



Director Customer Insight and Strategy - Job Profile

Job Family: Customer Insight and Strategy Function: Customer Care/ CES Reports to: Senior Director, Customer Engagement	Effective Date of Job Profile: July, 2011 Last Updated:
--	--

Job Summary	The Director, Customer Insight and Strategy is responsible for ensuring the customer perspective is prioritized, captured and incorporated into the work we do by: <ul style="list-style-type: none"> • Driving a deeper understanding of customers through research and data analysis • Providing actionable insights about customer needs, behaviors, attitudes and profiles that enable strategic and tactical decision making as well as improve and enhance customer experience and engagement. • Defining customer experience strategies to guide more efficient and effective customer education and outreach strategies • Tracking company performance through key performance metric reporting.
Job Title	Director, Customer Insight and Strategy
Position Title	Director, Customer Insight and Strategy
PGE Job Level	Director
SAP Job Code	New Job Code: 51784179 / 51680981 Obsoleted 8/26/2015
Major Responsibilities	<ul style="list-style-type: none"> • Serve as a single point of contact and accountability for customer and product research, data management, customer strategy and analysis and metrics performance • Act as an advocate for customers and represent the customer internally to all areas of the Company • Guide customer experience and customer engagement strategy development • Guide overall customer strategy to shape product, marketing and sales plans for residential and business customers • Oversee customer and product research plans • Oversee long term research strategy • Recommend research and data analyses to guide deeper customer understanding • Oversee data analyses leveraging the CAS database as a resource for customer profiling, and analysis and product/service opportunity analysis • Recommend and coordinate foundational enhancements to the CAS database and work with agency partner to implement • Oversee long term customer data strategy to support Customer Energy Solutions • Develop and manage non-balancing and balancing account budgets, schedules, work plans and metrics and provide variance explanations and course correction tactics as needed to Sr. Leadership • Identify, develop, implement and maintain an appropriate and aligned infrastructure of internal and external resources that are needed to achieved the defined vision, strategy and goals • Oversee key performance metrics development and tracking to achieve increased efficiency and effectiveness • Support various regulatory filings through testimony and work paper development and providing customer implications to the Regulatory team on various proposed decisions • Maintain a safe working environment and promptly and proactively resolve any safety concerns
Supervisory Responsibility	<ul style="list-style-type: none"> • Manage direct reports that may comprised of Managers, Supervisors, Principal and/or other job levels • Demonstrate leadership skills to attract, motivate and retain creative, high performance team members • Manage, coach, and develop team members to achieve goals through a motivating and rewarding work environment • Set goals for team members and evaluate their performance against goals • Define, structure, lead and direct work of team members
Education Minimum	<ul style="list-style-type: none"> • Bachelor's degree in business, marketing, research or statistics



Director Customer Insight and Strategy - Job Profile

Desired	<ul style="list-style-type: none"> • Master's degree in business administration or related discipline if less than 10 years in referenced discipline
License/ Certification Minimum	
Desired	
Experience Minimum	<ul style="list-style-type: none"> • 10+ years of experience in utilities, retail, financial services, consumer products or telecommunications • 7+ years experience in research and data analysis in the utility, financial services, telecommunications or consumer products sectors • 5+ years experience in customer strategy work in the utility, financial services, telecommunications or consumer products sectors • 5+ years experience managing high performing teams
Desired	<ul style="list-style-type: none"> • Strong experience in customer qualitative/quantitative research methods, tools and applications of statistical analyses • Proven track record in defining strategic objectives and setting metrics and performance measures • Extensive project management experience
Knowledge, Skills, Abilities Desired	<ul style="list-style-type: none"> • Passion for understanding customer perceptions, attitudes, needs and requirements • Be an expert and thought leader on the topic of customer mindsets, behaviors, attitudes, needs and expectations • Comfortable interfacing with higher levels of the organization when gathering and interpreting information, delivering results and making recommendations • Excellent oral and written communication and presentation skills • Strong strategic, creative, analytical and organizational skills • Successful track record building strong partnerships and working collaboratively with teams • Ability to work in a fast-paced, rapidly changing environment • Experienced developing, justifying and managing budgets greater than \$1 million • Strong understanding marketing and sales strategies • Detailed understanding of relational databases • Understanding of electric utility rates • Working knowledge of analysis methods such as regression modeling, factor analysis cluster analysis, conjoint design and analysis, discrete choice design and analysis • Working knowledge of multiple analytic and database tools such as SAS, SPSS, SQL • Strong ability to think strategically and execute tactically
Supplemental/ Other Minimum	<ul style="list-style-type: none"> • Work on site in a PG&E office environment • Travel required: approximately 20% of time will be traveling primarily throughout PG&E's service territory
Desired	<ul style="list-style-type: none"> • May act as an expert witness in a regulatory proceeding



Director Customer Insight and Strategy - Job Profile

Technical Competencies	Technical Competency Descriptions	Proficiency Level*
Advocacy and Persuasion	Effectively influences others to achieve understanding, acceptance, and commitment to act in support of ideas, programs or causes.	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.	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.	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.	Advanced
Metrics and KPI Tracking	Tracks Metrics and Key Performance Indicators to provide information on operational efficiency to others	Advanced
Facilitating Groups	Coordinates and leads small groups, creates a cooperative and productive environment in which to resolve problems or develop and implement plans.	Advanced
Managing Performance	Takes responsibility for improving the effectiveness of others; sets and aligns performance goals and expectations; provides performance feedback and follows through on the performance management process.	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.	Advanced
Client Satisfaction Metrics Knowledge	Uses appropriate measures to collect baseline information to determine how well requirements are met compared against established targets for gauging client satisfaction.	Advanced

*

-

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.