



Proposal to Transition to an In-House Contact Center

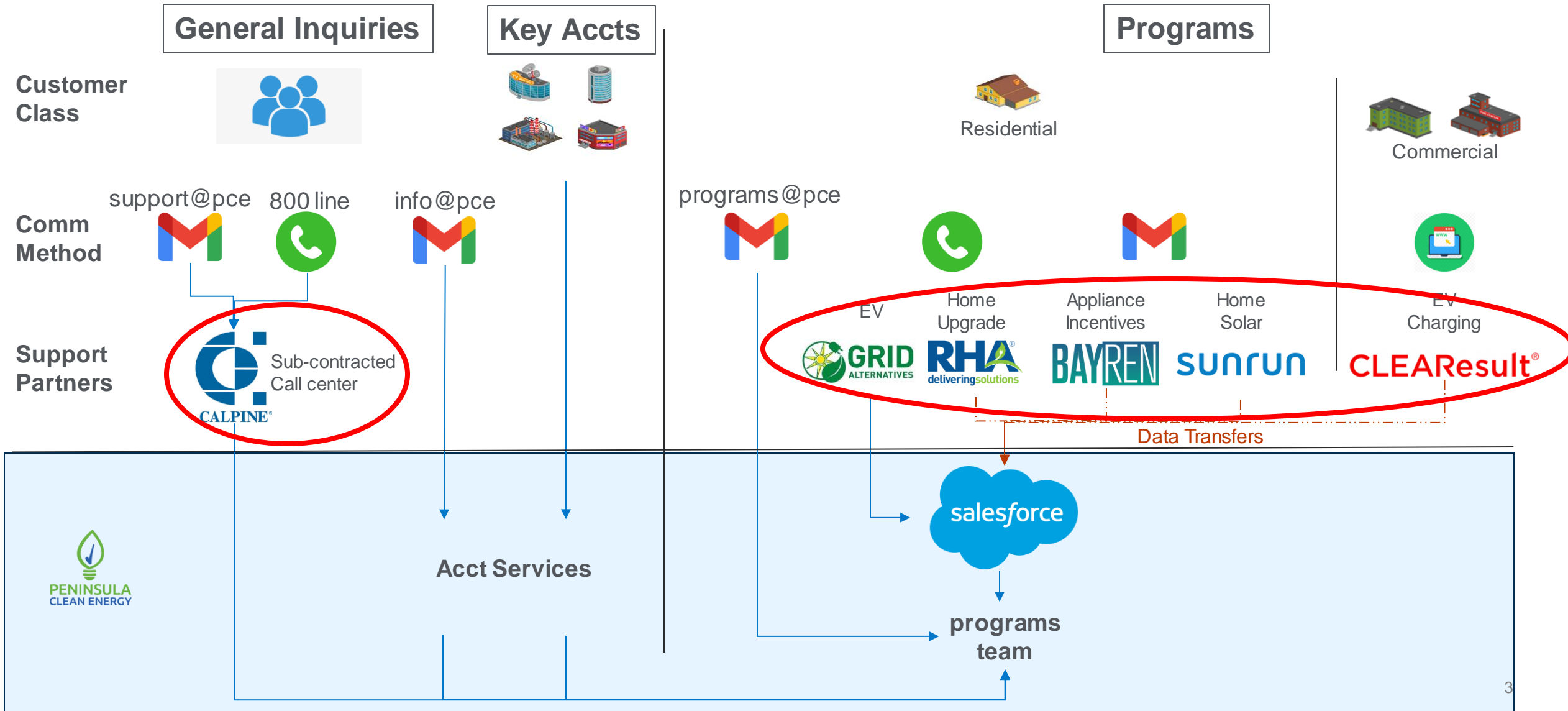
Leslie Brown Director of Account Services
Presented to Community Advisory Committee
May 9th, 2024



Agenda

- Current Contact Center Solution
- New Contact Center Solution
- Peer Agency Analysis
- Implementation Timeline
- Recommendation

Problem: Current Customer Support Architecture

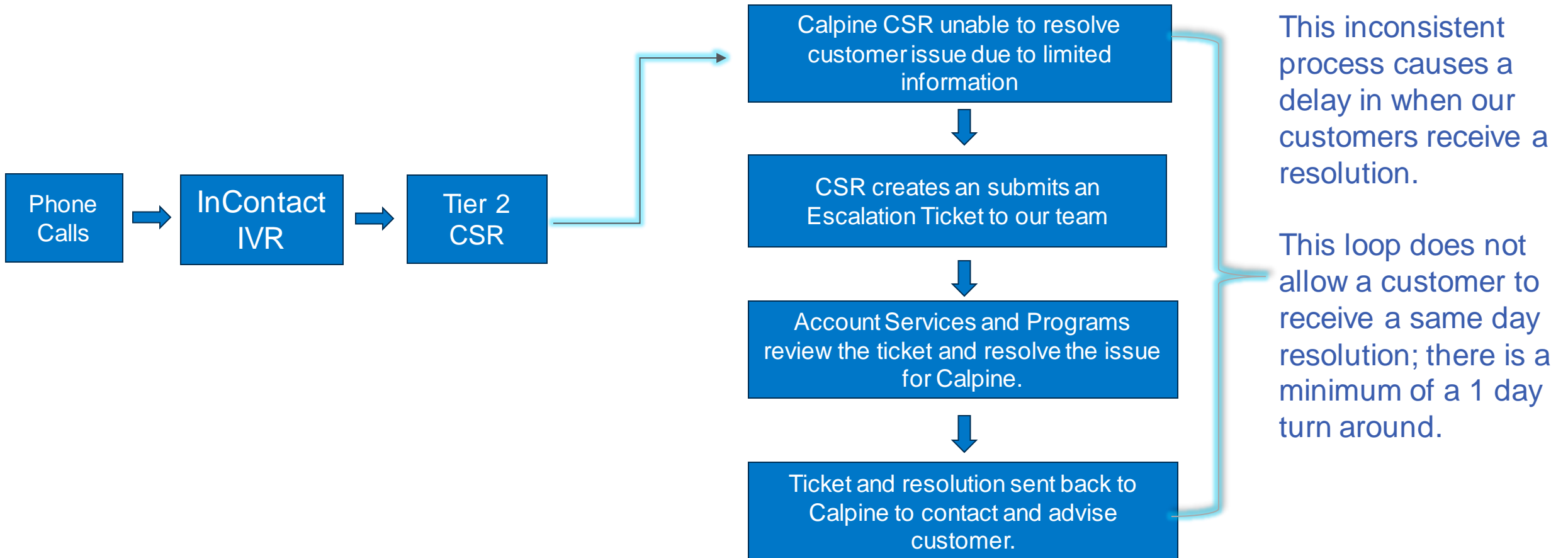


Current Service Ecosystem

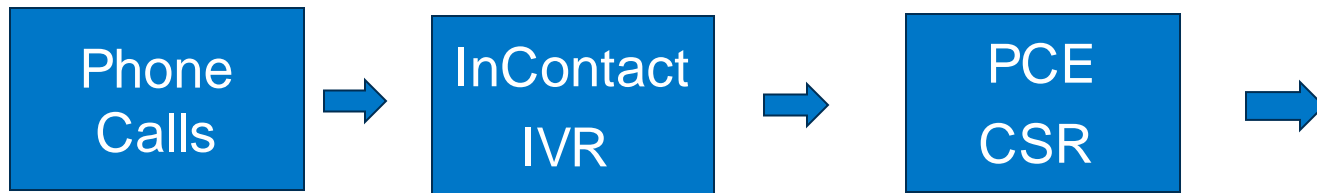


- Calpine/ECC CSRs are the first line of contact for PCE customers.
- ECC representatives are unable to provide in-depth explanations beyond the information available on our website and scripted talking points.
- PCE does not have immediate feedback from customers.
- PCE is not allowed to have direct contact with Calpine agents.
- Quality Assurance concerns & issues.

Current Service Escalation Ecosystem

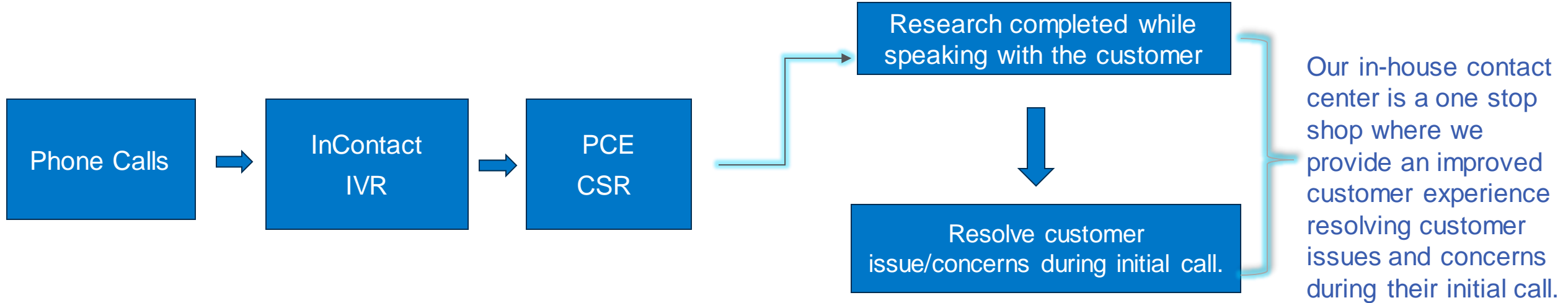


New In-House Contact Center Service Ecosystem



- PCE is now in direct contact with our customers. This instantly creates a cohesiveness creating transparency and efficiency for all PCE Customers.
- Immediate enhanced and seamless experience for PCE Customers.
- Improved quality control and immediate feedback as our customers can ask questions and voice concerns real-time (VOC).

New Contact Center Service Escalation Ecosystem



Example Training Topics

- **History of Peninsula Clean Energy**
 - Who we are and why we were founded
 - Department and Roles
- **How Solar Energy Works**
 - Renewable Energy Fundamentals
 - Net Energy Metering (NEM)
 - Solar Billing Plan
- **Billing**
 - How to read and Understand your PG&E Bill
 - FAQs
 - Rates and Billing
- **Rate Analysis and Optimization**
 - Ensuring customers are on the best rates
- **Opt Out Retention**
- **PCE Programs**
 - Program Qualifications/Eligibility
 - Application/Rebate status
 - Refer and schedule concierge service follow up as needed
- **General Energy Efficiency**
 - Advise customers on how to reduce overall energy use to lower bills
 - Help educate customers on the value of shifting load to off-peak hours
- **Commonly Used PCE Acronyms**
- **Contact Center Etiquette**
 - Phrases to use and phrases to avoid
 - How to de-escalate an upset customer

Peer Agencies: Internal Call Center Transition



- **MCE Experience**
 - Improved call retention
 - Increased Spanish call volume
 - Better/faster service response times (SLA)



- **CPSF Experience**
 - Improved customer experience
 - Direct communication between Supervisors and CSRs



- **Sonoma Experience**
 - Building rapport with their customers
 - Improved quality control

Proposed Timeline

May 23, 2024

Board approval to move forward with in-house contact center transition

Jul 1, 2024

Convert from contracted Contact Center Manager to regular employee status

Aug 2024

Recruit and hire a team of 3 customer service representatives.

Sept - Oct 2024

Training of contact center representatives

Nov 2024

Transfer calls from Calpine to the new in-house contact center having our new representatives handle all live calls.

May 2024

November 2024

Staff Recommendation

Staff Recommends supporting the plan to transition to an in-house contact center solution to enhance overall customer experience and support PCE's decarbonization program goals.