

## Strategic Analysis Job Profile

<b>Job Family:</b> Strategic Analysis <b>Department:</b> PIP <b>Function:</b> Customer Care <b>Reports to):</b> Manager, Sr. Manager, Principal	<b>Last Updated:</b> April 2011
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<b>Job Summary</b>	Develop strategies to support programs and initiatives incorporating understanding of customer needs, industry direction, business impacts and company vision. Work with regulators, utility industry peers and/or internal departments to influence the company and/or regulatory and industry efforts around current and future priorities, funding constraints and future business needs. Influence company and/or regulatory and/or industry priorities considering inputs from customer research, business impacts and PG&E strategies and priorities.
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<b>Major Responsibilities</b>	Responsibilities typically include: <ul style="list-style-type: none"> <li><b>Strategic Planning</b> <ul style="list-style-type: none"> <li>• Identify and understand customer needs, industry direction, business impacts, risks and opportunities to influence current and future regulatory and industry strategies and priorities</li> <li>• Use understanding of current and future regulatory and industry priorities and strategies to develop company specific business strategies based on customer needs, industry direction and business needs</li> <li>• Represent the company at regulatory proceedings, industry forums and events to communicate company position and support the company's desired direction and needs</li> <li>• Develop coordinated strategic direction within the organization and company in line with regulatory and industry direction</li> <li>• Provide recommendations and define tailored strategies to enhance program development, implementation and delivery</li> </ul> </li> <li><b>Strategic Analysis</b> <ul style="list-style-type: none"> <li>• Develop methodology / approach to translate strategic vision into program decisions and operational activities</li> <li>• Construct analytic models and tools to analyze customer data, program accomplishments and other relevant industry data to support program directions and development</li> <li>• Evaluate policies, technologies, programs, customer needs and industry direction to identify customer and company benefits to influence development of future strategies and program development</li> <li>• Conduct and use research and/or data to shape products, direction or program plans. May include targeted customer research.</li> </ul> </li> <li><b>Policy Development</b> <ul style="list-style-type: none"> <li>• Develop and implement regulatory, legislative, external and internal policies and procedures for internal and external use</li> <li>• Coordinate and communicate policy supporting development, implementation and performance of programs in regulatory, legislative, external, and internal settings</li> <li>• Interact and partner with key regulatory agencies, including CPUC, CEC, FERC, other utilities, CAISO, industry groups and key market players to influence decision makers as well as policy and regulatory direction</li> </ul> </li> </ul>
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<b>Job Title</b>	<b>Strategic Analyst, Associate</b>	<b>Strategic Analyst</b>	<b>Strategic Analyst, Senior</b>	<b>Strategic Analyst, Expert</b>	<b>Strategic Analyst, Principal</b>
<b>Position Title</b>	Strategic Analyst, Associate	Strategic Analyst	Strategic Analyst, Senior	Strategic Analyst, Expert	Strategic Analyst, Principal
<b>PGE Job Level</b>	Associate	Career	Senior	Expert	Principal
<b>SAP Job Code</b>	50419631	50419632	50419633	50419634	50419635
<b>Distinguishing Characteristics</b>	<ul style="list-style-type: none"> <li>• Demonstrates basic knowledge of program planning and program performance analysis process</li> <li>• Requires guidance, support and resources with analysis development.</li> <li>• Communicates with peers inside and outside the department regarding project analysis and development</li> </ul>	<ul style="list-style-type: none"> <li>• Demonstrates full understanding of regulatory and program strategy planning and analysis process</li> <li>• Completes analysis assignments of moderate scope and complexity in support of regulatory and portfolio strategy and decision making</li> <li>• Receives little instruction on daily</li> </ul>	<ul style="list-style-type: none"> <li>• Demonstrates advanced understanding of regulatory and program strategy planning and analysis process</li> <li>• Ability to address moderate to complex strategic issues and problems and takes a new perspective on existing solutions</li> <li>• Needs little guidance on most analytical and complex problems.</li> </ul>	<ul style="list-style-type: none"> <li>• Demonstrates expert understanding of regulatory and program strategy planning and analysis process</li> <li>• Organizes and presents expert testimony with assistance from others.</li> <li>• Ability to address complex strategic issues and takes a broad perspective to identify innovative solutions</li> </ul>	<ul style="list-style-type: none"> <li>• In-depth and unique industry and regulatory expertise.</li> <li>• Assignments of the highest complexity and impact to PG&amp;E.</li> <li>• Coaches, mentors and trains others.</li> <li>• Evaluates and develops new analytic methods and tools, processes, procedures for the department.</li> </ul>

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	<ul style="list-style-type: none"> <li>• Works to support development of new data models and comments on the results of the model.</li> <li>• Identifies analysis approach appropriate for situation and task at hand</li> <li>• Organizes and prepares information as directed for regulatory filings.</li> </ul>	<p>projects and general guidance on new assignments</p> <ul style="list-style-type: none"> <li>• May need assistance to navigate organization in order to achieve goals efficiently</li> <li>• Communicates ideas in both written and oral communications to internal and external colleagues and customers.</li> <li>• May participate on project teams, able to provide effective contributions to projects.</li> <li>• Develops econometric models, forecasting, data analysis and evaluations, interprets outcomes and develops recommendations in support of policy development, operations or regulatory needs</li> <li>• Includes appropriate customer research findings in all analysis when applicable</li> <li>• Prepares analytic support for regulatory filings.</li> <li>• Implements operational improvements</li> </ul>	<ul style="list-style-type: none"> <li>• Clearly articulates recommendations and findings in both written and oral communications both internally and externally and to functional management</li> <li>• May act as a team lead and provide direction to less experienced employees</li> <li>• Works with all levels of leadership (up to and including VP) across functions to provide relevant information for decision making</li> <li>• Understands the Company and regulatory organizational structure and how to interact with and utilize available contacts and resources.</li> <li>• Develops analytic tools including complex econometric modeling, forecasting, data analysis and evaluation to meet customer needs and company business objectives and in support of regulatory directives and strategies</li> <li>• Examines alternate solutions to a problem, effectively troubleshoots various issues and analysis, and provides findings and recommendations for internal clients and external stakeholders</li> <li>• Prepares analytic support for regulatory filings</li> <li>• Clearly and often demonstrates innovative thinking from strategy to operational implementation</li> <li>• Support preparation of testimony on complex analyses and policy issues</li> <li>• Works with other utilities and industry groups in the development of new and innovative data models, research, etc. to support strategy and planning at PG&amp;E</li> </ul>	<ul style="list-style-type: none"> <li>• Works independently with guidance on only the most complex issues</li> <li>• Leverages contacts within and beyond Company to pressure-test and refine solutions</li> <li>• Ability to effectively communicate complex ideas to diverse audiences using a variety of media.</li> <li>• May manage cross-functional projects or initiatives</li> <li>• Works with all levels of leadership (up to and including SVP) across functions to influence decisions</li> <li>• Integrates industry knowledge into everyday business practices and decision making.</li> <li>• Examines alternate solutions to issues, effectively troubleshoots various problems, analyses, and provides findings and recommendations for internal clients and external stakeholders</li> <li>• May develop new analytic tools including complex econometric modeling, forecasting, data analysis and evaluation to support strategic planning and decision making.</li> <li>• Prepares analytic support for regulatory filings and presents complex analysis to leadership or external parties.</li> <li>• Prepares and may lead preparation of testimony on complex analyses and policy issues</li> <li>• Demonstrates high level of innovative thinking focused on strategy and operational implementation</li> </ul>	<ul style="list-style-type: none"> <li>• Solves unique and complex strategic issues and problems</li> <li>• Works autonomously and has a solid leadership role and function</li> <li>• Leverages contacts within and beyond Company to pressure-test and refine solutions.</li> <li>• Ability to effectively communicate highly complex ideas to diverse audiences using a variety of media.</li> <li>• May manage major cross-functional projects and initiatives</li> <li>• Works with all levels of leadership (up to and including SVP) across functions to influence decisions</li> <li>• Anticipates issues and develops innovative solutions</li> <li>• Continually applies and guides others to apply understanding of company goals and strategies.</li> <li>• Influences policy and program strategy at other utilities and regulatory agencies</li> <li>• Sponsors testimony on complex analysis and policy issues</li> </ul>
<b>Supervisory</b>	No supervisory responsibility	No supervisory responsibility	No supervisory responsibility	No supervisory responsibility	May have 1 – 2 direct reports

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Responsibility					
<b>Education</b>	<ul style="list-style-type: none"> <li>Bachelor's degree in Business, Finance, Accounting, Economics, Statistics, Mathematics, Sociology, Engineering, Physics or other related fields or equivalent work experience</li> </ul>	<ul style="list-style-type: none"> <li>Bachelor's degree in Economics, Statistics, Mathematics, Business, Finance, Sociology, Engineering, Physics or other related fields or equivalent work experience</li> <li>Advanced degree desired</li> </ul>	<ul style="list-style-type: none"> <li>Bachelor's degree in Economics, Statistics, Mathematics, Business, Finance, Sociology, Engineering, Physics or other related fields or equivalent work experience</li> <li>Advanced degree preferred</li> </ul>	<ul style="list-style-type: none"> <li>Bachelor's degree in Economics, Statistics, Mathematics, Business, Finance, Sociology, Engineering, Physics or other related fields or equivalent work experience</li> <li>Advanced degree preferred</li> </ul>	<ul style="list-style-type: none"> <li>Bachelor's degree in Economics, Statistics, Mathematics, Business, Finance, Sociology, Engineering, Physics or other related fields or equivalent work experience</li> <li>Advanced degree preferred</li> </ul>
<b>License/Certification</b>	<i>NA</i>	<i>NA</i>	<i>NA</i>	<i>NA</i>	<i>NA</i>
<b>Experience</b>	0-2 years of experience	Typically 3 years experience 1-2 years of job related experience	Typically 6 years experience 2-4 years of job related experience	Typically 8 years of experience 6+ years of job related experience	Typically 10 years of experience 8+ years of job related experience
<b>Knowledge, Skills, and Abilities</b>	<ul style="list-style-type: none"> <li>Ability to work in team environment</li> <li>Possesses general technical knowledge of demand-side management programs</li> <li>Ability to communicate in written and verbal form</li> <li>Demonstrated attention to detail</li> <li>Ability to learn new concepts quickly</li> <li>Adaptable to changing business priorities.</li> <li>Adeptness with statistical analysis, modeling, software and tools</li> <li>Able to understand basic technical and business concepts</li> <li>Proficient with Microsoft Office products including Word, Excel, Access, Visio, PowerPoint</li> <li>Knowledge and experience in energy markets desired</li> <li>Knowledge of utility ratemaking preferred</li> <li>Experience with regulatory processes preferred</li> <li>Knowledge of financial markets as they relate to regulated entities preferred</li> <li>Basic familiarity with SAS, STATA or</li> </ul>	<p>In addition to those for Associate, Career requires:</p> <ul style="list-style-type: none"> <li>Solid technical knowledge of utility operations as a whole</li> <li>Research and issue resolution skills</li> <li>Ability to assess and recommend solutions for assigned projects</li> <li>Ability to prioritize, plan, perform and communicate strategy and analysis activities, plans and outcomes both in written and verbal form</li> <li>Knowledge and experience in energy markets</li> <li>Knowledge of utility industry in other states and ability to lead research efforts with other states</li> <li>Knowledge of utility ratemaking</li> <li>Knowledge of current utility and energy industry issues, applications to local level customers, including customer energy efficiency applications, and general customer information.</li> <li>High level of adeptness with statistical analysis, modeling, software and tools</li> <li>Proficient with SAS, STATA or other</li> </ul>	<p>In addition to those for Career, Senior requires:</p> <ul style="list-style-type: none"> <li>Strong technical knowledge of utility operations as a whole</li> <li>Demonstrated ability to perform complex assessments</li> <li>Able to present complex data and findings to internal audiences and ability to present to Directors and Managers).</li> <li>Understands programs, policy and operations to advise business on meaning of data, results</li> <li>Ability to effectively manage multiple projects with demanding time constraints.</li> <li>Ability to lead and manage projects and project teams</li> <li>Knowledge of national policy issues if relevant to position</li> </ul>	<p>In addition to those for Senior, Expert requires:</p> <ul style="list-style-type: none"> <li>Able to present complex data and findings to internal audiences including Managers and Directors and to external stakeholders, regulatory agencies, etc</li> <li>Demonstrated ability to select appropriate analytical tools to resolve complex problems</li> <li>Ability to influence leaders inside and outside of the department through data analysis, insights and recommendations</li> <li>Ability to lead large and complex projects working with cross-functional teams</li> <li>Ability to lead, manage and analyze business processes and recommend improvements to gain efficiency and effectiveness.</li> </ul>	<p>In addition to those for Expert, Principal requires:</p> <ul style="list-style-type: none"> <li>Able to lead department wide modeling and data initiatives of the highest complexity and impact</li> <li>Able to present highly complex data and findings to diverse audiences which may include upper management, top industry and regulatory stakeholders</li> <li>Ability to use understanding of the business to help drive strategic decision making, and to recommend operational improvements</li> <li>Deep knowledge and expertise of business and or industry drivers, regulatory policy and policy strategy and development processes</li> <li>Ability to analyze business processes and recommend improvements to gain efficiency and effectiveness.</li> <li>Ability to lead and implement key process improvements</li> <li>Expert ability to integrate macro and micro economic factors and statistical analysis into decision making</li> </ul>

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	other analysis software	analysis software) <ul style="list-style-type: none"><li>• Able to translate data analysis, forecasting and evaluation requirements into economic modeling and output in support of business decisions</li><li>• Working knowledge of the California DR, EE or DG M&amp;E Protocols or analysis techniques inherent in the protocols if relevant to position</li></ul>			
<b>Working Conditions</b>	Primarily office environment with extensive use of personal computers, telephone conversations, conference calls and in person meetings. Travel required depends on position.				
<b>Supplemental Information</b>	Some positions like in the Measurement and Evaluation (M&E) Department are required to conduct primary research, disseminate and file results pursuant to Regulatory Decisions. Conducting such research may require specialized skills and training including advanced educational achievement incremental to those requirements indicated above.				



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Technical Competencies	Technical Competency Descriptions	Proficiency Level*				
		Associate	Career	Senior	Expert	Principal
Deals w/Ambiguity	Effectively copes with change; shifts gears comfortably; decides and acts without having complete information; isn't upset when things are up in the air; doesn't have to finish things before moving on; comfortably handles risk and uncertainty	Novice	Proficient	Advanced	Advanced	Master
Process Management	The application of knowledge, skills, tools, techniques and systems to define, visualize, measure, control, report, manage, and improve processes in order to meet business and organizational needs	Novice	Proficient	Advanced	Advanced	Master
Business / Industry Knowledge	Knows the business and its environment; knows key issues and trends including leading practices and technology; is familiar with the industry language and terminology; knowledge of financial implications of issues specific to the Utility industry.	Novice	Proficient	Advanced	Advanced	Master
Communication	Communicates with peers, subordinates, leadership, and external stakeholders as necessary, using a variety of media; conveys his/her views in a clear, direct, and non-threatening manner; seeks first to understand and then to be understood	Novice	Proficient			
Analytical Acumen	Studies a problem in a systematic way; can abstract or synthesize from one set of ideas or facts to another; identifies causal relationships, anticipates obstacles, considers several explanations/plans, makes logical conclusions; can recommend or hypothesize (several) root cause(s)	Novice	Proficient	Advanced	Advanced	Master
Organizational Savvy	Can maneuver through complex organizational situations effectively and without disruption; is sensitive to how people and organizations function; anticipates where the obstacles are and plans his/her approach accordingly. Aligns and maneuvers organizational resources skillfully to solve problems or accomplish goals.			Proficient	Advanced	Master
Strategic Business Perspective	Understands the company's overall goals and strategies, as well as the goals of business partners; continually applies this understanding to identify and address the critical needs of the overall business			Advanced	Advanced	Master
Creative & Innovative Thinking	Develops innovative ideas that provide solutions to all types of workplace challenges.	Novice	Proficient	Advanced		
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	Advanced	Master
Advocacy and Persuasion	Effectively influences others to achieve understanding, acceptance, and commitment to act in support of ideas, programs or causes.		Proficient	Advanced	Advanced	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 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.