

ENERGY SERVICES ACCOUNT REPRESENTATIVE I  
ENERGY SERVICES ACCOUNT REPRESENTATIVE II

DEFINITION

To perform professional customer service work to build and maintain residential and commercial electric utility customer relationships and to provide and promote value added services and solutions. Develop and maintain in-depth strategic market segment information to deeply understand customer needs and goals now and in the future. Research, develop and implement strategies designed to promote such relationships, services, solutions and programs, and to encourage new and continuing program participation.

DISTINGUISHING CHARACTERISTICS

Energy Services Account Representative I – This is the entry level class in the Energy Services Account Representative series. This class is distinguished from the journey level by the performance of the more routine tasks and duties assigned to positions within this series. Employees at this level are not expected to perform with the same independence of direction and judgment on matters allocated to the journey level. Since this class is typically used as a training class, employees may have only limited or no directly related work experience. Employees work under general supervision while learning job tasks.

Energy Services Account Representative II – This is the journey level class within the Energy Services Account Representative series and is distinguished from the I level by the assignment of the full range of duties. Employees at this level receive only occasional instruction or assistance as new, unusual or unique situations arise and are fully aware of the operating procedures and policies within the work unit. Positions in this class are flexibly staffed and are normally filled by advancement from the I level.

SUPERVISION RECEIVED AND EXERCISED

Energy Services Account Representative I

Receives general supervision from an assigned supervisor or manager.

May exercise technical and functional supervision over technical and clerical staff.

Energy Services Account Representative II

Receives direction from an assigned supervisor or manager.

May exercise direct supervision over lower level technical and clerical staff.

EXAMPLES OF ESSENTIAL DUTIES - Duties may include, but are not limited to, the following:

Act as a representative of the utility and a facilitator with residential and commercial customers, developing and promoting utility solutions and tools, resolving customer service issues, providing technical energy advice, and maintaining and enhancing the customer relationship.

Serve as liaison to community groups and the general public regarding electric utility customer services and solutions; receive and respond to questions, problems, concerns or request for City or utility information from community organizations.

Develop a detailed understanding of the customers' needs by segment and identify opportunities to enhance utility services to meet those needs.

Conduct market research including surveys and analysis regarding public opinion to provide input into the creation of utility customer services and solutions to meet the customer's needs.

Develop and maintain in-depth information and strategic market segment database of assigned customers.

Conduct research, develop, implement, and manage various energy efficiency and conservation programs for residential, large and small retail commercial electric utility customers, tenant improvements, new residential construction, and retro-fit projects; update and modify existing programs to make best use of new technology, to respond to customer needs and to reduce electric utility demands and operating costs.

Work closely with customers, building and business owners, architects, developers, and contractors to determine energy efficiency programs that meet their needs, enhance operations and reduce electric utility payments; assist in identifying and resolving problems and concerns related to energy efficient and environmentally sound installations.

Research products to improve electric energy efficiency; review electric industry and various market sectors for best practices; identify new technology and products that are available to customers and meet the objectives of the utility and the City.

Make presentations to educate and inform customers, developers, contractors, architects, City staff and others about electric utility customer services and solutions; represent the City at events, public gatherings and participate in panel discussions.

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Receive and review public benefit rebate applications, ensuring products installed meet technical requirements; perform on-site inspections and process for rebate payment.

Research and review grant opportunities; complete and submit grant applications and administer grants; develop and implement programs consistent with grant requirements.

Maintain awareness of current codes, laws, and regulations and technological developments affecting energy efficiency programs.

Develop and recommend new and/or modified policies, programs, and services to meet utility regulatory requirements.

Collect and manage customer information using methods and techniques required for regulatory compliance and reporting.

Develop and implement measures to analyze and evaluate the effectiveness of utility provided customer programs, services and solutions; recommend modifications for process improvements; and prepare related cost/benefit analysis.

Coordinate with City staff in other divisions and departments regarding program operations and to facilitate resolution of customer issues and concerns; interpret customer issues and investigate complaints and recommend corrective action.

Prepare a variety of technical reports that include supporting statistical data.

Build and maintain positive working relationships with co-workers, other City employees and the public using principles of good customer service.

Perform related duties as assigned.

### MINIMUM QUALIFICATIONS

#### Energy Services Account Representative I

##### Knowledge of:

Principles and practices of cost/benefit analysis, including methods of quantitative analysis.

Principles and practices of electric energy efficiency technologies and related program development and implementation.

General methods of business decision making.

General practices of marketing, sales and business retention.

State and local government practices and organizational structures.

Development and implementation of new policies related to customer service operations.

Basic program and project management, consultant contract administration, and related budget coordination.

Effective public presentation skills and methods.

Technical report writing procedures and techniques.

Modern office procedures, and proficiency with common office software applications.

Principles and practices of customer service, account management, and sales.

Ability to:

Provide a professional level of customer service to build and maintain residential and commercial electric utility customer relationships.

Perform professional analytical work in developing, managing, and implementing customer services and customer solutions to a variety of customers.

Provide a professional level of support to community groups and the general public regarding the electric utility.

On a continuous basis, know and understand all aspects of the job; intermittently analyze work papers, reports and special projects; identify and interpret technical and numerical information; observe and problem solve operational and technical policy and procedures.

On a continuous basis, sit at a desk for long periods of time; intermittently twist to reach equipment surrounding desk; perform simple grasping and fine manipulation; use telephone, and write or use a keyboard to communicate through written means; and lift or carry weight of 10 pounds or less.

Learn current technical market research techniques, consumer behavior and market data analysis.

Learn the principles and practices of grant administration.

Learn program development and management skills.

Learn electric consumption economics and electric utility operating procedures and practices.

Learn to manage a project from inception to completion.

Learn to prepare and administer budgets.

Learn City policies and procedures and department standards related to customer service energy efficiency programs.

Learn pertinent local, State, and Federal codes, regulations, and laws.

Use effective marketing, sales and business retention methods.

Develop and coordinate new policies, programs, and customer solutions for customer service operations.

Communicate clearly and concisely, both orally and in writing.

Maintain positive customer relationships and value the customer experience.

Establish and maintain effective working relationships with those contacted in the course of work.

### Experience and Training

#### Experience:

One year of responsible professional marketing, sales, or customer support experience in a technical environment. Experience in an energy services industry is desirable.

AND

#### Training:

A Bachelor's degree from an accredited college or university, preferably in marketing, business administration, public administration, engineering or a related field.

#### License and Certificate:

Possession of a valid California driver's license by date of appointment.

Energy Services Account Representative II

In addition to the qualifications for the Energy Services Account Representative I:

Knowledge of:

Professional customer service strategies to build and maintain residential and commercial electric utility customer relationships.

Professional analytical strategies to develop, manage, implement and promote energy efficiency and conservation programs, customer electric utility services and customer electric utility solutions to a variety of customers.

Electric energy consumption economics and financial analysis.

Grant application and administration practices.

Current technical market research techniques, consumer behavior and market data analysis.

Pertinent local, State, and Federal ordinance, rules and regulations.

City policies, electric industry standards, and current technology and trends related to energy efficiency and conservation programs.

Ability to:

Independently act as a representative of the utility and provide professional level customer service to develop and maintain residential and commercial electric utility customer relationships.

Develop a detailed understanding of the utility customers by segment and communicate changing needs and behavior that may impact the utility business operations.

Work in a lead capacity within a team and provide direction and oversight to projects and programs as assigned.

Independently perform professional analytical work in developing, managing, and implementing energy efficiency and conservation programs, customer services and customer solutions to a variety of customers.

Perform complex analysis of and provide recommendations related to programs and existing/potential markets.

Identify, design and administer programs, customer services and customer solutions, which result in energy/cost savings for customers, contribute to maintenance of the electric utility's fixed costs, provide input into the customer's utility related needs now and in the future, and build and maintain positive customer relationships.

Perform complex calculations related to energy efficiency and to perform energy audits in person or via the internet, as assigned.

Maintain positive customer interactions and value the customer experience.

Experience and Training

Experience:

Two years of responsible experience performing duties similar to that of an Energy Services Account Representative Account I with the City of Roseville.

AND

Training:

A Bachelor's degree from an accredited college or university, preferably with major course work in marketing, business administration, public administration, engineering or a related field.

License and Certificate

Possession of a valid California driver's license by date of appointment.

08-22-19

02-09-13      Energy Services Account Representative I/II

05-26-05

03-02-00

06-12-97

09-24-99

2-16-00      Marketing Representative I/II