

*2022 Distributed Energy Resources RFP:*

# Exhibit M. Co-Branding and Customer Interaction Requirements

**EXHIBIT M. CO-BRANDING AND CUSTOMER INTERACTION REQUIREMENTS***Co-Branding and Customer Interaction Requirements***Co-Branding with PSE****Policy Statement:**

It is PSE's business policy to maintain a standardized customer-facing presentation/image while directly engaging with our residential, business and retail customers. PSE requires that all vendors under contract with PSE and working in customer-facing roles also maintain appropriate standardization.

All materials developed—for external or internal use—must follow PSE's brand standards. The use of vendor-managed creative teams (including, but not limited to, graphic designers, videographers, photographers and developers) must be pre-approved by PSE's Brand and Marketing teams, via the program's designated Marketing Manager. Vendors approved to produce materials on PSE's behalf will receive a copy of PSE's brand guidelines and assets and must attend a one-hour brand training. All work must be reviewed and approved by PSE's Brand and Marketing teams prior to production.

Each PSE program is unique and co-branding activities will be based specifically on how each vendor interacts with PSE customers. Some areas for co-branding include:

**Vendor Identification:**

Vendors will be provided PSE contractor badges. When interacting with PSE customers, these badges must be prominently displayed at all times.

**Business Cards:**

Contractor business cards must meet PSE contractor corporate standards.

**Clothing:**

PSE logo shall be prominently displayed on clothing worn at PSE customer sites.

**Vehicles:**

Vehicles driven by vendors to PSE customer sites must have PSE logo prominently displayed along with the vendor's logo or company name.

**Customer Displays/Events:**

Customer displays, event materials and marketing collateral shall have PSE logos and other PSE identifiers located on all material (table top displays, canopies, trade show displays, handouts, etc.)

**Customer Notifications and Digital Properties:**

Customer-facing notifications including digital communications (e.g., email, SMS), websites, and printed materials should use PSE-branded templates and approved PSE design elements. All written communication to PSE customers shall have PSE logos or other identifiers.

**Customer Interaction Requirements**

**EXHIBIT M. CO-BRANDING AND CUSTOMER INTERACTION REQUIREMENTS****Collateral, Messaging, and Execution Logistics**

Customer experience is at the center of PSE ethos. As such, the vendor will work with PSE to define the customer journey, as well as the most efficient and effective processes to successfully communicate, schedule and execute assessments. These processes will be the foundation for an excellent customer experience.

Having the right collateral and messaging will ensure we are starting on the right foot with customers and can clearly communicate the goals of the program and the benefits of the relationship to the customer.

In all communities we serve, especially ones that are considered highly impacted or part of a vulnerable population, the vendor will work with PSE to understand customer's barriers and build marketing and outreach communications that are relevant, culturally competent, removes barriers and make program participation more accessible.

To ensure this the PSE team will:

- Review and approve all training, marketing, outreach and communications materials including digital and non-digital materials.
- Provide detailed internal program messaging documents to aid liaisons to speak to PSE programs, services, and benefits. This messaging will also include but not limited to: PSE potential messages to help the outreach team navigate potentially difficult conversations with PSE customers, and an email template to use for program follow-up.
- Provide an outreach best practices document to guide and train community liaisons in building relationships on PSE's behalf

**Cross-cultural and Multilingual Customer Experience**

Customer-facing materials and communications in languages other than English should be transcreated (not simply translated), to authentically represent the voices and experience of the customers PSE serves. Transcreation reinforces PSE's principles on providing equitable program access for all customers, in a manner that reflects the diverse communities in PSE's service area. Depending on the program, multiple languages may be represented as dominant, and this should be represented in program communications.

**Current Standard PSE Contractor Language:****Customer Services**

Contractor will at all times maintain a high level of Customer service and satisfaction during the term of this Agreement. Without limiting the generality of the foregoing, Contractor:

- (i) will respond to Customers within one (1) working day of an initial request and will keep appointments or contact Customers not less than 24 hours in advance of an appointment to reschedule;

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- (ii) will provide all estimates to Customers free of cost; provided however, that if due to special circumstances Contractor will charge a site visit, proposal or other fee, such cost must be fully disclosed to Customers upon scheduling the initial visit with Customer;
- (iii) will clean up the work area to the same or better conditions after any installation or service, and will follow all state and local requirements to ensure proper recycling and/or disposal of debris or waste materials;
- (iv) will provide same day customer contact to respond to Customers relating to (as applicable) (i) the quality of any equipment sold, (ii) the quality of the installation service, (iii) the Customer's satisfaction with the services or with the equipment provided or (iv) scheduling repairs to the equipment installed by Contractor that does not comply with the warranty set forth in Section 1(f). With respect to such repairs, Contractor will use its best efforts to perform all repair work at the earliest opportunity during its normal work schedule (but in any event, no later than ten (10) calendar days after contacted by Customer) and at no additional charge to the Customer; provided, however, that if a repair is necessary to provide Customer with hot water, heat, or if Customer's health or safety is impaired, Contractor will perform the repair within 24 hours.
- (v) will immediately take all necessary safety precautions and appropriate actions to remedy any unsafe condition related to the equipment or worksite;
- (vi) will not mislead Customers or engage in any unfair or deceptive trade practice.

**Additional Terms for DER Customer Services**

In conjunction with the terms above, PSE requests that Contractor:

- (i) will provide information on customer complaints received regarding DER products and services.
- (ii) will indicate how PSE customer interests will be considered when dispatching an event.
- (iii) will provide the ability for customers to opt out of a called event. Contractor to provide description of the process for opting out.

**Additions for Team Consideration (not all clauses are applicable for every respondent):**

**Marketing Development and Implementation Plan**

Contractor may support development and implementing of a marketing plan, as directed by PSE's Marketing team.

**Outbound Calling**

Contractor will provide outbound call assistance to PSE to acquire eligible customers and promote general program awareness. A mutually agreed upon scope and script will be developed.

**PSE Program Marketing and Cross-Promotion**

Contractor will provide PSE customers marketing materials about other PSE programs that will give participating customers information about other services PSE offers, including scheduling instructions. Actual scheduling and sales will be handled by PSE and registered Contractors for those other programs. PSE will provide Contractor with marketing materials to distribute to PSE customers or will approve all Contractor-created materials.

**Call Center**

Contractor has an established customer call center that will be responsible for participant scheduling and confirmation of service, instructing customers on preparing their home for service appointment,

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program questions and the timely resolution of customer service issues. PSE will develop an approved script with contractor.

**Call Answering**

Contractor will provide a toll-free number dedicated to customer information and enrollment. Calls for service will be directed into Contractor's call center and go into a queue to be taken by the next available representative. A recording will play after regular business hours informing customers to leave a message for a return call during business hours.

**Metrics**

Contractor will answer all calls coming into the call center at a minimum rate of 80% within 30 seconds. The call abandonment rate should be 5% or less. These metrics will be required for both English and non-English calls, refer to Cross-cultural and Multilingual Customer Experience.

**Hours**

Contractor's call center will operate between the hours of 5:00 a.m. – 8:00 p.m. Monday through Friday and 7:00 a.m. – 6:00 p.m. Saturday Pacific Time. After-hours callers are directed to a voice mail system to leave a message for next business day follow-up. These hours are subject to change upon mutual agreement by Contractor and PSE. Unanswered calls are directed to a voicemail box for next business day follow-up.

**Automation Capabilities**

Contractor will maintain full automation capabilities for scheduling callers, hold messaging, multi-caller routing, voice mail, and call reports with statistics. Each workstation will be equipped with a computer allowing access to the customer database.

**Call Monitoring**

Contractor will allow PSE to monitor calls to ensure Contractor is adhering to corporate standards. These calls may be listened to live (live calls can be listened to only at the call center location). Contractor will also silently monitor calls on a regular basis and address any performance issues.

**Correspondence**

Contractor will handle customer correspondence related to the program whether it is email or hard copy, with prior consent and approval from PSE.

**Emergency Plan**

Contractor will maintain a backup plan for the call center and direct toll-free numbers and will redirect calls according to the plan during emergency situations.

**Confirmation Call**

Contractor will provide customers a confirmation phone call and reminder of their appointment.

**Resolving Conflicts**

Contractor customer service employees will be empowered to resolve customer conflicts, thus keeping customer dissatisfaction to a minimum (and minimizing call transfers).

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All Contractor customer service representatives will be trained on the program, including an overview of the program, an in-depth understanding of answers to commonly asked questions, and a marketing calendar that will be updated as needed.

**Responsibilities**

Contractor's call center agents are responsible for providing customers with accurate program information, verifying customer eligibility, scheduling appointments, completing outbound calls to gather or relay information, and performing all duties in a courteous, accurate and timely manner.

**Meetings**

PSE will communicate and collaborate on a regular basis to review program performance and address day-to-day challenges. Contractor will hold weekly meetings with PSE to ensure all issues are identified and resolved quickly and effectively. In this meeting; performance, marketing, compliments, complaints, and progress to goal will be discussed, in addition to other topics as needed.

**Website:**

Contractor operates a website – <http://www.xyzcontractor.net/>. Note that customers can choose to utilize the website in either English or non-English languages most pertinent to the customer base, refer to Cross-cultural and Multilingual Customer Experience. Contractor will provide PSE ability to review and perform customization of the web enrollment pages established for PSE.

Any digital communications involving email or a website will need to conform to PSE brand and digital standards. Vendor online implementation proposal should provide for integration with PSE's web platform, as follows.

Customers should experience online engagement with PSE seamlessly from their device of choice. Account information, supporting content, task status, and the way interactions look and feel should be consistent as the customer moves between transactions, devices or channels.

Secure transactions should be managed with a single sign-on (SSO) through PSE's myPSE Account login. Customer navigation between PSE.com and the vendor platform should provide a seamless user experience.

Vendor should answer the following questions:

- Does vendor provide a hosted platform, API, or other implementation? What are the options?
- Does the product support content management and administration by PSE business owners?
- What is the process for making changes to the product regarding messaging, customer experience, etc.?
- What customer communication options does this product provide or support: on-screen confirmation messaging; email message; SMS?
- What customer data is stored; where and how? Is it accessible to PSE?
- How will the solution integrate with PSE's Customer Information System (CIS)?
- What technical customer support is provided? Is there a separate call center?
- What is the upgrade path for the product? How may PSE participate in upgrade designs?

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**Field Performance:**

All field personnel will carry cell phones, and will be dressed to convey a professional image that is branded as required by PSE's Co-Branding Requirements.

Customers will be called by Contractor call center staff members either 1 or 2 days ahead to confirm appointments.

Customers will be called by crew members approximately 30 minutes ahead of the crew's expected arrival time as a "final" reminder (and/or if traffic/weather conditions will affect arrival times relative to the appointment time window). Note: the crew will go to the pickup site even if there is no answer to this particular reminder call, since it is Contractor's experience that many customers 1) arrive just ahead of crews and/or 2) have caller ID telephone functions, and do not pick up calls from phone numbers that are not recognized.

At the customer site, the crew member(s) initially will display badge identification to the customer. Note: if damage occurs, the damage is noted, the crew person calls a supervisor in front of the customer, and the supervisor speaks directly to the customer; the issue is then resolved within 48 hours.

If the customer is not home, a door tag will be left with the driver's name, mobile phone number, and the 800 number so the customer can reschedule. If the customer calls the driver and the truck is still in the area, the truck will return the same day to complete the appointment.

Customer is always thanked for being a PSE customer and a PSE leave behind kit is left as a final thank you.