



CES Business Operations Leadership- Job Profile Matrix

Line of Business: Customer Care / Customer Energy Solutions / CES Business Operations
Job Family: CES Business Operations

Effective Date of Job Profile: 08/01/2013
Last Updated: 5/16/2013, 6/25/2013

Job Family Summary	Leads the development of strategic, financial and operational planning for Customer Energy Solutions (CES). Responsible for the quality, consistency and rigor of financial and energy savings reporting. Provides data analysis, forecasting, modeling and reporting to support decision making for business priorities. Facilitates continuous improvement and quality throughout the organization. Ensures CES proactively manages operational risks and complies with all regulatory compliance requirements by developing sustainable internal controls and procedures.		
Job Title	Supervisor, CES Business Operations	Manager, CES Business Operations	Senior Manager, CES Business Operations
Position Title	Supervisor, CES Business Operations	Manager, CES Business Operations	Senior Manager, CES Business Operations
PGE Job Level	Supervisor	Manager	Senior Manager
SAP Job Code	51548230	51548229	51548231
Job Responsibilities	<ul style="list-style-type: none"> • Supervises a team of analysts responsible for the financial reporting and governance; risk management, compliance, and process improvement; OR data analytics, forecasting, and reporting functions for CES. • Provides the following business support for CES: <ul style="list-style-type: none"> ○ Financial Reporting & Governance: <ul style="list-style-type: none"> – Oversees the team to ensure accurate and timely budget monitoring, forecasting, and monthly accruals. – Prioritizes and plans the work for the team in maintaining various dashboards, energy savings forecast, diversity spend and SOX controls. <p style="text-align: center;">OR</p> <ul style="list-style-type: none"> ○ Risk, Compliance & Process Improvement <ul style="list-style-type: none"> – Oversee team that supports contract management and governance processes for CES – Improves controls and efficiency of contract management procedures – Manages process improvement and training projects. – Responds to audit requests and business requests for contract data – Assists with the budget planning of contract budget for CES – Conducts audits and quality reviews 	<ul style="list-style-type: none"> • Manages a team of skilled professionals responsible for the financial reporting and governance OR risk management, compliance, and process improvement. • Provides the following business support for CES: <ul style="list-style-type: none"> ○ Financial Reporting & Governance: <ul style="list-style-type: none"> – Manages a team of employees that works on implementation of financial controls, production of internal financial reports that provide insights into potential risks and produce reports required by the CPUC for financial spend tracking. – Manages financial risks for regulatory balancing accounts through implementation of controls, monitoring actual spend through financial reports and ensuring compliance with CPUC financial reporting requirements. – Leads team responsible for activities of team focusing on management and mitigation of regulatory balancing account financial risks for CES. These key activities include budget planning, forecasting, analysis of spend, ensuring compliance with all CPUC financial restrictions and complying with all CPUC mandated financial reporting. – Facilitates and coordinates regulatory filings for future year balancing accounts that allow for continuation of funding for program implementation and support. – Provides leadership with financial insights and actionable recommendations to mitigate potential financial risk. – Implements financial governance process for budget 	<ul style="list-style-type: none"> • Leads the development of strategic, financial and operational planning for CES. • Leads a team of 35+ skilled professionals responsible for the financial reporting and governance; risk management, compliance, and process improvement; and data analytics, forecasting, and reporting functions for CES. • Delivers on priority operational business needs of CES including the following: <ul style="list-style-type: none"> ○ Financial Reporting & Governance <ul style="list-style-type: none"> – Enhances the consistency and rigor of financial reporting – Improves rigor of financial management, forecasting, and controls for balancing and non-balancing accounts – Implements budget governance process for balancing and non-balancing accounts ○ Risk, Compliance & Process Improvement <ul style="list-style-type: none"> – Protects CES from risk through proactive identification, mitigation, controls, and compliance – Improves controls and efficiency of contract management procedures – Works with CES leadership and develops strategic plans in relation to process improvement plans – Improves processes and tools across CES – Empowers all employees across CES to improve process – Facilitates continuous improvement and quality throughout the organization.



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<p style="text-align: center;">OR</p> <ul style="list-style-type: none"> ○ Data Analytics, Forecasting, and Reporting: <ul style="list-style-type: none"> – Supports savings forecast for regulatory filings – Prepares monthly, quarterly, and annual reports (regulatory and/or internal recurring reports) – Completes internal / external data requests – Prepares high-level monthly metrics – Defines scope of different analytics projects assigned to team – Manages projects to ensure timely delivery with high quality results, through assigning individual work streams to appropriate analysts, setting milestones and reviewing results – Reviews results, analyses and presentations prior to final delivery to stakeholders – Manages and maintains savings forecasting, pipeline development and reporting for all balancing accounts – Develops and maintains policies and procedures for savings forecasting and tracking – Supports program, product, and portfolio governance (modeling, process improvement, and governance) ● Provides advice and counsel to client organizations at all levels of management. ● Provides development opportunities to team members, through assigning appropriate work that develops diverse skills to analysts, recommending training and conference opportunities ● Establishes a working environment that fosters engagement, continuous improvement, business understanding, client focus and honest and open communications. 	<p>pressures, budget transfers, and budget requests. Manages operational budget adjustments and facilitates budget conversations with the leadership resulting in quick and efficient decision making.</p> <p style="text-align: center;">OR</p> <ul style="list-style-type: none"> ○ Risk, Compliance & Process Improvement <ul style="list-style-type: none"> – Develops and implements the risk, quality, regulatory compliance, and improvement strategies for CES – Oversees team responsible for quality control of operational procedures to assess performance and measure adherence to quality standards and guidelines. – Leads performance of risk assessments to identify and prioritize operational, regulatory, financial, technology, reputation, and other business risks. In coordination with key stakeholders, develops mitigation plans in accordance the PG&E risk guidelines. – Executes strategies for ensuring compliance with Sarbanes-Oxley requirements, internal and external audits, regulatory requirements, and Company standards and procedures. – Works collaboratively with stakeholders across the organization to achieve compliance to applicable laws, regulations, and Company standards and procedures. – Develop standards, procedures, governance, and control processes that align with regulatory requirements and business objectives. – Leads process improvement activities in coordination with subject matter experts, industry experts, and other resources to solve unique and complex process problems, anticipating issues, and develop innovative process solutions. – Develops and implements tools for identifying and tracking process improvement requests – Prioritizes process and continuous improvement initiatives and assign to greenbelts / blackbelts ● Establishes a working environment that fosters engagement, continuous improvement, business understanding, client focus and honest and open communications. 	<ul style="list-style-type: none"> ○ Data Analytics, Forecasting, and Reporting <ul style="list-style-type: none"> – Enhances the consistency and rigor of energy savings reporting – Establishes the team as the source for efficiently and accurately implementing CES program forecasts, dashboards, metrics and reports – Performing research and data analysis to provide recommendations to improve products, programs, and/or channels – Responding promptly and accurately to external reporting requirements and requests ● Develops long-term strategy for department and ensure alignment with overall goals of CES and Customer Care. Determines department performance metrics and processes to monitor and report on metrics. Regularly presents updates to senior leadership on status of department initiatives and goals. ● Develops and manages an annual operating budget for department. Analyzes department needs and plans annual operating budget. Manages expenses vs. budget on a monthly basis, and addresses variances. ● Leads staff to accomplish results through effective recruitment and selection, training and development, performance management, change management, and rewards and recognition.
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		<ul style="list-style-type: none"> • Develops and manages an annual operating budget for team. Analyzes team needs and plans annual operating budget. Manages expenses vs. budget on a monthly basis, and addresses variances. • Leads staff to accomplish results through effective recruitment and selection, training and development, performance management, change management, and rewards and recognition. 	
Supervisory Responsibility	Recruit/select, communicate expectations, foster employee engagement, coach, develop, mentor, recognize and reward employees in order to drive performance and results. Manages professional and support employees	Recruit/select, communicate expectations, foster employee engagement, coach, develop, mentor, recognize and reward employees in order to drive performance and results. Manages supervisory and professional employees.	Recruit/select, communicate expectations, foster employee engagement, coach, develop, mentor, recognize and reward employees in order to drive performance and results. Manages leadership, professional and support employees.
Education Minimum	High school diploma or equivalent	Bachelor's degree or equivalent	Bachelor's degree or equivalent
Desired	Bachelor's degree or equivalent	Advanced degree in related field	Advanced degree in related field, PhD
License/Certification Minimum	Lean Six Sigma certification and/or training (Supervisor for Risk, Compliance, and Improvement)	Lean Six Sigma certification and/or training	
Desired		PMP Certification	
Experience Minimum	5 years of relevant experience	8 years of relevant experience	8 years of relevant experience
Desired	Prior supervisory experience	Prior supervisory/managerial experience	2 years of supervisory/managerial experience
Knowledge, Skills, Abilities Desired	<p>Safety: Ability to create, promote and manage a safe work environment</p> <p>Budget/Expenses: Ability to develop and manage dept. budgets, expenses, variances</p> <p>Communication: Ability to communicate and support company and organization policies, procedures, goals, objectives, vision and values</p> <p>Operations Management: Ability to manage day-to-day operations, identify and implement operational changes and improvements in support of the business</p> <p>Relationship Management: Ability to develop working relationships with customers and business partners where operations, service, support or other inter-dependencies exist</p> <p>Continuous Improvement: Ability to encourage employees to identify work process and system improvements, champion and overcome resistance to and facilitate change.</p> <p>Leadership Presence: Ability to convey credibility, confidence and</p>	<p>Safety: Ability to create, promote and manage a safe work environment</p> <p>Budget/Expenses: Ability to develop and manage dept budgets, expenses, variances</p> <p>Communication: Ability to communicate and support company and organization policies, procedures, goals, objectives, vision and values</p> <p>Strategy: Has knowledge and skills to develop and implement short and medium-term strategy in support of company and organizational objectives</p> <p>Work Planning: Has knowledge and skills to develop and implement work plans in support of dept. goals</p> <p>Operations Management: Has knowledge and skills to develop operating policies and procedures; ability to monitor operations, identify and implement metrics, operational changes and improvements in support of the business;</p> <p>Relationship Management: Ability to develop working relationships with</p>	<p>Safety: Ability to create, promote and manage a safe work environment</p> <p>Budget/Expenses: Ability to develop and manage dept. budgets, expenses, variances</p> <p>Communication: Ability to communicate and support company and organization policies, procedures, goals, objectives, vision and values</p> <p>Strategy: Has knowledge and skills to develop and implement short, medium, and long-term strategy in support of company and organizational objectives that affect multiple teams or a large work unit representing multiple disciplines</p> <p>Work Planning: Has knowledge and skills to develop and implement work plans in support of dept. goals that affect multiple teams or a large work unit representing multiple disciplines</p> <p>Operations Management: Has knowledge and skills to develop operating policies and procedures; ability to monitor operations, identify and implement metrics, operational changes and improvements in</p>



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	<p>sense of authority. Conveys messages simply, concisely and at right pace and tone for audience. Remains calm, controlled and productive when confronted by opposition or work stress.</p> <p>Functional Expertise: Ability to foster a learning environment and to develop employees to ensure backfills and successors. Has an understanding of PG&E's business to maximize results, limit risks and effectively lead group.</p> <p>Technical Knowledge & Expertise:</p> <ul style="list-style-type: none"> • Ability to collect, analyze, and interpret qualitative and quantitative data to solve unique and complex strategic issues and problems. • Strong presentation, written and verbal communication skills. • Ability to manage major cross-functional projects and initiatives. • Excellent follow through on deliverable. • Ability to drive teams to resolutions. <p>• Financial Reporting & Governance:</p> <ul style="list-style-type: none"> ○ SAP R3 and BW ○ PG&E Cost Model with specific experience with the CES Cost Model preferred <p style="text-align: center;">OR</p> <ul style="list-style-type: none"> • Risk, Compliance & Process Improvement <ul style="list-style-type: none"> ○ Experience with process improvement projects ○ Strong contract management experience ○ Experience implementing quality assurance or governance programs <p style="text-align: center;">OR</p> <ul style="list-style-type: none"> • Data Analytics, Forecasting, and Reporting: <ul style="list-style-type: none"> ○ Demonstrated knowledge of utility operations, regulatory process, and regulatory filing interactions ○ Understanding of databases and increasing levels of analytics ○ Strong experience with SQL Plus, Excel, and PowerPoint ○ Familiarity with reporting tools like Tableau 	<p>customers & business partners ensuring that work plans and operations are coordinated, aligned and support department and company goals and objectives; ability to persuade higher levels of leaders and leadership peers to change positions or approach based on situational need.</p> <p>Continuous Improvement: Ability to encourage employees to identify work process and system improvements, incorporate benchmarking and best practices, champion and overcome resistance to and facilitate change. Leadership Presence: Ability to convey credibility, confidence and sense of authority. Conveys messages simply, concisely and at right pace and tone for audience. Remains calm, controlled and productive when confronted by opposition or work stress.</p> <p>Functional Expertise: Ability to foster a learning environment and to develop employees to ensure backfills and successors. Has an understanding of PG&E's business to maximize results, limit risks and effectively lead group.</p> <p>Technical Knowledge & Expertise:</p> <ul style="list-style-type: none"> • Ability to solve unique and complex issues and problems. • Strong analytics and problem-solving capabilities • Exceptional ability to collect, analyze, and interpret qualitative and quantitative data. • Ability to extract actionable insights from large, highly complex, multi-dimensional dataset • Strong communication skills, including ability to explain complex analytics to executive audience • Ability to think strategically. • Strong ability to manage major cross-functional projects and initiatives • Ability to use business understanding to help drive strategic decision making, and recommend areas for process improvements. <p>• Financial Reporting & Governance</p> <ul style="list-style-type: none"> ○ Financial planning, forecasting, and governance experience ○ Experience as a financial analyst, accounting, auditing or other related Finance careers ○ Demonstrated knowledge of Utility operations and a regulated environment ○ Consulting experience (desired) <p>• Risk, Compliance & Process Improvement</p> <ul style="list-style-type: none"> ○ Experience developing and managing quality assurance 	<p>support of business strategies, goals and objectives</p> <p>Relationship Management: Ability to develop working relationships with customers & business partners ensuring that work plans and operations are coordinated, aligned and support department and company goals and objectives; ability to persuade higher levels of leaders and leadership peers to change positions or approach based on situational need.</p> <p>Continuous Improvement: Ability to encourage employees to identify work process and system improvements, incorporate benchmarking and best practices, champion and overcome resistance to and facilitate change.</p> <p>Leadership Presence: Ability to convey credibility confidence and sense of authority. Conveys messages simply, concisely and at right pace and tone for audience. Remains calm, controlled and productive when confronted by opposition or work stress.</p> <p>Functional Expertise: Ability to foster a learning environment and to develop employees to ensure backfills and successors. Has an understanding of PG&E's business to maximize results, limit risks and effectively lead group.</p> <p>Technical Knowledge & Expertise:</p> <ul style="list-style-type: none"> • Demonstrated knowledge of Utility operations and a regulated environment • Audit and compliance management experience • Experience developing and managing quality assurance programs • Demonstrated knowledge of internal control principles and business risk assessment • Experience with process improvement projects • Ability to use business understanding to help drive strategic decision making, and recommend areas for process improvements. • Financial planning, forecasting, and governance experience • Ability to solve unique and complex issues and problems • Strong analytics and problem-solving capabilities • Exceptional ability to collect, analyze, and interpret qualitative and quantitative data. • Ability to extract actionable insights from large, highly complex, multi-dimensional dataset • Ability to think strategically. • Strong communication skills, including ability to explain complex analytics to executive audience
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		<p>programs (required)</p> <ul style="list-style-type: none"> ○ Audit and compliance management experience ○ Sarbanes-Oxley experience; knowledge of Sarbanes-Oxley section 404 and AS5. ○ Demonstrated knowledge of internal control principles ○ Through knowledge of business risk assessment. ○ ○ Prior experience with controls design and assessment ○ Experience with process improvement projects 	
Other Minimum			
Desired	<p>Interactions With Others: Typical internal interactions are with supervisors and managers</p>	<p>Interactions With Others: Typical internal interactions are with supervisors, managers and directors. May interact with senior directors and officers.</p>	<p>Interactions With Others: Typical internal interactions are with supervisors, managers, directors, senior directors and officers.</p>