



## SMB Strategy - Job Profile Matrix

<b>Line of Business:</b> Customer Care / Customer Service <b>Job Family:</b> SMB Strategy <b>Reports to (Job Title):</b> Manager, ES&S	<b>Effective Date of Job Profile:</b> October, 2015 <b>Last Updated:</b> Oct 2015
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<b>Job Family Summary</b>	<p>PG&amp;E's Small and Medium Business (SMB) group within the Energy Solutions &amp; Service (ES&amp;S) organization is responsible for managing PG&amp;E's relationships with its customers and communities throughout the PG&amp;E territory. The SMB ES&amp;S organization is focused on providing customer service to assigned segments by educating and inspiring the growth of SMB customers to improve and enhance their experience with PG&amp;E. Specific work includes the promotion of energy efficiency, demand response, building awareness around PG&amp;E tools, resources, and local community activities.</p> <p>The SMB Strategy job family is responsible for providing strategic direction and execution for PG&amp;E's small, medium and large business customer experience plans through various channel or digital options in conjunction with the SMB Leadership Team.</p>	
<b>Job Title</b>	<b>SMB Channel Strategy Specialist, Principal</b>	<b>SMB Digital Strategy Specialist, Principal</b>
<b>Position Title</b>	SMB Channel Strategy, Principal	SMB Digital Strategy, Principal
<b>PGE Job Level</b>	Principal	Principal
<b>SAP Job Code</b>	51810920	51810921
<b>Job Responsibilities</b>	<ul style="list-style-type: none"> <li>Serves as a subject matter expert and point of contact for Channel Strategies amongst key internal partners.</li> <li>Leads and participates in SMB-related tools and resources meetings.</li> <li>Sets up short- and long-term SMB Channel Strategies while managing budget and results.</li> <li>Presents reports on progress for the SMB Leadership Team.</li> <li>Creates and manages the Affinity Programs (external organizations with resources to serve SMB customers through various outreach channels).</li> <li>Partners with PG&amp;E Sourcing to create Statement of Work for each program.</li> <li>Plans, executes, and meets regularly with Affinity Programs to manage cost-effectiveness, customer satisfaction, and accountability for results. Ensures Affinity Program is in compliance with SOW agreements / contract fulfillments.</li> <li>Develops and executes customized integrated outreach and education campaigns educating SMB customers on existing resources such as enhanced digital options and energy efficiency.</li> <li>Collects feedback and input from field sources to maximize channel partner results.</li> <li>Collaborates and partners with SMB leadership and leads to maximize SMB efforts and opportunities through thoughtful coordination.</li> <li>Responsible for strategic planning and scheduling of SMB-related campaigns for key players.</li> <li>Integrates resources to closely align with Marketing SMB Plan, CES SMB</li> </ul>	<ul style="list-style-type: none"> <li>Serves as a subject matter expert on SMB Digital Strategies amongst Customer Care Partners with digital tools, support, data analytics, and trends (website online service tools, SMB website content, My Energy Enhancements, etc.)</li> <li>Sets up short and long-term SMB Digital Strategies and manages budget and results</li> <li>Builds awareness and communicates regularly with SMB Organization on available SMB Digital Options</li> <li>Engages and manages ongoing relationships with internal key partners and key external agencies</li> <li>Presents reports for progress with SMB Leadership Team</li> <li>Serves as the liaison to the SMB Digital Strategy with other internal partners, leading the SMB channel in the future development of tools, content, and SMB website design.</li> <li>Markets new digital projects and measures results.</li> <li>Manages expectations and schedules digital projects appropriately within IT's timeline.</li> <li>Partners with enterprise-wide Digital Strategy on all SMB-related projects.</li> <li>Manages and maintains digital contracts with external agencies; attends regular check in meetings, provides internal insights and resources, shares progress with SMB Leadership Team, etc.</li> <li>Partners with similar businesses and collaborates to share digital experiences for both successes and opportunities.</li> </ul>



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	<p>Incentive Programs, SMB Digital Opportunities, and integrates resources accordingly.</p> <ul style="list-style-type: none"> <li>Ensures continuous improvement from internal and external feedback along with data and metrics review.</li> <li>Accountable for the planning, implementation, and tracking for all SMB Channel campaigns and projects.</li> </ul>	<ul style="list-style-type: none"> <li>Attends workshops, events, conferences, classes / courses and other forums for continuous training and knowledge building on digital strategies pertaining to increasing the level of SMB customer service.</li> <li>Accountable for the planning, implementation, and tracking for all SMB Digital projects, tools, resources, and strategies.</li> <li>Conducts navigation and site effectiveness analysis and recommends enhancements, solutions, and improvements through internal and external experience feedback.</li> </ul>
<b>Supervisory Responsibility</b>		
<b>Education Minimum</b>	<ul style="list-style-type: none"> <li>BS or BA degree in a business discipline, engineering, operations, finance, marketing or related discipline</li> </ul>	<ul style="list-style-type: none"> <li>BS or BA degree in a business discipline, engineering, operations, finance, marketing or related discipline</li> </ul>
<b>Desired</b>	<ul style="list-style-type: none"> <li>MBA or MS in business discipline</li> </ul>	<ul style="list-style-type: none"> <li>MBA or MS in business discipline</li> </ul>
<b>License/ Certification Minimum</b>		
<b>Desired</b>		
<b>Experience Minimum</b>	<ul style="list-style-type: none"> <li>Requires a minimum of eight years of relevant experience which may include customer service, customer outreach, consumer sales, account management, communications, marketing, regulatory relations, or program management</li> </ul>	<ul style="list-style-type: none"> <li>Requires a minimum of eight years of relevant experience which may include customer service, customer outreach, consumer sales, account management, communications, marketing, regulatory relations, or digital experience</li> </ul>
<b>Desired</b>	<ul style="list-style-type: none"> <li>SMB customer experience with sales, service, or support</li> <li>Energy efficiency or other sustainability-related fields</li> <li>Stakeholder engagement or relationship management</li> <li>CPUC regulatory compliance</li> <li>Experience in multi-channel customer engagement and experience strategy development</li> <li>Experience of cross vertical application of customer relationship programs</li> <li>Experience with CRM systems and analytics</li> <li>Experience in working in cross-functional teams</li> </ul>	<ul style="list-style-type: none"> <li>Past experience in online digital strategies (e.g., mobile, social, web, email, direct, etc.)</li> <li>Experience in multi-channel customer engagement and experience strategy development</li> <li>Experience with cross vertical application of customer relationship programs</li> <li>Experience with Salesforce CRM systems and analytics</li> <li>Experience in working in cross-functional teams</li> </ul>
<b>Knowledge, Skills, Abilities Desired</b>	<ul style="list-style-type: none"> <li>Ability to quickly develop deep knowledge of several key Customer Care business functions and become familiar with PG&amp;E's overall SMB Strategy to appropriately plan out the SMB channel strategy functions</li> <li>Strong communication skills to interact regularly with subject matter experts, company attorneys, and senior leadership at the director, senior director and vice president levels</li> <li>Reputation and demonstrated ability to work well across several lines of business</li> <li>Ability to think strategically and proactively, anticipate future trends, and</li> </ul>	<ul style="list-style-type: none"> <li>Ability to quickly develop deep knowledge of several key Customer Care business functions and become familiar with PG&amp;E's overall SMB Strategy to appropriately plan out the SMB digital strategy functions</li> <li>Strong communication skills to interact regularly with subject matter experts, company attorneys, and senior leadership at the director, senior director and vice president levels</li> <li>Reputation and demonstrated ability to work well across several lines of business</li> <li>Ability to think strategically and proactively, anticipate future trends, and</li> </ul>



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	<p>interpret meanings and implications</p> <ul style="list-style-type: none"> <li>• Combination of strong analytical and communications skills. Must be able to communicate at all levels of leadership, subject matter experts and internal and external business partners</li> <li>• Ability to lead cross-functional teams</li> <li>• Must be able to work independently, yet able to operate effectively as a team player</li> <li>• Must be self-motivated</li> <li>• Deep knowledge of industry, relevant line of businesses</li> <li>• Excellent analytical and project management skills</li> <li>• Excellent verbal and written communications skills</li> <li>• Ability to analyze regulatory documents and understand implications to the company</li> </ul>	<p>interpret meanings and implications</p> <ul style="list-style-type: none"> <li>• Combination of strong analytical and communications skills. Must be able to communicate at all levels of leadership, subject matter experts and internal and external business partners</li> <li>• Ability to lead cross-functional teams</li> <li>• Must be able to work independently, yet able to operate effectively as a team player</li> <li>• Must be self-motivated</li> <li>• Deep knowledge of industry, relevant line of businesses</li> <li>• Excellent analytical and project management skills</li> <li>• Excellent verbal and written communications skills</li> <li>• Ability to analyze regulatory documents and understand implications to the company</li> </ul>
<b>Supplemental/ Other Minimum</b>		
<b>Desired</b>	<ul style="list-style-type: none"> <li>• Travel Requirements: 10-15% travel time required</li> </ul>	<ul style="list-style-type: none"> <li>• Travel Requirements: 10-15% travel time required</li> </ul>