

Summary

The Energy Accounts Specialist works under direction of the Manager of Energy Accounts Services and has responsibility for a wide range of account related issues, including customer service, business development, and energy data analytics. This position will work with Central Coast Community Energy's (3CE) major commercial and industrial accounts, data management and call center vendor, and Pacific Gas and Electric Company (PG&E), Southern California Edison (SCE) to ensure customer satisfaction and retention. The Energy Accounts Specialist will also be responsible for analyzing customer data and addressing systemic customer relationship issues as they arise and developing/offering new programs of benefit as they are developed. The Energy Accounts Specialist shall maintain positive relationships with all 3CE customers and assist with event outreach and presentations as may be necessary from time to time.

Supervision Received/Exercised

This position reports to the Manager of Energy Accounts Services and no supervision is exercised.

Essential Duties and Responsibilities (including but not limited to):

- Primary point of contact for major commercial accounts in the Monterey Bay region
- Support 3CE's customer data analytics and customer resource management platform for ensure 3CE staff has strong and reliable analytics for customer engagement
- Interface with 3CE's data management and call center provider and PG&E/SCE representatives to ensure consistent and positive interaction with customers.
- Support development and integration of 3CE and PG&E aimed at commercial accounts including but not limited to:
 - Net Energy Metering
 - Bill design and rate structures
 - Balanced Payment Plan
 - Account-level opt outs
- Identify, advocate for and implement solutions to deficiencies in the service PG&E/SCE or others provide to 3CE's customers.
- Manage major accounts, including large commercial, industrial, agricultural and public sector customers.
- Identify and implement solutions to increase customer retention and customer satisfaction with 3CE services and tariffs.
- Identify and resolve high-level customer billing issues.
- Provide expertise on Time of Use rates and demand response options and services.
- Maintain rate models for cost comparison and other analytical purposes.
- Conduct customer follow-up as needed, including providing cost comparisons for major accounts.
- Maintain 3CE's business relationships with key PG&E and data management vendor representatives.

- Provide data analysis support as needed to develop tailored programs and rates for key account customers.
- Provide support and guidance for Finance, Power Supply, Energy Programs and Regulatory/Legislative departments on customer analytics, account or program-related issues.
- Track and ensure customer inquiries and issues are resolved in a timely manner by 3CE staff or partner organizations.
- Identify and execute ad hoc solutions to customer switching and/or billing issues
- Performs related duties and responsibilities as required.

Minimum Qualifications

To perform this job successfully, an individual must be able to perform each essential duty satisfactorily. The requirements listed below are representative of the knowledge, skill, and/or ability required.

Knowledge of:

- Electric utility rules, tariffs, bill design and terminology.
- Knowledge of account services, customer service, and program management.
- Advanced principles of customer service.
- Principles and practices of communication.
- CRM, Tableau, Python, Salesforce, Microsoft Office Suite (Word, Excel, and PowerPoint) and Adobe Acrobat.

Ability to:

- Prepare and present clear and comprehensive correspondence, reports, presentations, and proposals to a diverse audience.
- Perform rate analysis with multiple rate classes, tiers and billing components
- Use customer relationship management software and strategic use of CRM reports and data for program design and problem solving
- Interact effectively with commercial, industrial and agricultural customers, local community groups and organizations
- Manage projects and time efficiently; adept at multi-tasking in a fast-paced environment
- Be self-motivated with a strong drive to retain and build customer base, track and resolve issues quickly and effectively
- Take responsibility and work independently, as well as coordinate team efforts
- Demonstrate patience, tact and courtesy with a variety of customers and personalities
- Be detail oriented and manage multiple projects in a fast-paced environment.
- Deal tactfully and maintain effective working and diplomatic relations with various levels of staff, the public, civic organizations, and representatives from governmental, industry, media, and other agencies.
- Demonstrate sensitivity to and respect for the rights of individuals and differences in people's ethnic and cultural heritage, attitudes, beliefs, goals, and interests.
- Promote teamwork, a positive work environment, and collaborative problem solving.
- Work effectively under stressful situations involving tight deadlines.
- Use tact, initiative, prudence, and independent judgment within general policy, procedural, and legal guidelines.

Experience/Education

Any combination of education and experience that would provide the knowledge and abilities listed. A typical way to obtain the require qualifications would be:

Education and experience equivalent to a bachelor’s degree from an accredited college or university in science, technology, environmental planning, business, communications, or a related field.

AND

A minimum of two (2) years of progressively responsible in customer service, energy industry operations and/or commercial account management, or closely related field.

A Master’s degree in related field may be substituted for work experience.

Licenses/Certificates:

Possession and continued maintenance of a valid class C California driver’s license, automobile insurance and a safe driving record.

Working Conditions

The physical demands described here are representative of those required for the position. Position requires sitting, walking, standing, bending, and twisting in the performance of daily activities. The position requires hand manipulation and repetitive hand movement and fine coordination in using a computer keyboard. The position requires near and far vision in reading reports and use of a computer. Acute hearing is required in supporting meetings and providing phone and in-person customer service. The position occasionally requires lifting and/or moving objects up to 40 pounds. 3CE will make reasonable accommodation of the known physical or mental limitations of a qualified application with a disability upon request.

Date Revised: 10/06/2020

FLSA Status: Exempt

I have read this job description (or had it read to me) and I fully understand all my job duties and responsibilities. I am able to perform the duties and responsibilities as outlined, with or without reasonable accommodation. I understand that my job duties and responsibilities may change on a temporary or regular basis according to the needs of my department and if so, I will be required to perform such additional duties and responsibilities.

Employee Signature

Date