



SMB Strategy - Job Profile Matrix

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



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



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