



EUCI presents...

# Call Center Management for Utilities

Structure Your Call Center to Achieve Maximum Customer Satisfaction

**SEPTEMBER 8-9, 2003**

**PRE-CONFERENCE**

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**SUCCESSFULLY TRANSITION  
YOUR CALL CENTER  
TO A SOLUTION-SALES MODEL**

**SEPTEMBER 8, 2003**

**POST-CONFERENCE**

**MONITORING FOR  
THE NEW MILLENNIUM –  
HOW TO PROPERLY MONITOR  
UTILITY CALL CENTERS WITH CALIBRATION**

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**SEPTEMBER 10, 2003**

**Hilton Garden Inn Downtown North • Chicago, IL**

# Call Center Management for Utilities

## Structure Your Call Center to Achieve Maximum Customer Satisfaction

SEPTEMBER 8-9, 2003

### Overview

Customer satisfaction is top on the list for utility executives these days. There is pressure from regulatory commissions and consumers to alleviate call center hold times and meet service guarantees while at the same time maintaining – or lowering – rates.

EUCI's Conference on Call Center Management for Utilities is designed to help guide energy companies through the three main areas key to call center operations: people, process and technology. How can you achieve the illusive customer satisfaction? Hear from 13 presentations and 10 case studies how your peers have tackled this challenge and won.

Attendees of the conference will learn how to:

- **Reduce** agent training time by breaking staff into specialized teams
- **Achieve** balance in forecasting and scheduling staff by outsourcing calls
- **Initiate** a successful culture change in your call center with a sales approach that increases customer satisfaction
- **Provide** high quality service at a low cost
- **Use** customer feedback to identify key drivers of customer satisfaction
- **Create** a best-in-class quality program to exceed your customers' expectations
- **Implement** a fully integrated solution sales campaign from the call center
- **Gain** customer acceptance of automated technologies in your call center

And much more!

## MAIN CONFERENCE

### **MONDAY, SEPTEMBER 8, 2003**

**Registration: 12:30-1:30 p.m.**

*Conference Chairperson: Barbara Burke, Principal,  
Barbara Burke & Associates*

**SESSION I: 1:30 – 3:00 P.M.  
INCREASE CUSTOMER SATISFACTION  
BY IMPLEMENTING TARGETED STAFFING  
STRATEGIES IN YOUR CALL CENTER**

**Case Study**

#### **“Reduce Agent Training Time and Expense by Breaking Your Call Center into Specialized Teams”**

When turnover is an expensive and morale busting factor in your call center, it is time to take a look at restructuring. Wisconsin Public Service Corporation found that by breaking into smaller, specialized teams, it reduced its agent training time and its training investment went further. Hear how this three-pronged approach has reduced training time from 10 weeks down to seven, and improved agent retention levels.

- Use of EEI pre-employment testing to screen potential agents
- Specialization with credit, new service application and general calls handled by separate groups
- Advanced skills-based routing to make the specialization work

*Larry Matzke, New Service Installation Leader,  
Wisconsin Public Service Corporation*

**Case Study**

#### **“Achieve Balance in Forecasting and Scheduling Staff for Your Call Center by Outsourcing Collection Calls”**

With several consolidated call centers, National Grid had experienced growth that required creative solutions and union agreement. By initiating a program to outsource certain types of calls, it has achieved balance in its forecasting and scheduling like never before. Learn how management made the decision to move forward with outsourcing, and how the results have been since its inception.

*Marilyn Flint-Jacques, Director, Call Centers,  
National Grid USA*

**3:00 – 3:30 p.m. Break**

**Case Study**

#### **“Initiate a Culture Change in Your Call Center that Encourages Up-Selling and Results in Higher Customer Satisfaction and Higher Revenues”**

It's been shown in customer satisfaction surveys – the greater number of products or services a customer has with its utility, the higher their satisfaction. Colorado Springs Utilities developed a package of services to provide its customers, initiated a successful culture change within its call center, and have increased revenues and customer satisfaction as a result. Learn how to initiate such a program in your utility.

*Dawn Roth, Manager, Call Center,  
Colorado Springs Utilities*

**“46 Lessons Learned in Changing the Culture of a Call Center”**  
Change is inevitable. You can facilitate it, attempt to lead it but

it is almost impossible to manage it. Face it with grace, and gain insights into lessons learned by utility call centers on how to best approach changing the culture of your call center.

*Barbara Burke, Principal, Barbara Burke & Associates*

### 5:00 p.m. Close of Day One

### 5:00 – 6:00 p.m. Cocktail Networking Reception

## **TUESDAY, SEPTEMBER 9, 2003**

### 7:45 a.m. Continental Breakfast

#### **SESSION II: 8:30 A.M. – 2:00 P.M. STREAMLINE CALL CENTER PROCESSES TO ELEVATE SERVICE LEVELS**

#### **Case Study** “Create a Best in Class Quality Program to Exceed Your Customers’ Expectations”

Salt River Project was recently rated “Best in the West” by JD Power & Associates for customer satisfaction and #1 in the nation for customer service among utilities. This success is attributed to their strong commitment to customer satisfaction. SRP has implemented many strategies to effectively create a best in class call center. Come hear the keys to their success:

- Survey your customers
- Hire and train customer focused CSRs
- Integrate customer expectations into your quality program
- Offer rewards and recognition

*Christy Kerekes and Amy Machajewski,  
Quality Assurance Specialists, SRP*

#### **Case Study** “Provide High Quality Service at a Low Cost – It’s Not an Either-Or”

Cinergy has a tradition of operational excellence, i.e. low cost, and high customer satisfaction. Hear how it’s been able to balance these seemingly competing goals including its results to-date and plans for the future. This presentation will discuss the key levers Cinergy’s Call Center Services is focusing on in an effort to move from “Good to Great”.

*Larry Eiser, Manager, Call Center Services, Cinergy Corp.*

### 10:00 – 10:30 a.m. Break

#### **“Use Customer Feedback to Identify Key Drivers of Customer Satisfaction”**

Hear the results from a transactional satisfaction survey by call. This presentation presents feedback for companies on what their customers are saying is good about each transaction and what needs improvement. It will discuss key drivers for customer satisfaction.

*Filomena Gogel, Managing Director, E Source Utility  
Customer Service, Platts Research & Consulting*

#### **Case Study** “Implement a Fully Integrated Solution Sales Campaign From the Call Center”

Using a utility’s call center as a marketing channel can pay huge dividends. Learn how the Omaha Public Power District’s utilization of “campaigns” in its call center directly

led to an increase in sales for several different products that the company offers. This presentation will discuss the key elements in establishing and implementing a successful campaign. Highlights include:

- Develop a creative campaign
- Implement incentives and rewards
- Recognize top performers
- Track sales
- Maintain morale for future campaigns
- Continue sales in the absence of a campaign

*Tony Walde, Product Manager, Omaha Public Power District*

### 12:00 – 1:15 p.m Group Luncheon

**Case Study** “Apply Six Sigma to Quality Assurance Monitoring”  
How can a utility rise to the challenge to improve its customer satisfaction? Ameren chose to apply its expertise in Six Sigma methodology, generally used by their engineers, to re-evaluate the key ingredients necessary for a quality customer service call. By marrying the objective standards of the methodology with the softer, more subjective nuances of customer service, Ameren has raised its call center monitoring standards. This session highlights:

- How the methodology led to a focus on monitoring
- New recommendations on how calls are monitored
- Changing the standards by which calls are graded

*Craig Boland, Supervising Engineer, Business Line  
Performance and Six Sigma Black Belt, Ameren*

*Anne Nicolas, Customer Service Supervisor,  
Customer Relations, Ameren*

#### **SESSION III: 2:00 – 4:30 P.M. EXPLORE NEW CONTACT CHANNELS AND ADVANCED TECHNOLOGIES TO MEET CUSTOMER EXPECTATIONS**

#### **“Gain Customer Acceptance of Automated Technologies in Your Call Center”**

Chartwell Inc. contacted 100 customer service center directors and executives to find out what the primary challenges that are facing utilities in the area of customer service. 22% of respondents said it was balancing service levels and costs. Hear the research findings concerning technology advancements in utility call centers and customer service from Chartwell. This presentation will highlight where the industry has been, where it is now and where it appears to be headed.

*Dennis Smith, Director of Editorial & Research,  
Chartwell Inc.*

### 2:45 – 3:00 p.m. Break

**Case Study** “NSTAR Explores New Galaxy Using CRM Technology”  
This presentation will focus on Call Center operations at NSTAR Electric and Gas located in Westwood, Massachusetts. Specific topics include how the introduction of a separate “Operations Group” within the Call Center as well as the use of skill-based routing have increased efficiencies within the department. Hear about the new Galaxy system, a Customer Relationship Management system (CRM) that will

be implemented late this summer. Reasons for choosing to implement a CRM system as well as the benefits to be realized by NSTAR will be discussed.

*Harry Ruscetta, Call Center Manager, NSTAR*



### “Outsourced VRU Services for Improving Customer Satisfaction and Maintaining Loads”

After a devastating January 1999 storm and in response to demands to improve customer response, Potomac Electric Power (PEPCO) instituted the High Volume Call Answering (HVCA) services of Twenty First Century Communications, Inc. (TFCC) for outage reporting. The way in which PEPCO applied HVCA significantly improved customer satisfaction and helped PEPCO win the J.D. Powers 2000 Customer Satisfaction Award. PEPCO remains on the cutting edge of HVCA technology and in 2001 used HVCA's outdial technology to manage load for several days. PEPCO now uses the HVCA technology to trigger messages created at time of use to any of its customers. This presentation details how PEPCO uses HVCA for outage reporting and to manage load on selected circuits and how utilities use HVCA's message “on the fly” capability for:

- Notification of disconnects for non-payment

- “Bad dog” calls prior to meter reading
- Emergency crew call in
- Disaster recovery
- Callback for verification of service restoration
- Monday morning overflow

*Alberto M. Osterling, General Supervisor –  
Project Development, Customer Operations Division,  
Potomac Electric Power*

*Jim Kennedy, President,  
Twenty First Century Communications*



### “Use Internet Self Service and Speech Recognition Technologies in the Call Center”

Hear from the local Chicago utility how it has implemented a web-based customer self- service system that interfaces real-time with its legacy system. Also learn about Commonwealth Edison's upcoming implementation of speech recognition technology to enhance its customer satisfaction.

*Lisa Olmstead, Call Center Technology Administrator,  
Commonwealth Edison*

**5:15 Close of Conference**

## PRE-CONFERENCE WORKSHOP #1

# SUCCESSFULLY TRANSITION YOUR CALL CENTER TO A SOLUTION-SALES MODEL

MONDAY, SEPTEMBER 8, 2003

**Registration and Coffee: 7:20 a.m. – 8:00 a.m.**

**Workshop Timing: 8:00 a.m. – 12:00 Noon**

**There will be a 30-minute networking and refreshment break at 10:00 am**

Call Centers don't just take orders anymore. The role of the utility Call Center has expanded to include multiple, complex functions, including selling solutions. Today's front line representatives are being asked to offer everything from budget billing to Internet service. Service reps are also charged with proactively educating customers about new web-based self-service options. The dual requirement of meeting service level goals, increasing customer satisfaction levels and generating revenue from non-traditional products can be a daunting challenge for utility executives and call center managers. This interactive workshop provides you with the tools and proven techniques you need to set up and manage a pro-active service culture that gets results. Prevent costly mistakes and demoralizing false starts by learning from the experiences of other utility service centers. Return to your office fully equipped to make a successful shift from transactions to solutions.

- Why utilities are moving to proactive problems solving: 4 motivators

- Four developmental stages of a solution-sales culture
- Latest data on correlating solutions with customer satisfaction
- Four simple ways to generate a solution or sale on an inbound service call
- In depth case studies: Results and lessons learned by 4 utilities of varying sizes
- 10 most common and costly mistakes utilities make
- Six keys to long-term success

### -ABOUT YOUR WORKSHOP LEADER-

Since 1986, **Barbara Burke**, Principal of **Barbara Burke & Associates, Inc.** has been providing America's public power, investor-owned and co-ops with consulting and customer service training. She specializes in guiding call centers and business offices to successfully transition from a traditional, transaction-based service model to one that is pro-active and solutions oriented. Her client list includes: Atmos Energy, Connexus Energy, Washington Gas & Light, Idaho Power, KN Energy Services, Omaha Public Power, Dakota Electric, Northwestern Energy, Lincoln Electric and Dawson Public Power.

## POST-CONFERENCE WORKSHOP #2

# MONITORING FOR THE NEW MILLENNIUM – HOW TO PROPERLY MONITOR UTILITY CALL CENTERS WITH CALIBRATION

WEDNESDAY, SEPTEMBER 10, 2003

**Registration and Coffee: 7:20 a.m. – 8:00 a.m.**

**Workshop Timing: 8:00 a.m. – 12:00 Noon**

**There will be a 30-minute networking and refreshment break at 10:00 am**

A utility's success is dependant on customer loyalty and repeat business. That is why it so important for employees on the front lines of a business to connect with customers and prospects. Good customer service is more than the speed of answering calls. It is the manner and tone used when speaking to customers, combined with product knowledge and empathy.

So, how do managers know if their customers are getting top-notch customer service? One of the best ways for managers to keep their fingers on the pulse of business is through monitoring. Companies can analyze and track the effectiveness of their call centers' programs through monitoring inbound and outbound phone calls, email and correspondence. The next step is to calibrate what you and others hear and see. What will you use for feedback and coaching. Is everyone "on the same page?"

This interactive workshop will discuss how a good monitoring program allows you to track both the effectiveness of your representatives, and what your customers are saying. The workshop will help you to:

- Select the best methods of monitoring for your call center.
- Implement a monitoring program
- Define calibration

- Conduct a calibration session
- Establish ground rules for calibration to be successful

When you leave this session, attendees will:

- Understand if the tools available to your managers and representatives are effective and if they're being used appropriately
- Know how to use your monitoring results to enhance your customer service program
- Understand how to focus your monitoring on the customer, not just on the representative

### -ABOUT YOUR WORKSHOP LEADER-

**Marcia Hicks** joined **Kowal Associates** in 1994 as a Senior Consultant. She spent over 20 years with AT&T and New England Telephone in Customer Service, Project Management and Data Center assignments. At Kowal Associates, Marcia has worked extensively with a Fortune 50 company to design and implement inbound customer service, consumer affairs and monitoring programs. She has performed numerous call center audits providing clients and providers with feedback on how to better manage their call center (both outsourced and in-house). Marcia's special expertise is operations, training and quality assurance including staffing, monitoring, workforce management and process improvements.

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