job Family Summary	Leads resolution of critical and complex customer issues by working cross-functionally with internal partners such as billing, rates, service planning, interconnections, metering and CES which may include service only customer assignments. Partners with CRMs to support sales and service activities and ensure that customer needs are handled in a timely and professional manner using a team approach. Identifies and implements process improvements and shares best practices to improve customer experience. Build internal and external relationships and functional/segment expertise to meet customer needs. Partners with CRMs and Local teams to prioritize and project manage initiatives for assigned or unassigned Commercial, Industrial, and Agricultural (CIA) customers.		
Job Title	Customer Success Manager, Senior	Customer Success Manager, Expert	Customer Success Manager, Principal
Position Title	Customer Success Manager, Senior	Customer Success Manager, Expert	Customer Success Manager, Principal
PGE Job Level	Senior	Expert	Principal
SAP Job Code	51810168	51810169	51810402
Job Responsibilities	<ul style="list-style-type: none"> Leads resolution of sensitive customer issues by working cross-functionally with internal partners. Actively supports CEE sales and customer satisfaction metrics for assigned customer segment. Works with CRM to resolve 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. Coordinates with Local Presence Teams/DLT and builds awareness to address local community and customer service opportunities and issues. As needed, supports outage communications and emergency communications during major event. Participates in cross functional process improvement initiatives with system wide impact. May provide guidance and training for less experienced CSMs. Develops specific action plans with customers to support CRMs. Identifies and pursues new market and segment opportunities that impact large customer groups to support CRMs with sales and service activities. Support local Chamber/Community events answering questions and representing company. Organizes communication and outreach for industry sectors and/or campaigns. 	<ul style="list-style-type: none"> Leads resolution of critical and complex customer issues by working cross-functionally with internal partners. Partners with CRMs to develop and drive targeted CEE sales strategies and plays key role in driving customer satisfaction for assigned customer segment. Works with CRMs, Directors and Managers from various departments to resolve unique and complex billing, reliability and service issues. Coordinates with Local Presence Teams/DLT and builds awareness to address local community and customer service opportunities and issues. Supports outage communications and emergency communications during major events. Demonstrates and applies a thorough understanding of industry practices in order to resolve unique and complex billing, reliability and service issues. May lead a team on service planning initiatives, and provide direction to other reps. Provides critical customer perspective for segment strategies. Provides critical customer perspective in the development of market segment strategies. Provides segment leadership. Uses expert service techniques and activities while proactively working to understand the intricacies of a customer organization, goals and metrics, decision making authority and internal influences. Shares knowledge of customer market and sales segment to help departmental planning and marketing functions. 	<ul style="list-style-type: none"> Leads resolution of critical and highly complex system wide customer issues by working cross-functionally with internal partners such as billing, rates, service planning, interconnections, metering and CES which may include service only customer assignments. Provides strategic direction on CEE sales campaigns and provides tactical customer care strategies for assigned customer segment. Acts as the industry market subject matter expert and works with professional trade association for assigned customer segment. Leads, coordinates and develops unique and innovative solutions for billing, reliability and service issues. Coordinates with Local Presence Teams/DLT and builds awareness to address local community and customer service opportunities and issues. Supports outage communications and emergency communications during major event Drives development of new tools and process with company-wide impact. Acts as mentor and expert to other reps. Works with Senior Management to influence system wide T&D operations and resources. Leads the development of market segment strategies, and translating these strategies into action. Develops complex service techniques and partnerships with a wide range span of influence, to have a broad impact on customer market and sales segments. May develop, execute and evaluate a new pilot CEE program, product or service. Seeks out, evaluates and analyzes information provided through Customer Insight and Marketing to identify industry sales trends and further



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		<ul style="list-style-type: none"> • May utilize industry and association memberships to leverage system wide department results. • Provides insight and leadership on cross-cutting service & sales tools, program, and marketing needs. • Supports CRMs and local DLTs with City officials and/or 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 CRMs to support large corporate customers and business or industrial organizations partnering on energy events, or, presenting at industry specific functions and events. • May support Gov Rel lead team which includes support from CEE, DR, Renewable Energy, and others. • Develops industry case studies and best practices, involving and soliciting input from others. • Shares industry news, trends and best practices. 	<ul style="list-style-type: none"> • departmental service and sales opportunities. • Creates multiple year energy management and sustainability plans. • Collaborates with internal and external contacts to influence and shape government relationships, regulatory policies and actions. • Provides input to internal company departments on strategic outreach to cities and communities. • Partners with Gov Rel to address community issues. • May work with CRMs to support large corporate customers and business or industrial organizations partnering on energy events, or, presenting at industry specific functions and events.
Supervisory Responsibility			
Education Minimum	<ul style="list-style-type: none"> • Bachelor's degree or equivalent experience 	<ul style="list-style-type: none"> • Bachelor's degree or equivalent experience 	<ul style="list-style-type: none"> • Bachelor's degree or equivalent experience
Desired	<ul style="list-style-type: none"> • Master's degree 	<ul style="list-style-type: none"> • Master's degree 	<ul style="list-style-type: none"> • Master's degree
License/Certification Minimum	<ul style="list-style-type: none"> • Valid CA driver's license 	<ul style="list-style-type: none"> • Valid CA driver's license 	<ul style="list-style-type: none"> • Valid CA driver's license
Desired			
Experience Minimum	<ul style="list-style-type: none"> • Six years of relevant experience 	<ul style="list-style-type: none"> • Eight years of relevant experience 	<ul style="list-style-type: none"> • 10 years of relevant experience
Desired			
Knowledge, Skills, Abilities Desired	<ul style="list-style-type: none"> • Thorough understanding of T&D operations including functions of relays, line re-closers, switches, transformers and substations • Familiar with Customer Care Advocate role in local emergency centers • Ability to develop a bundle of products, programs and technological solutions to support the needs of the customer and their industry and present them in a comprehensive and compelling manner • Ability to organize and present comprehensive 	<ul style="list-style-type: none"> • Thorough understanding of system wide T&D operations—local system constraints and issues and associated resolutions • Familiar with Incident Command Structure • Ability 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 • Ability to keep up with industry trends and technological advancements and ability to determine / translate how those might affect company's existing programs 	<ul style="list-style-type: none"> • Ability to lead efforts with demand-side management programs, renewable programs, marketing to influence and impact strategy and major program, product, marketing and regulatory decisions • Skilled at representing PG&E with outside organizations as a subject matter expert • Ability to keep up with industry trends and technological advancements and to determine/ translate the impact on company's existing programs • Skilled at proactively sharing new and/or unique program and product knowledge with others • Extensive and thorough understanding of regulatory, economic, and



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	<ul style="list-style-type: none"> recommendations to customers and peers Ability to identify program and process enhancement opportunities Ability to develop and manage relationships within the company and external to company to effectively understand and provide advice on trends, innovative / best practices and matters of industry importance Skilled at sharing industry knowledge and expertise with others across service & sales organizations Ability to work with others to develop case studies, provide documentation, and share best practices Understands market and segment strategy and initiatives Skilled in using tools and data and communicating information to customers in a targeted and compelling manner Skilled at assimilating information on industry trends, opportunities and needs to develop and influence new strategies, solutions and process improvements 	<ul style="list-style-type: none"> Skilled at proactively sharing program and product knowledge and expertise with others Full knowledge of and involvement in complex regulatory and political issues affecting one or more industries Skilled at proactively sharing best practices related to programs or regulatory changes affecting one or more industries with customer groups, and others in Service & Sales Expert knowledge and skill in using tools and data to proactively develop and share customer-focused communication Skilled at representing PG&E with outside organizations as a subject matter expert Experience and participation with industry-specific stakeholders and groups 	<ul style="list-style-type: none"> political issues impacting utility and energy industry as well as customer segment Adept at analyzing industry or regulatory trends, identifying customer impacts, and suggesting opportunities for customers Ability to garner customer support and advocacy on behalf of company on matters of importance to company, specific industries, and/or the state Ability to develop case studies/white papers addressing multiple energy-, or industry-related initiatives while disseminating input from a team of internal and external experts Extensive expertise and knowledge of applicable customer segment(s), and associated technical knowledge Ability to develop and negotiate contracts that are unique to segment and specific customers
Supplemental / Other Minimum			
Desired	<ul style="list-style-type: none"> Company office environment combined with occasional visits to customer/account field facilities and locations and community events to support CRMs and DLTs (varies based on customers/ accounts supported). Project Management Experience 	<ul style="list-style-type: none"> Company office environment combined with occasional visits to customer/account field facilities and locations and community events to support CRMs and DLTs (varies based on customers/ accounts supported). Project/program management training Lean six sigma training/certification 	<ul style="list-style-type: none"> Company office environment combined with occasional visits to customer/account field facilities and locations and community events to support CRMs and DLTs (varies based on customers/ accounts supported). Project/program management training/ certification Lean six sigma training/certification