



## Customer Research Job Profile

<b>Job Family:</b> Customer Research <b>Department:</b> Customer Engagement <b>Function:</b> Customer Care <b>Reports to:</b> Manager/ Supervisor	<b>Last Updated:</b> May 2011
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<b>Job Family Summary</b>	Design, conduct, and manage customer research studies (qualitative and quantitative) focusing on all types of customers in order to measure and track customer satisfaction, develop insights from the research to identify and implement new service improvements. Also, assist with performance management efforts. <ul style="list-style-type: none"> <li>PROJECT MANAGEMENT: Manage research study from initial research request form from client to presenting research results ensuring that the project is completed in budget and on-time.</li> <li>RESEARCH DESIGN: Design research studies, which include defining product scope, research objectives, methodology, resource requirements, sampling plans, questionnaires, budget, and timing.</li> <li>DATA ANALYSIS: Analyze research data using various statistical tools to track research results, compare and contrast research data, identify changes or trends, uncover key insights and identify key drivers using multivariate/modeling techniques.</li> <li>RESEARCH REPORTING: Develop and communicate clear and concise and actionable research results for clients. Facilitate the incorporation of research findings into actionable improvement plans.</li> <li>VENDOR MANAGEMENT and CONTRACT MANAGEMENT: Write research Requests for Proposals, coordinate with Sourcing Department to develop vendor contracts, provide guidance and define vendor tasks and deliverables and manage vendor performance, timelines and project budgets.</li> </ul>
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Job Title	Cust Care Market Research Analyst, Associate	Cust Care Market Research Analyst	Cust Care Market Research Analyst, Senior	Cust Care Market Research Analyst, Expert	Cust Care Market Research Analyst, Principal
SAP Code	50419563	50419564	50422897	50419565	50419566
FLSA Status	Exempt	Exempt	Exempt	Exempt	Exempt
Distinguishing Characteristics	<ul style="list-style-type: none"> <li>Assist other Marketing Research Analysts in project management, research design, data analysis, and research reporting.</li> <li>Basic knowledge of customer research techniques.</li> <li>Organize and prepare information as directed.</li> <li>Works on routine assignments with limited scope and complexity.</li> </ul>	<ul style="list-style-type: none"> <li>Manage standard, routine research projects using standard types of questions and tools with limited supervision.</li> <li>Work with other Marketing Research Analysts to design research studies, analyze data and report research findings.</li> <li>Full understanding of customer research techniques.</li> <li>Monitors vendor performance, timelines and budgets</li> </ul>	<ul style="list-style-type: none"> <li>Manage complex research projects with limited supervision.</li> <li>Design research studies to achieve business objectives, design actionable questionnaires, analyze data, write clear and concise research reports and recommendations and tailor communications to specific audiences.</li> <li>Advanced knowledge of customer research techniques.</li> <li>Develop customer research testimony.</li> <li>Write Requests for Proposals and coordinate with Sourcing to develop vendor contracts.</li> <li>Manages vendor performance budgets and timelines.</li> <li>Presents findings and recommendations to functional</li> </ul>	<ul style="list-style-type: none"> <li>Manage complex research projects with limited supervision on only the most complex projects.</li> <li>Design research studies to achieve business objectives, design actionable questionnaires, analyze data, write clear and concise research reports and recommendations and tailor communications to specific audiences.</li> <li>Develop customer research testimony.</li> <li>Act as team lead and provides direction to less experienced employees.</li> <li>Broad expertise in customer research and applies this knowledge to a number of different issues.</li> <li>Write Requests for Proposals and</li> </ul>	<ul style="list-style-type: none"> <li>Manages very complex research projects with limited supervision.</li> <li>Act as a thought leader applying extensive customer research expertise in the development of strategy or resolution to complex issues.</li> <li>Develops customer research testimony and present expert testimony with the assistance of others.</li> <li>Manage major and complex cross functional customer research projects that have broad company implications.</li> <li>Act as team lead and provides direction to less experienced employees.</li> <li>Work with Senior Management to leverage customer research in decision making.</li> </ul>



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			management and to others within organization.	coordinate with Sourcing to develop vendor contracts. <ul style="list-style-type: none"> <li>Manages vendor performance budgets and timelines.</li> <li>Presents findings and recommendations to Directors and Managers, and occasionally presents findings and recommendations to Senior Management.</li> </ul>	<ul style="list-style-type: none"> <li>Write Requests for Proposals and coordinate with Sourcing to develop vendor contracts.</li> <li>Manages vendor performance budgets and timelines.</li> <li>Presents findings and recommendations to Senior Management.</li> </ul>
<b>Minimum Education and Experience Required</b>	BA/BS Degree in Marketing, Business, Statistics, Communications or other related field or equivalent work experience.  Typically less than 3 years of experience.	BA/BS Degree in Marketing, Business, Statistics, Communications or other related field or equivalent work experience.  Typically at least 3 years of relevant experience.  Familiarity with utilities, operations, energy efficiency and demand side management concepts and programs.	BA/BS Degree in Marketing, Business, Statistics, Communications or other related field or equivalent work experience. Masters Degree preferred  Typically at least 6 years of relevant experience.  Familiarity with utilities, operations, energy efficiency and demand side management concepts and programs.	BA/BS Degree in Marketing, Business, Statistics, Communications or other related field or equivalent work experience. Masters Degree preferred  Typically at least 8 years of relevant experience  Familiarity with utilities, operations, energy efficiency and demand side management concepts and programs.	BA/BS Degree in Marketing, Business, Statistics, Communications or other related field or equivalent work experience. Masters Degree preferred  Typically at least 10 years of relevant experience.  Familiarity with utilities, operations, energy efficiency and demand side management concepts and programs.
<b>License/Certification</b>	NA	NA	NA	NA	NA
<b>Knowledge, Skills, and Abilities</b>	<ul style="list-style-type: none"> <li>Skilled in SPSS/SAS statistical software, multivariate analysis/data mining</li> <li>Able to understand basic technical and business concepts</li> </ul>	<ul style="list-style-type: none"> <li>Skilled in SPSS/SAS statistical software, multivariate analysis/data mining</li> <li>Able to analyze and interpret research data and effectively communicate research findings.</li> </ul>	<ul style="list-style-type: none"> <li>Advanced skills in SPSS/SAS statistical software, multivariate analysis/data mining</li> <li>Strong organizational skills, ability to effectively prioritize work, meet deadlines and work on multiple tasks independently. Able to effectively manage multiple projects with demanding time constraints.</li> <li>Able to present research findings and make recommendations to stakeholders.</li> <li>Manage cross-functional research projects</li> </ul>	<ul style="list-style-type: none"> <li>Advanced skills in SPSS/SAS statistical software, multivariate analysis/data mining</li> <li>Able to solve complex problems through customer research recommendations.</li> <li>Work with Directors and Managers across functions to influence decisions.</li> </ul>	<ul style="list-style-type: none"> <li>Advanced skills in SPSS/SAS statistical software, multivariate analysis/data mining</li> <li>Able to present high complex data and findings to Sr. Management.</li> <li>Able to lead company research initiatives and develop concise research findings for Investor Relations, PG&amp;E Board and Sr. Management.</li> </ul>



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<b>Technical Competency</b>	<b>Technical Competency Description</b>	<b>Marketing Research Analyst, Associate</b>	<b>Marketing Research Analyst</b>	<b>Marketing Research Analyst, Senior</b>	<b>Marketing Research Analyst, Expert</b>	<b>Marketing Research Analyst, Principal</b>
<b>Trend Analysis</b>	Performs trend analysis on key performance indicators to monitor the operational performance of the business	NA	Novice	Proficient	Advanced	Master
<b>Metrics and KPI Tracking</b>	Tracks metrics and key performance indicators to provide information on operational efficiency to others.	NA	Novice	Proficient	Advanced	Master
<b>Market Research</b>	Gathers, evaluates, and analyzes external customer, industry, business information, and secondary research to identify solutions to business needs.	Novice	Proficient	Advanced	Master	Master
<b>Information Analysis</b>	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
<b>Survey Design and Analysis</b>	Demonstrates knowledge on established methods and procedures concerning all phases needed for conducting the survey: methodological and sample design, logistics involved in the management of the field force and the distribution and receipt of survey questionnaires and forms, and procedures for data collection, processing and analysis.	Novice	Proficient	Advanced	Master	Master
<b>Project Management</b>	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
<b>Research and Analysis</b>	Monitors, gathers and analyzes information, determines potential impacts, communicates findings and recommends actions to improve satisfaction and/or business operations.	Novice	Proficient	Advanced	Master	Master
<b>Filing and Reporting</b>	Prepares applications/filings, testimony, exhibits, models, work papers and discovery responses for submittal in regulatory proceedings.	NA	NA	Proficient	Advanced	Master
<b>Contract Development</b>	Develops and writes contracts through negotiation and/or a competitive bid process	NA	NA	Proficient	Advance	Master
<b>Vendor Management</b>	Monitors vendor agreements, manages vendor and provides direction regarding project scope, deliverables, budget and timelines.	NA	Novice	Proficient	Advanced	Master
<b>Business &amp; Financial Acumen</b>	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
<b>Written Communication</b>	Demonstrates skill in communicating information and ideas in writing so others will understand.	Proficient	Advanced	Master	Master	Master
<b>Oral Communication</b>	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
<b>Proactive Customer Service</b>	Anticipates, identifies and mitigates potential customer issues before they escalate into a significant problem.	NA	Novice	Proficient	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.