

**BEFORE THE WASHINGTON  
UTILITIES & TRANSPORTATION COMMISSION**

WASHINGTON UTILITIES AND TRANSPORTATION COMMISSION,

Complainant,

v.

PUGET SOUND ENERGY

Respondent.

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DOCKET NOS. UE-190529 and UG-190530 (*Consolidated*)

**SUSAN M. BALDWIN ON BEHALF OF PUBLIC COUNSEL UNIT**

**EXHIBIT SMB-8**

Puget Sound Energy Response to Public Counsel Data Request Nos. 121, Attachment A

November 22, 2019

**BEFORE THE WASHINGTON UTILITIES AND TRANSPORTATION COMMISSION**

**Dockets UE-190529 & UG-190530  
Puget Sound Energy  
2019 General Rate Case**

**PUBLIC COUNSEL DATA REQUEST NO. 121:**

**Re: Get to Zero – Customer Care Center; Direct Testimony of Joshua J. Jacobs, Exh. JJJ-1T at 22:26-28.**

Please refer to Mr. Jacobs' testimony: "As more customers choose to manage their service via a digital channel, fewer calls are coming to the Customer Care Center."

- a) Separately for each of the past five years show the number of calls that came into the Customer Care Center and for each of the five years show the total number of all customers served by PSE (provide answer with references to residential customers only, if feasible, if not, please indicate this). Also, disaggregate between those calls handled by customer service representatives and those handled by IVR.
- b) Separately for each of the past five years provide:
  - i. The call abandonment rate;
  - ii. The average speed of answer (exclude calls answered by IVR); and
  - iii. The percent of calls answered within 30 seconds (exclude calls answered by IVR).
- c) Does the Company have any contracts with outside vendors to handle calls? If so, please provide.
- d) Has the Company assessed the categories of calls that continue to come to the Customer Care Center? If so, please provide copies of such assessments.
- e) Please provide the IVR script and describe any future plans to change the IVR, including the timing of such changes.

**Response:**

Puget Sound Energy ("PSE") provides the following information in response to Public Counsel Data Request No. 121:

- a) It is not feasible to provide answers in reference to residential customers or total customers served.

	Main Menu Calls	IVR Handled	Agent Offered
2014	2,255,835	293,995	1,850,779
2015	2,374,537	460,951	1,822,546
2016	2,401,051	626,292	1,735,500
2017	2,628,479	815,108	1,761,578
2018	2,610,385	1,066,008	1,503,164

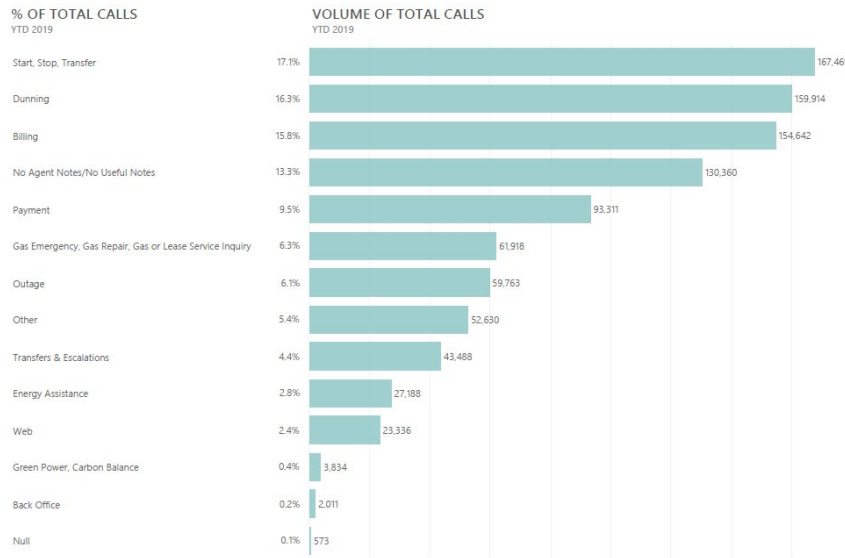
b)

	Abandonment Rate	Average Speed of Answer in Seconds (excludes calls answered by the IVR)	Percent of Calls Answered within 30 Seconds (excludes calls answered by the IVR)
2014	5.66%	28	76%
2015	4.76%	59	70%
2016	2.21%	36	77%
2017	2.86%	44	78%
2018	2.67%	45	81%*

\*In 2018 the SQI5 metric changed to be “calls answered within 60 seconds.”

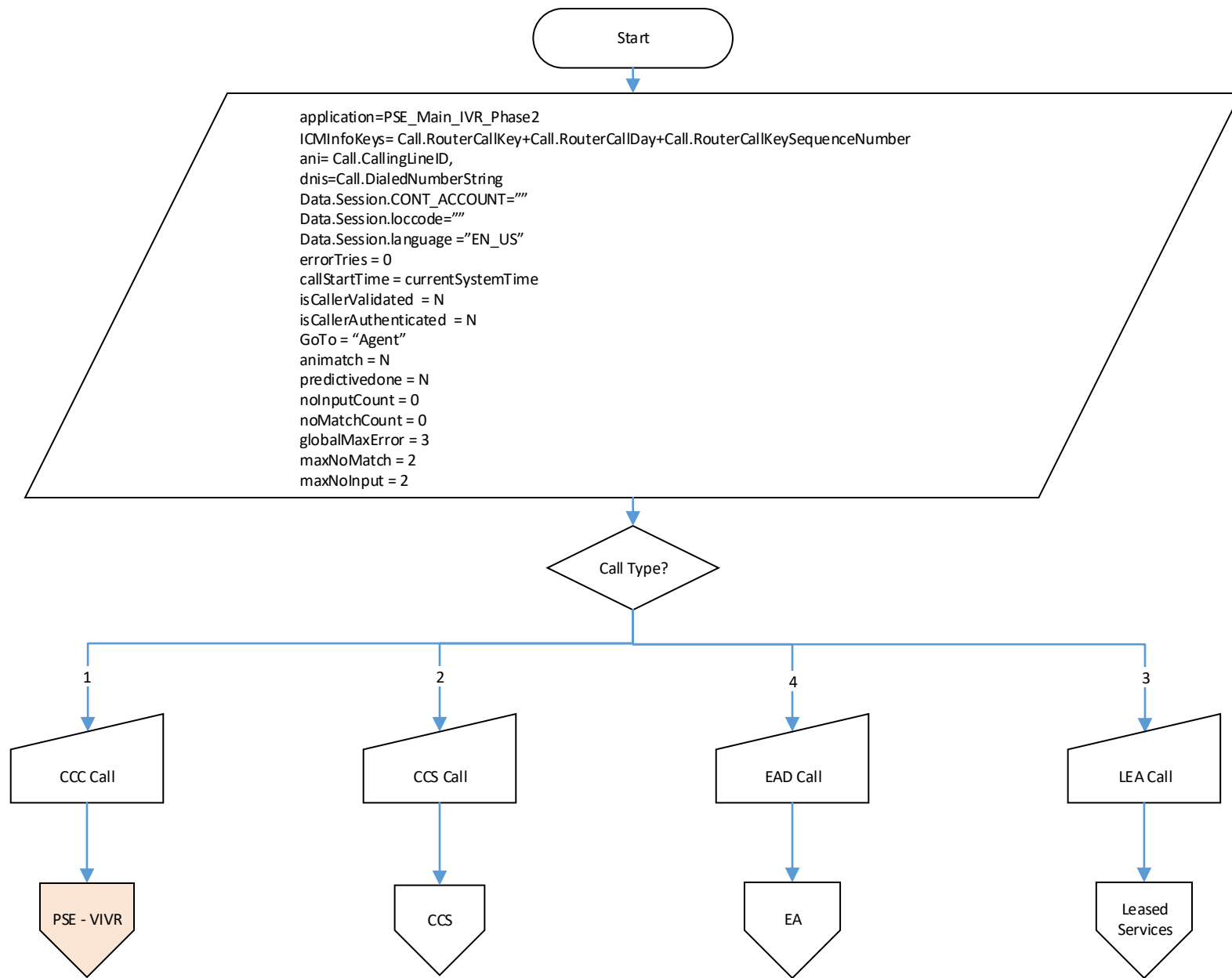
- c) Yes, PSE currently uses Active TeleSource. The contractor provides PSE with Tier 1 call overflow services for the Customer Access Center. More specifically:
- 25-35% of the incoming average daily calls are handled by Active TeleSource;
  - Potential maximum call full-time employees with hours the same as PSE (7:30 AM-6:30 PM) Monday through Friday PST; and
  - Occasional 24x7 coverage needs due to storm or other business need.
- d) Yes. As described in the Prefiled Testimony of Joshua J. Jacobs, Exh. JJJ-1T, at pages 11, lines 4-7, tracking call volumes is an effective measure of progress toward the Get to Zero objective to improve customer experience and reduce problems that prompt customers to call. PSE tracks call volumes across categories on an on-going basis (e.g., see figure 1 below). Although overall call volume has reduced by 25.5 percent through May 2019 when compared to the initiative baseline (see Prefiled Testimony of Joshua J. Jacobs, Exh. JJJ-1T, at page 11, 7-20), PSE has not eliminated all calls in any specific category or eliminated the ability for customers to call for assistance.

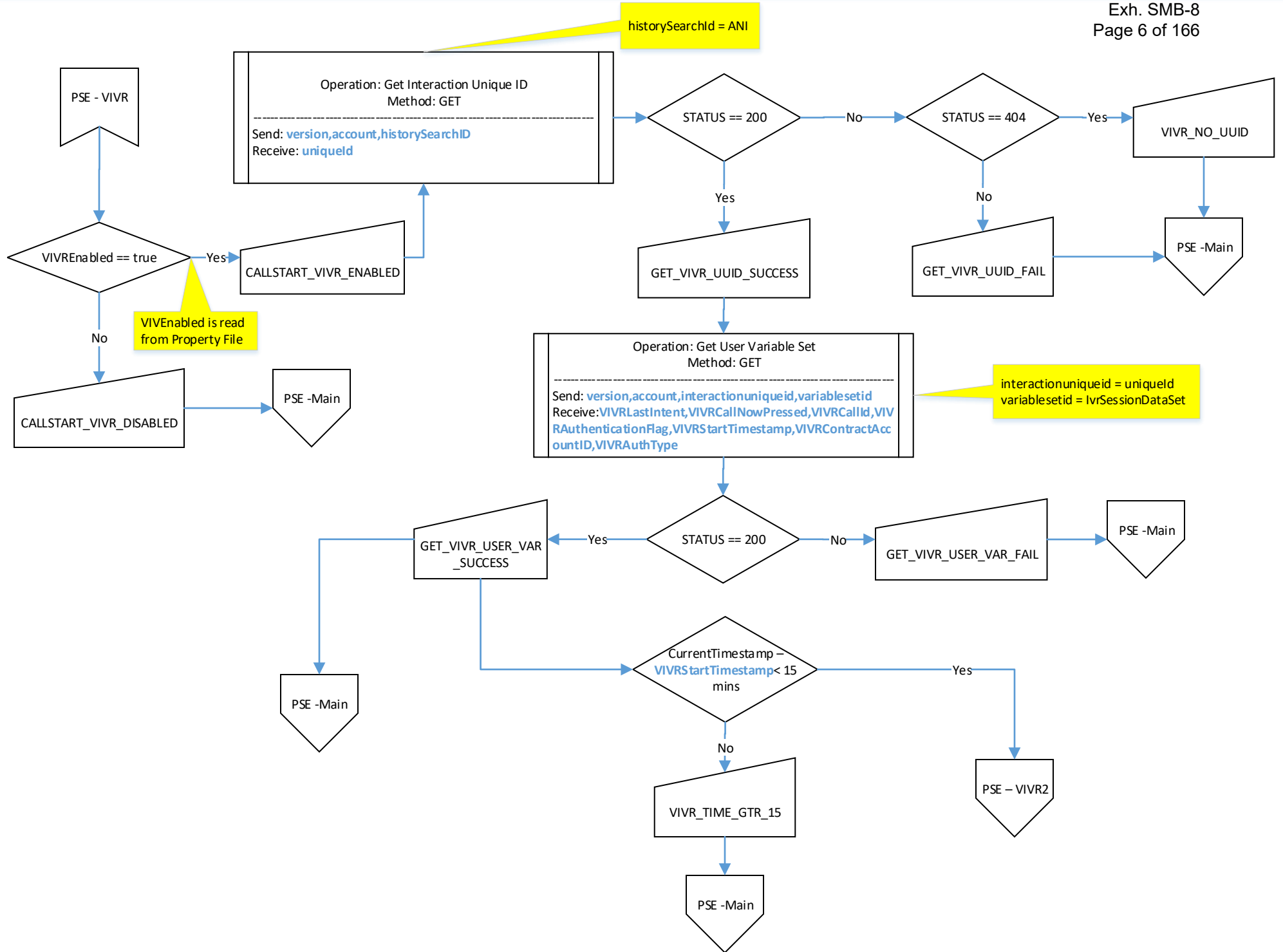
Figure 1 – August Call Volume by Category

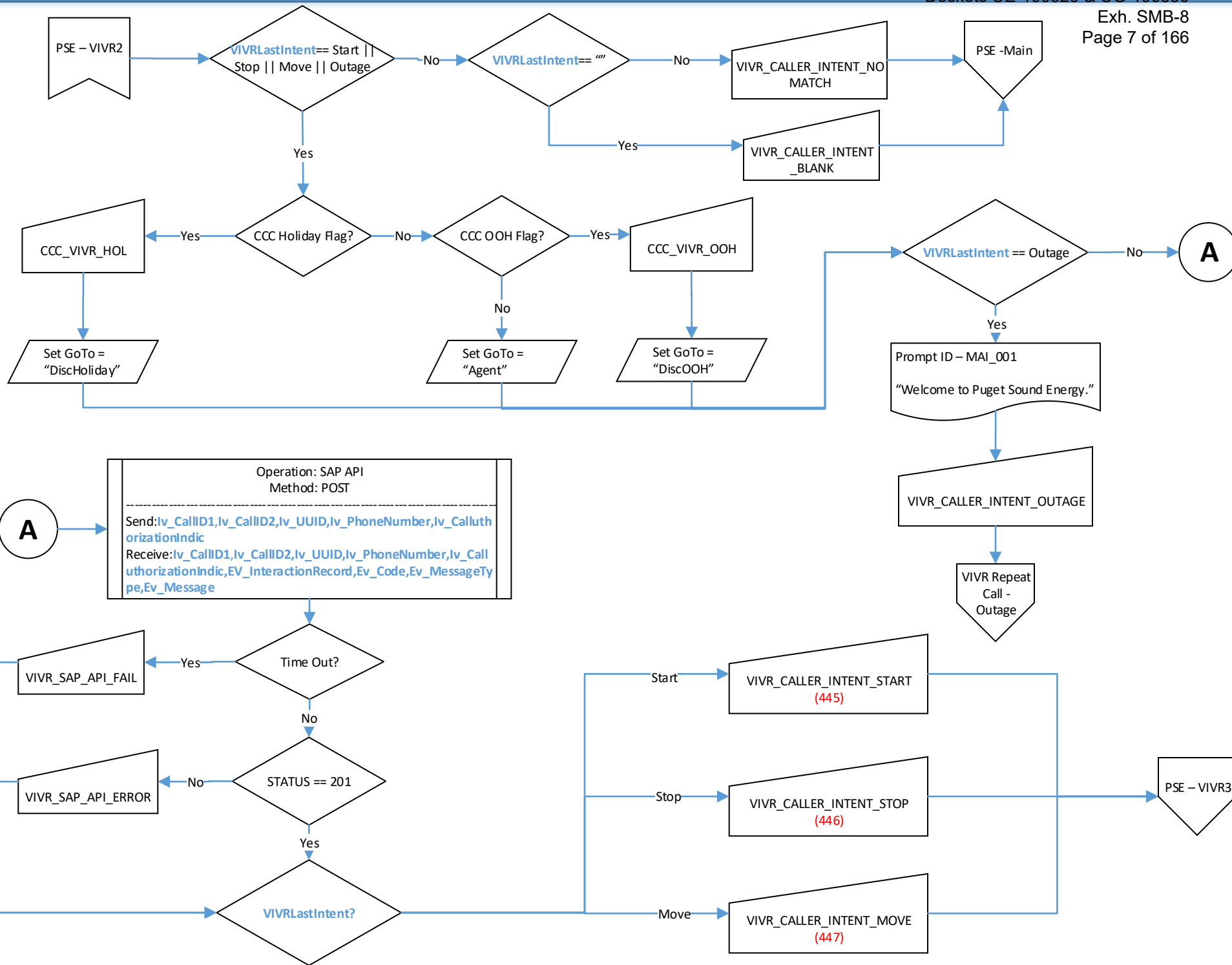


- e) Please see Attachment A to PSE’s Response to Public Counsel Data Request No. 121 for the current interactive voice response (“IVR”) script. Currently, PSE does not have any specific changes or improvements to IVR identified.

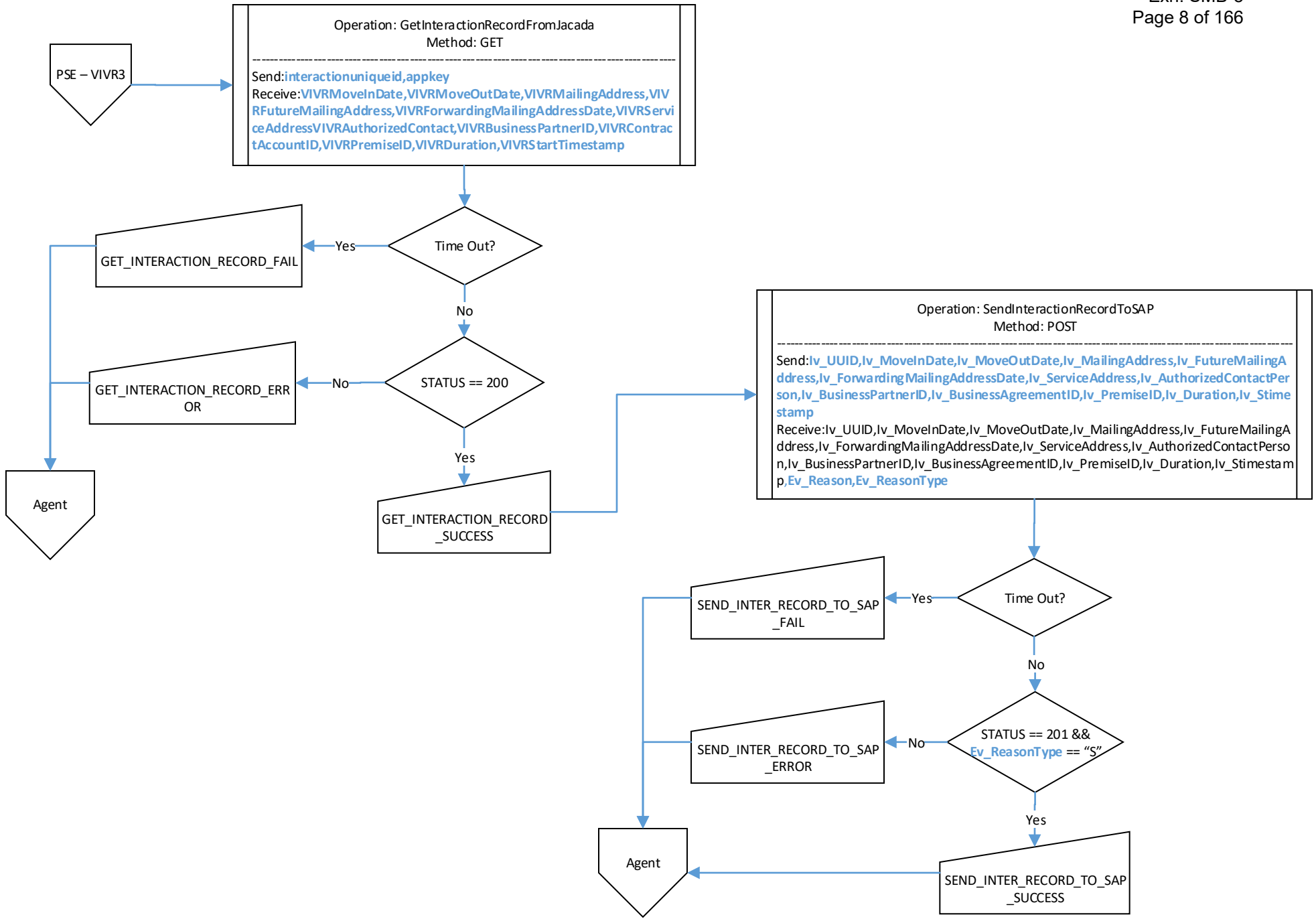
# **ATTACHMENT A to PSE's Response to PUBLIC COUNSEL Data Request No. 121**

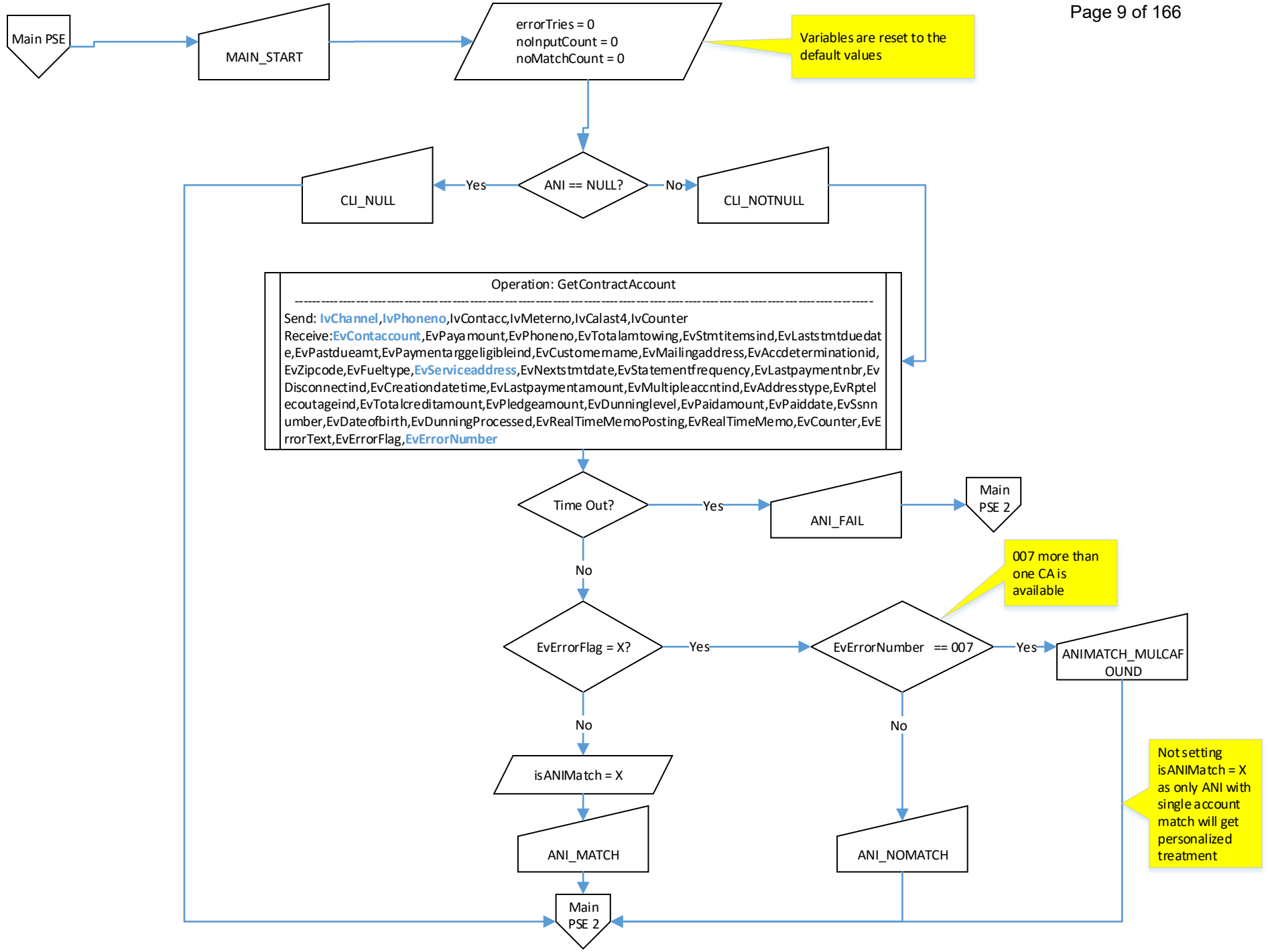


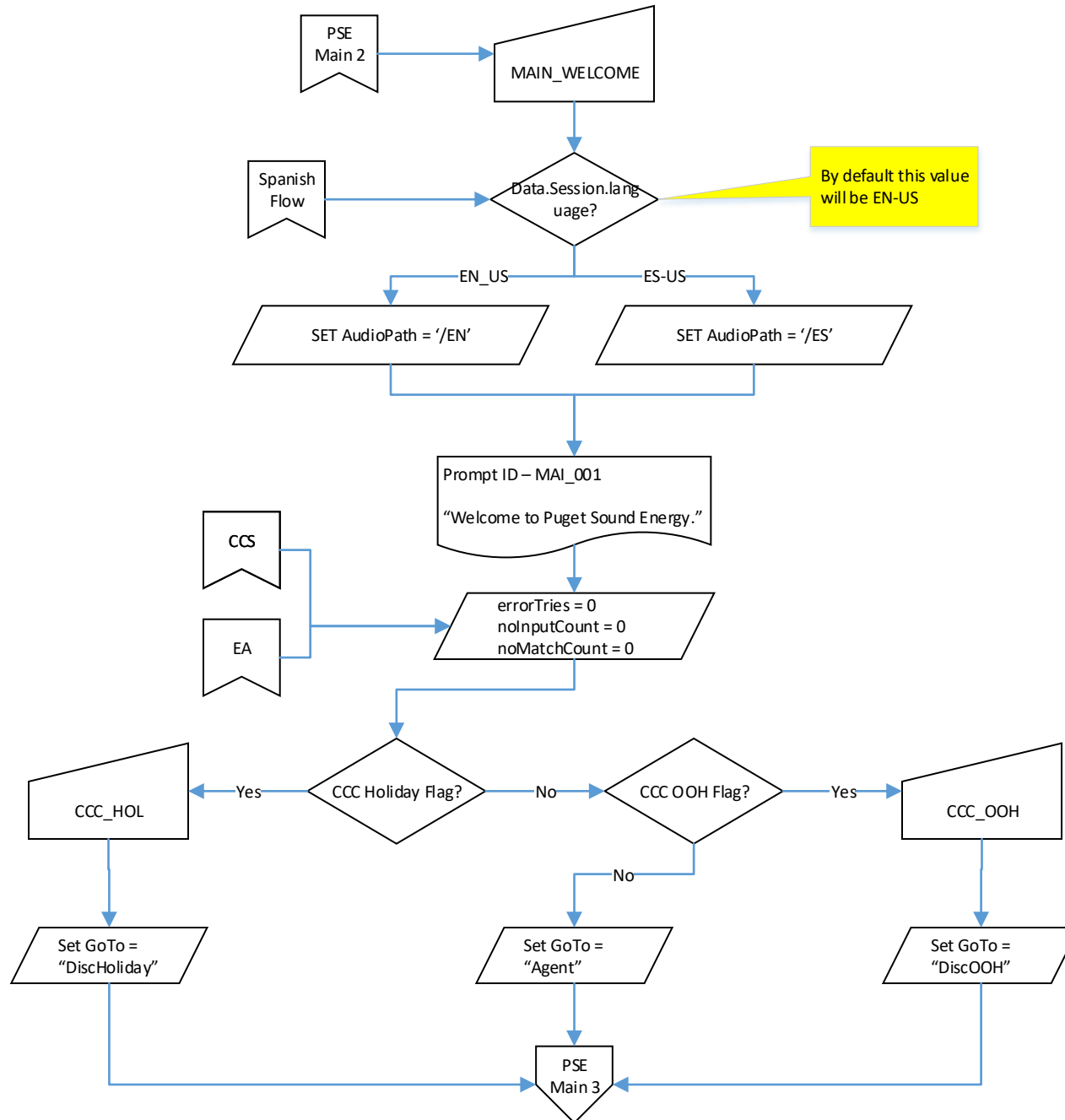


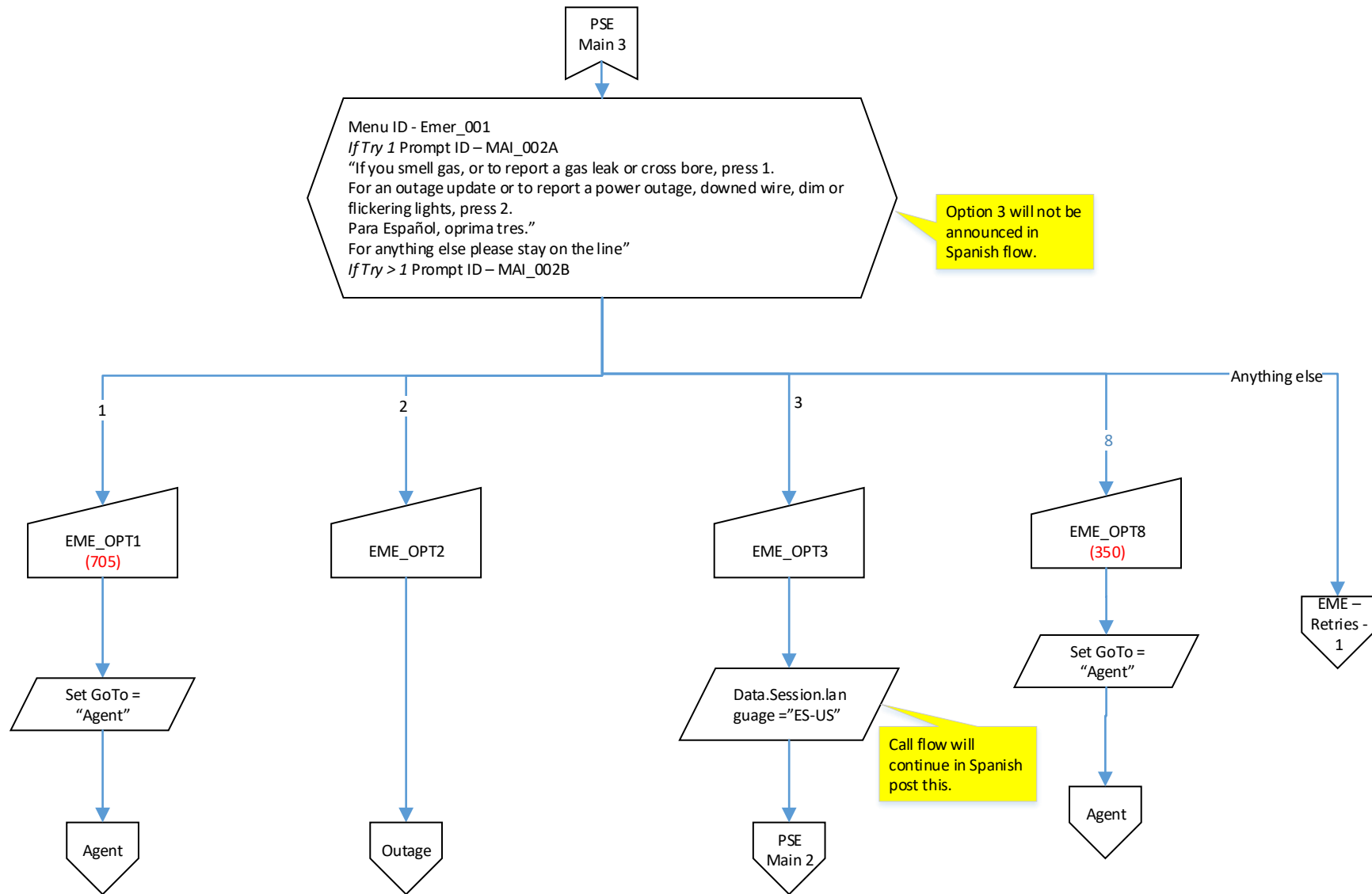


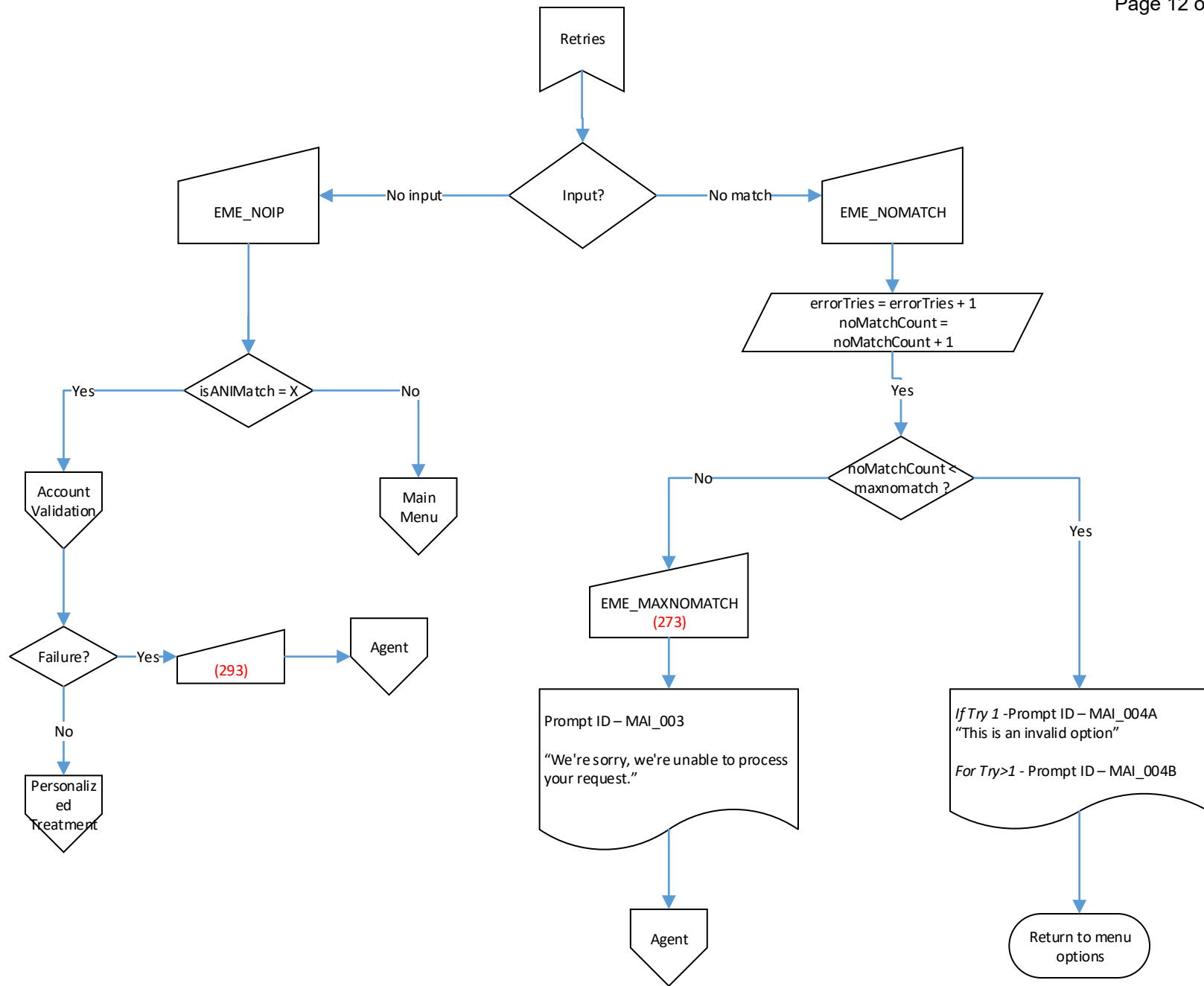


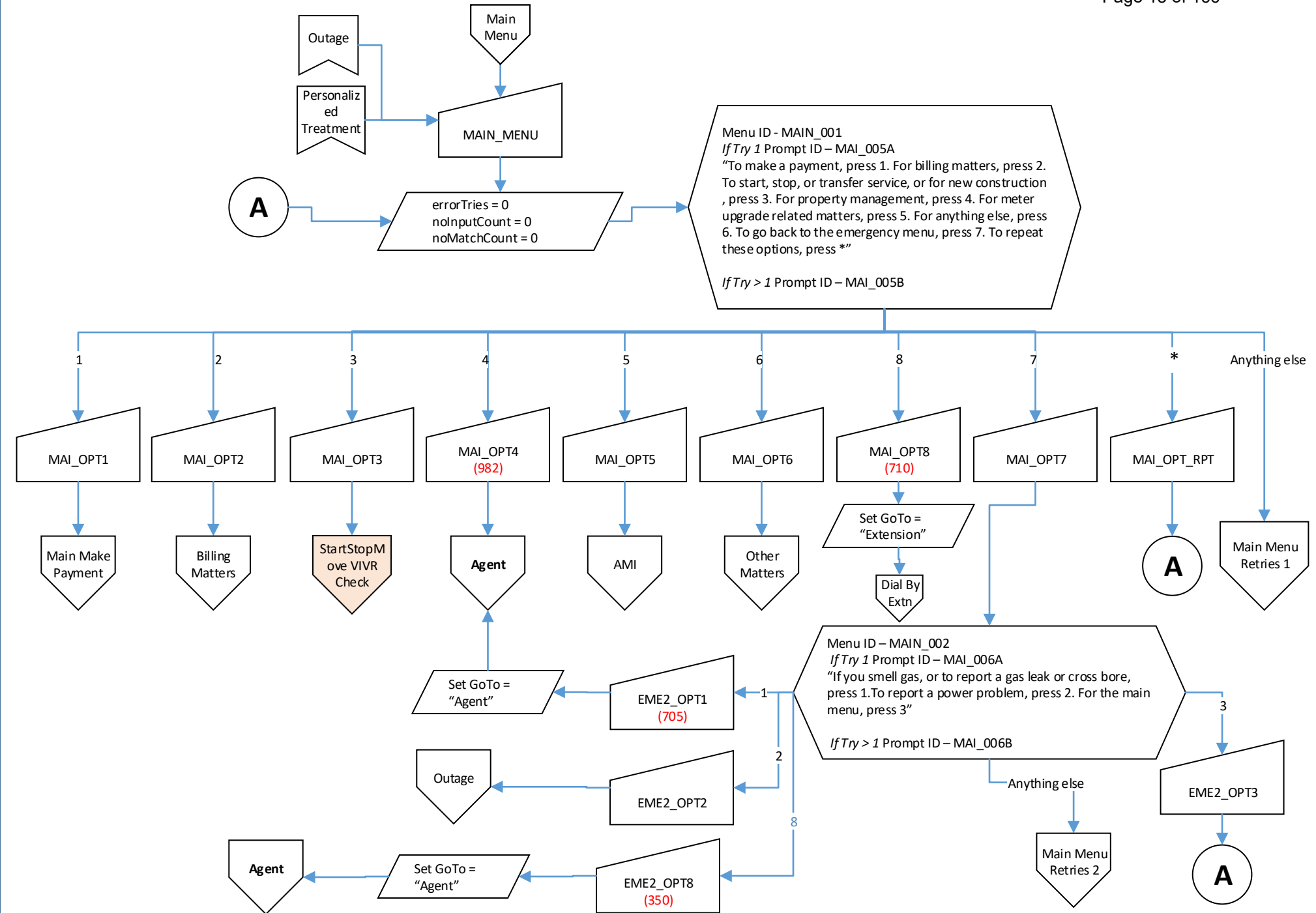


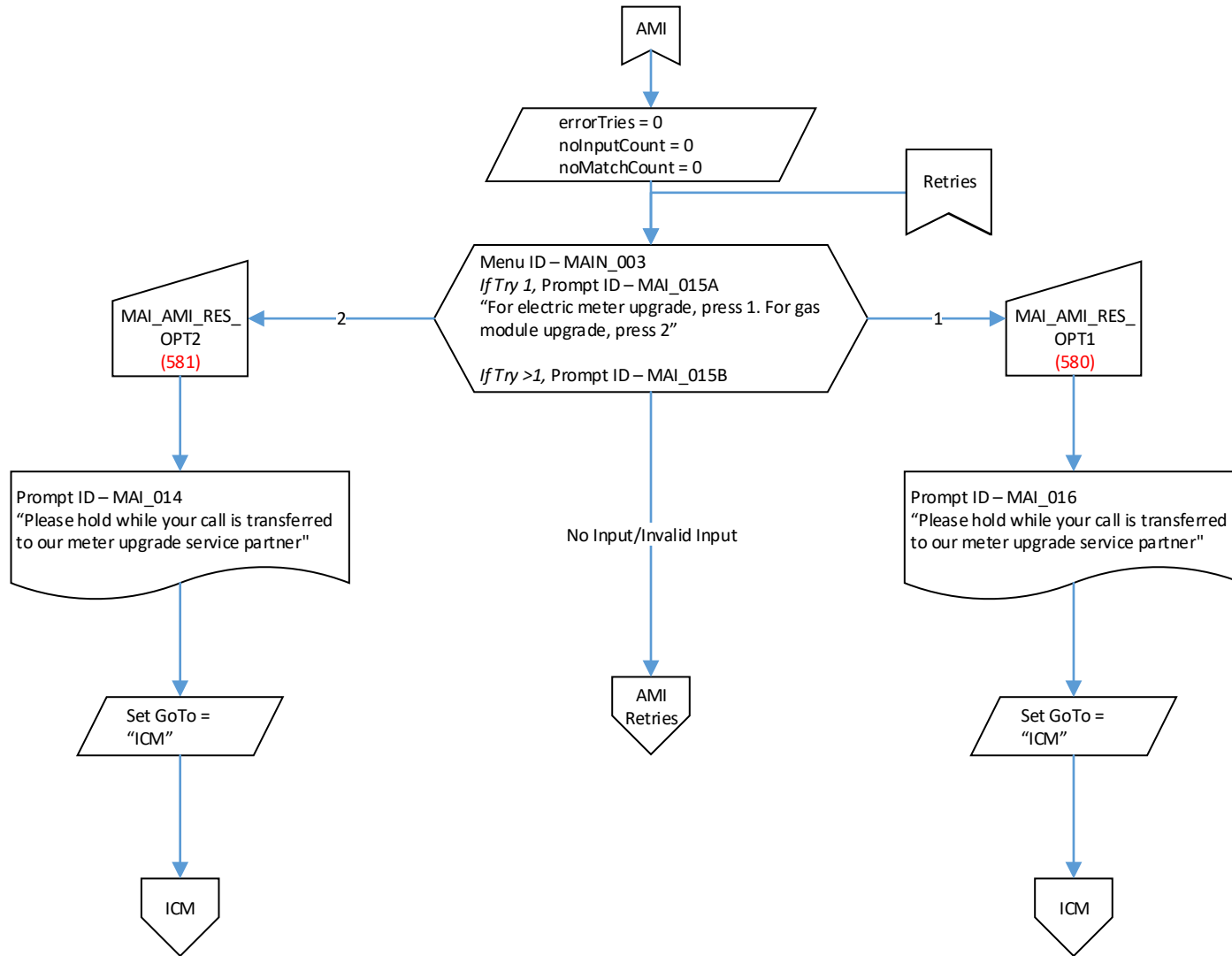


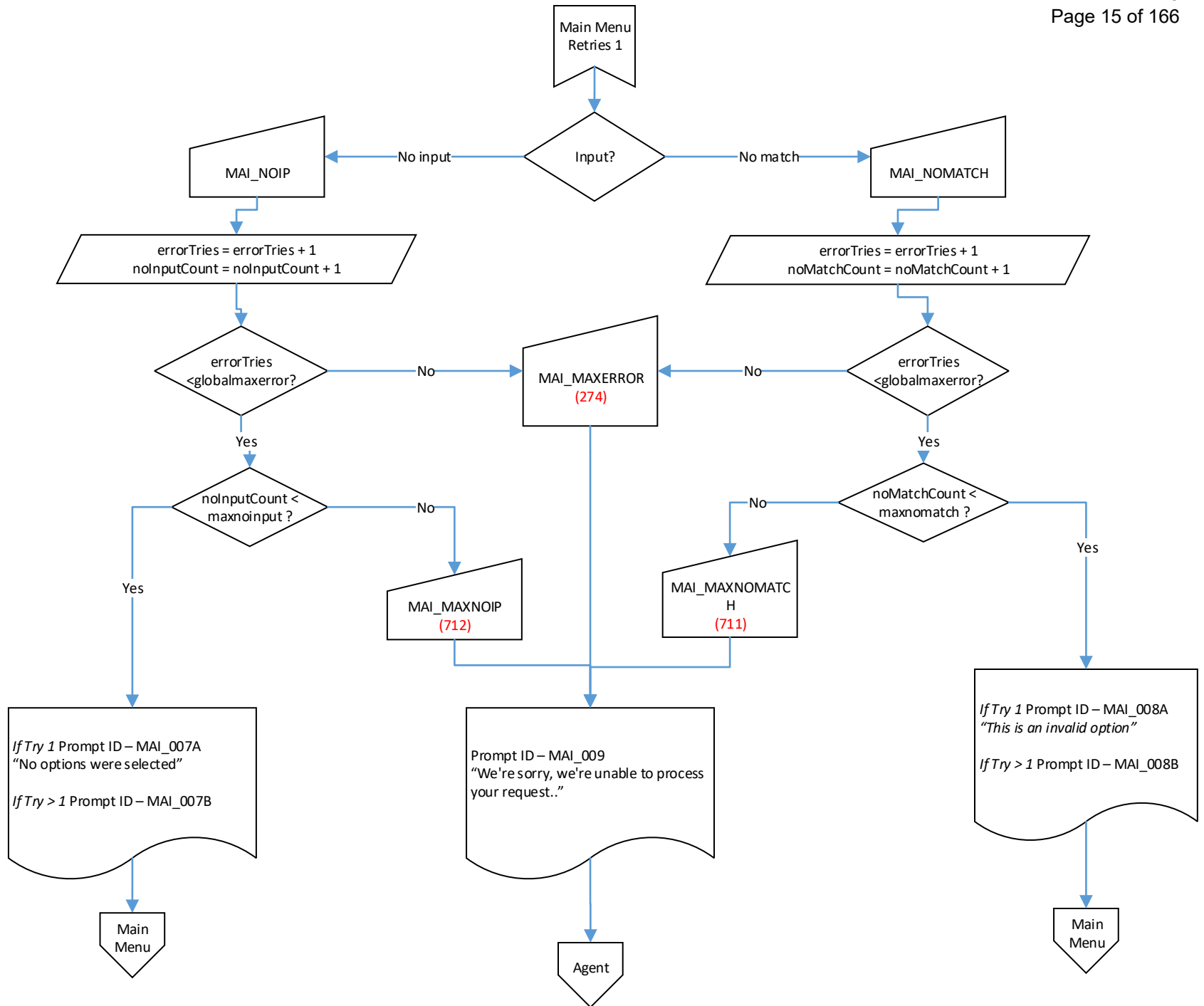




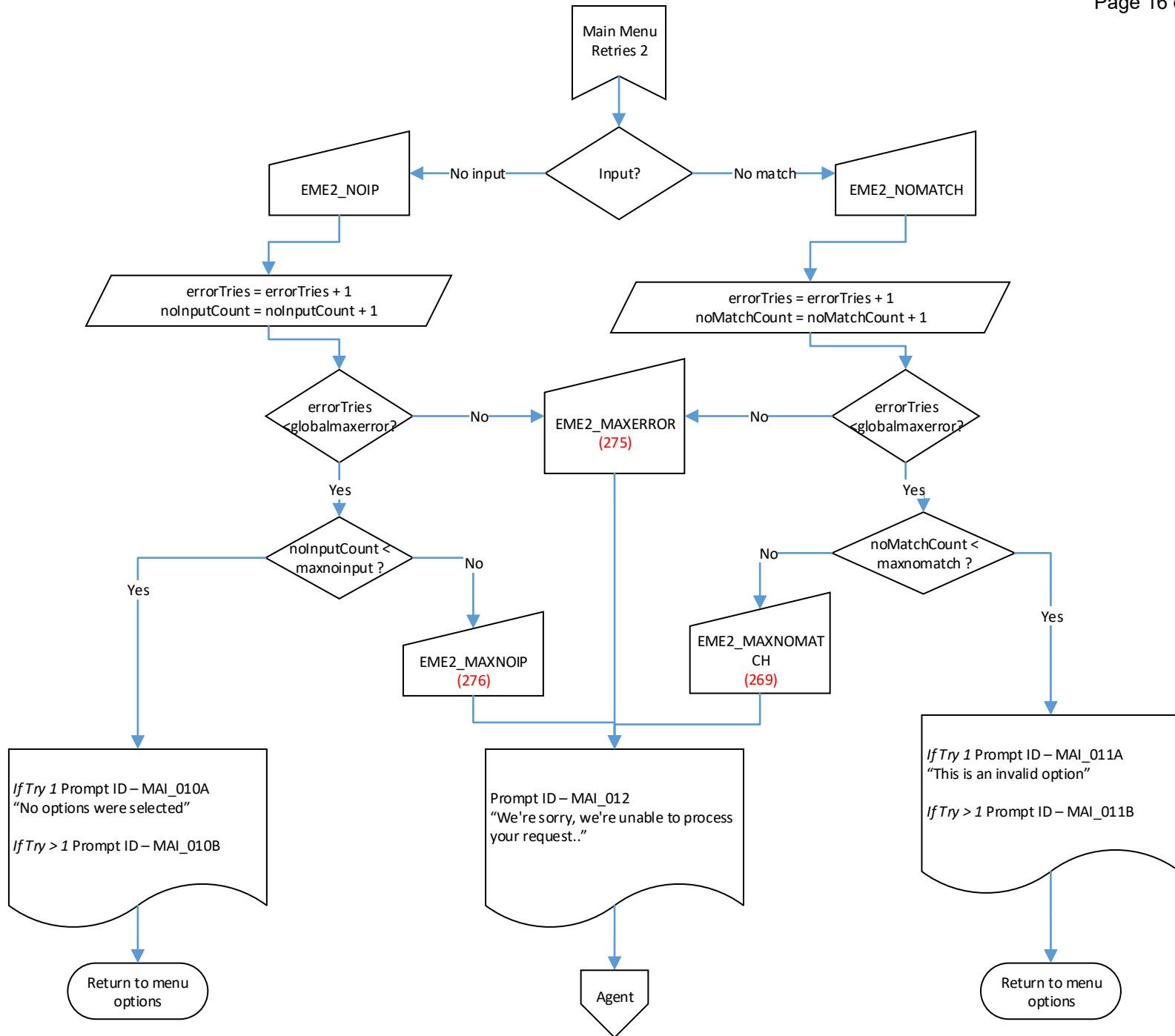


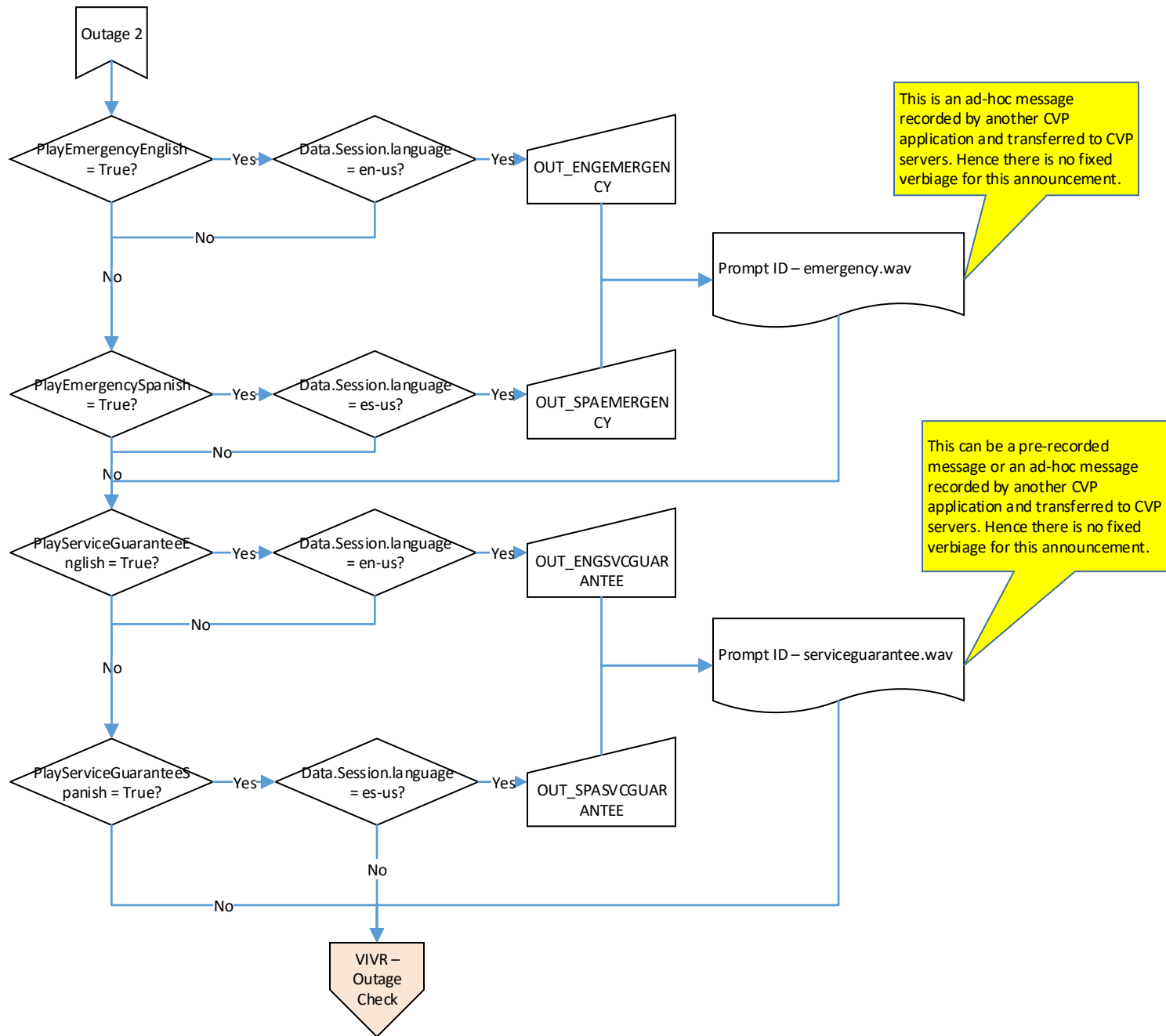


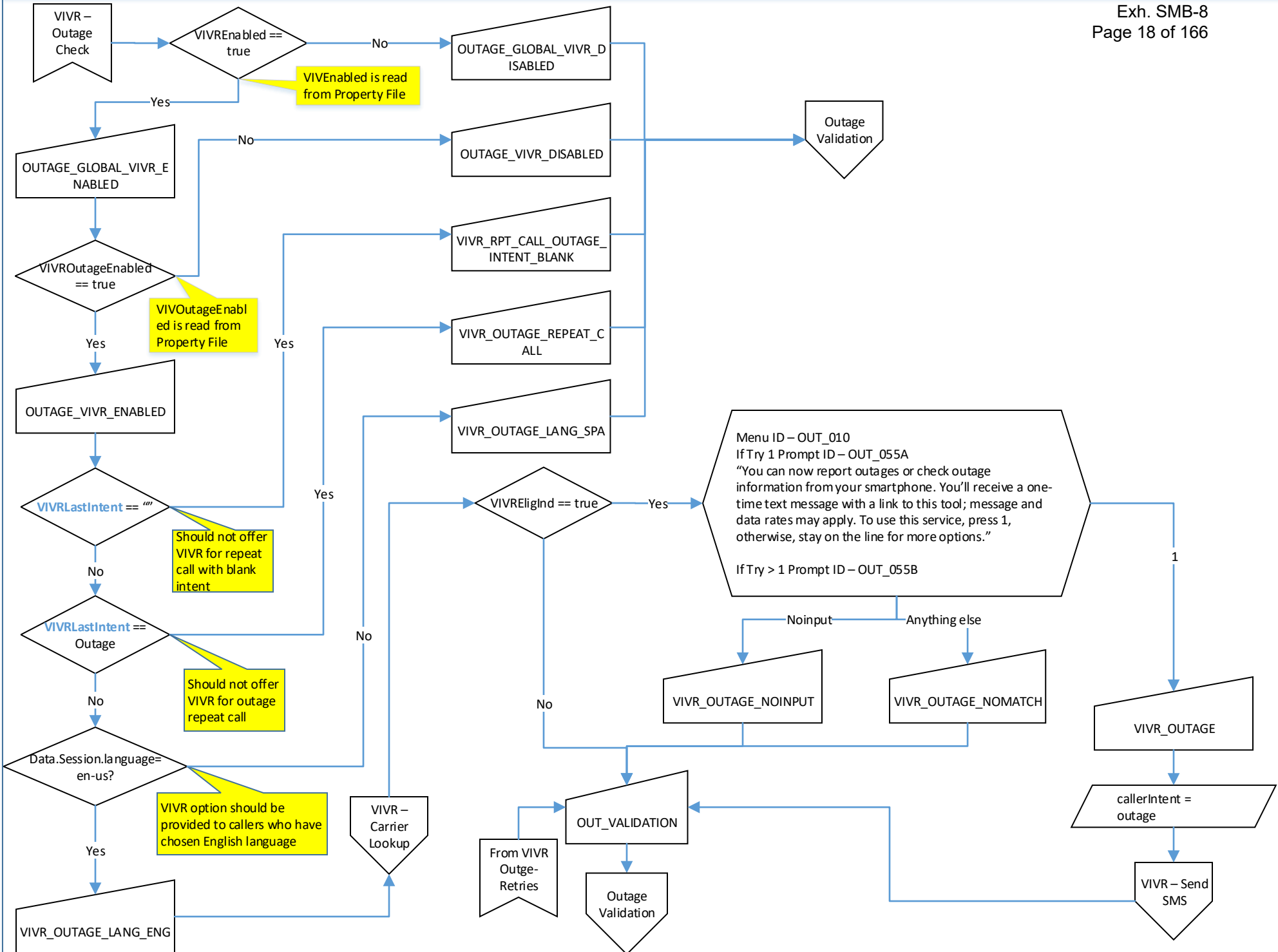


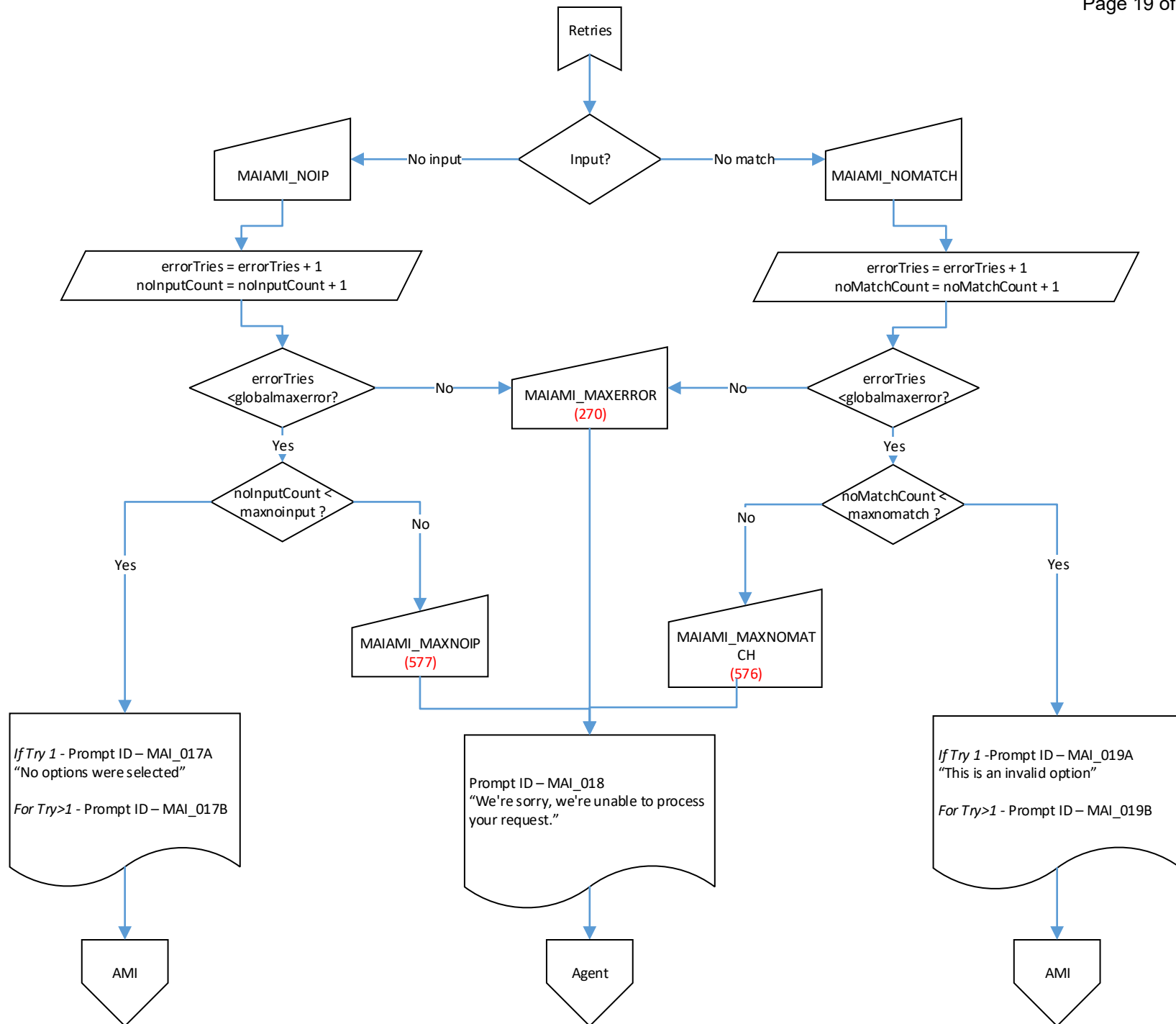


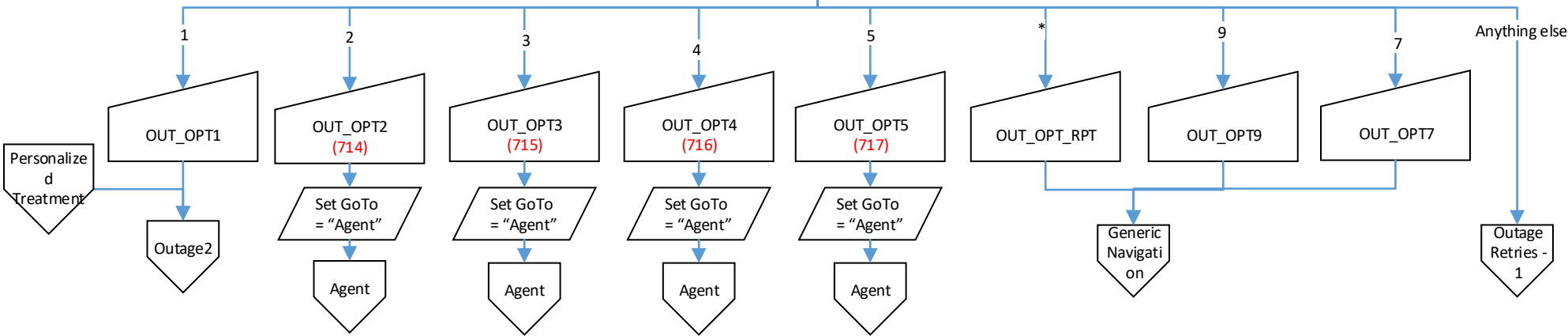
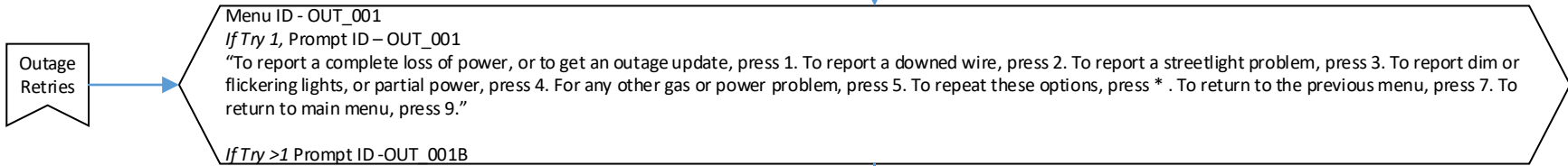
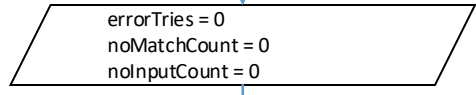
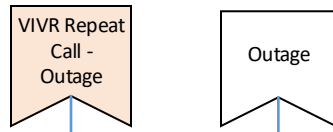


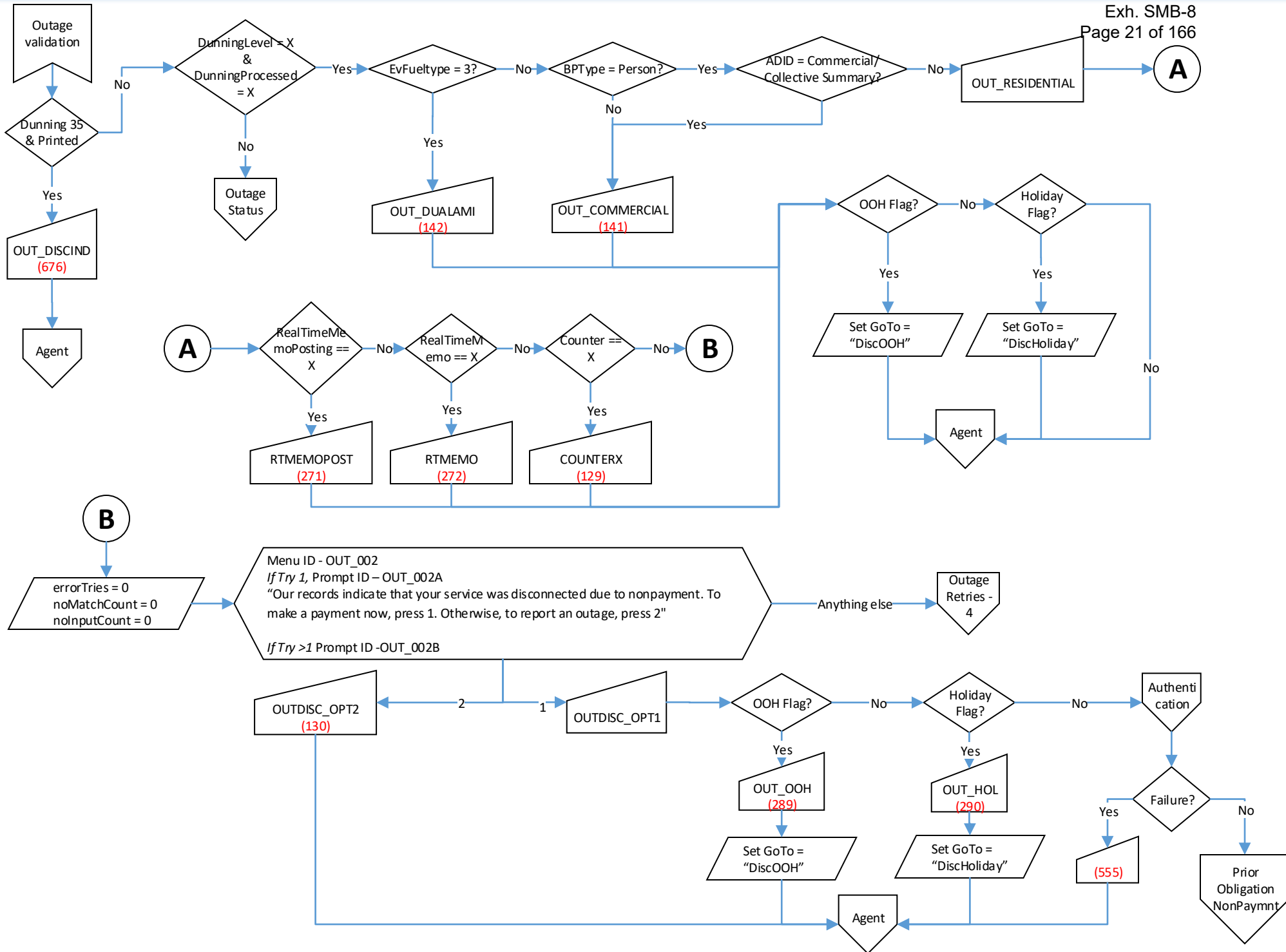


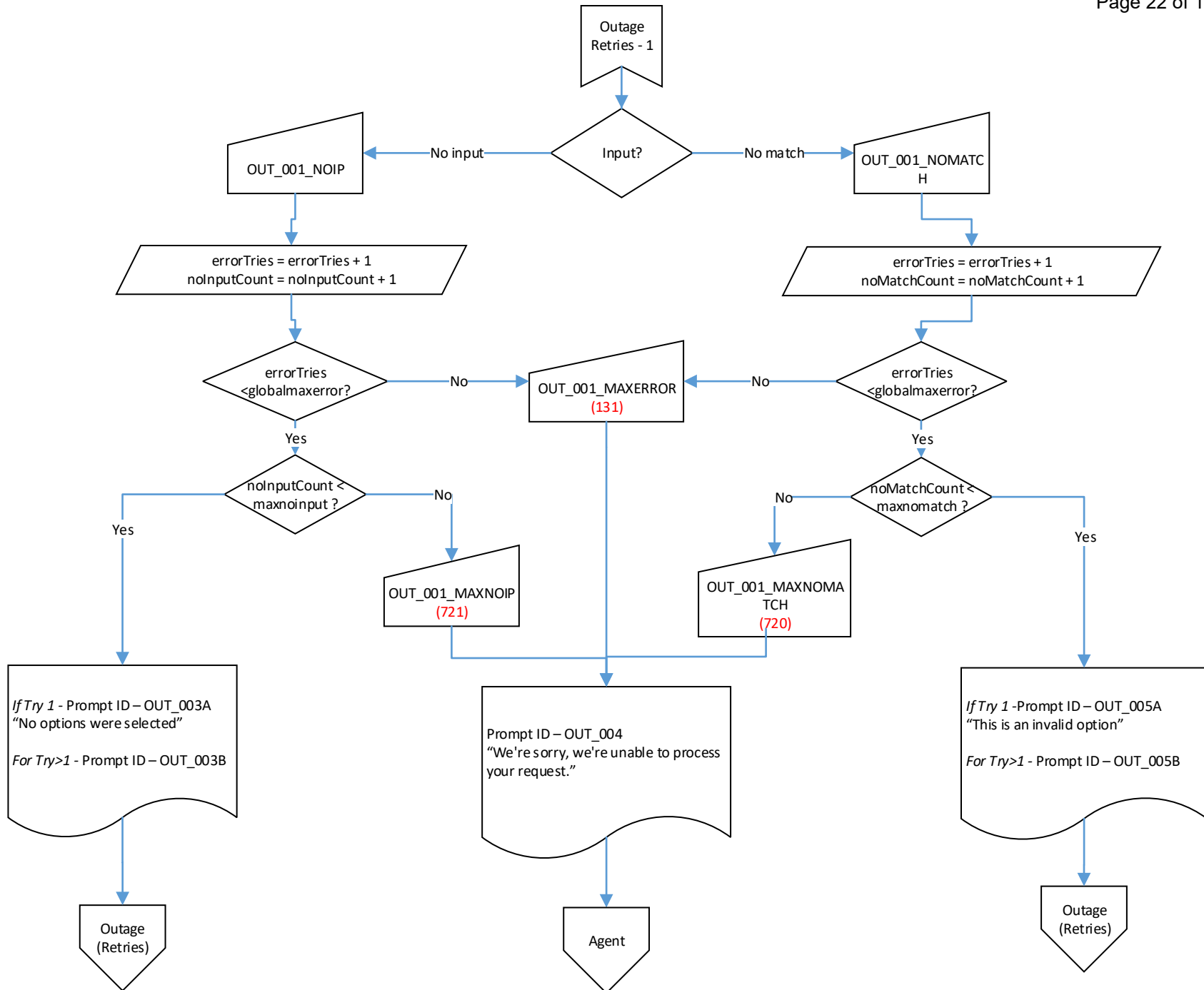


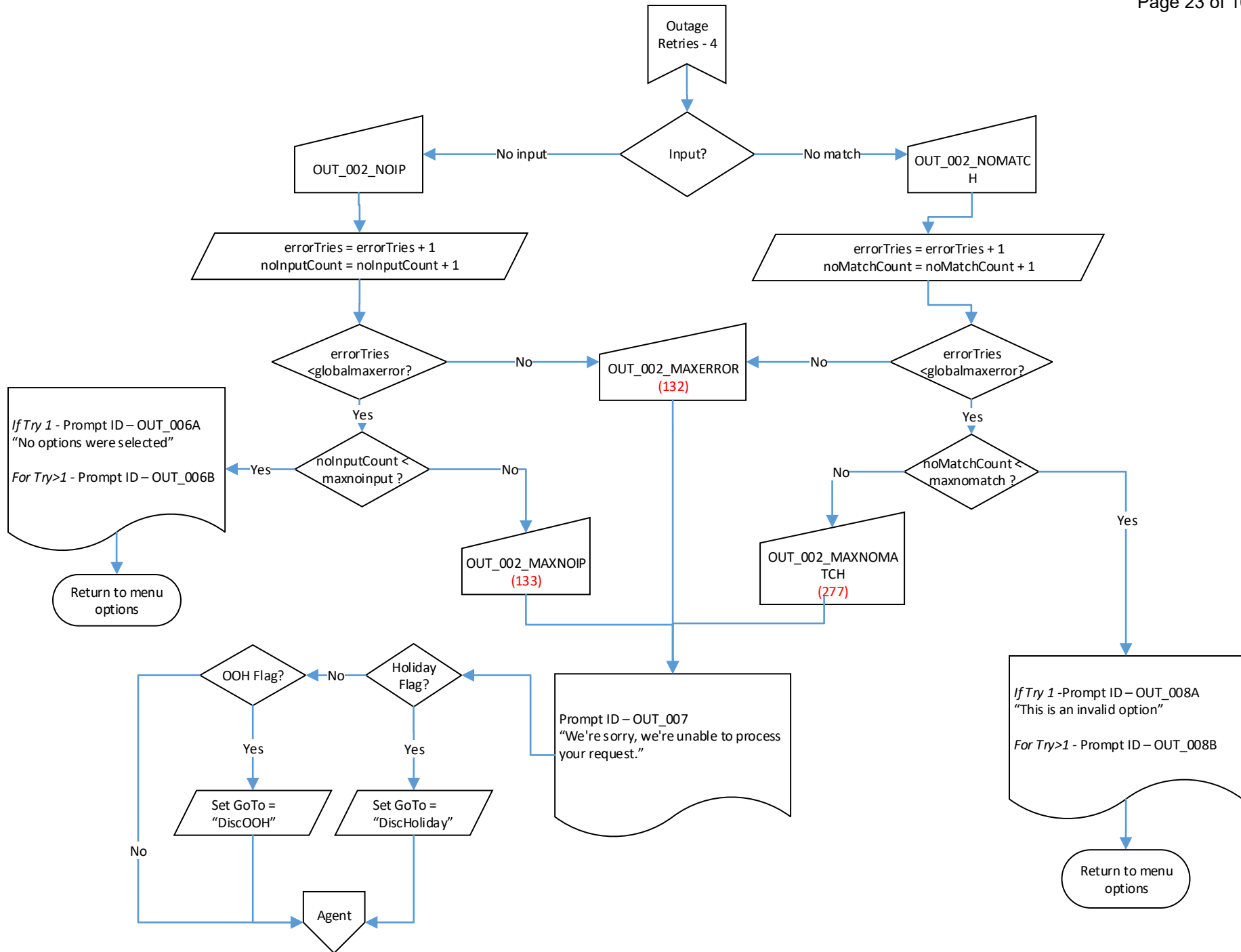




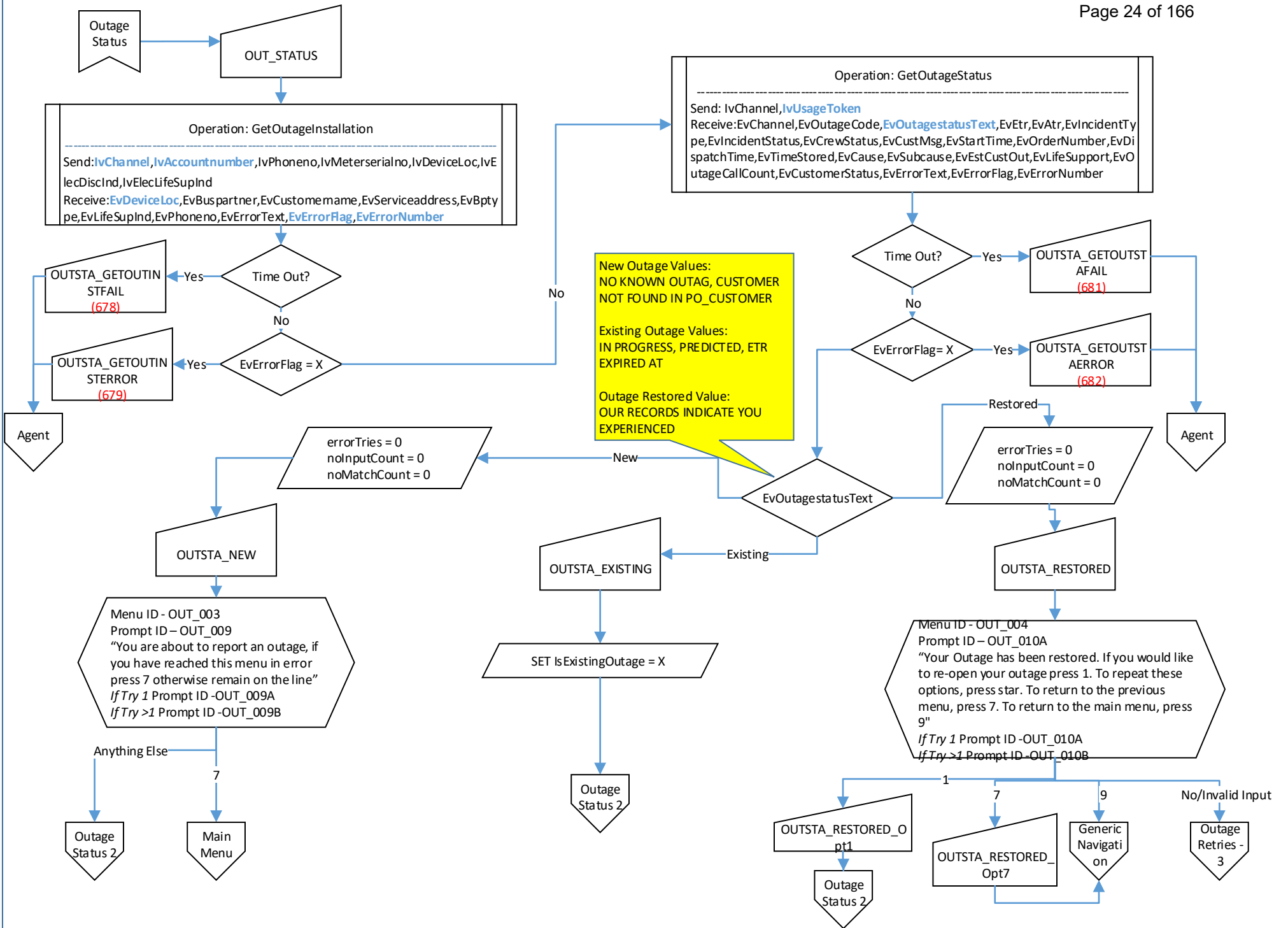


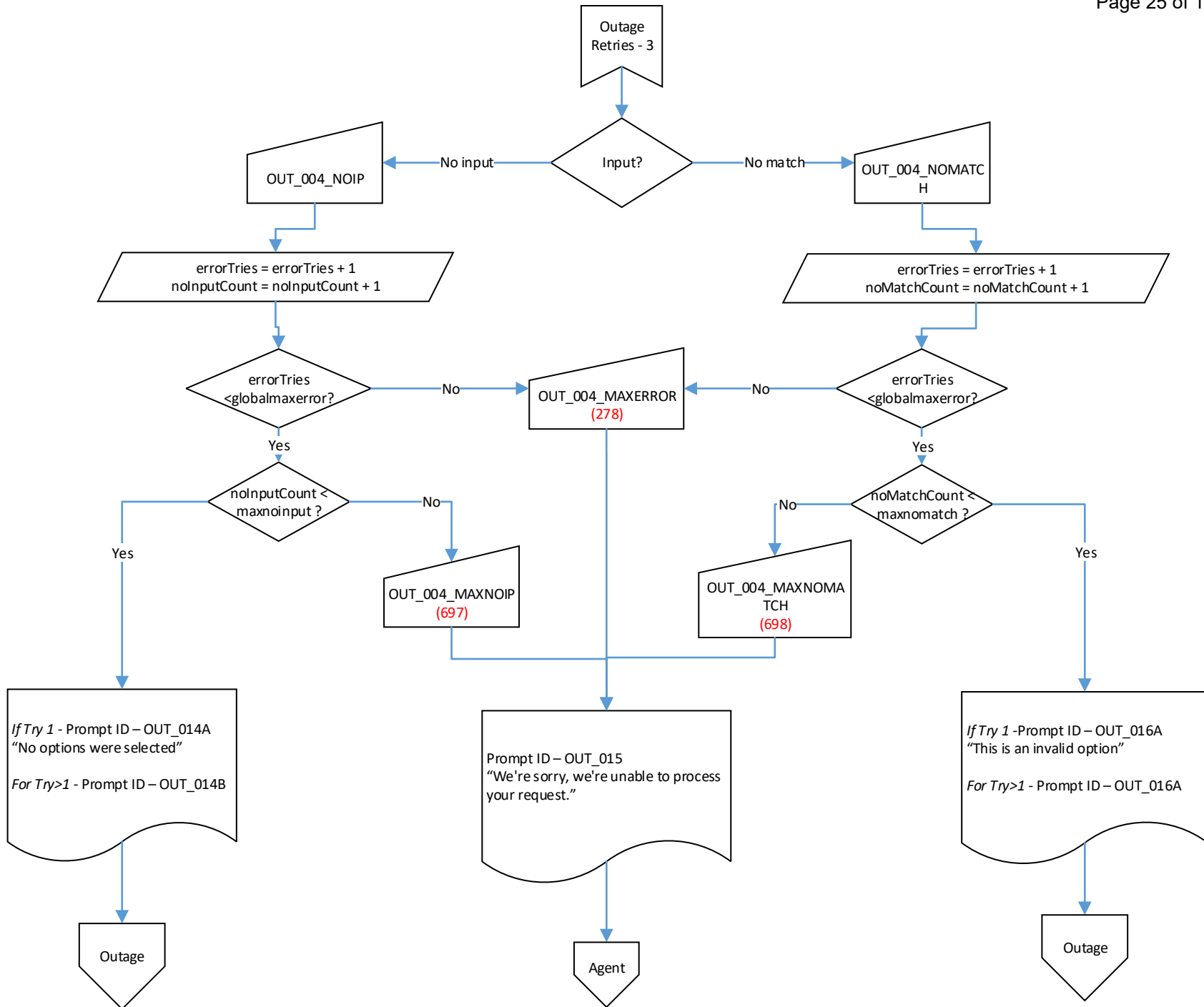


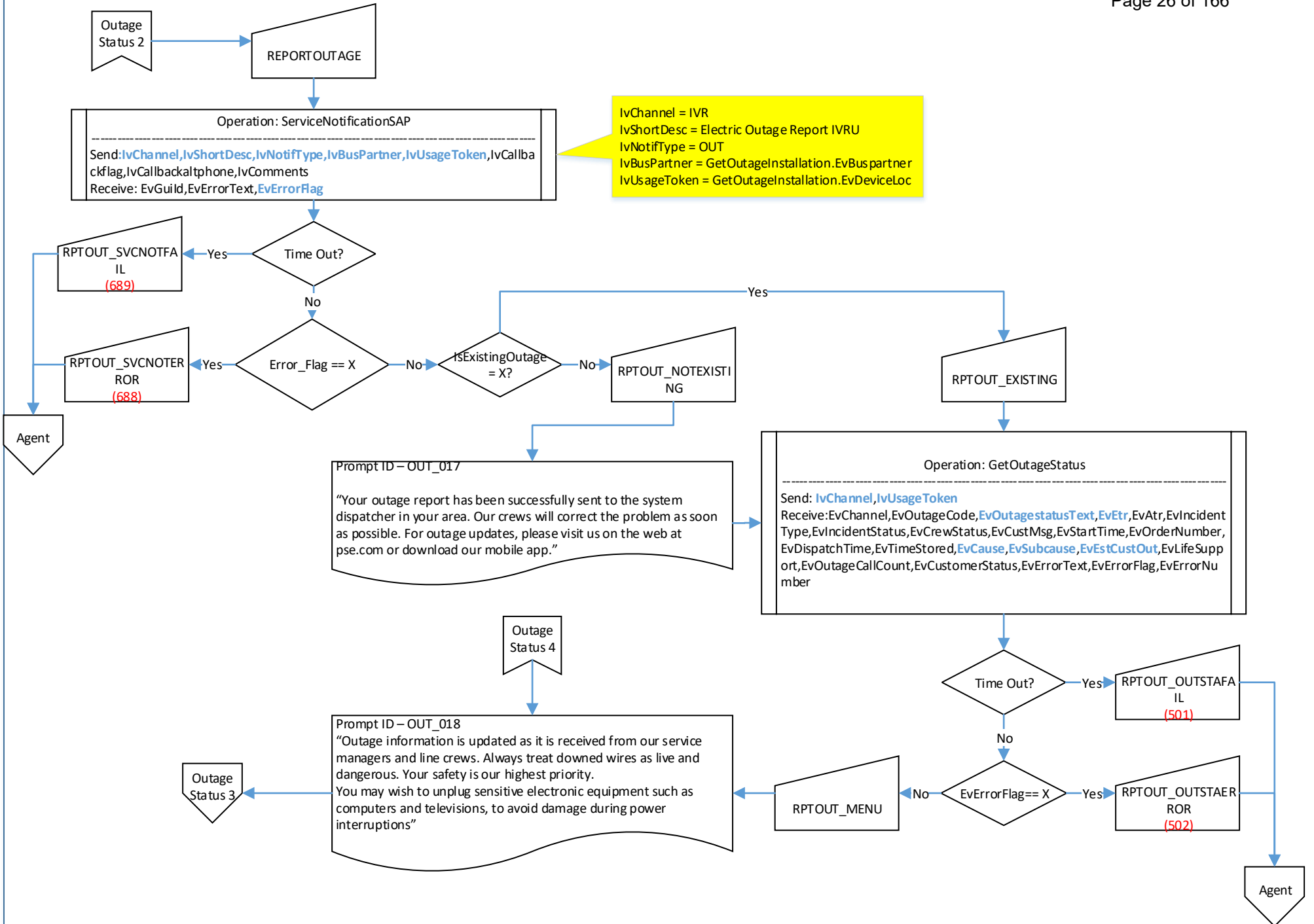


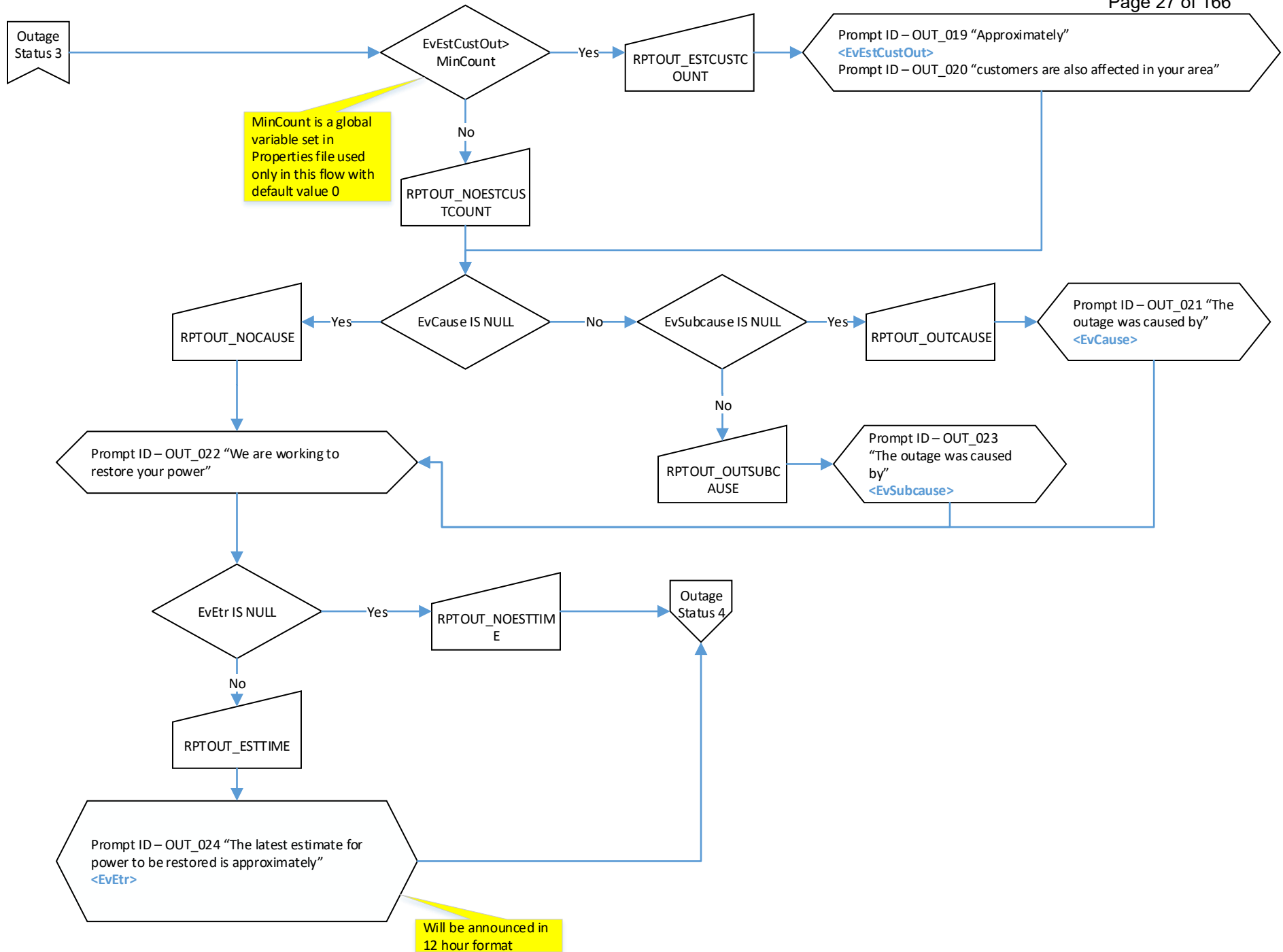






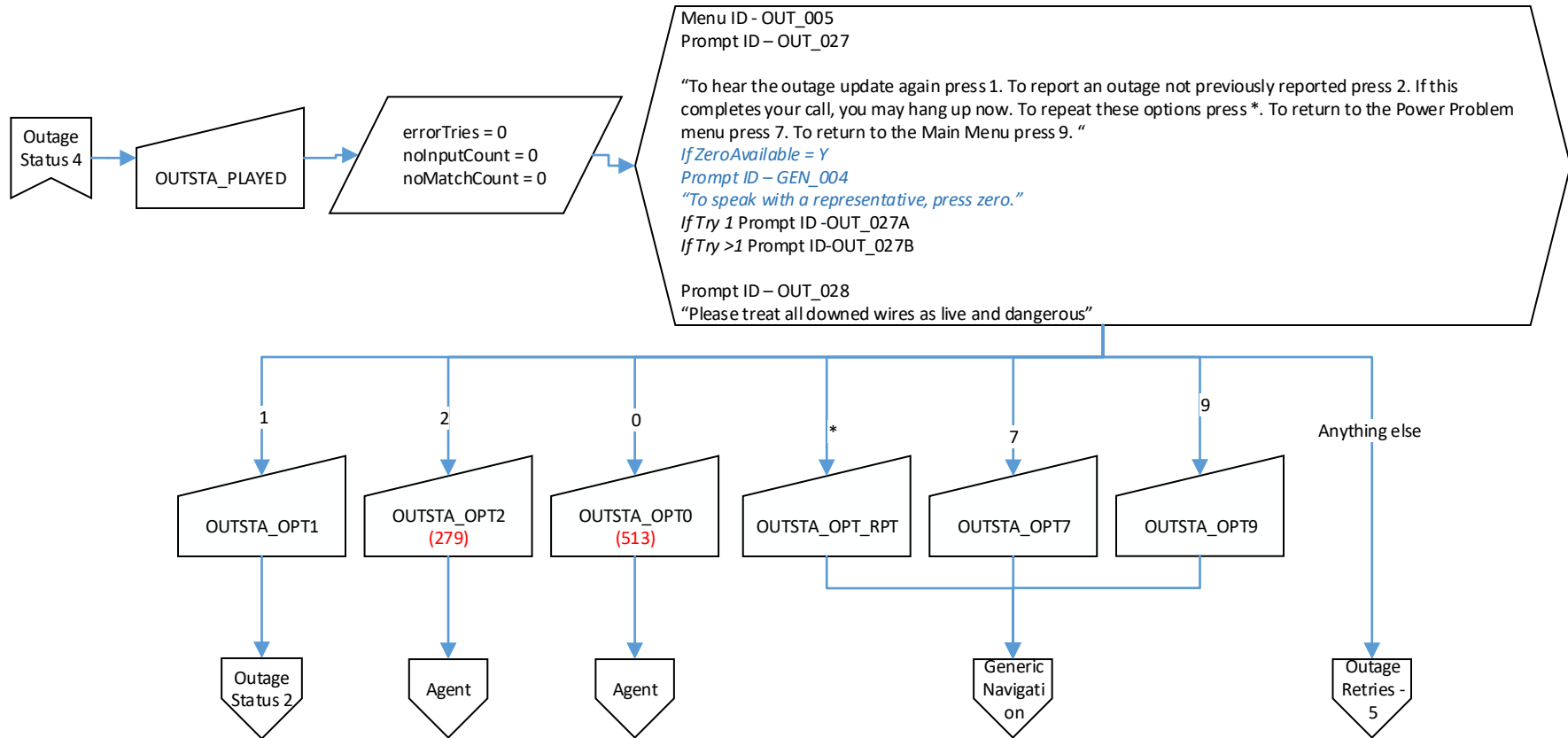


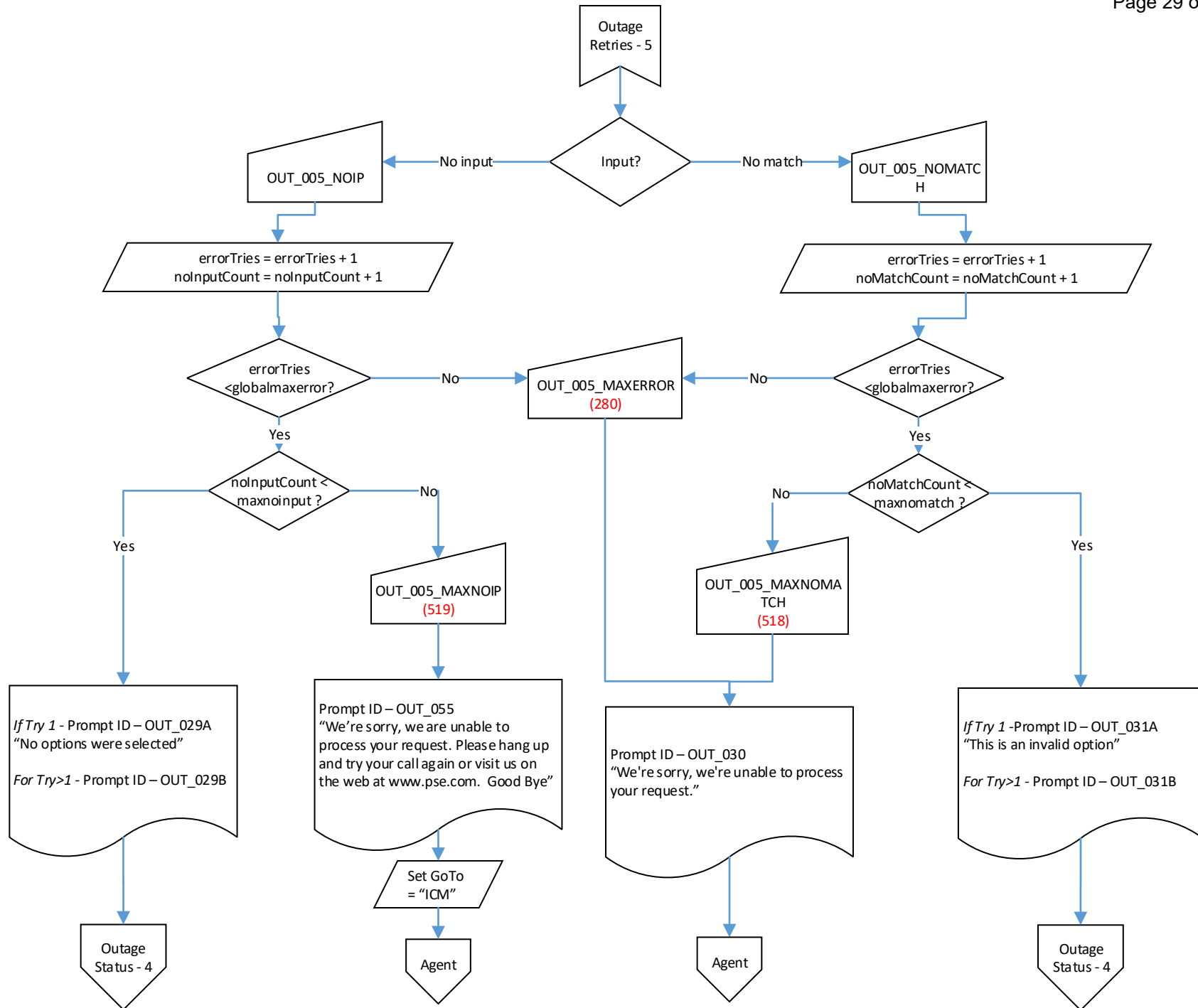


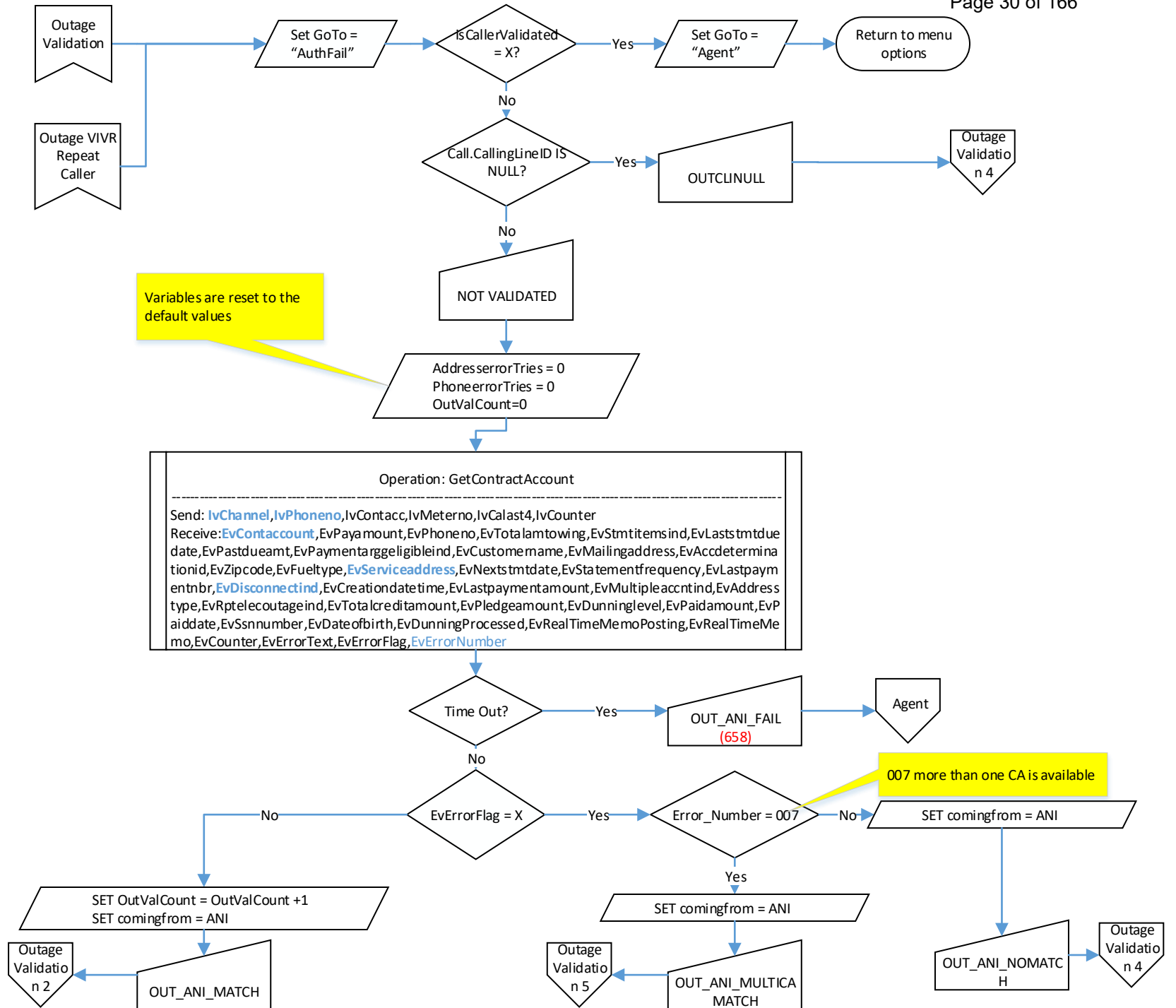


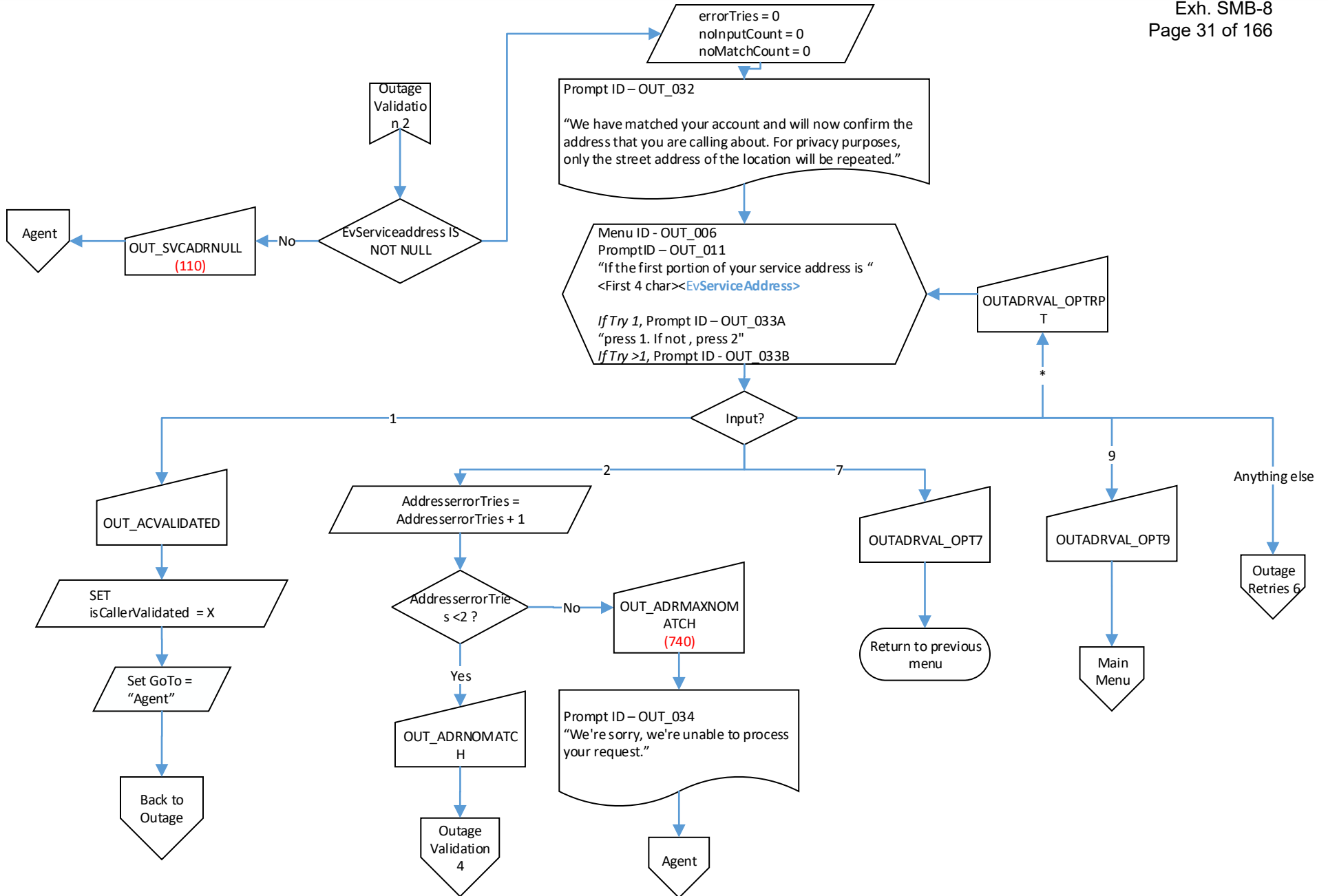
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Will be announced in 12 hour format

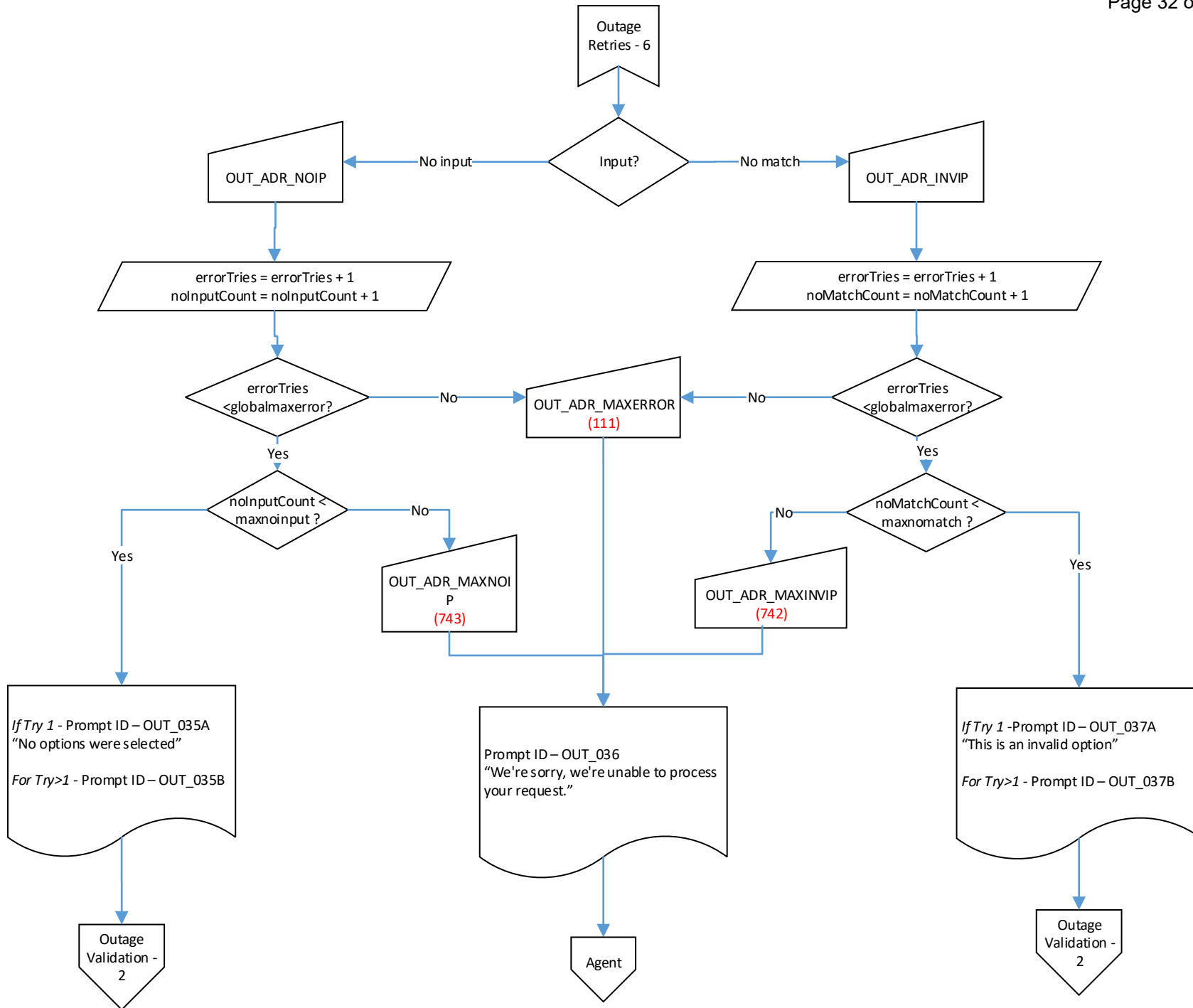


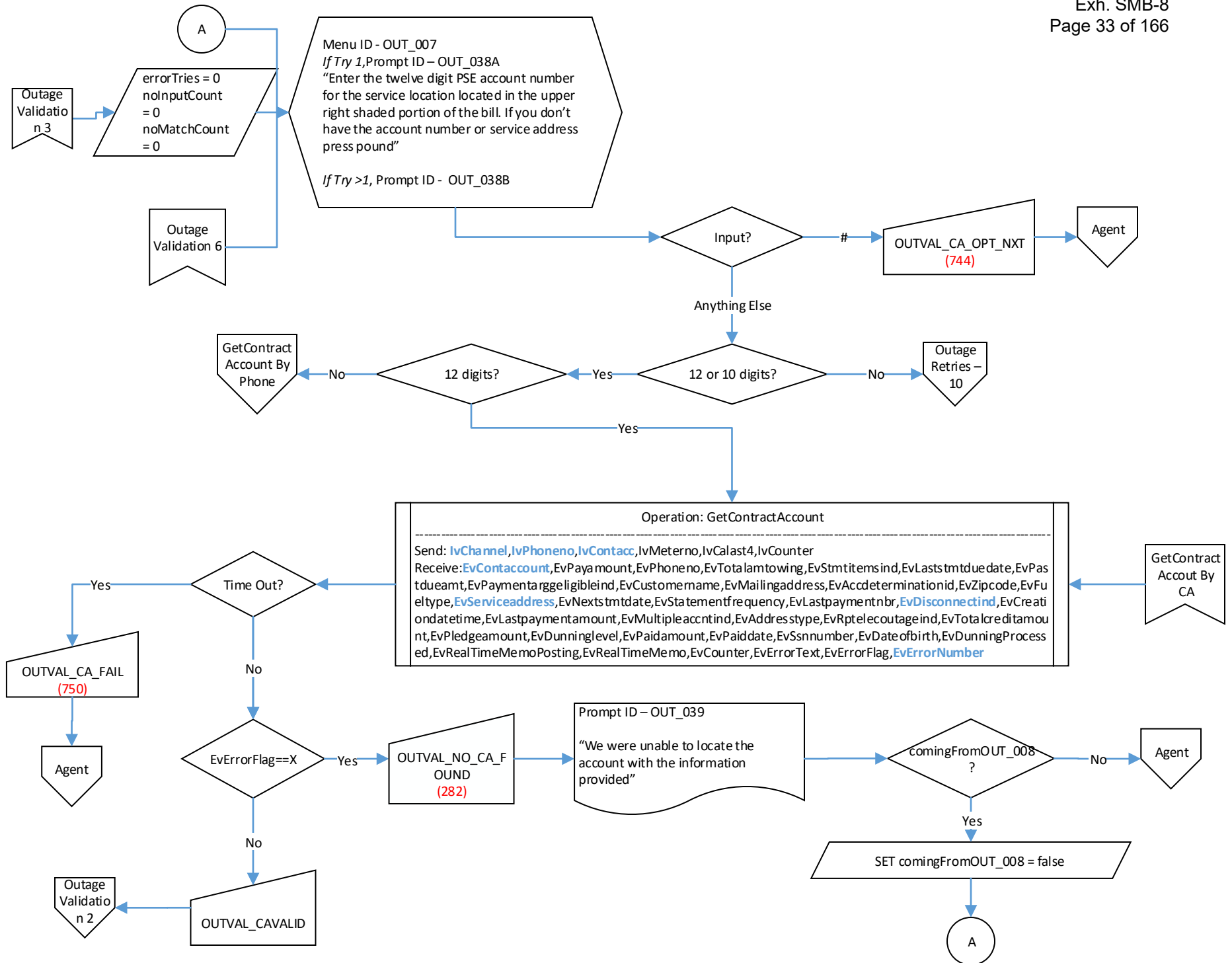


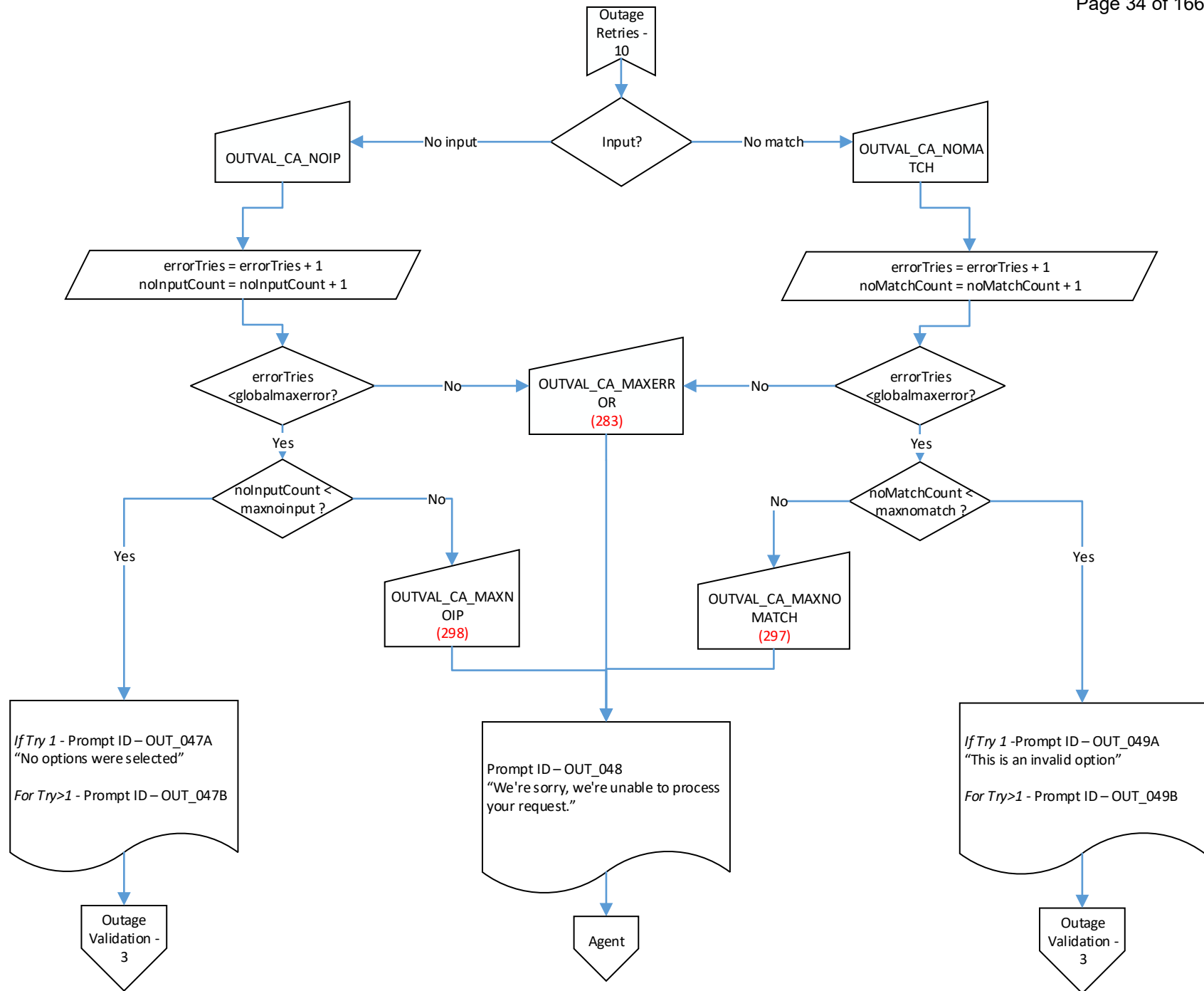


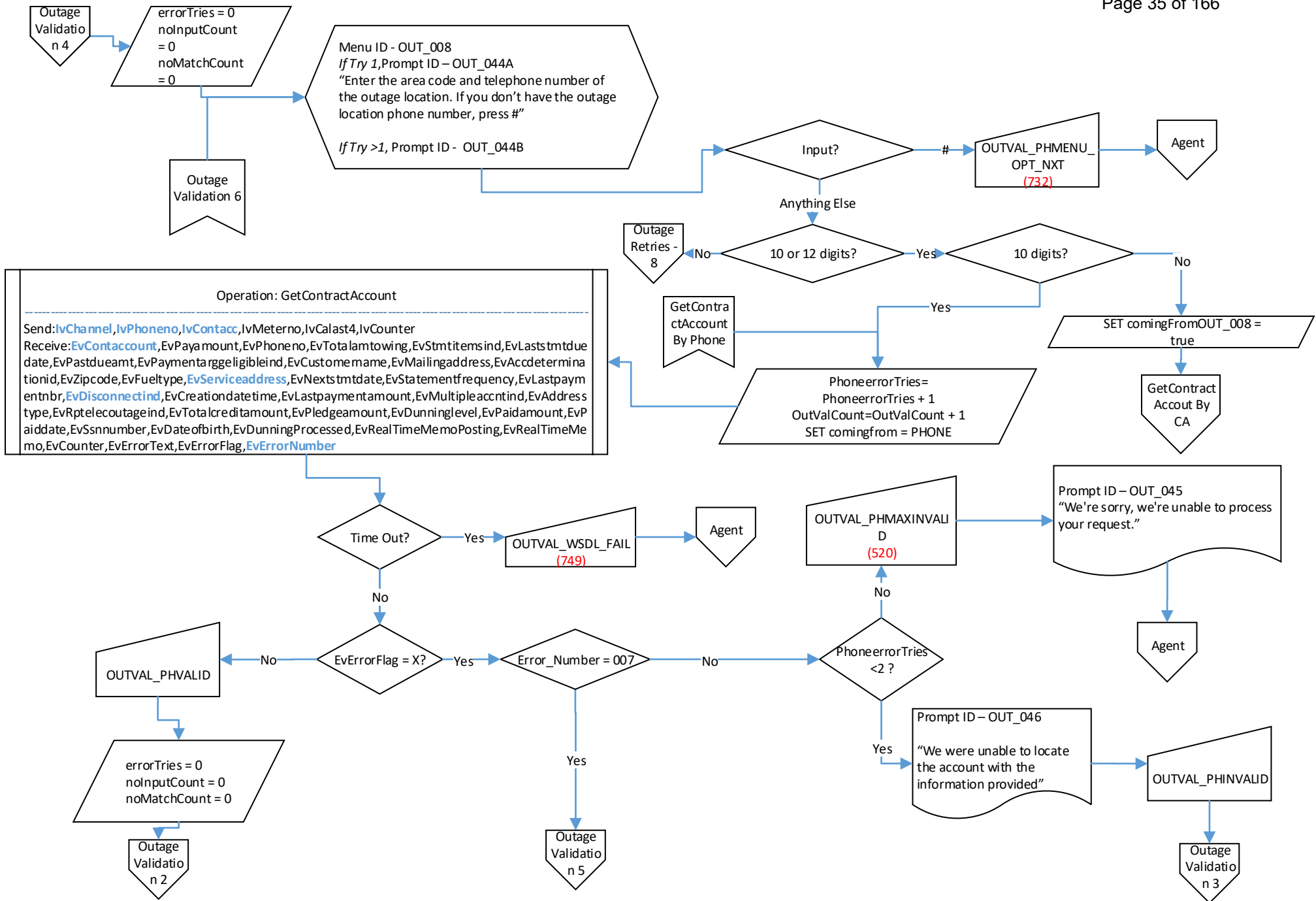


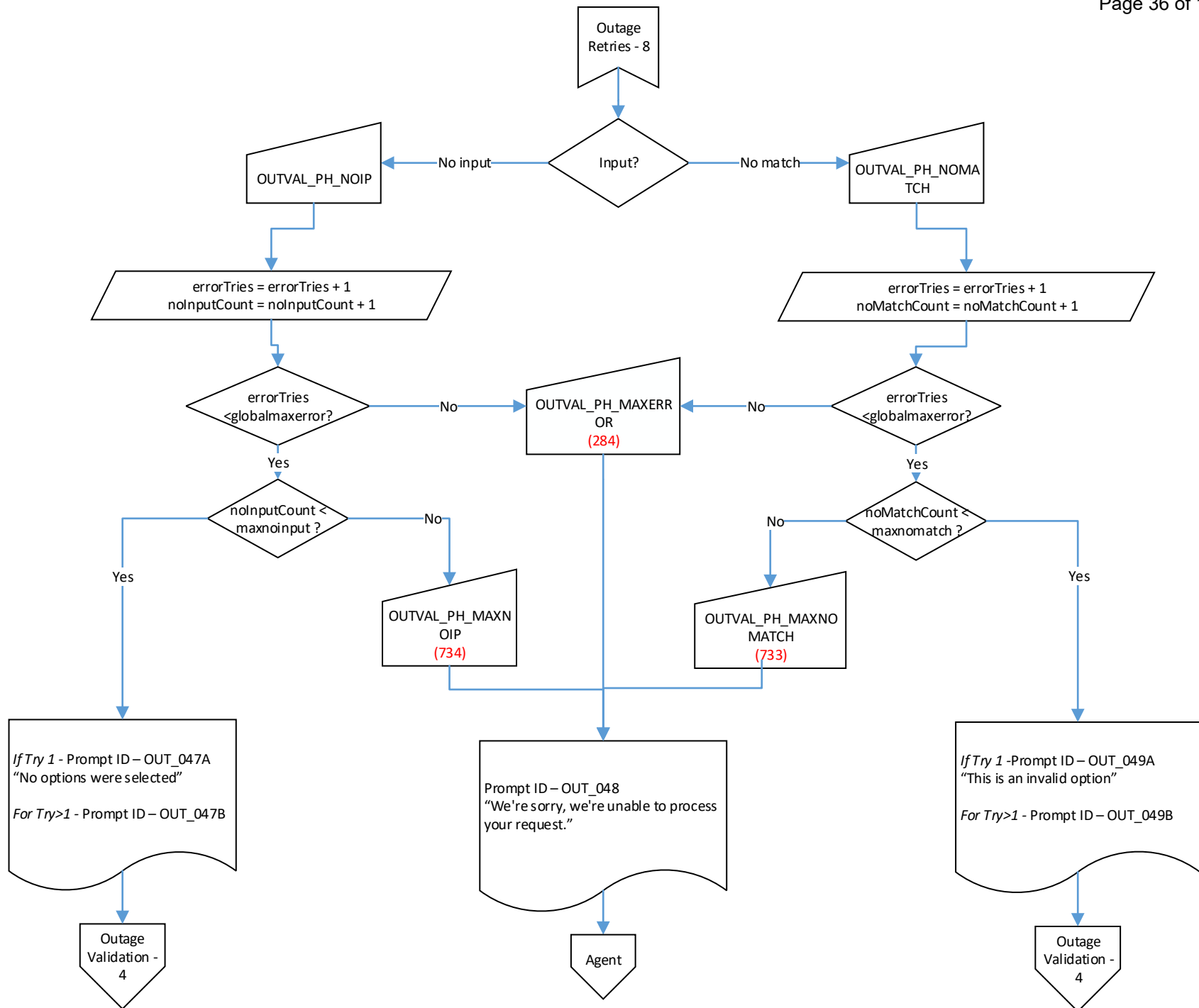


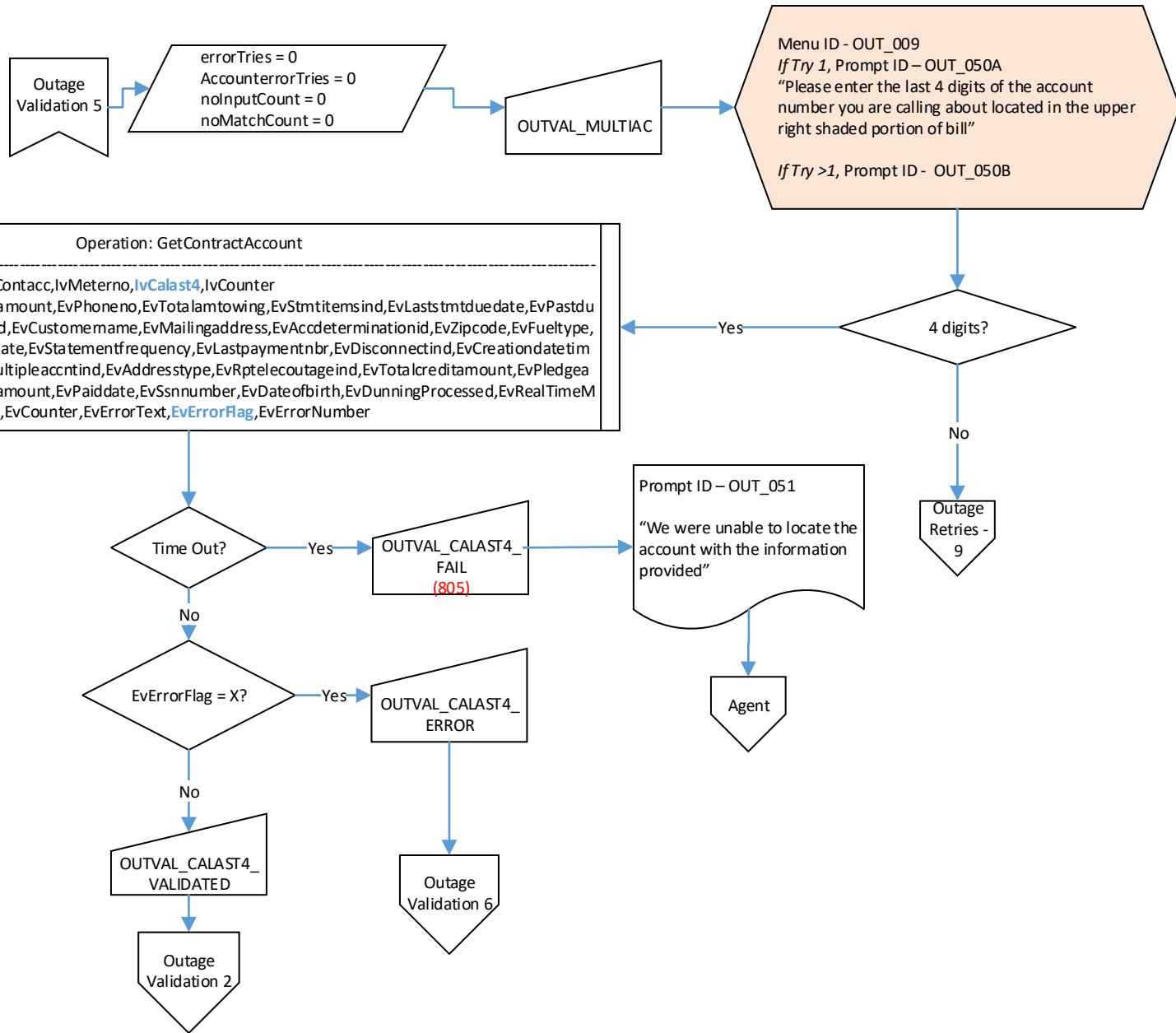


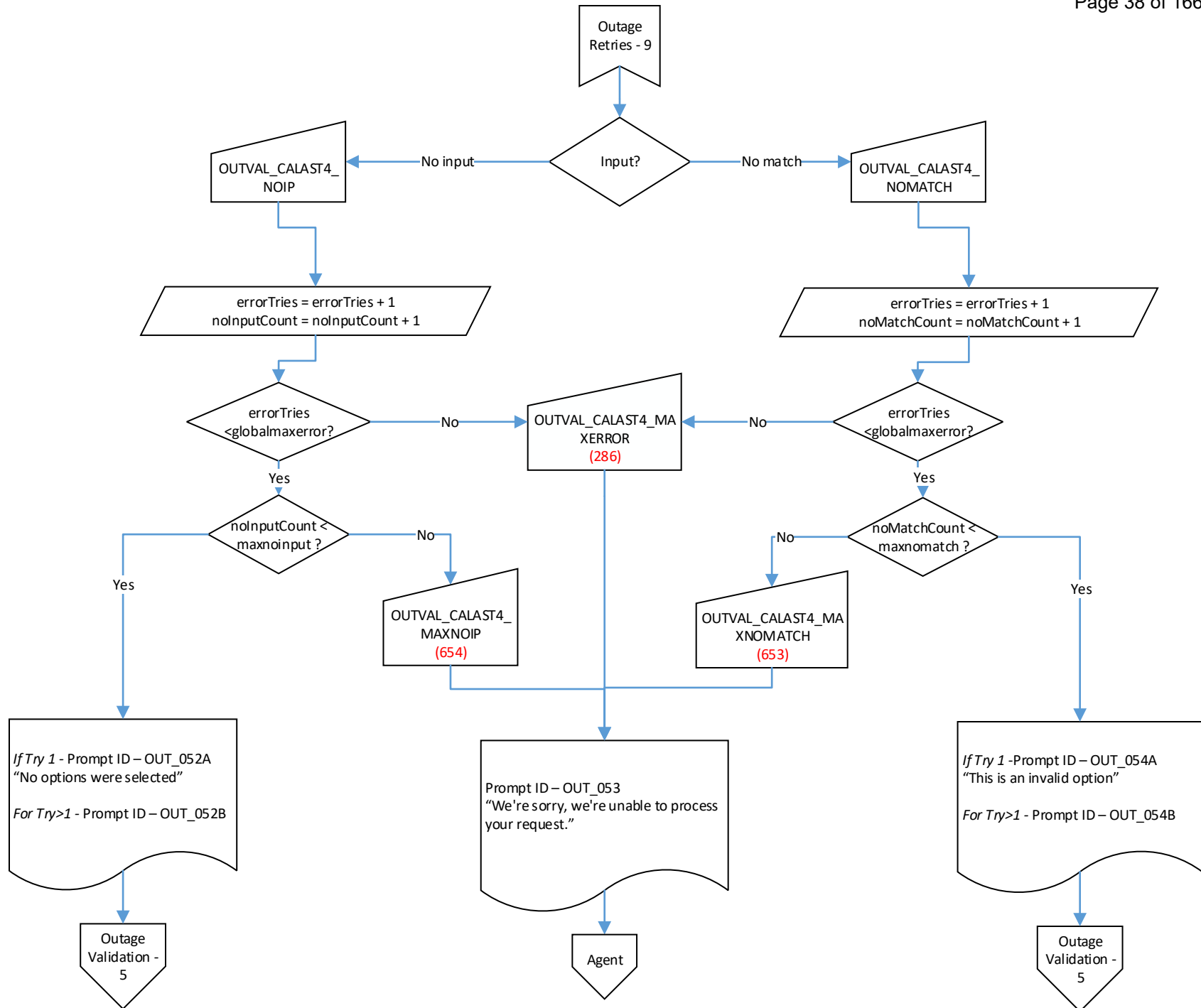


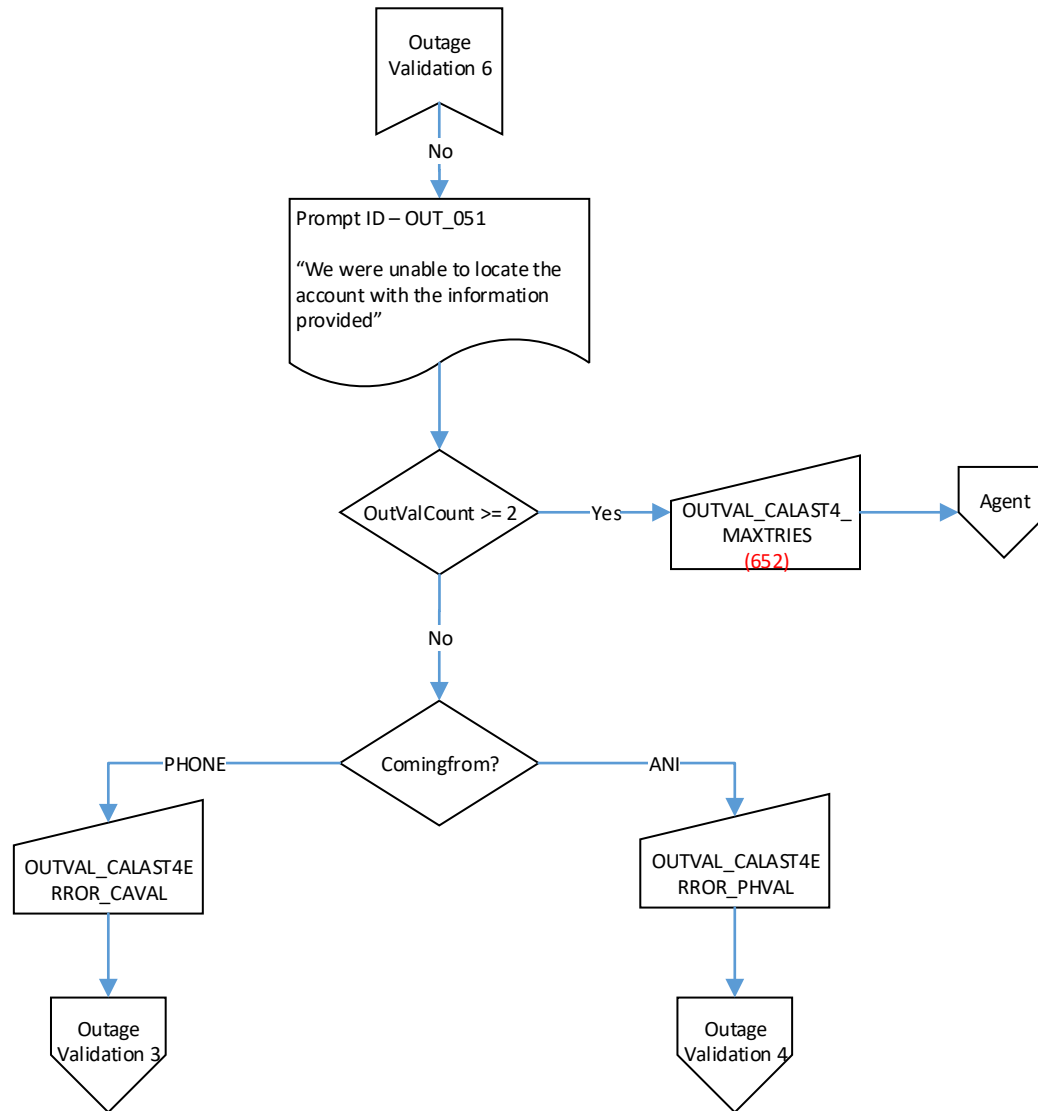




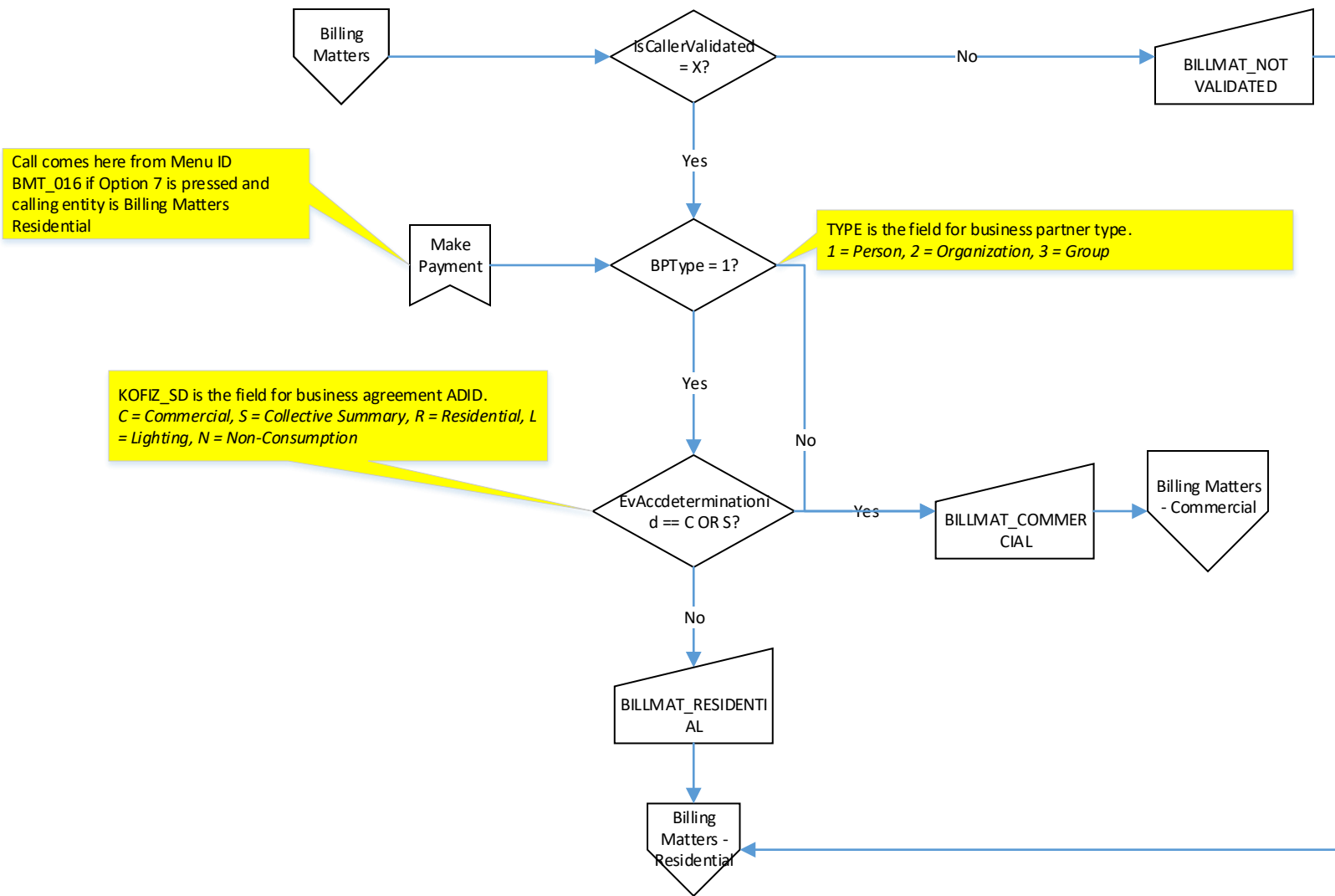


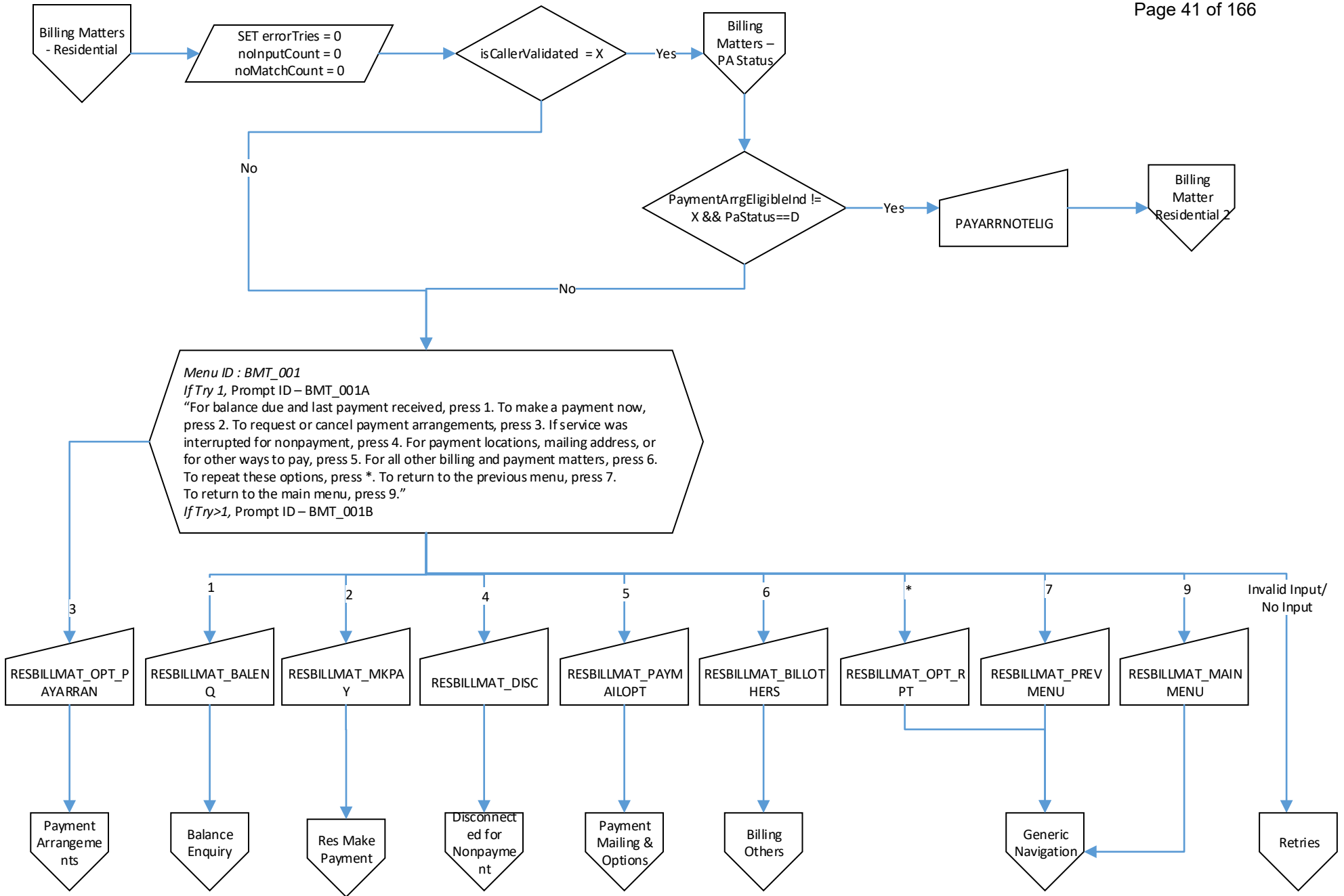


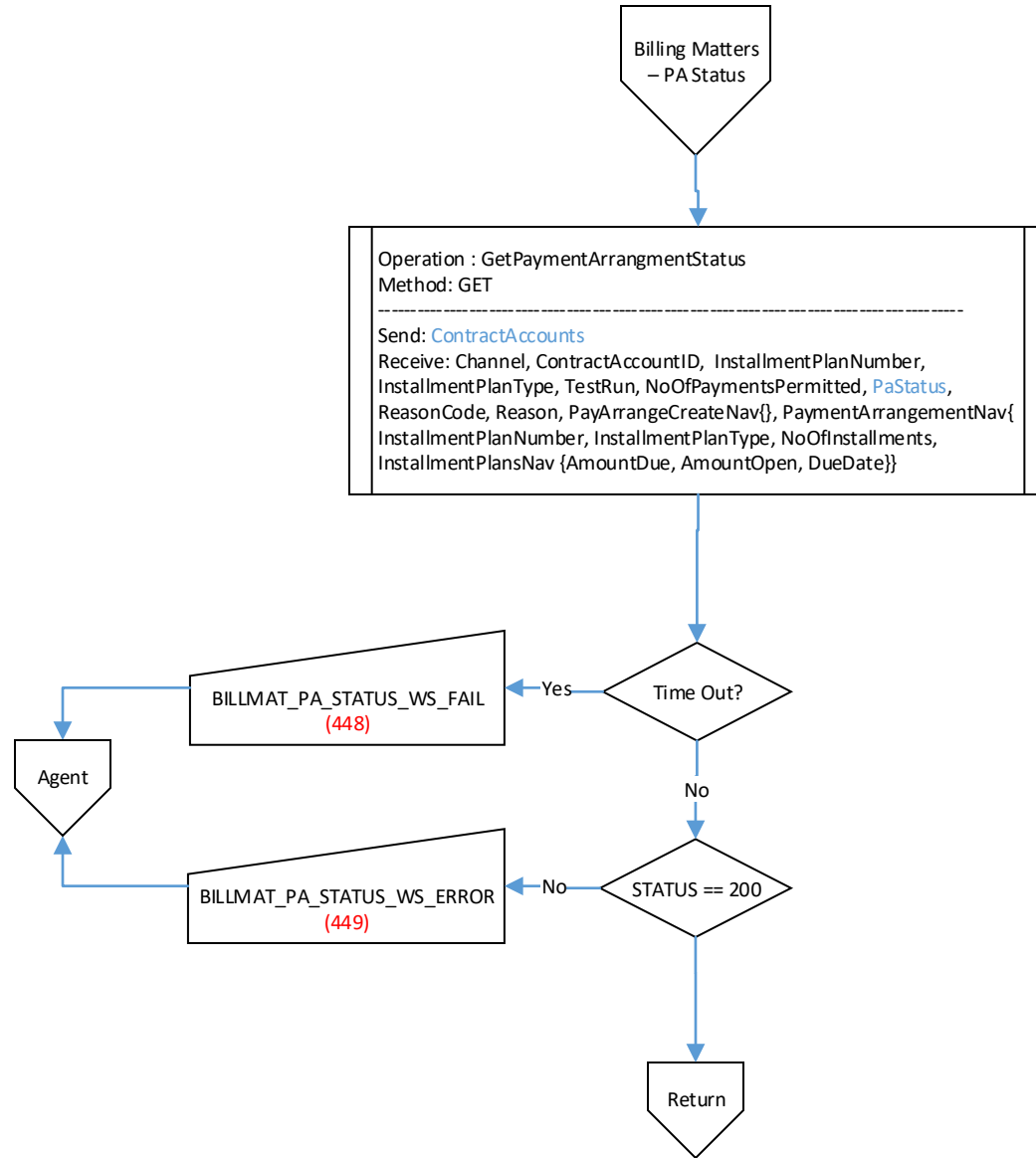


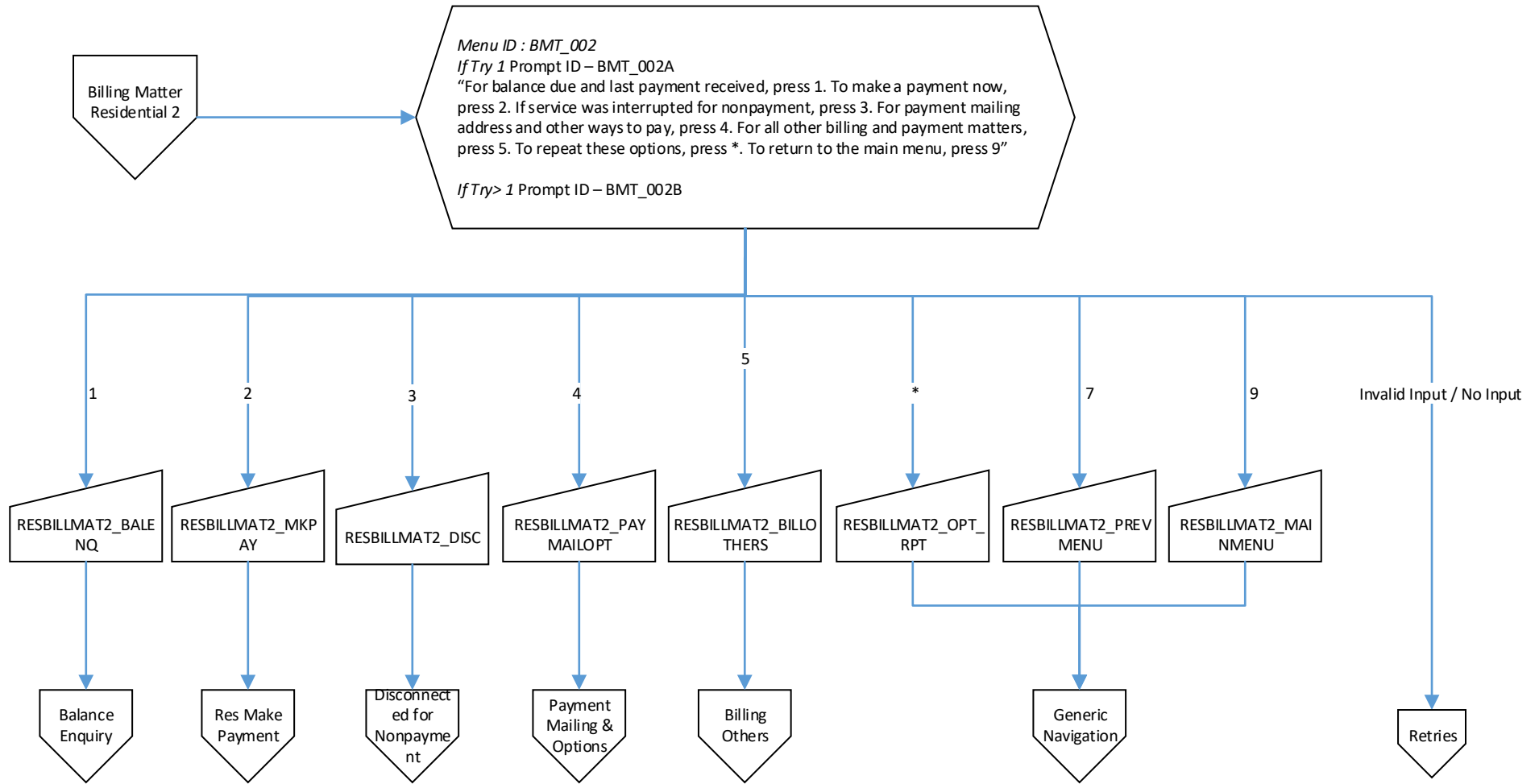


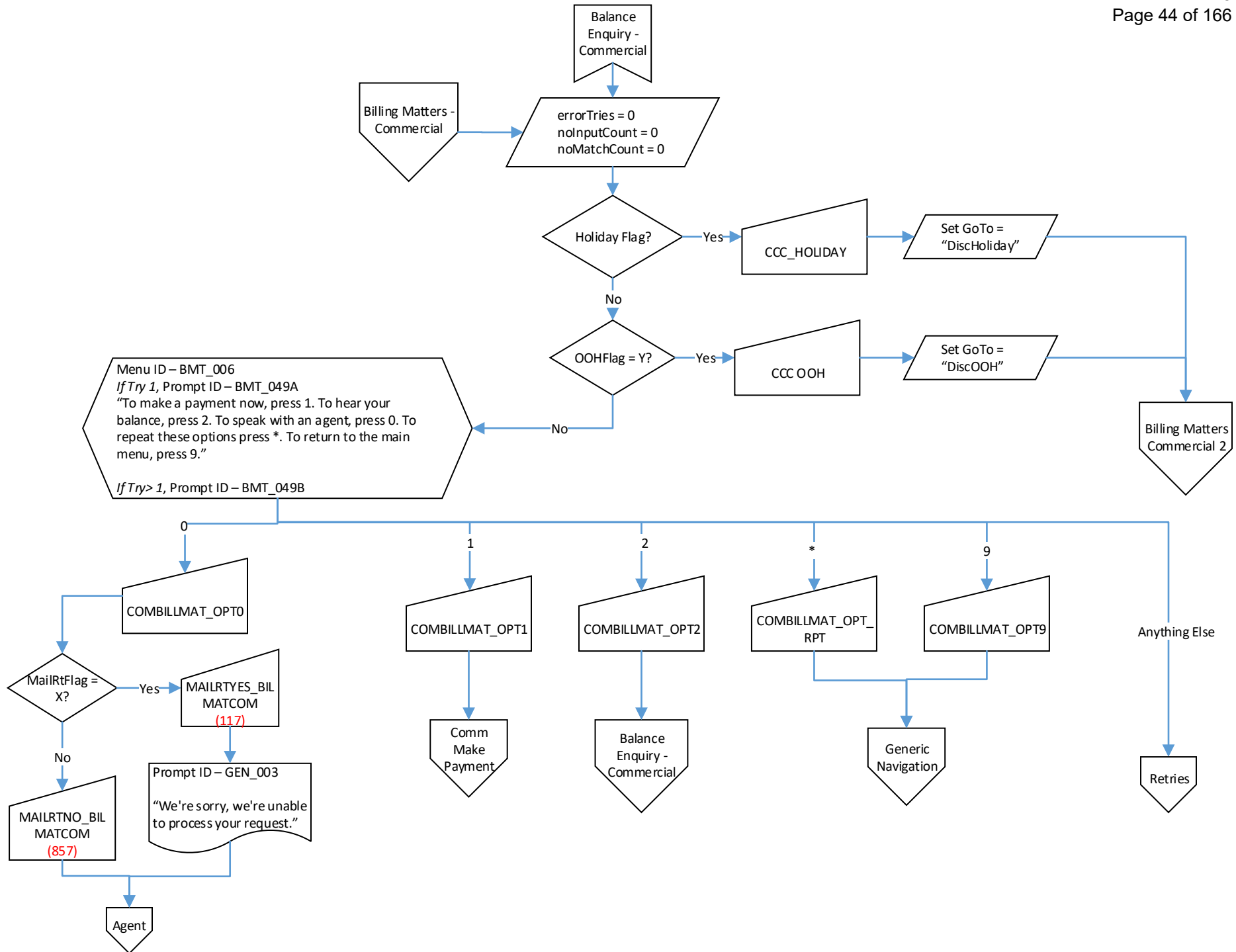


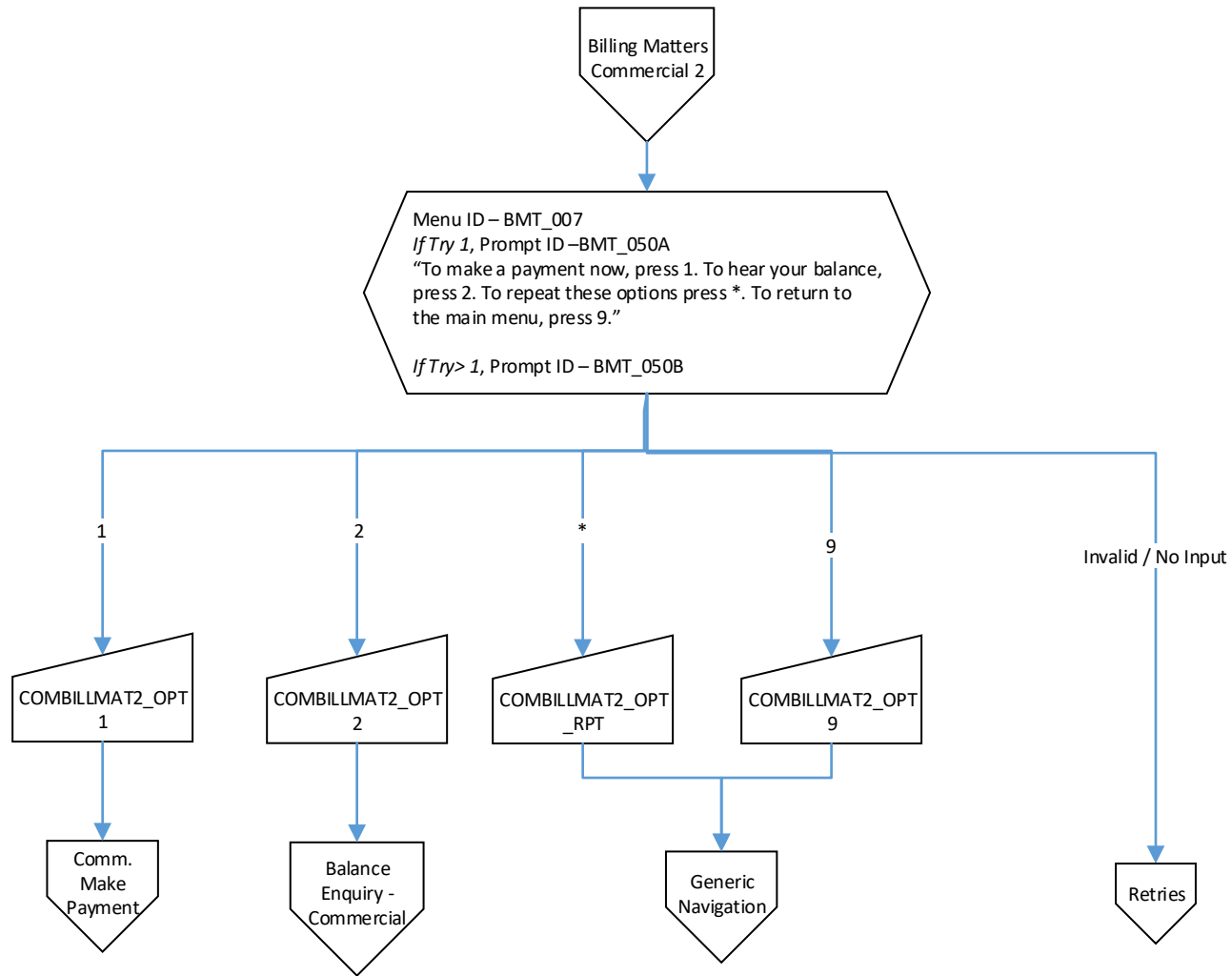




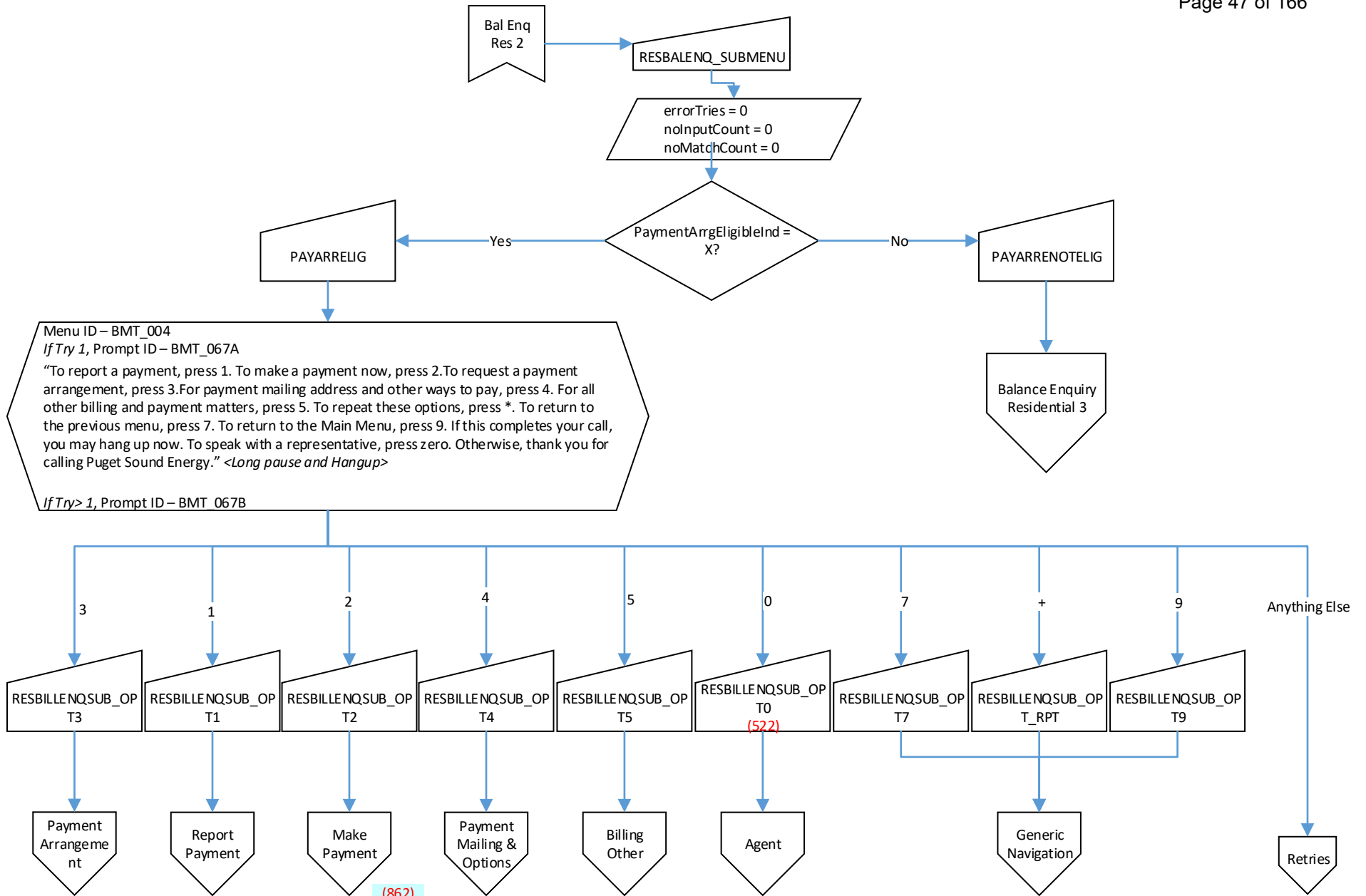




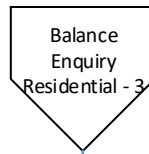




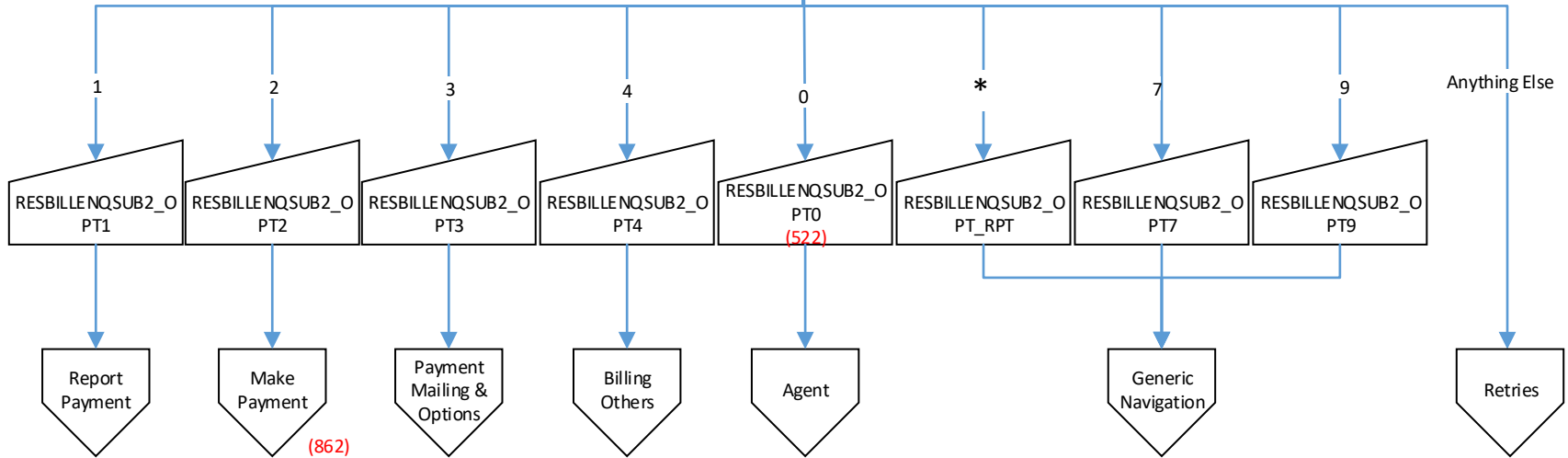


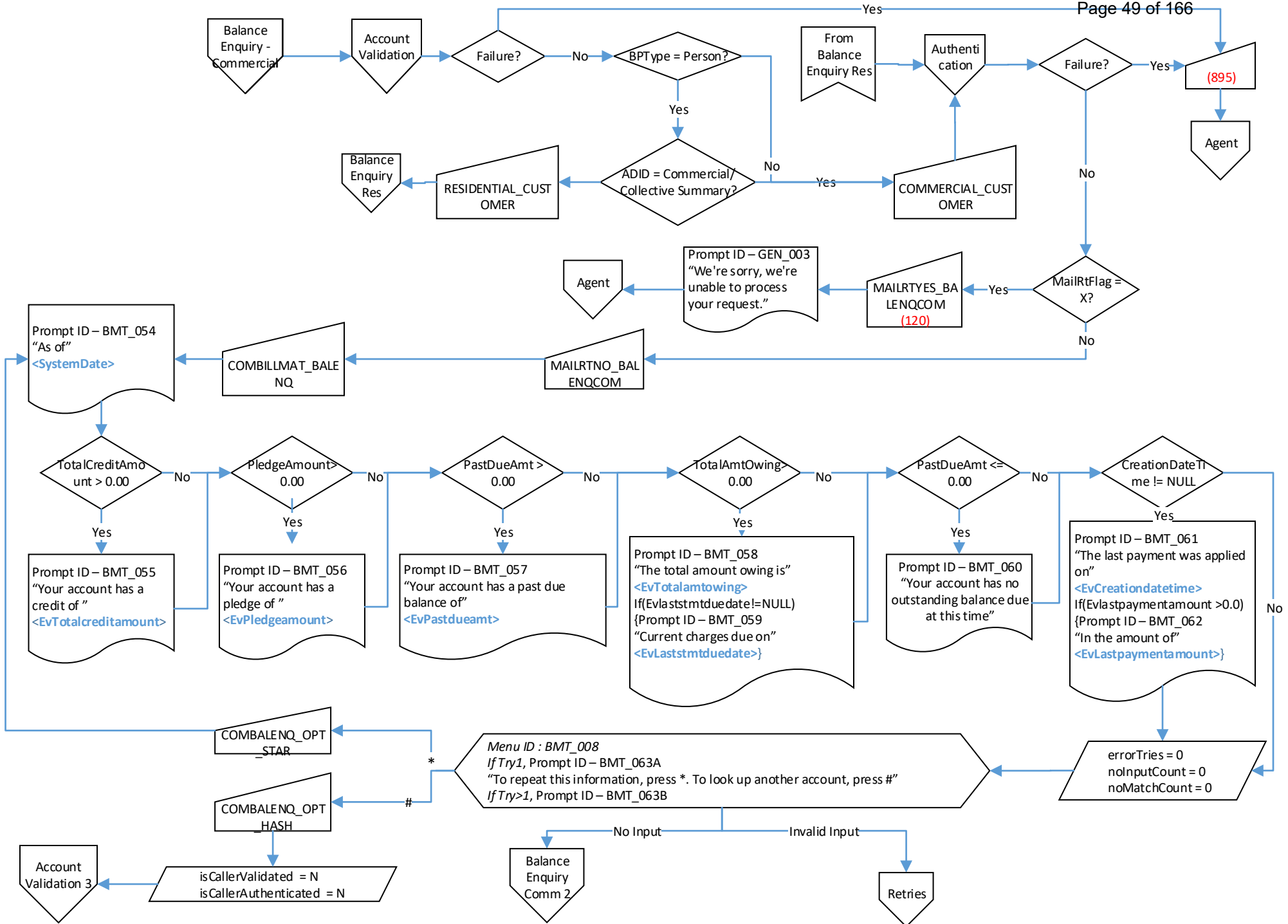


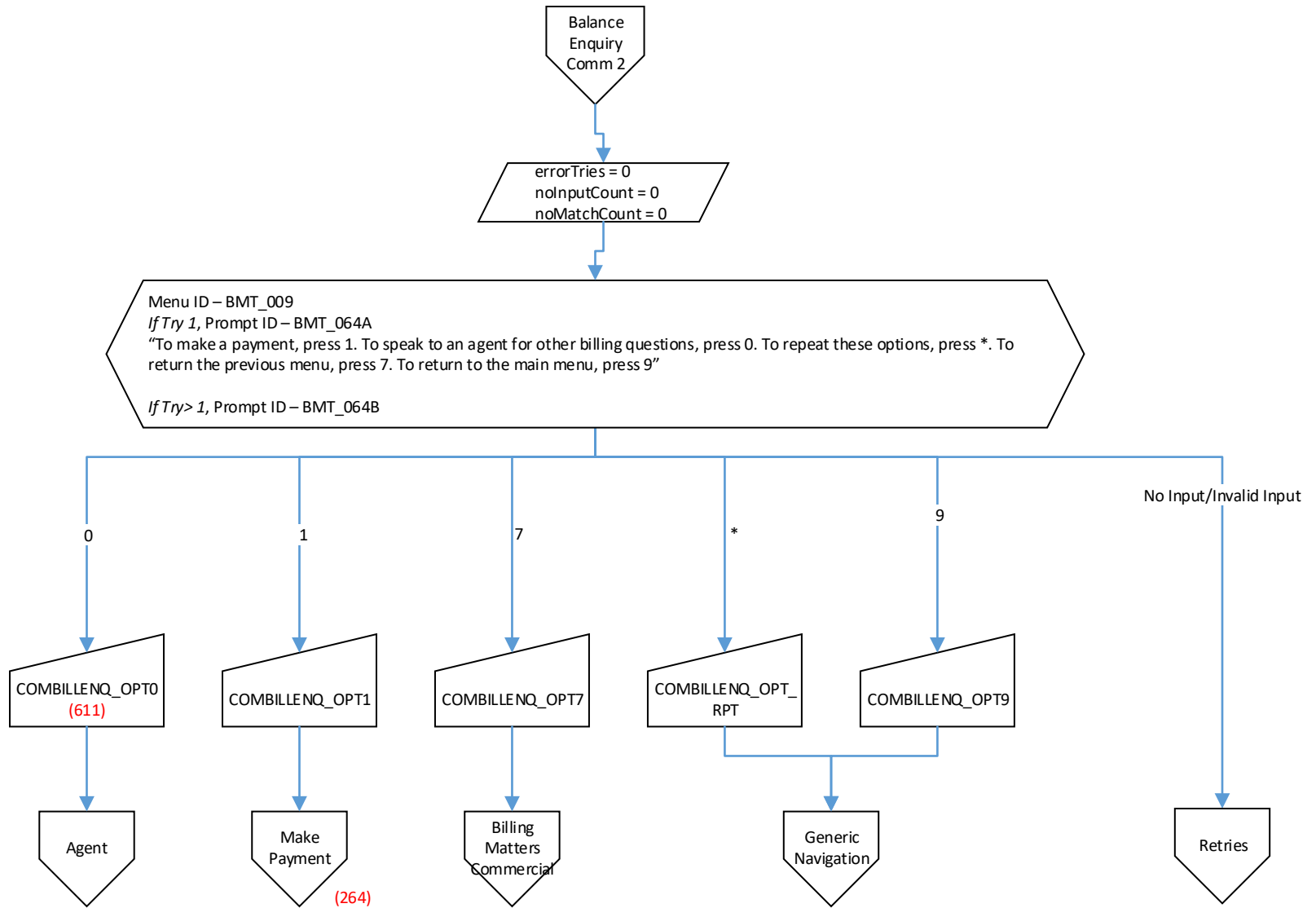


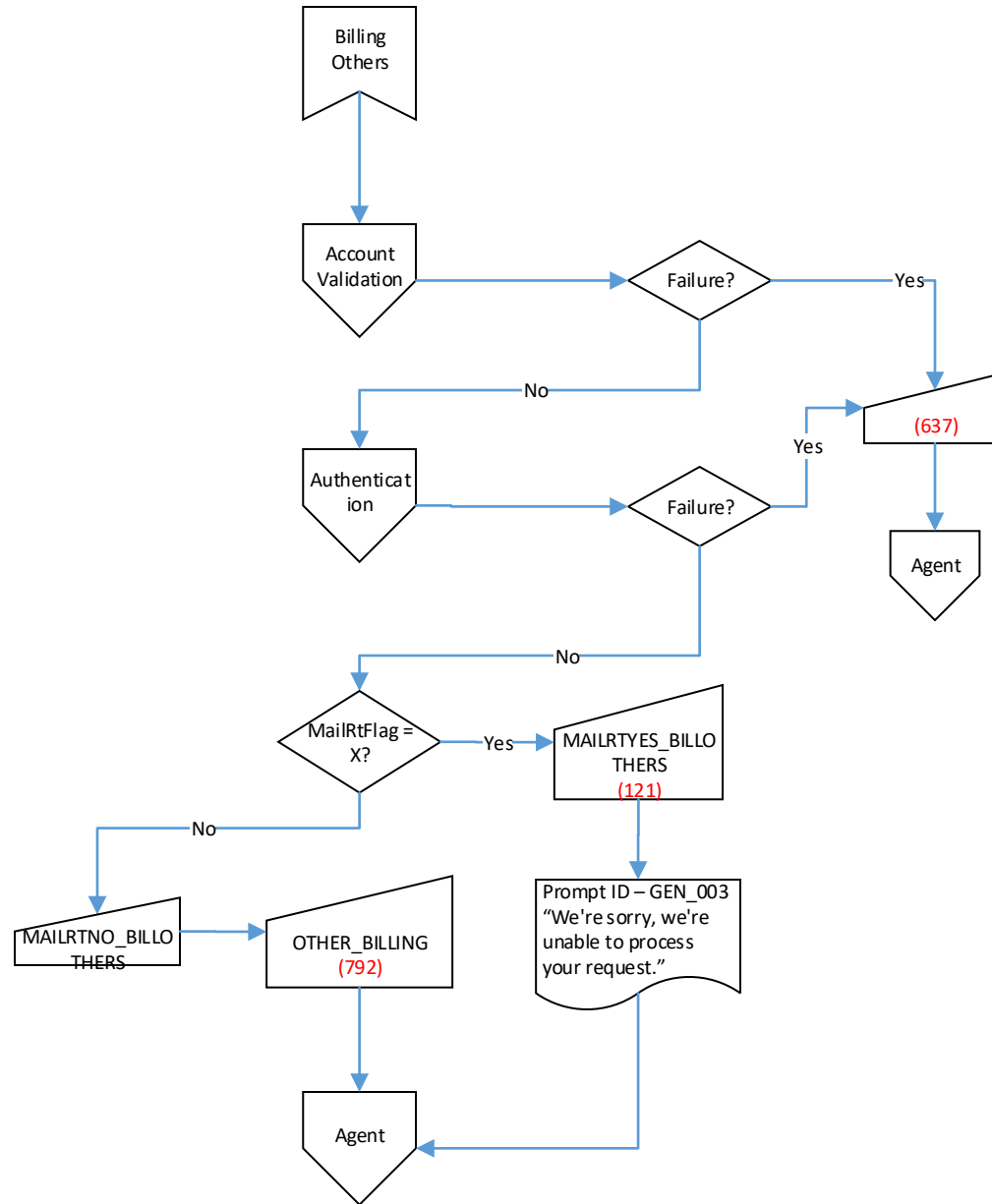


Menu ID – BMT\_005  
 If Try 1, Prompt ID – BMT\_068A  
 “To report a payment, press 1. To make a payment now, press 2. For payment mailing address and other ways to pay, press 3. For all other billing and payment matters, press 4. To repeat these options, press \*. To return to the previous menu, press 7. To return to the Main Menu, press 9. If this completes your call, you may hang up now. To speak with a representative, press zero. Otherwise, thank you for calling Puget Sound Energy.” <Long pause and Hangup>  
 If Try> 1, Prompt ID – BMT\_068B





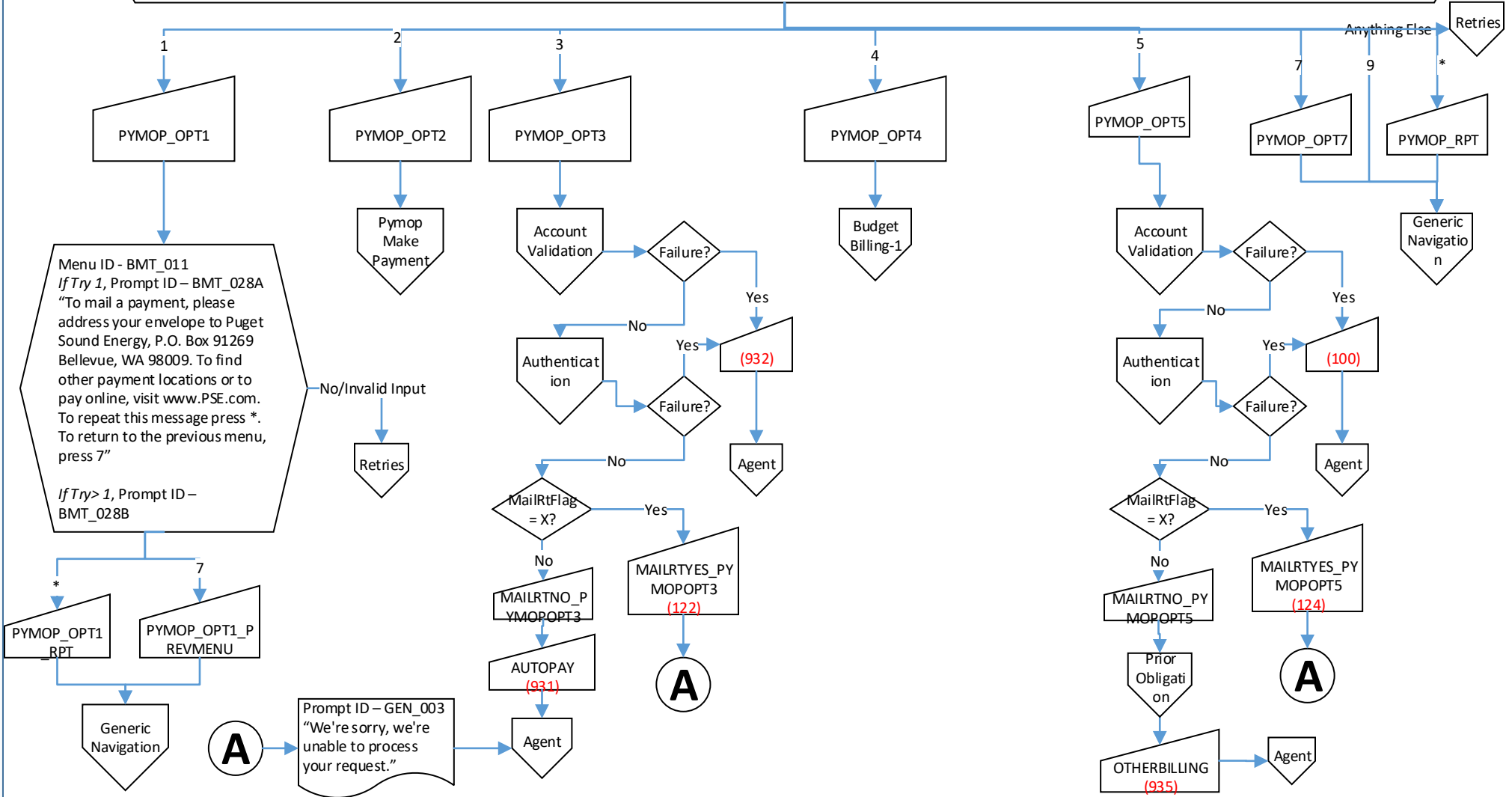


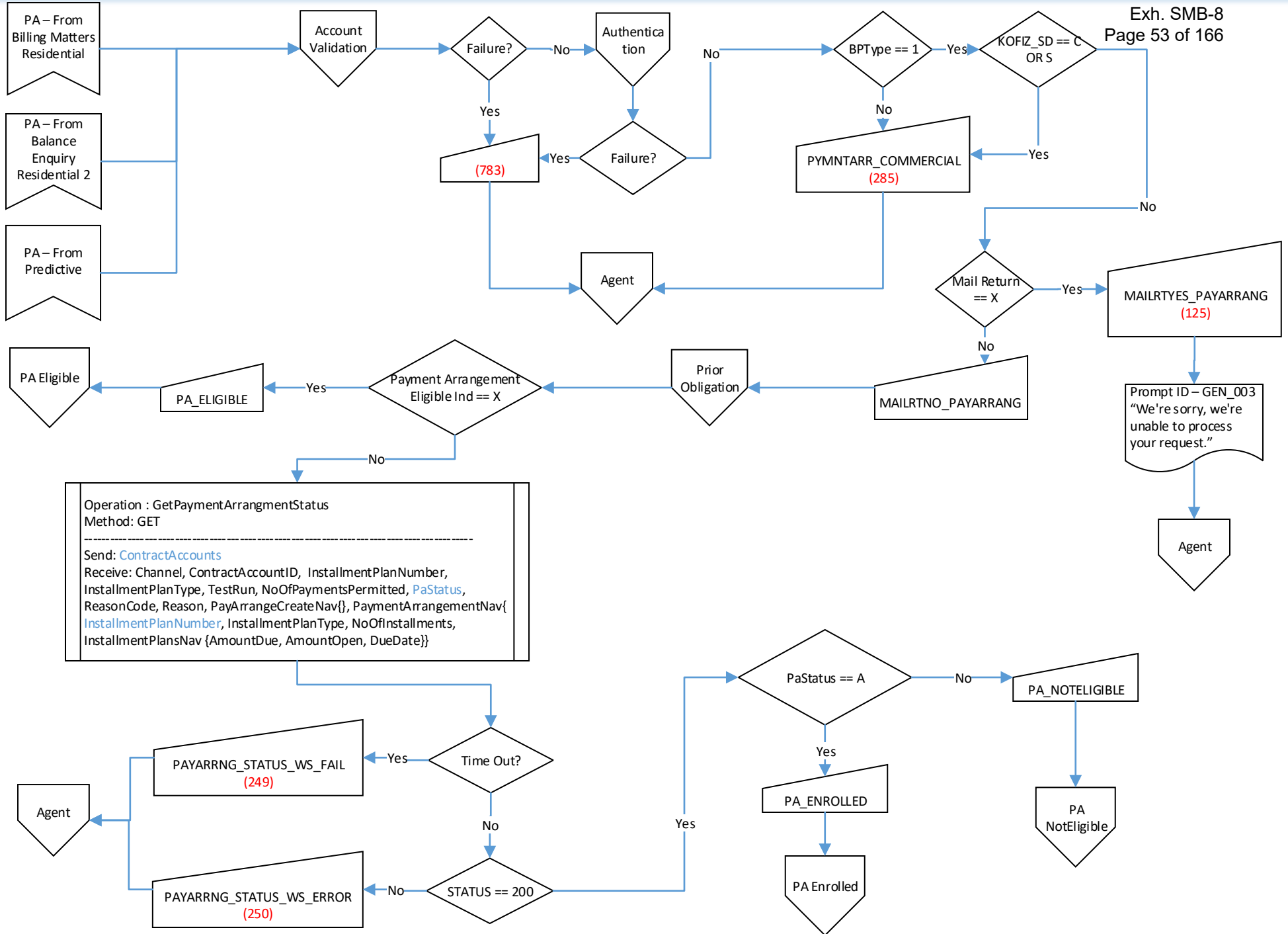


Payment Mailing & Options

errorTries = 0  
noInputCount = 0  
noMatchCount = 0

Menu ID – BMT\_010  
If Try 1, Prompt ID – BMT\_027A  
“For payment mailing address, press 1. To make a payment now, press 2. To set up automatic payments from a checking or savings account, press 3. For our budget payment plan, press 4. For all other billing and payment matters, press 5. To repeat these options, press \*. To return to the previous menu, press 7. To return to main menu, press 9”.  
If Try>1, Prompt ID – BMT\_027B



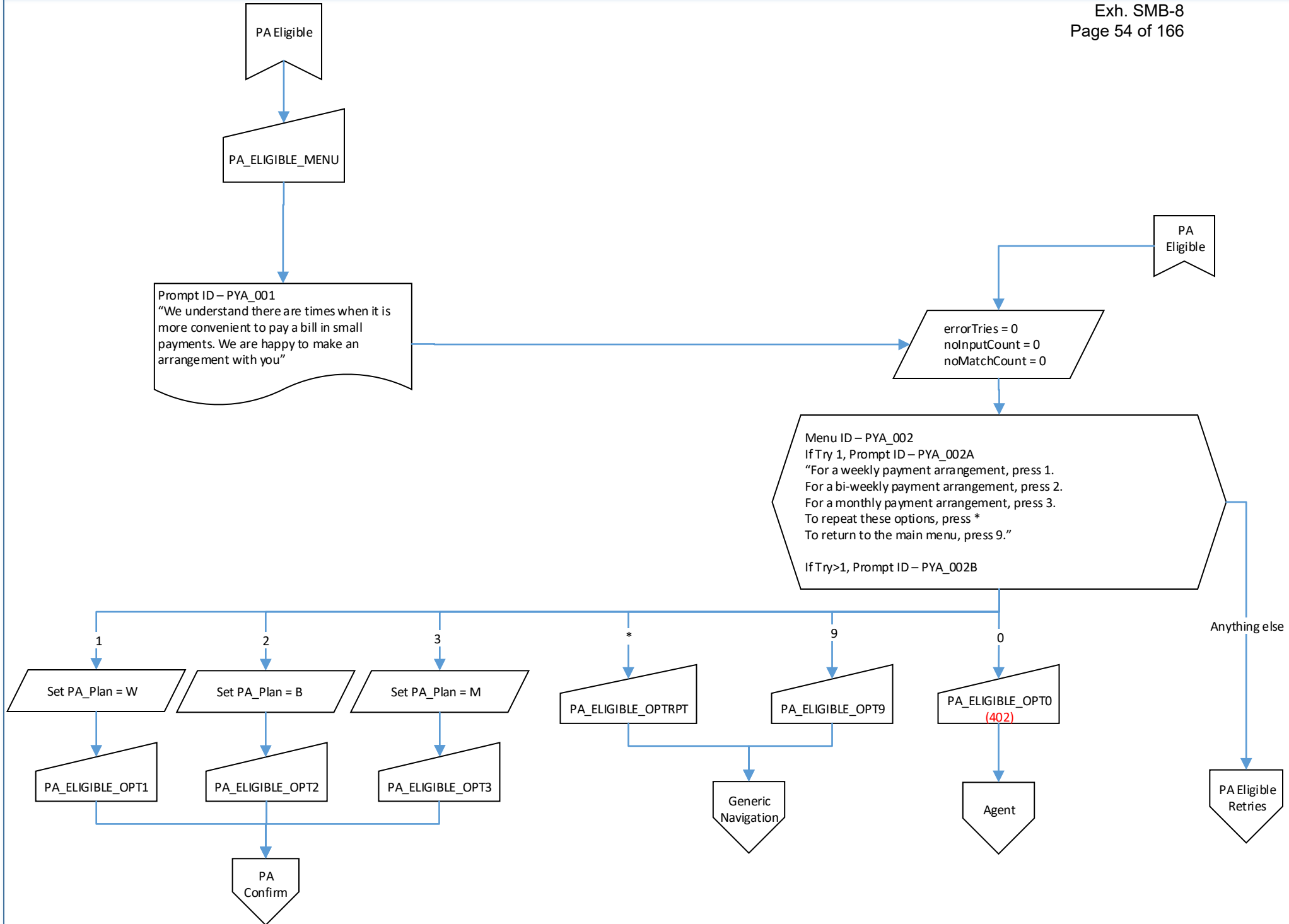


Operation : GetPaymentArrangementStatus  
 Method: GET

---

Send: [ContractAccounts](#)

Receive: Channel, ContractAccountID, InstallmentPlanNumber, InstallmentPlanType, TestRun, NoOfPaymentsPermitted, PaStatus, ReasonCode, Reason, PayArrangeCreateNav{}, PaymentArrangementNav{InstallmentPlanNumber, InstallmentPlanType, NoOfInstallments, InstallmentPlansNav {AmountDue, AmountOpen, DueDate}}



Operation : PA SIMULATE  
Method: POST

---

Send: Channel, ContractAccountID, InstallmentPlanType, TestRun, Frequency, PayArrangeCreateNav[]

Receive: Channel, ContractAccountID, InstallmentPlanNumber, InstallmentPlanType, TestRun, Frequency, NoOfPaymentsPermitted, PaStatus, ReasonCode, Reason, PayArrangeCreateNav{{Payment, DueDate}}, PaymentArrangementNav{ }

PA Confirm

Set Channel = IVR,  
InstallmentlanType = 05,  
TestRun=X

Time Out?

PAYARRNG\_ENROLL\_WS\_FAIL  
(961)

STATUS == 201 &&  
ReasonCode == NULL

PAYARRNG\_ENROLL\_WS\_ERROR  
(281)

Agent

PayArrangeCreateNav.results.length > 1

PA Details

PAYARRNG\_RESULTS\_NULL  
(438)

Agent

PA Confirm2

```

Prompt ID – PYA_061
First payment for the amount of <PayArrangeCreateNav.results.Payment[0]>
Prompt ID – PYA_062
Is due on <PayArrangeCreateNav.results.DueDate[0]>
For(i=1; i<PayArrangeCreateNav.results.length; i++)
{
  if(i == PayArrangeCreateNav.results.length - 1)
  {
    Prompt ID – PYA_063
    And the final payment for the amount of <PayArrangeCreateNav.results.Payment[i]>
    Prompt ID – PYA_064
    is due on <PayArrangeCreateNav.results.DueDate[i]>
  }
  else
  {
    Prompt ID – PYA_065
    The next payment for the amount of <PayArrangeCreateNav.results.Payment[i]>
    Prompt ID – PYA_066
    is due on <PayArrangeCreateNav.results.DueDate[i]>
  }
}
    
```

```

If(PA_Plan==W)
Prompt ID – PYA_060
Please listen carefully to the proposed weekly
payment arrangement details

Else If(PA_Plan==B)
Prompt ID – PYA_067
Please listen carefully to the proposed bi-weekly
payment arrangement details

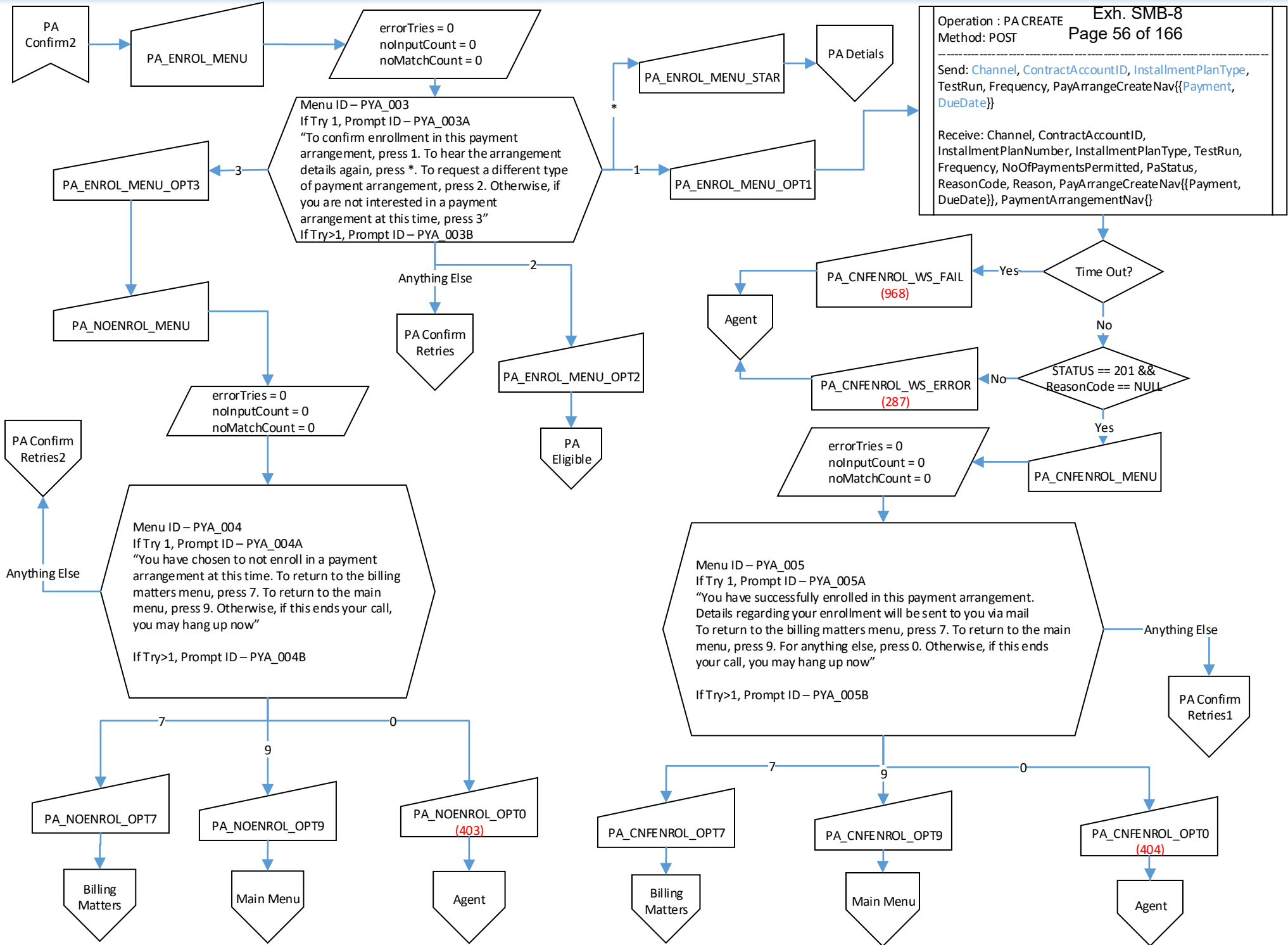
Else
Prompt ID – PYA_068
Please listen carefully to the proposed monthly
payment arrangement details
    
```

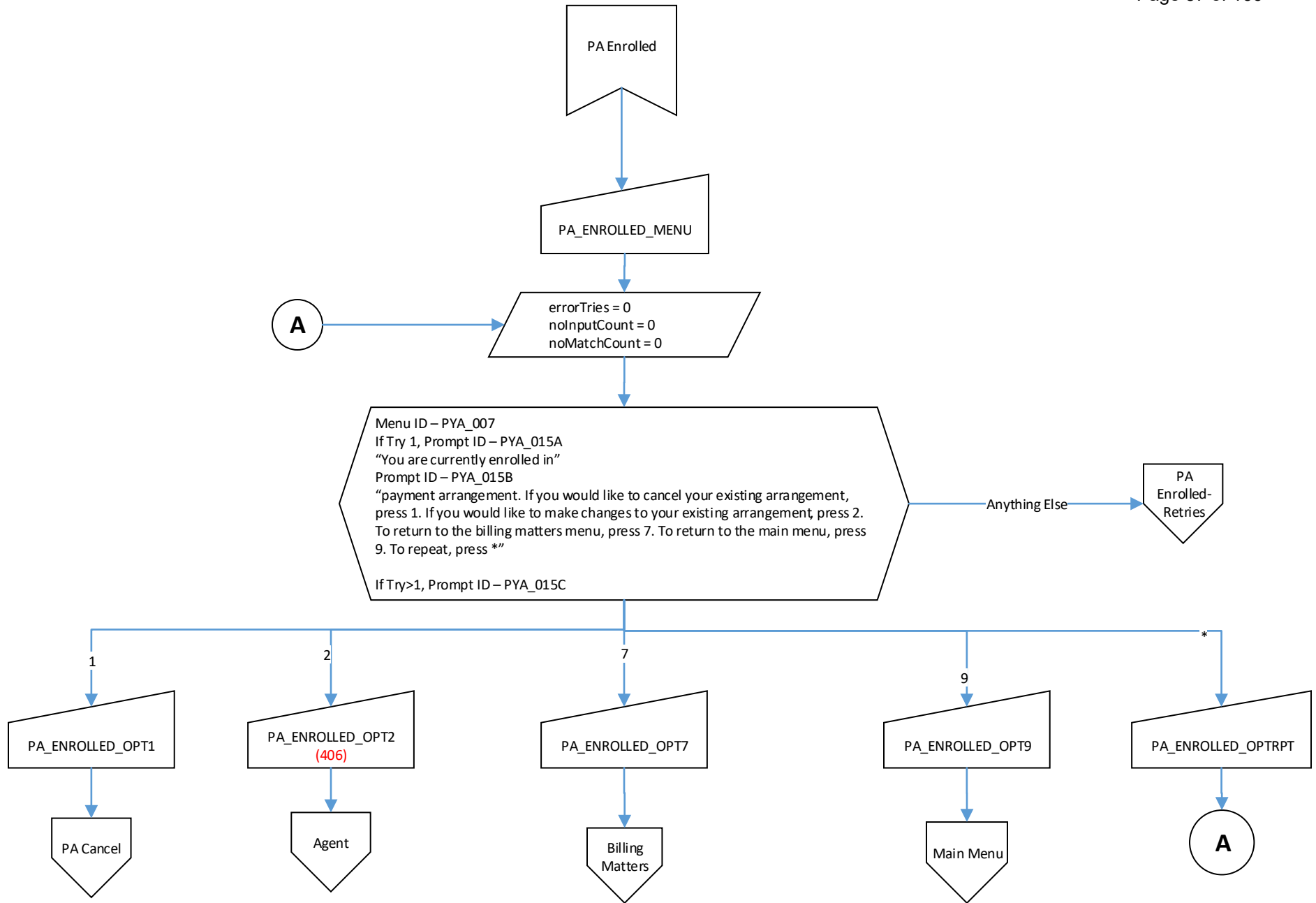


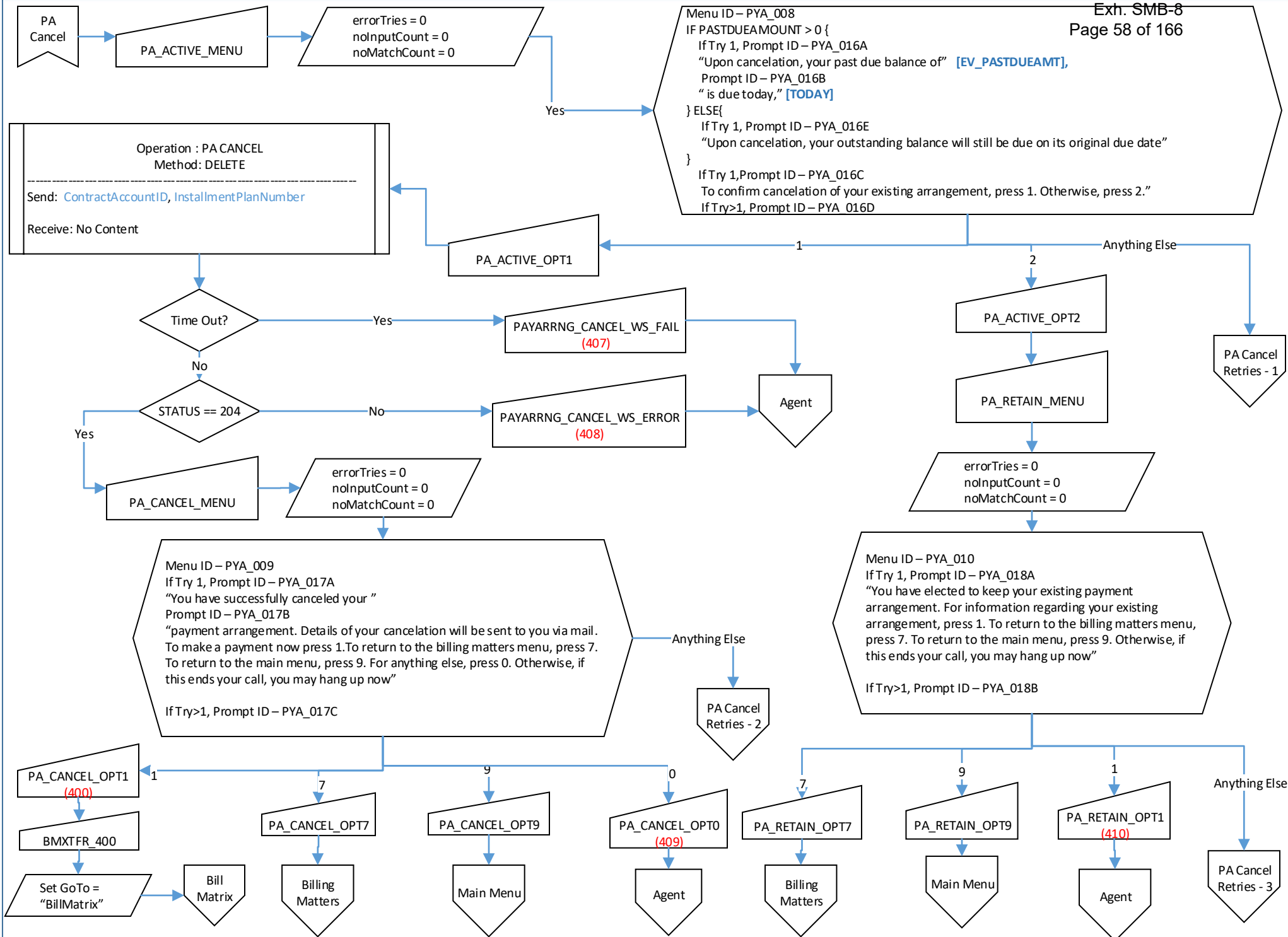
Operation : PA CREATE Exh. SMB-8  
 Method: POST Page 56 of 166

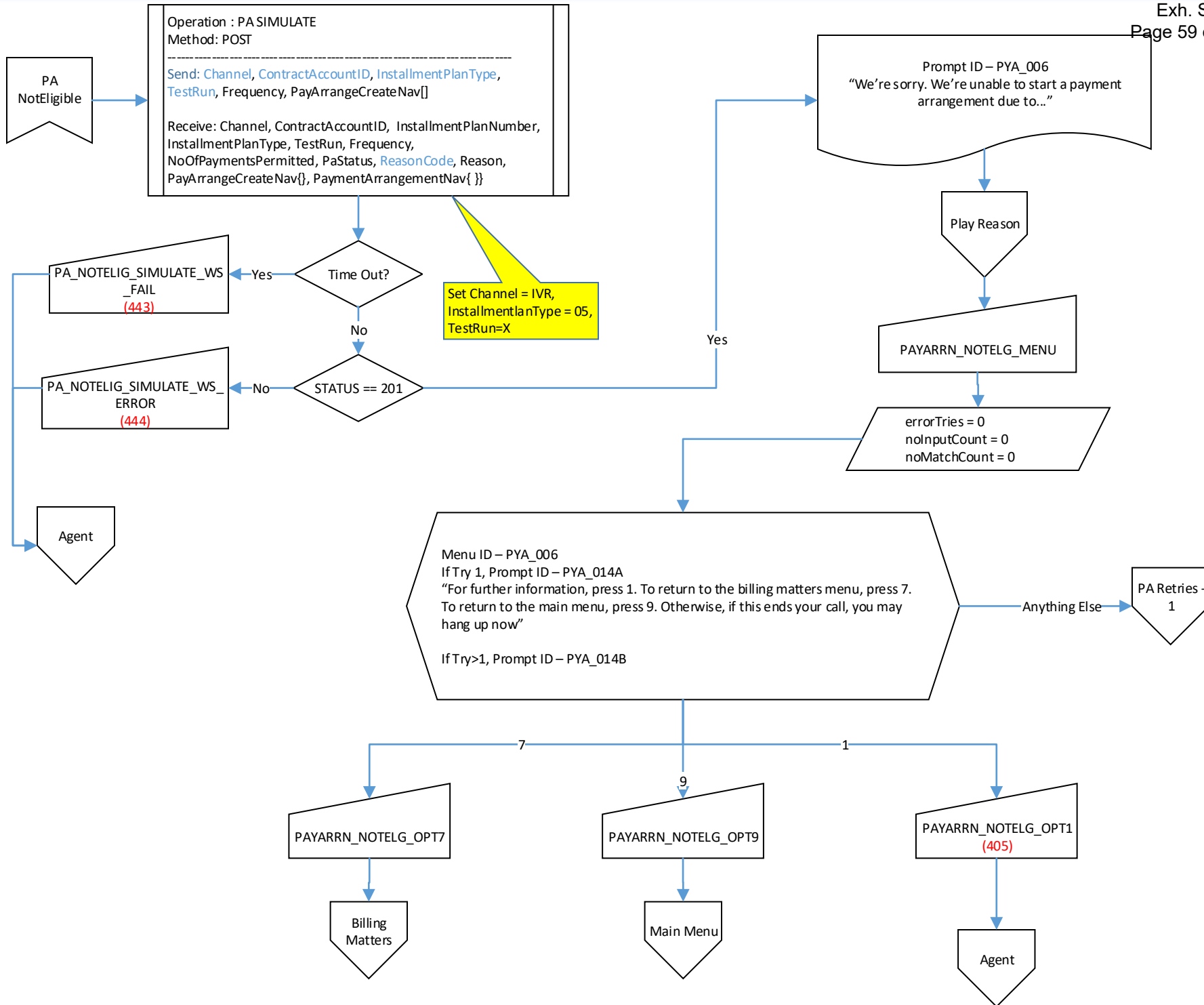
Send: Channel, ContractAccountID, InstallmentPlanType, TestRun, Frequency, PayArrangeCreateNav{{Payment, DueDate}}

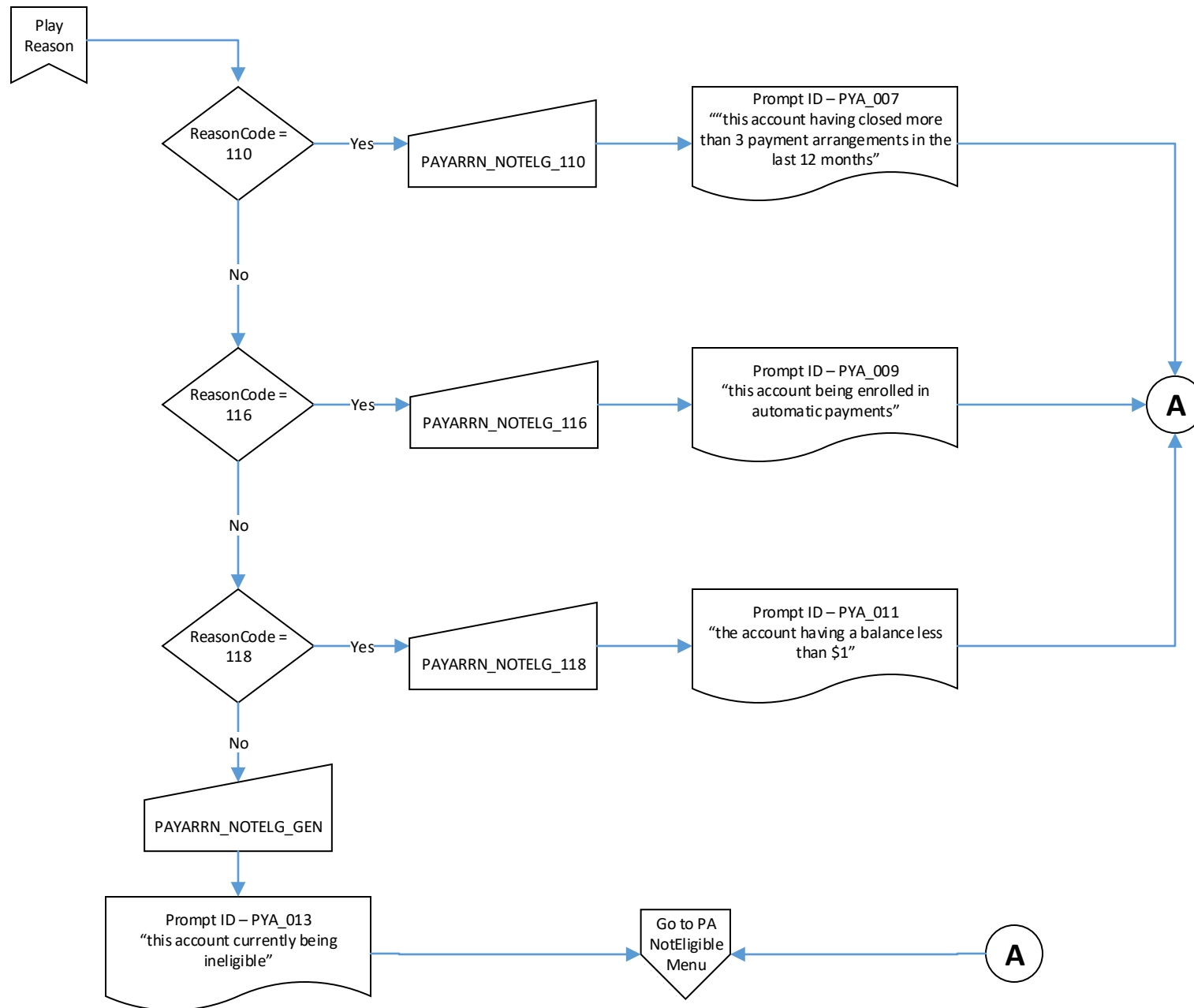
Receive: Channel, ContractAccountID, InstallmentPlanNumber, InstallmentPlanType, TestRun, Frequency, NoOfPaymentsPermitted, PaStatus, ReasonCode, Reason, PayArrangeCreateNav{{Payment, DueDate}}, PaymentArrangementNav{}

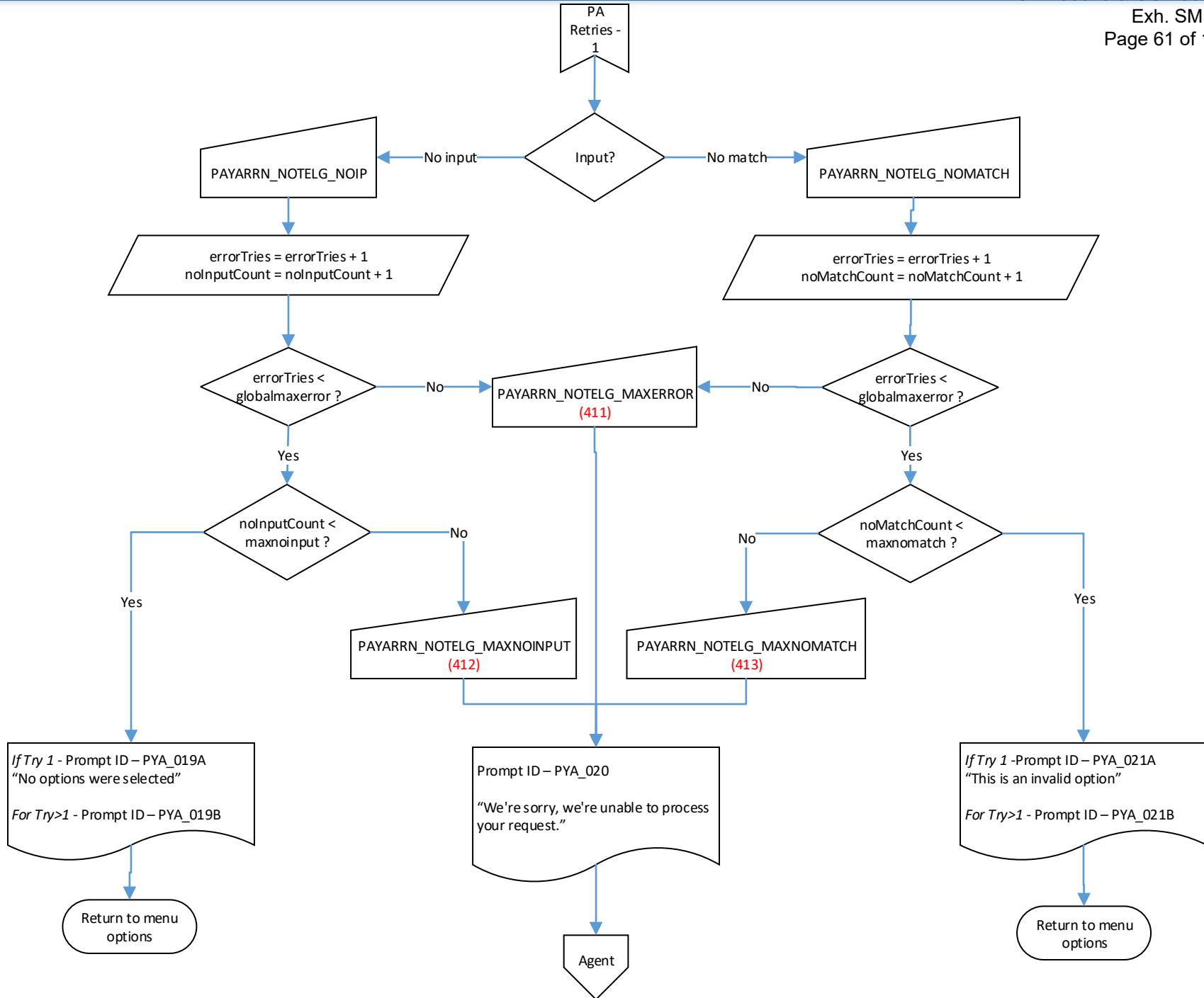


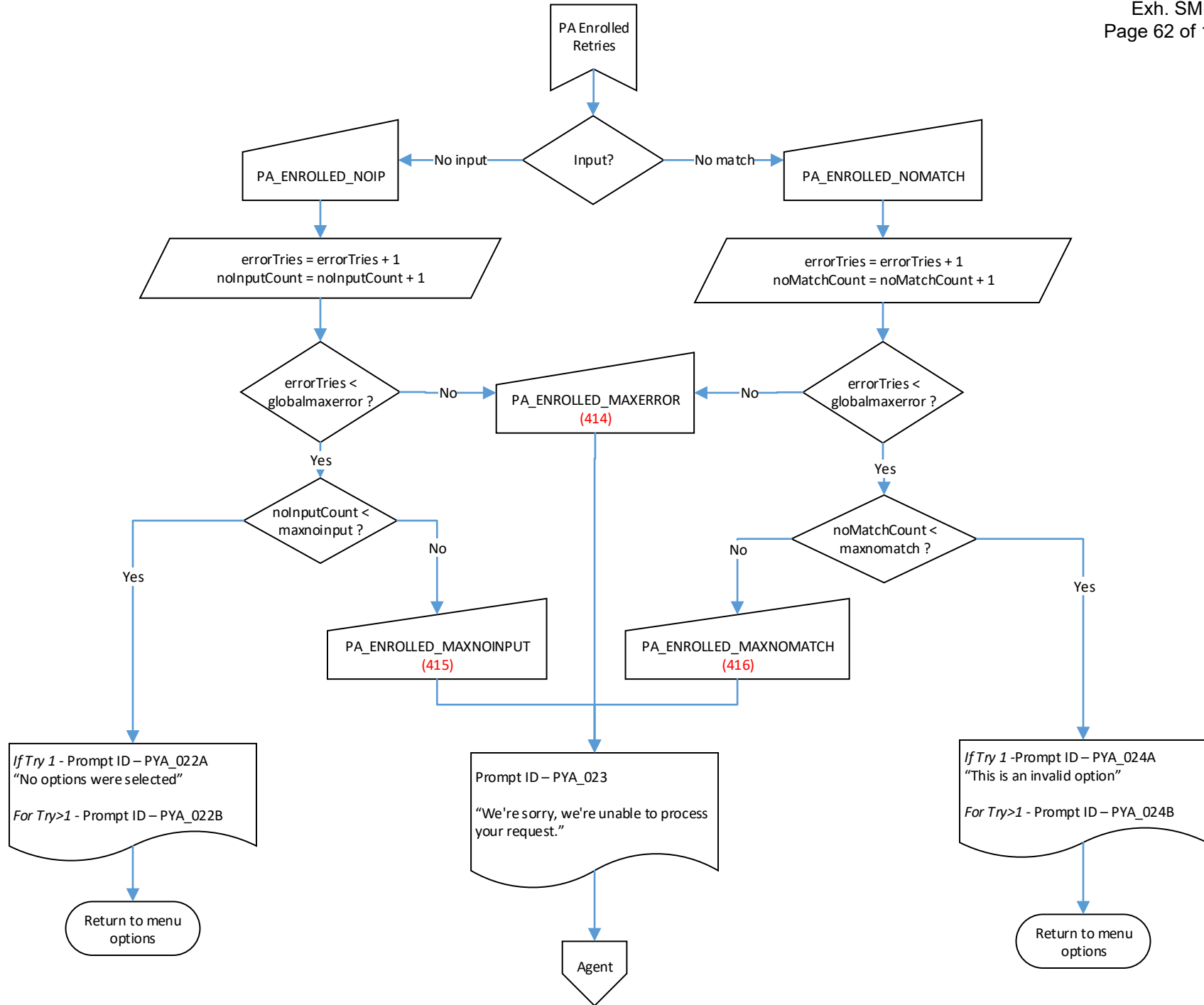


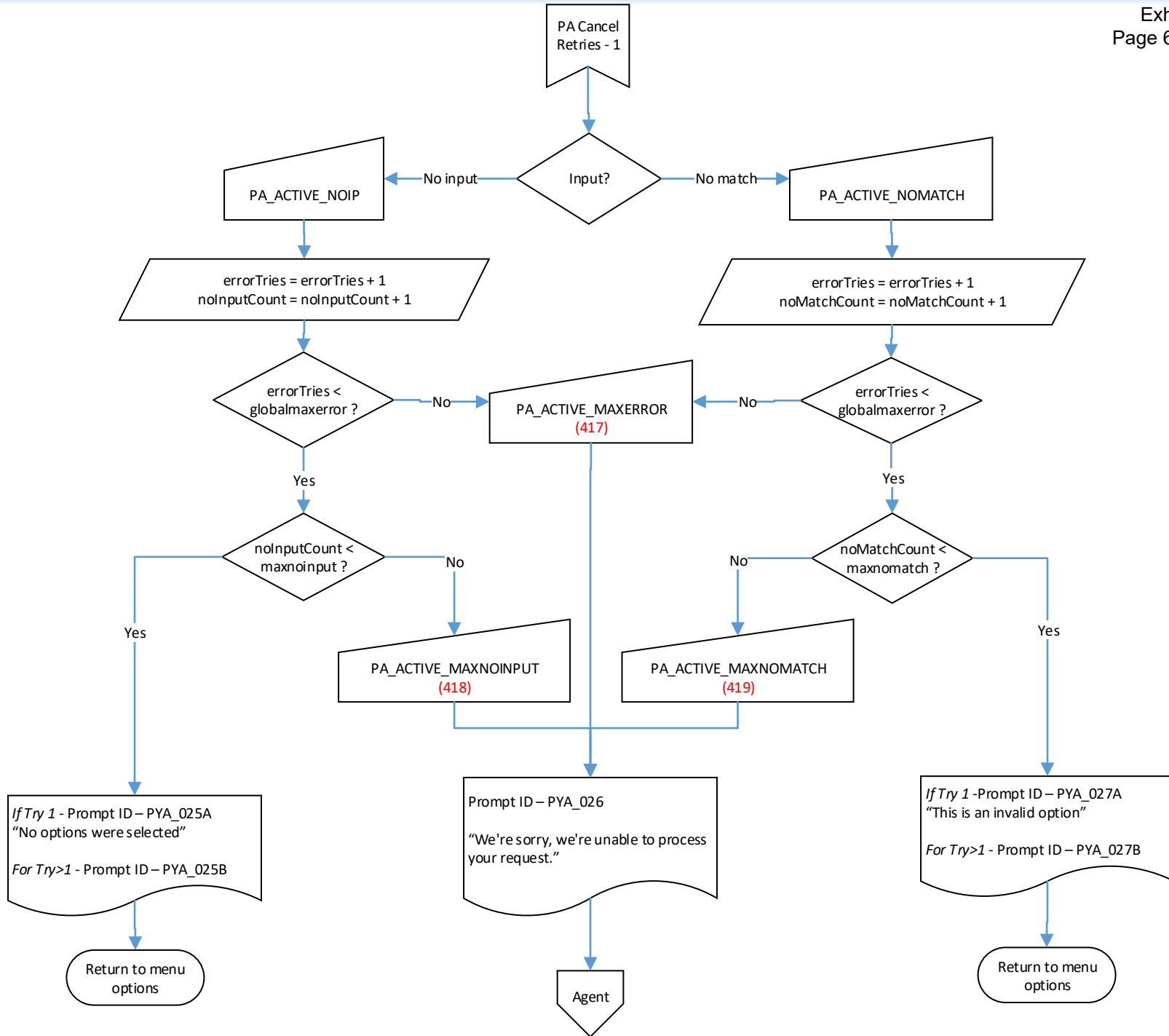




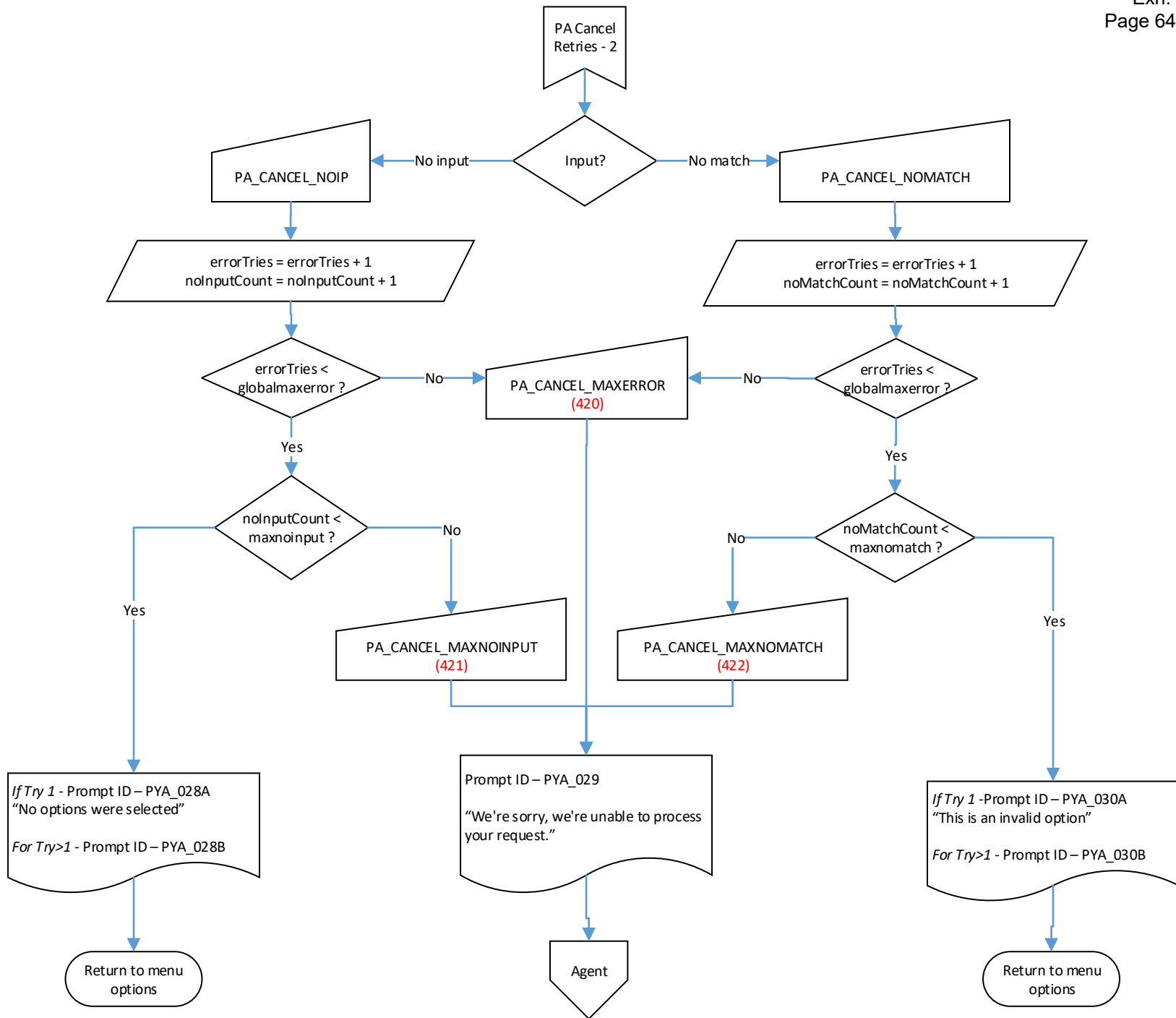


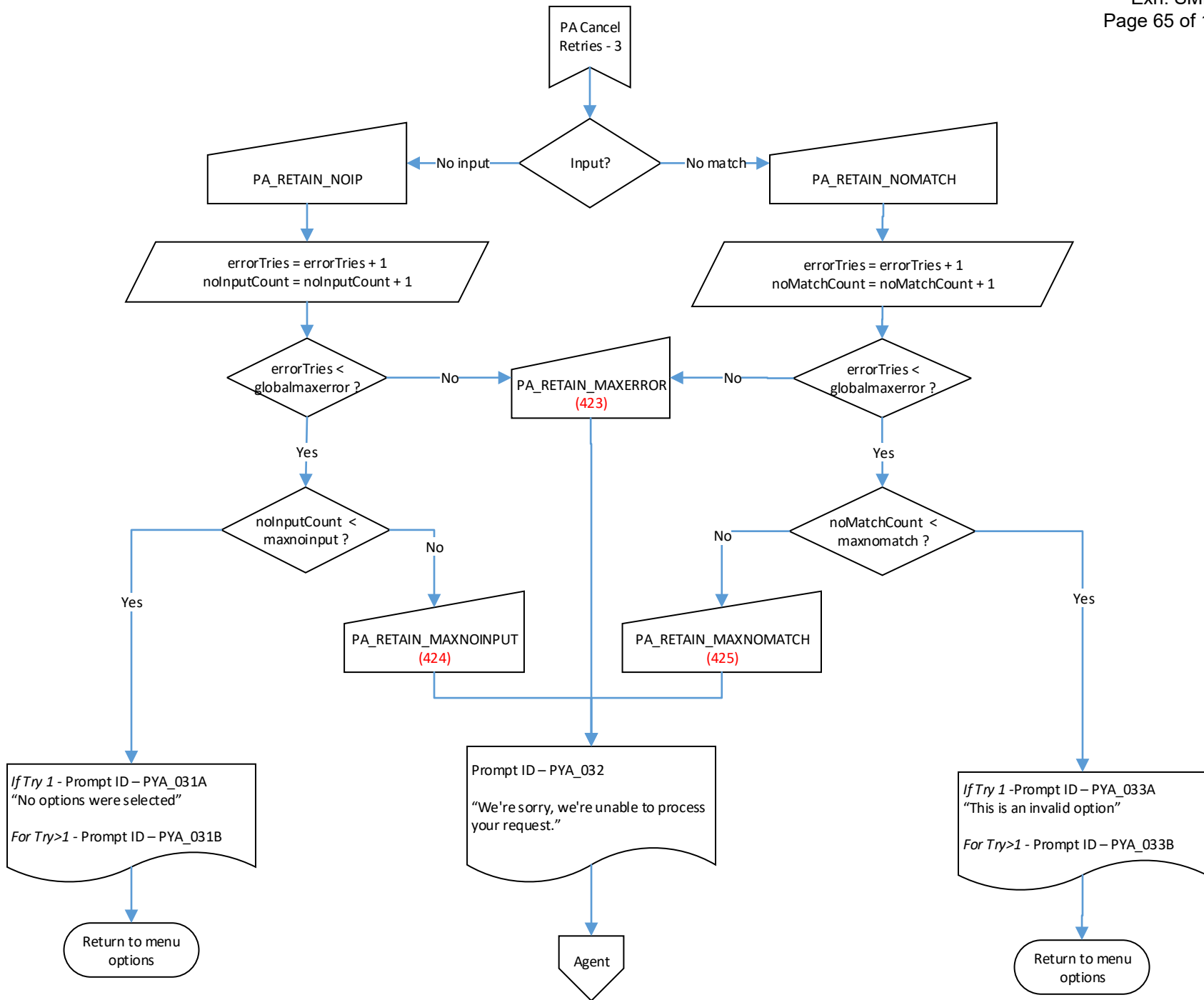


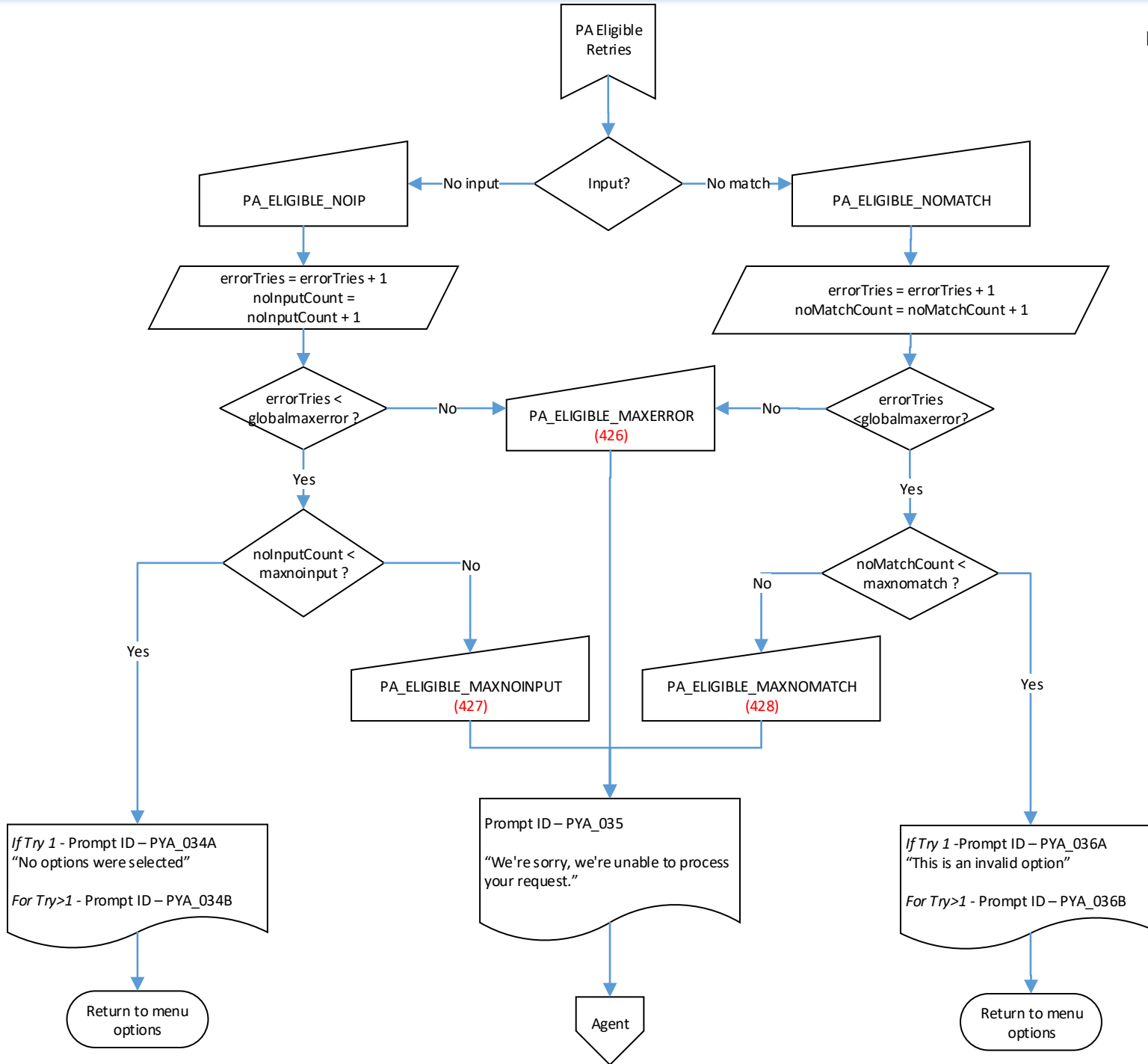


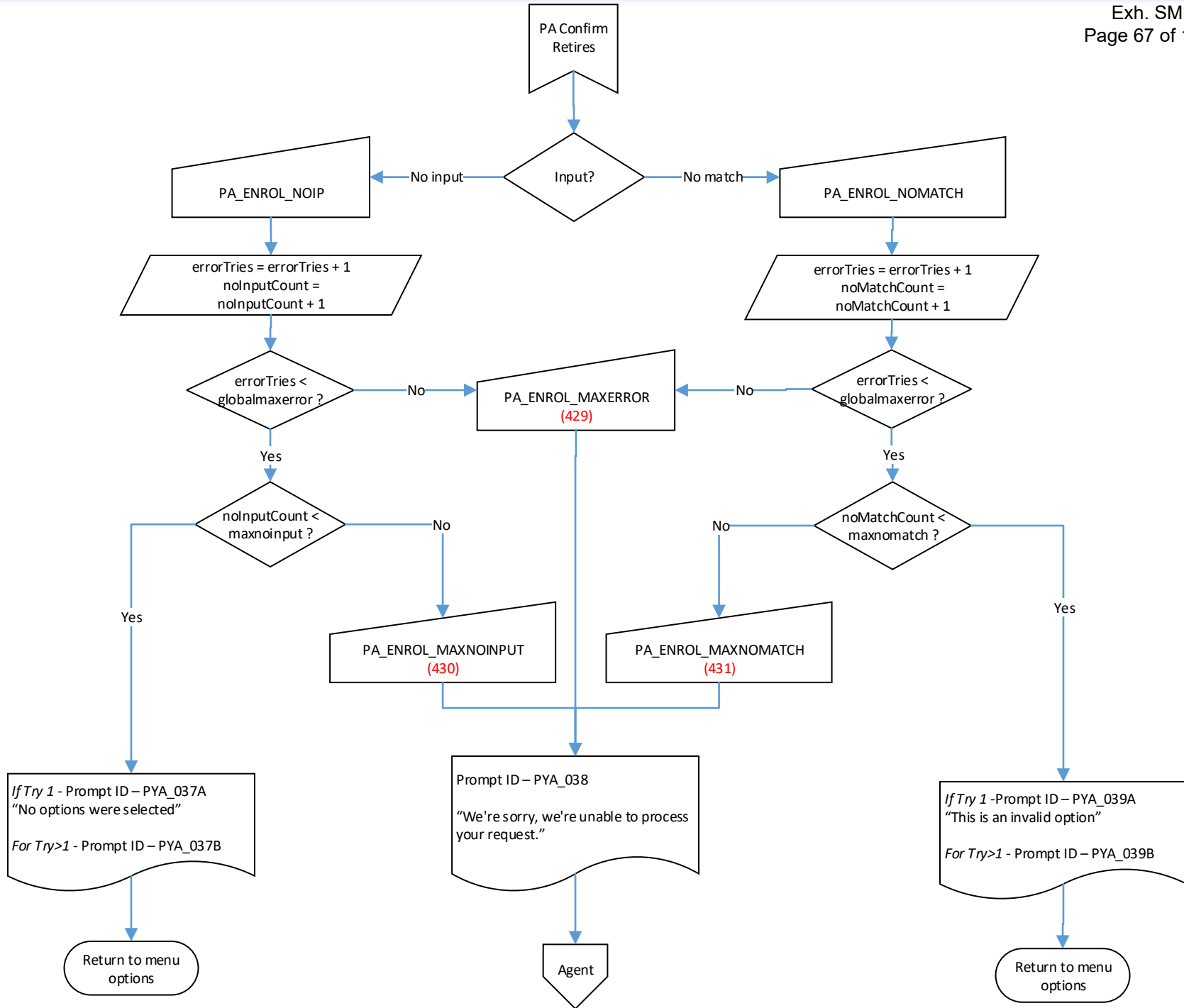


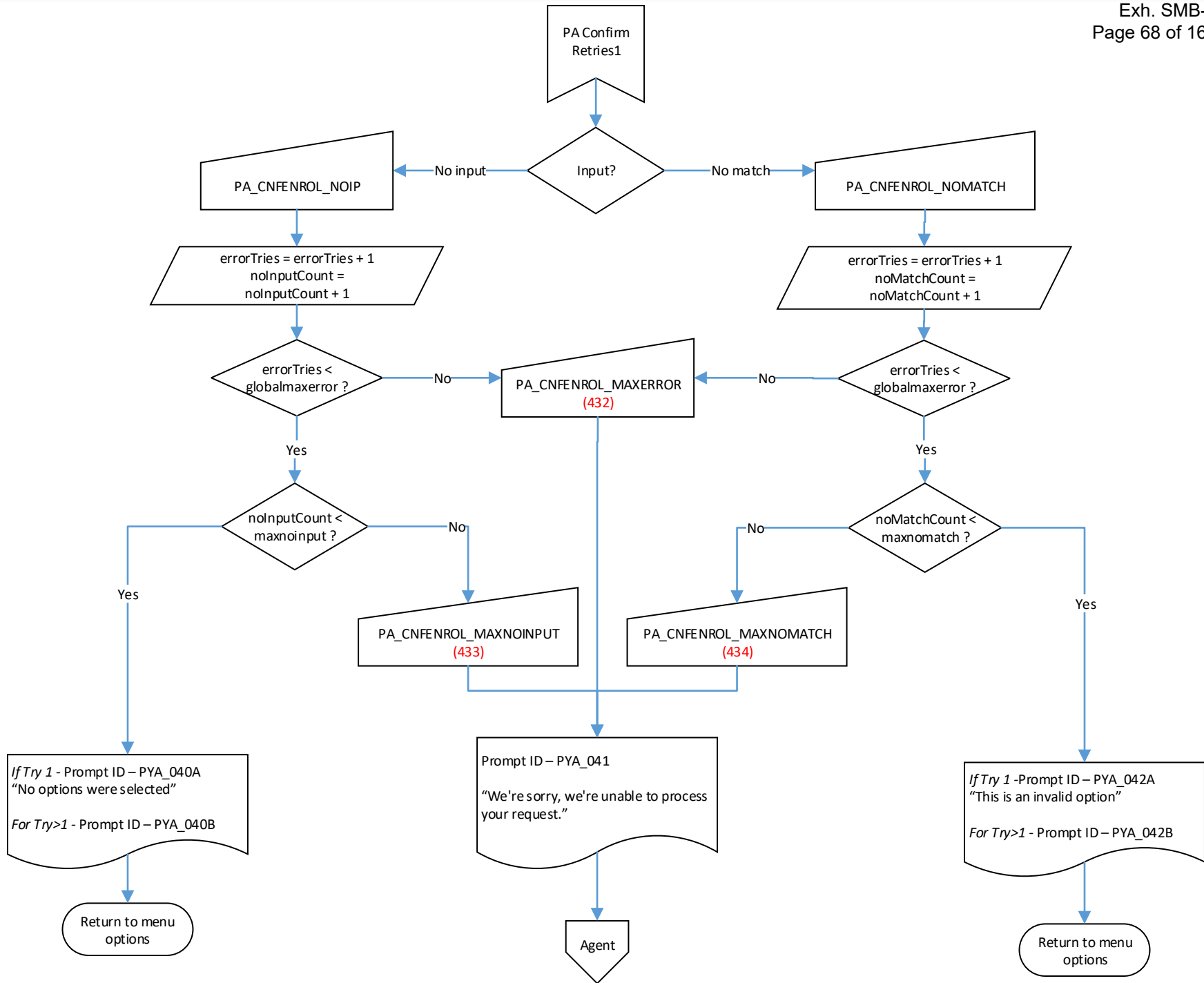


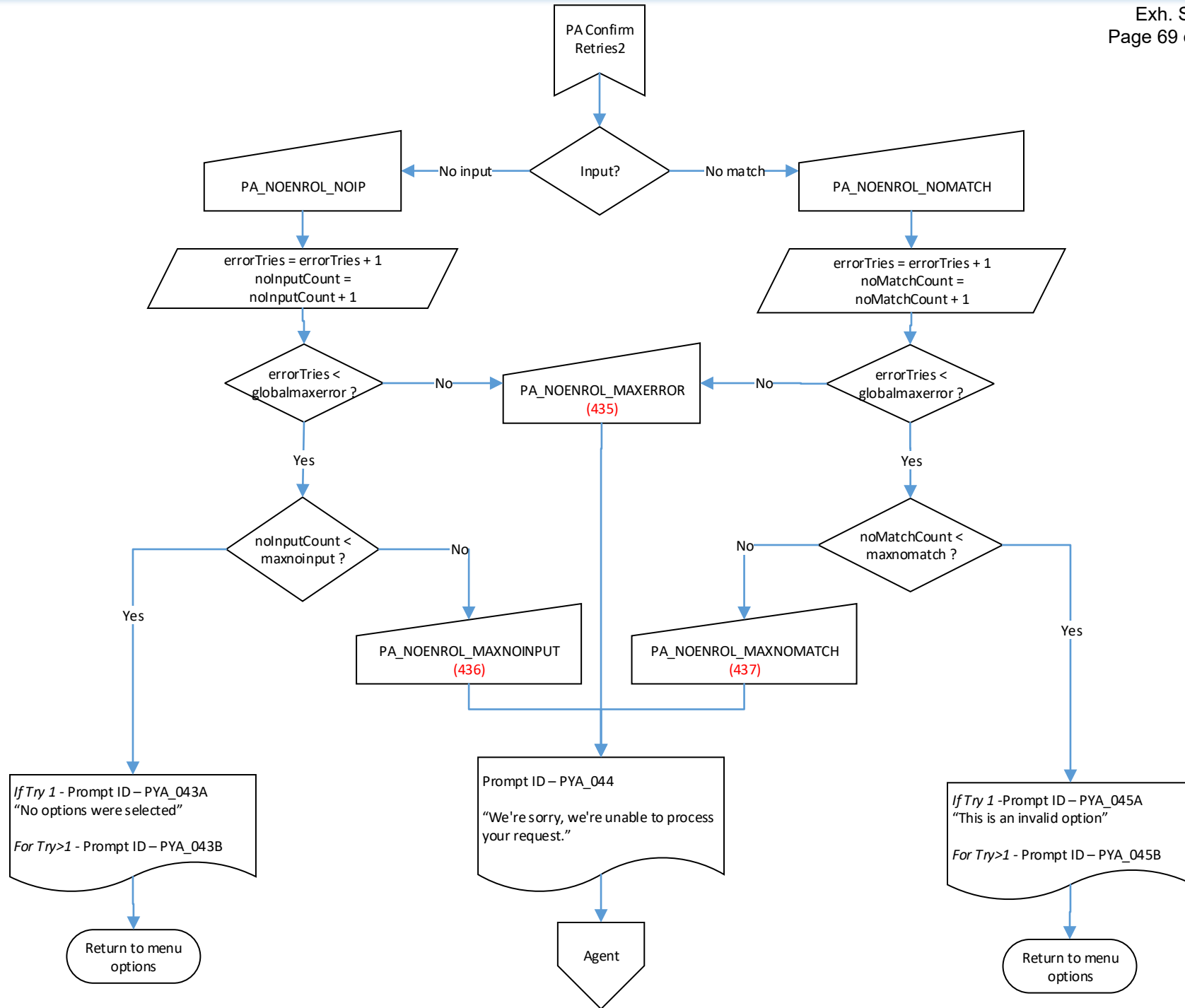


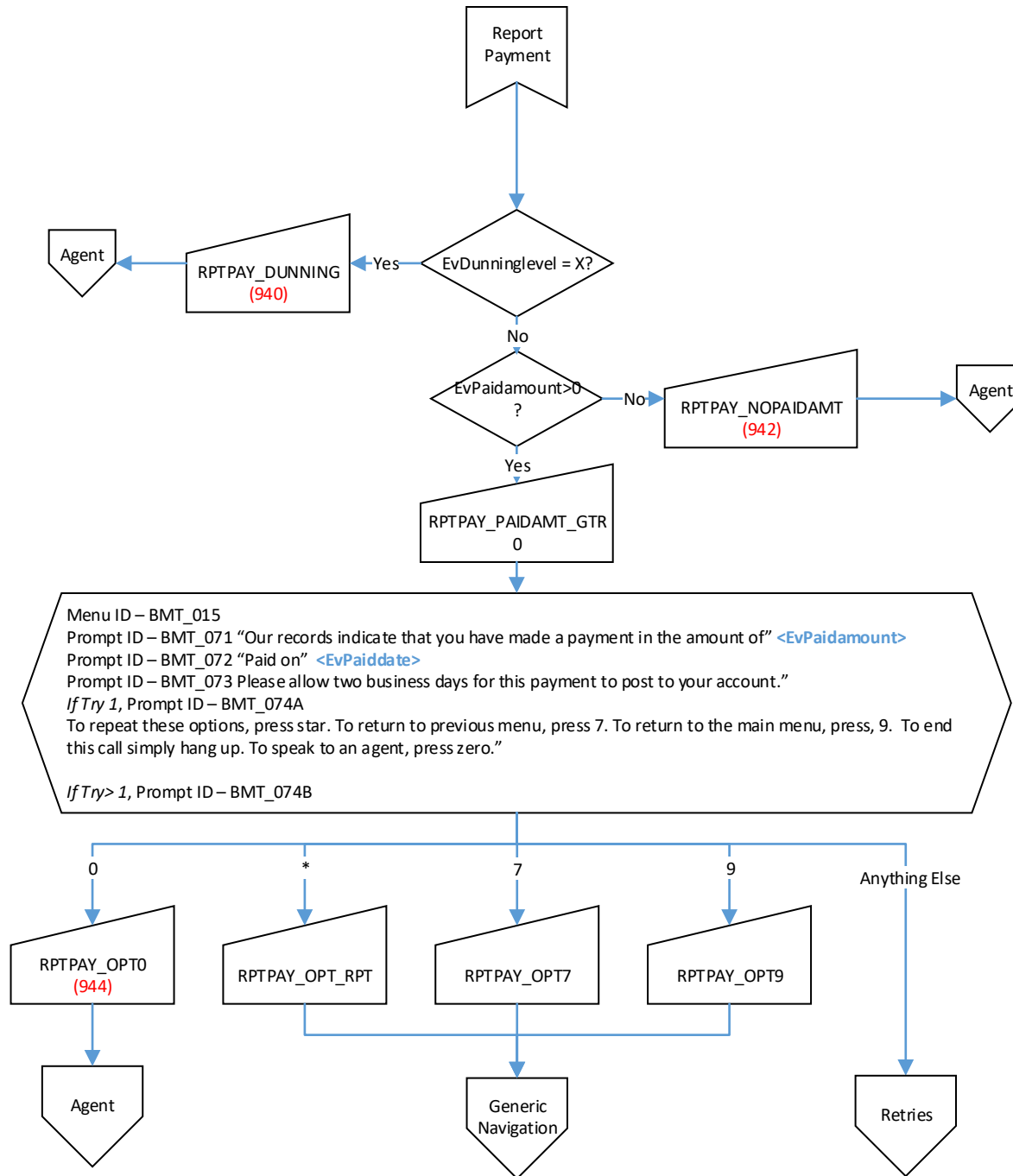


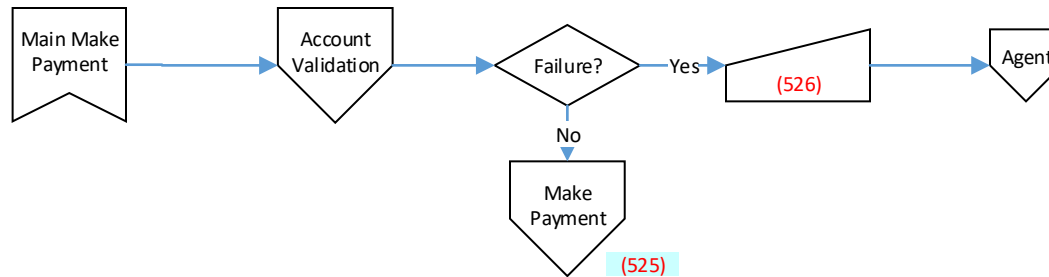
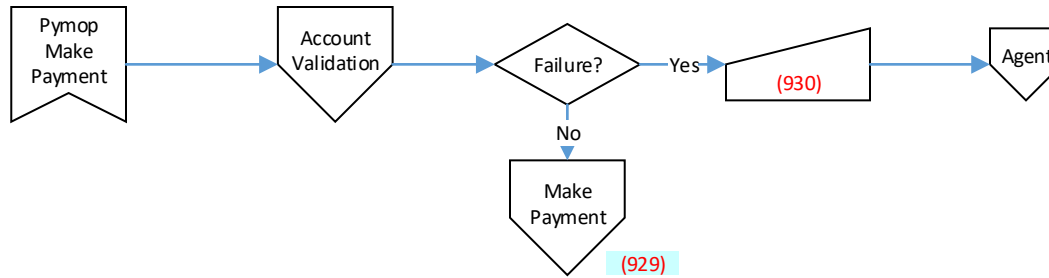
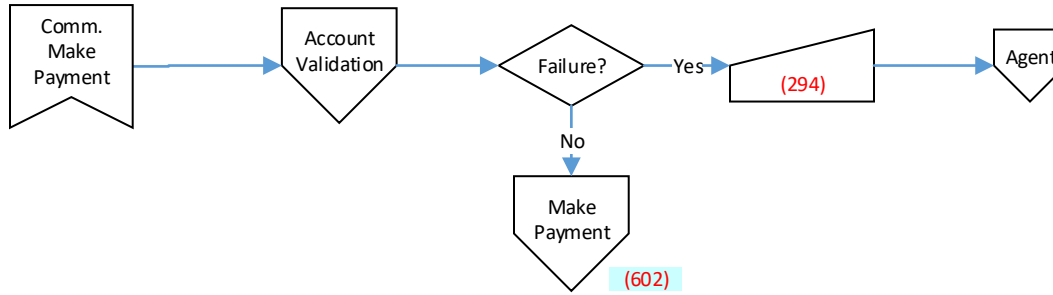
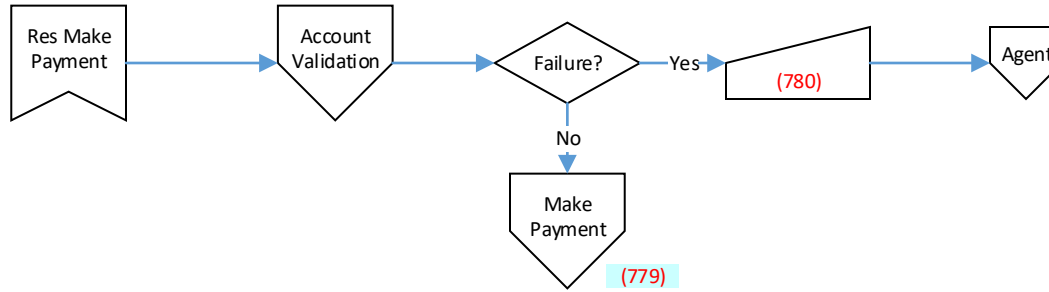




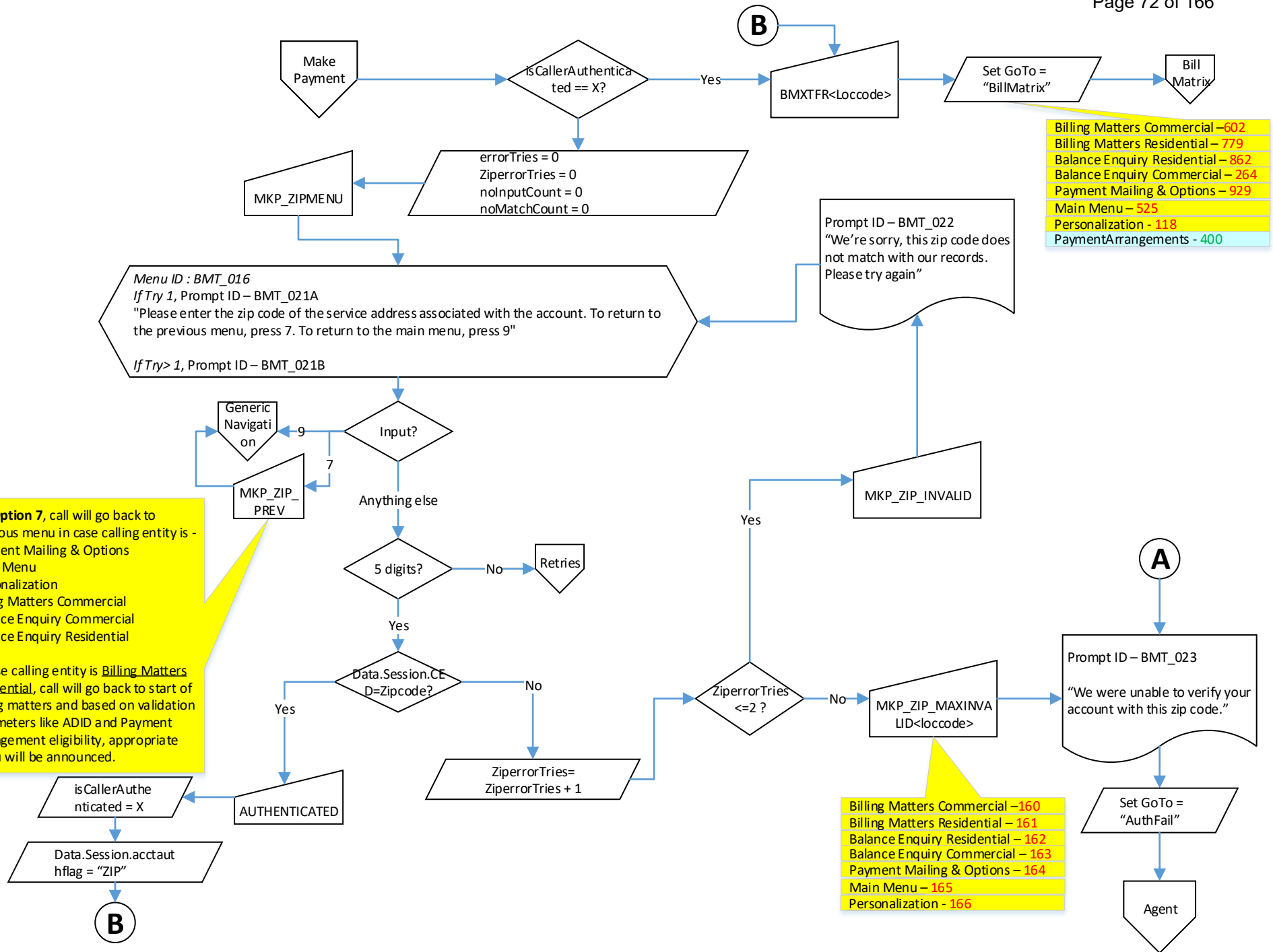










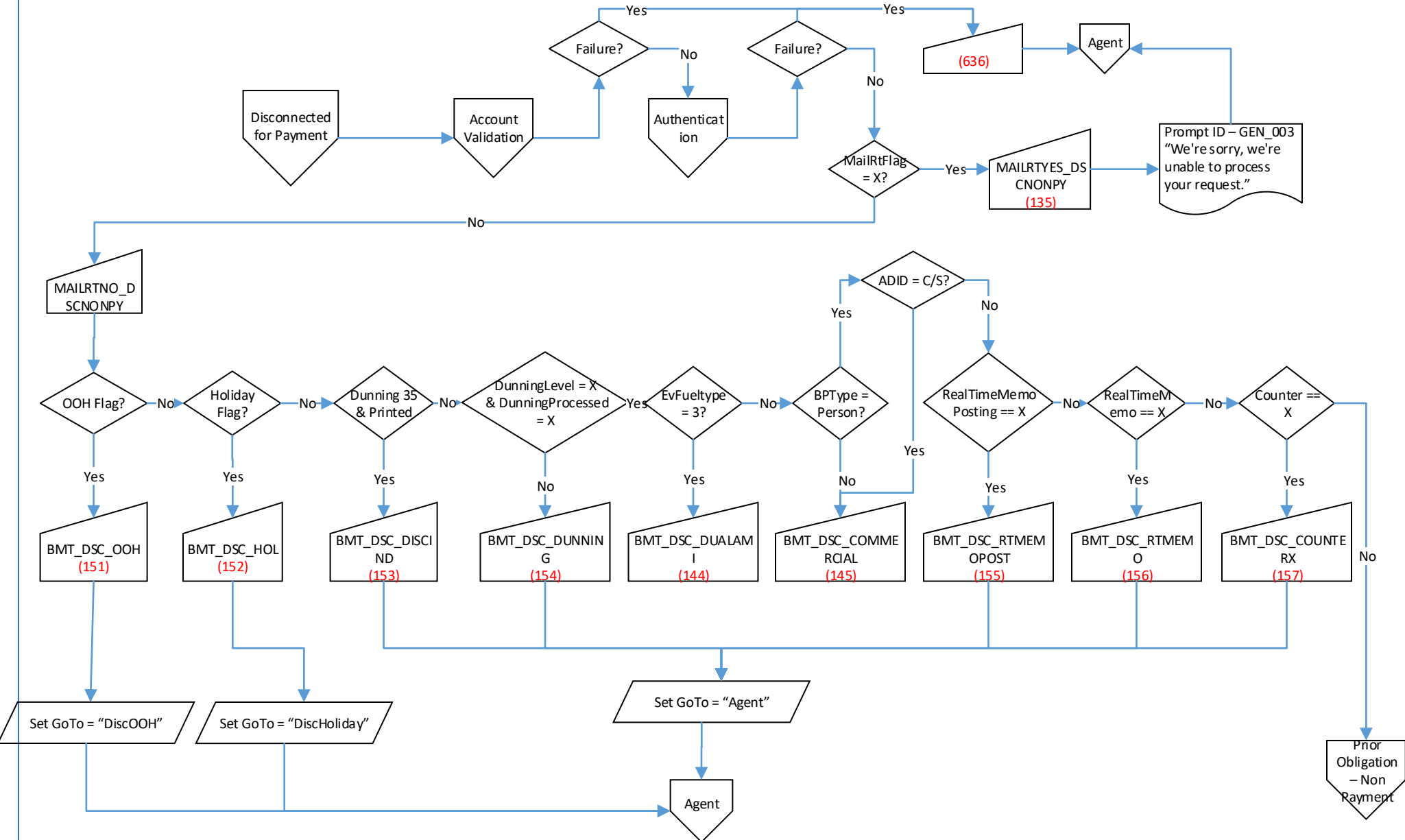


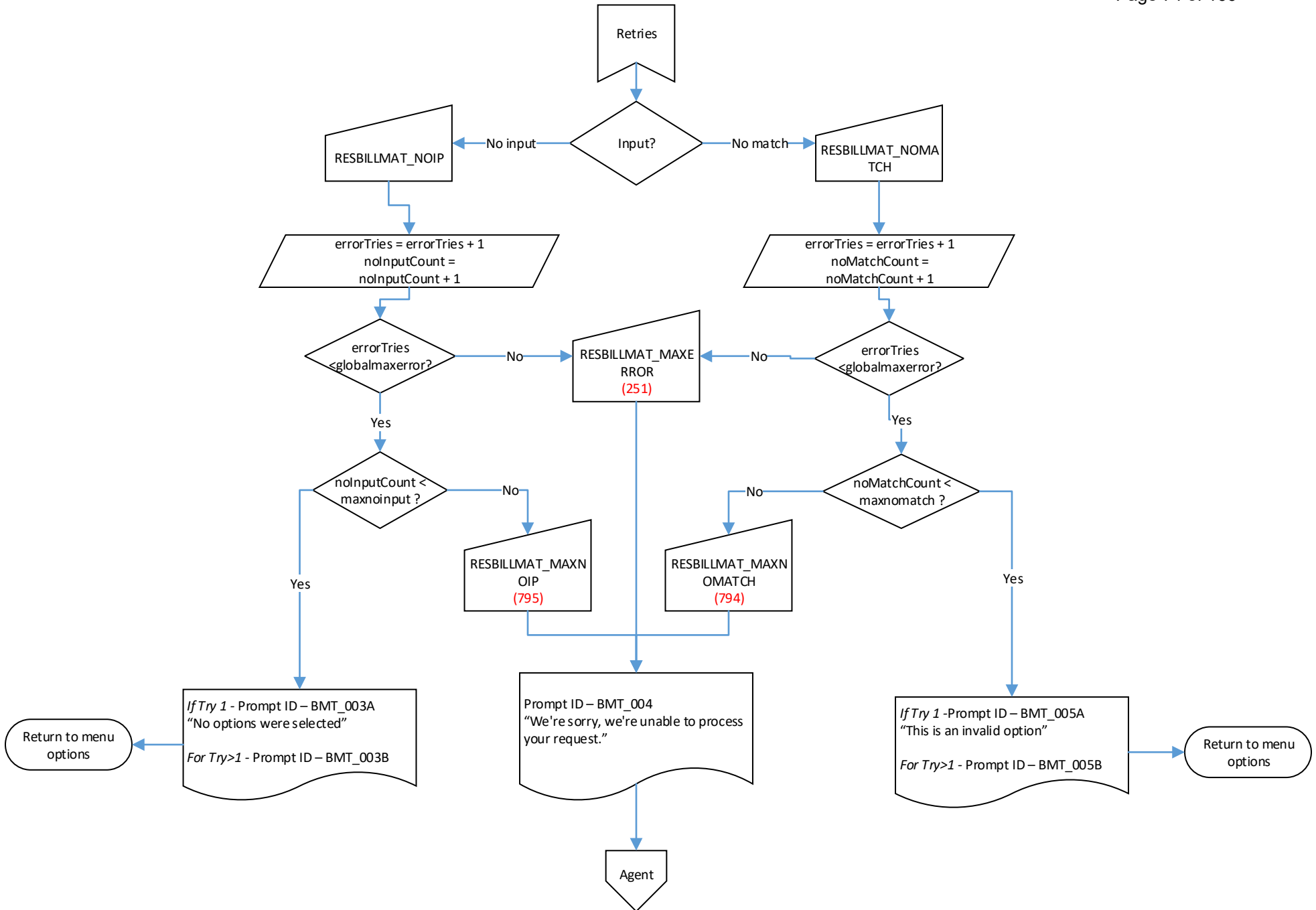
- Billing Matters Commercial - 602
- Billing Matters Residential - 779
- Balance Enquiry Residential - 862
- Balance Enquiry Commercial - 264
- Payment Mailing & Options - 929
- Main Menu - 525
- Personalization - 118
- Payment Arrangements - 400

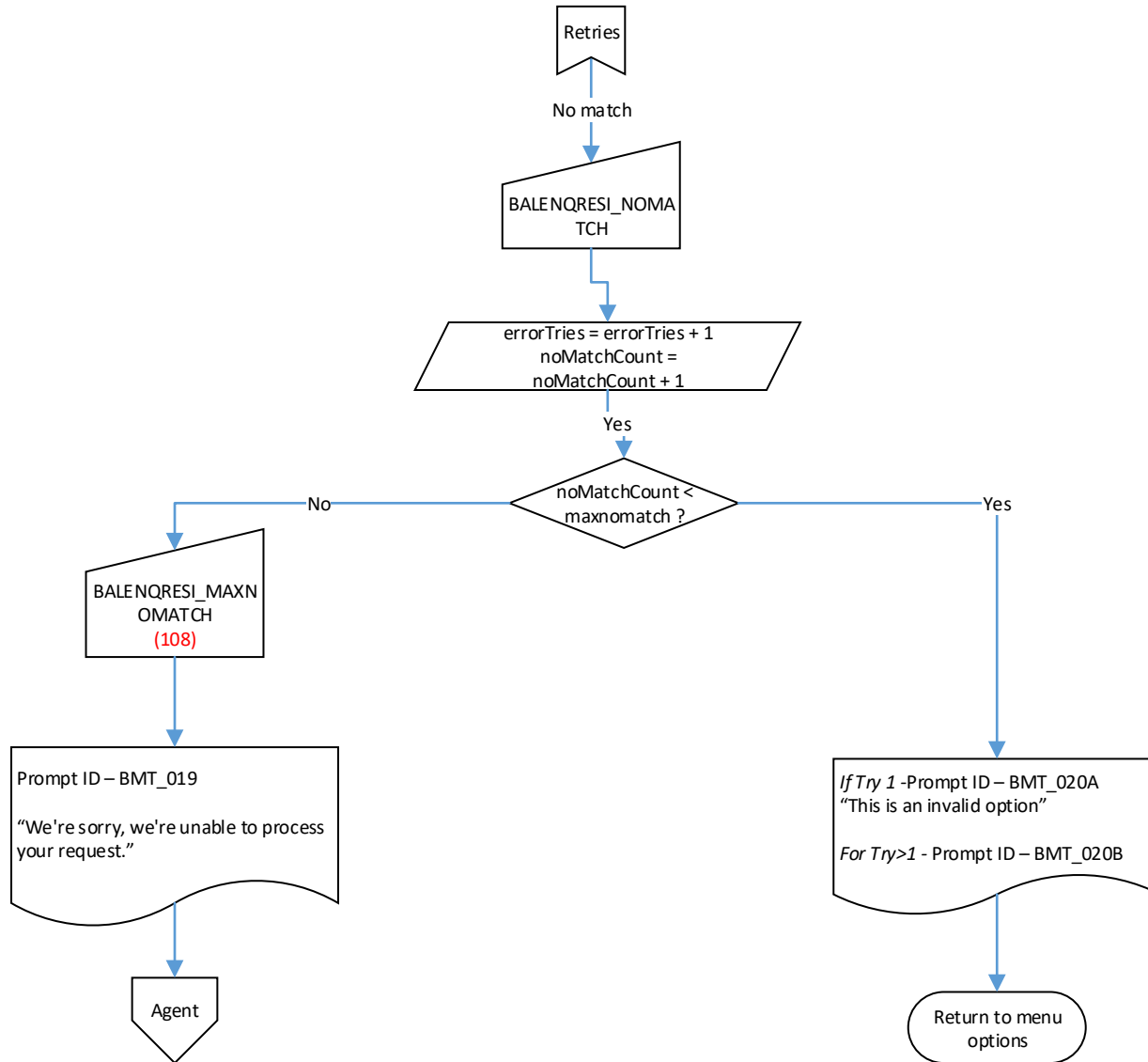
For **Option 7**, call will go back to previous menu in case calling entity is - Payment Mailing & Options Main Menu Personalization Billing Matters Commercial Balance Enquiry Commercial Balance Enquiry Residential

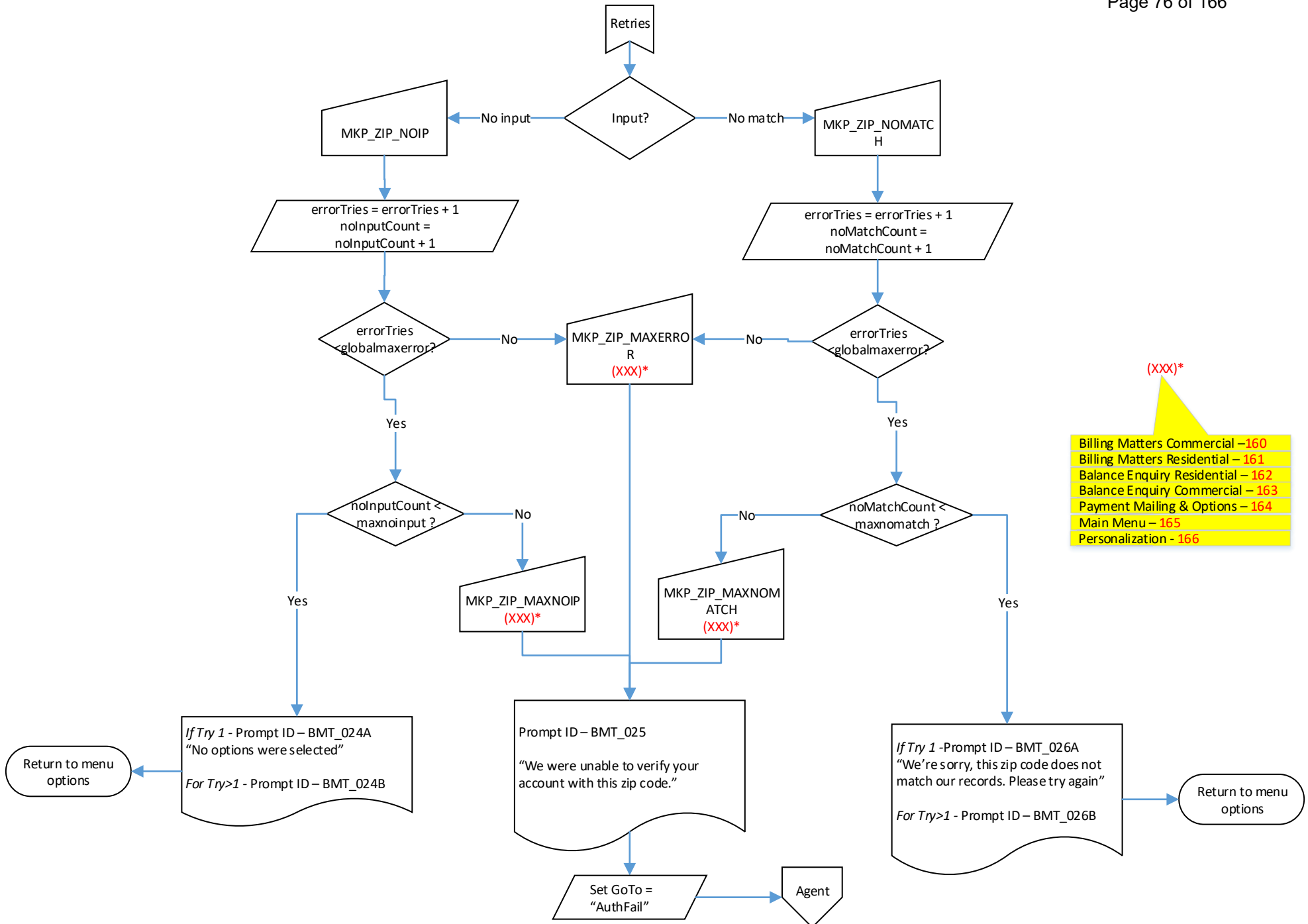
In case calling entity is **Billing Matters Residential**, call will go back to start of Billing matters and based on validation parameters like ADID and Payment Arrangement eligibility, appropriate menu will be announced.

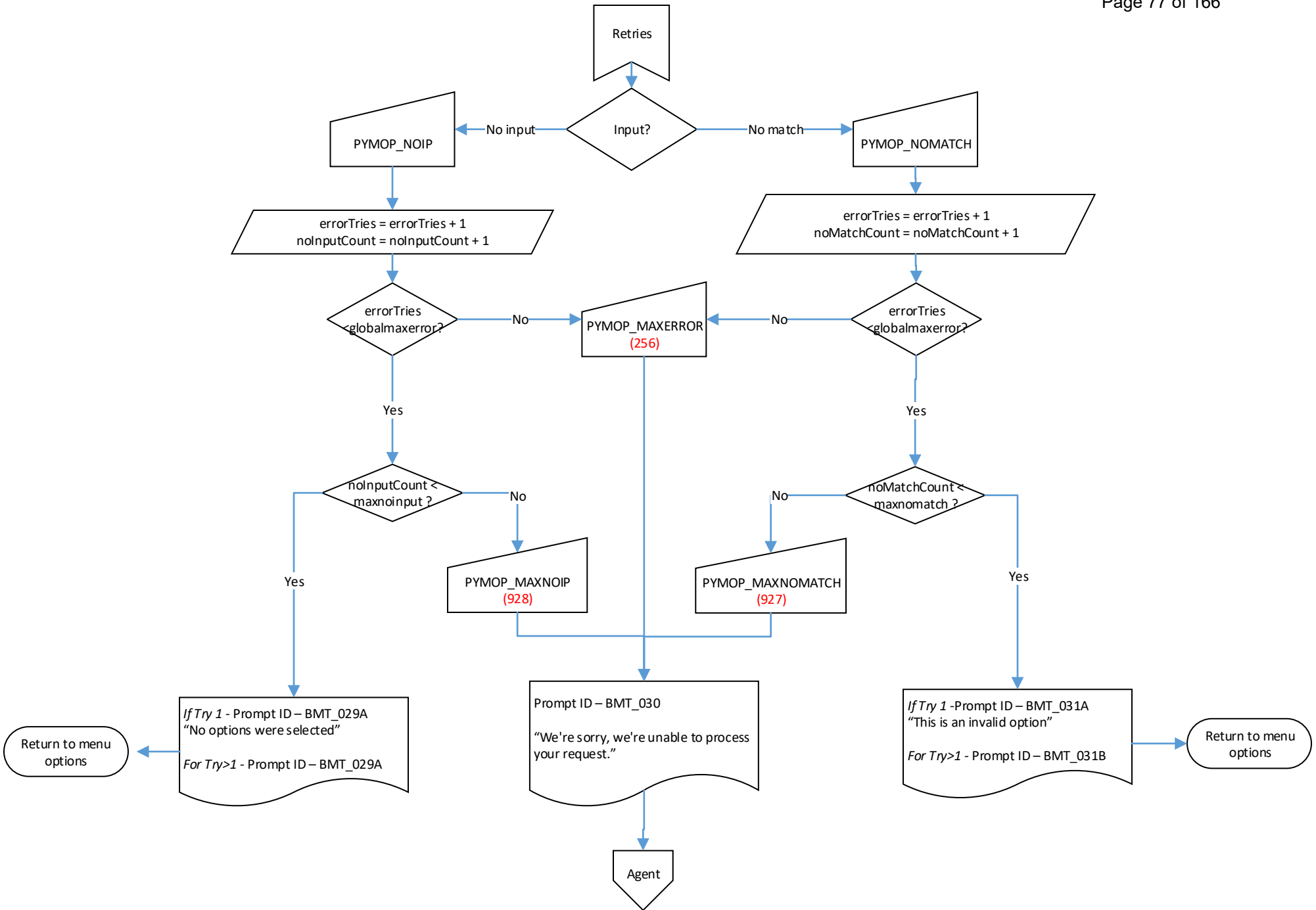
- Billing Matters Commercial - 160
- Billing Matters Residential - 161
- Balance Enquiry Residential - 162
- Balance Enquiry Commercial - 163
- Payment Mailing & Options - 164
- Main Menu - 165
- Personalization - 166

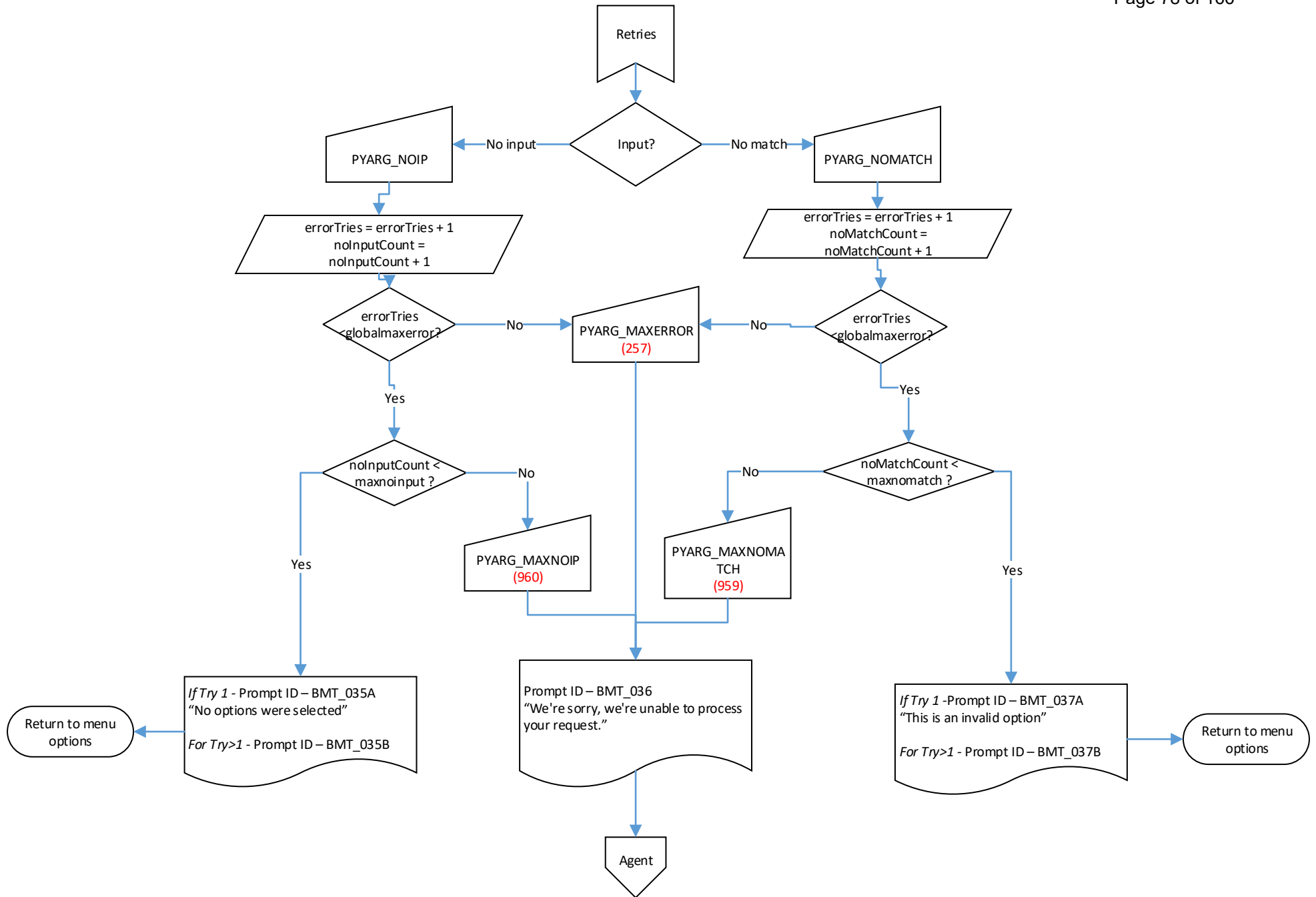


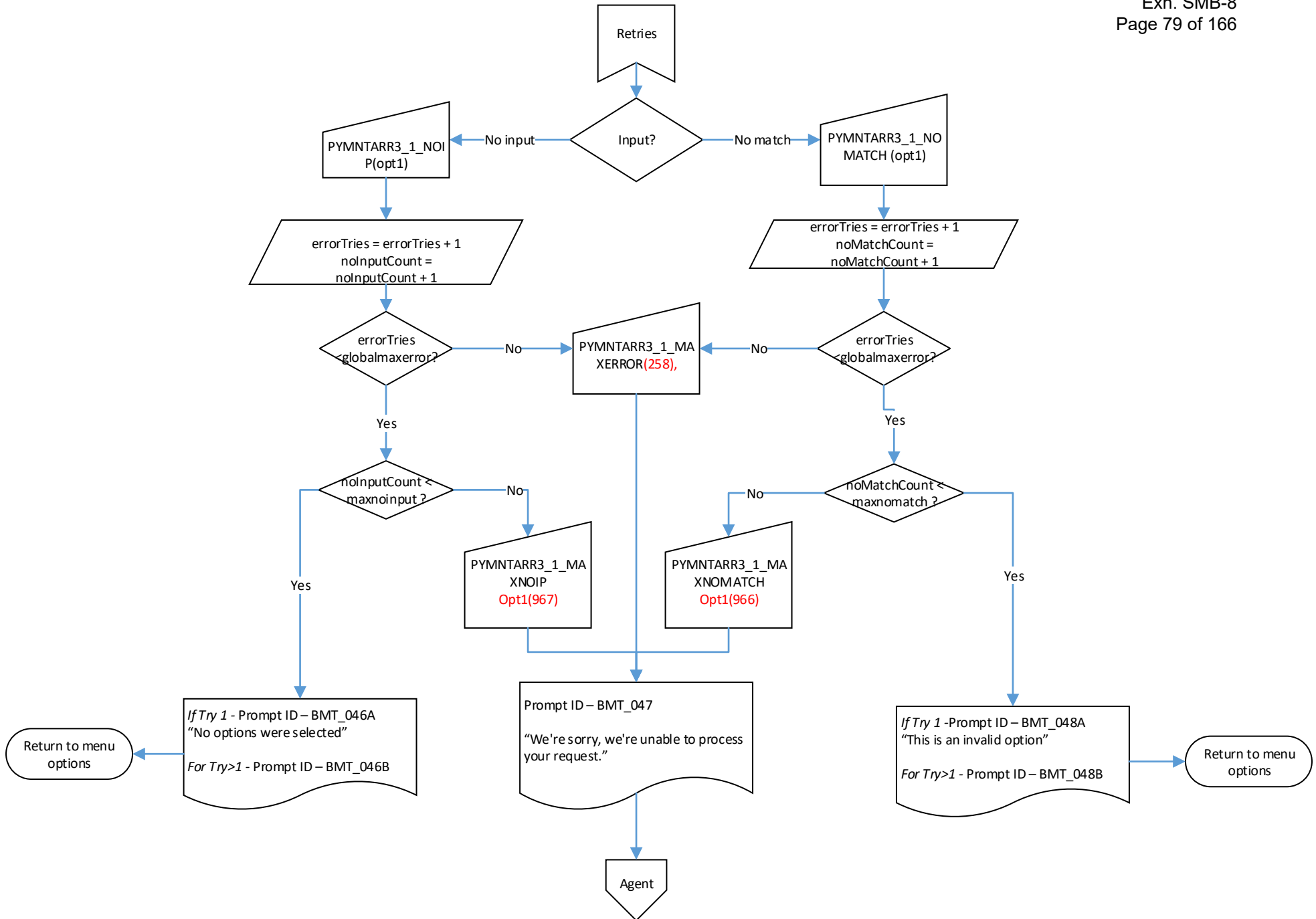




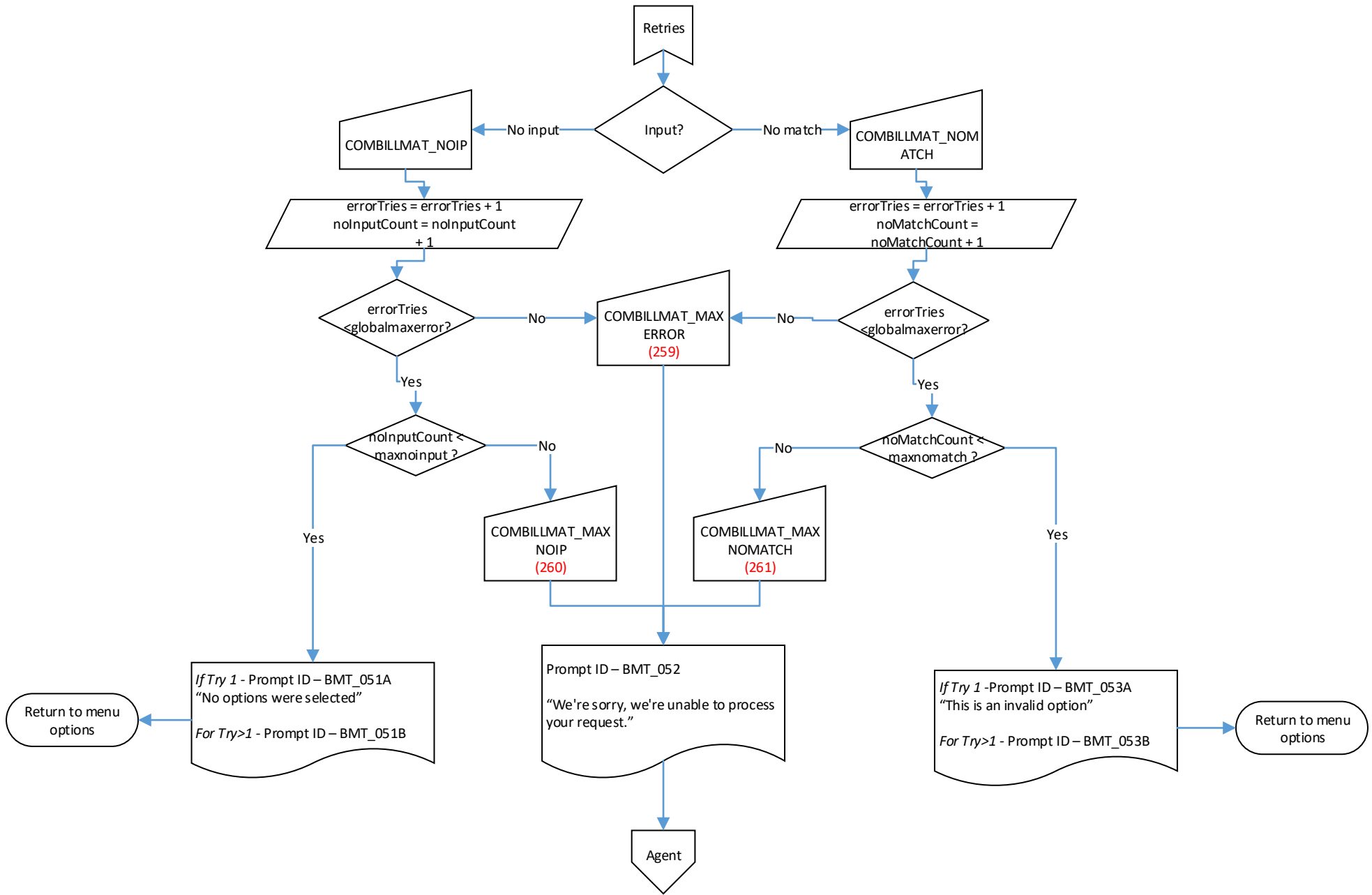


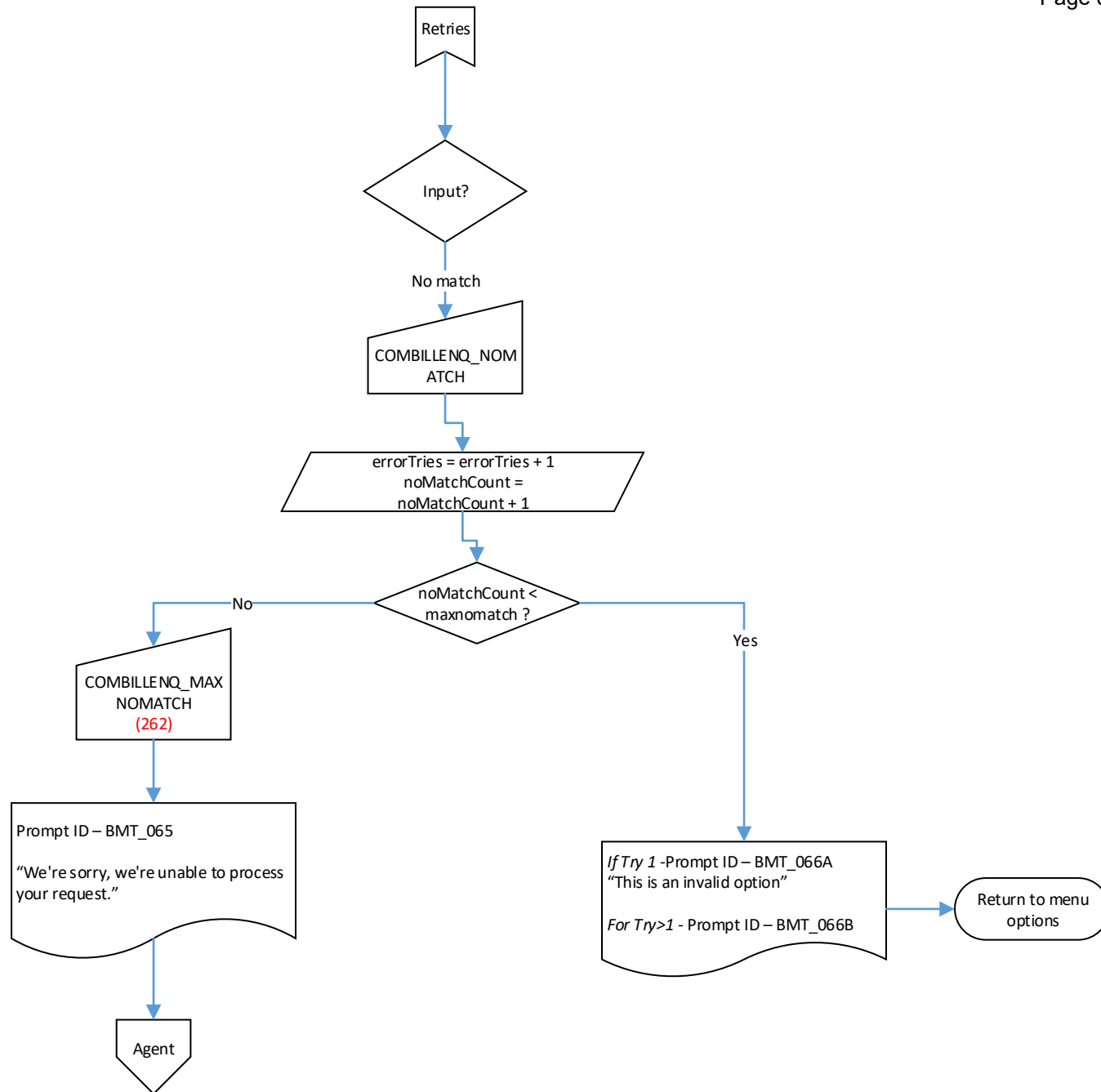


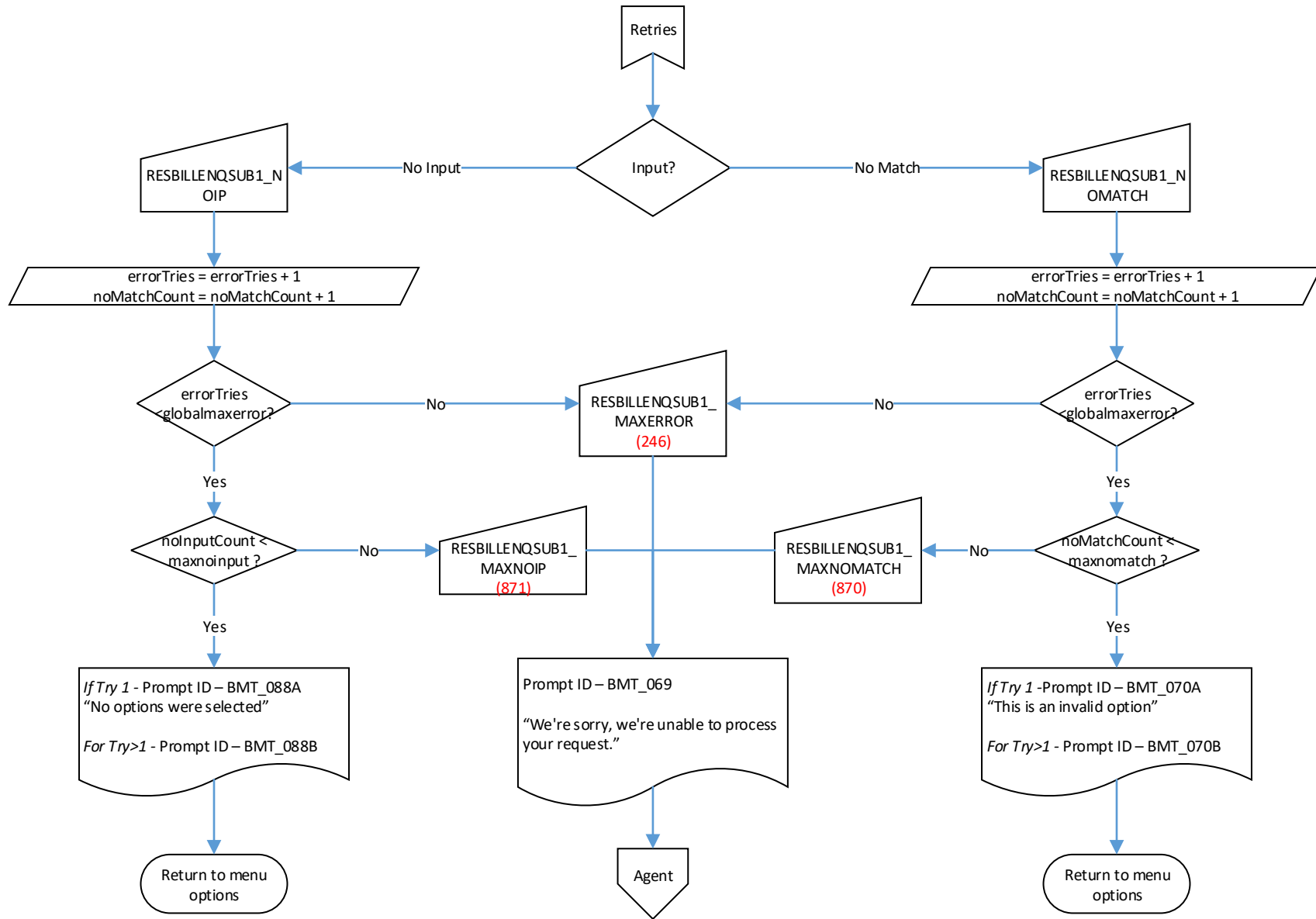


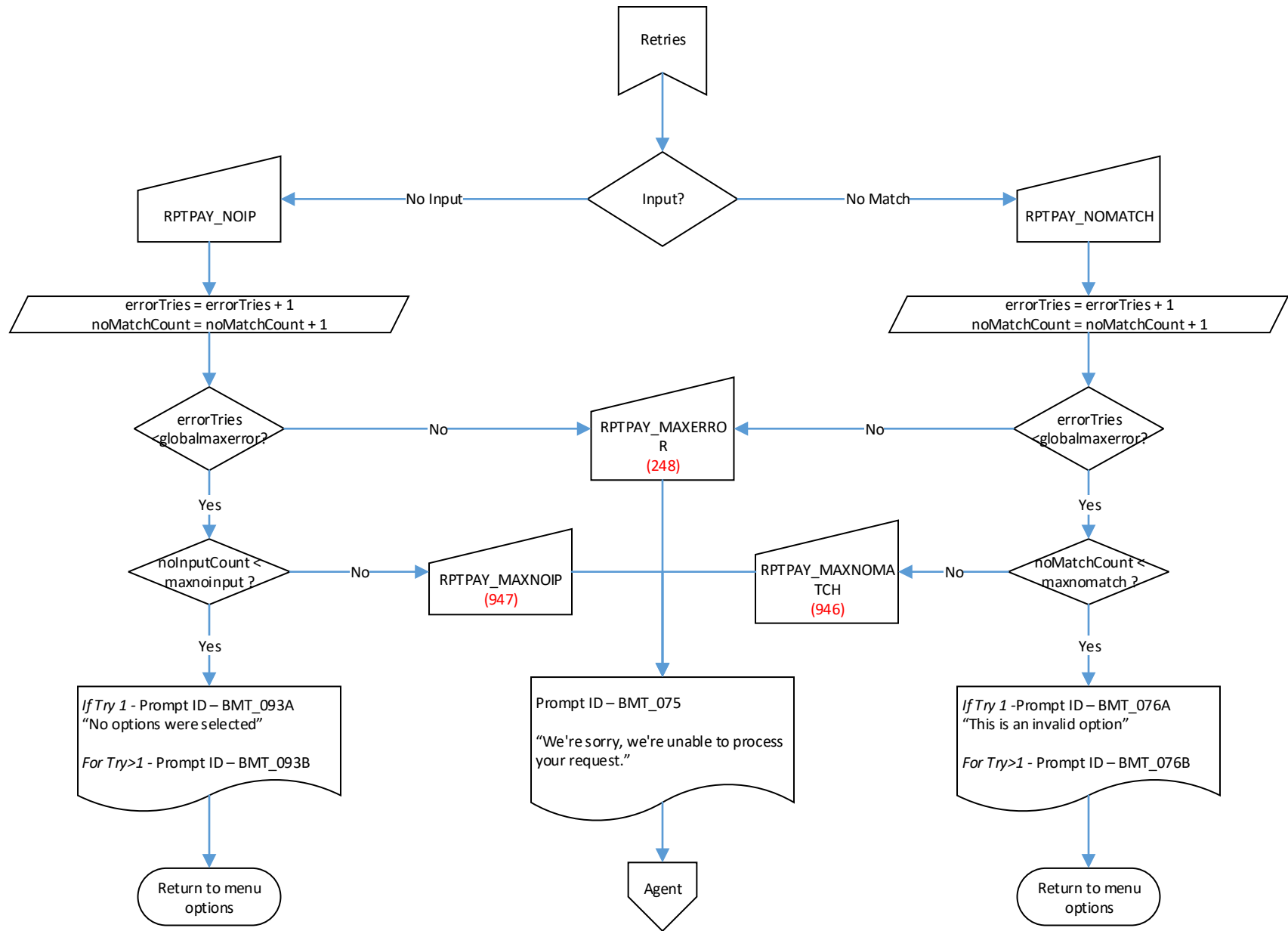


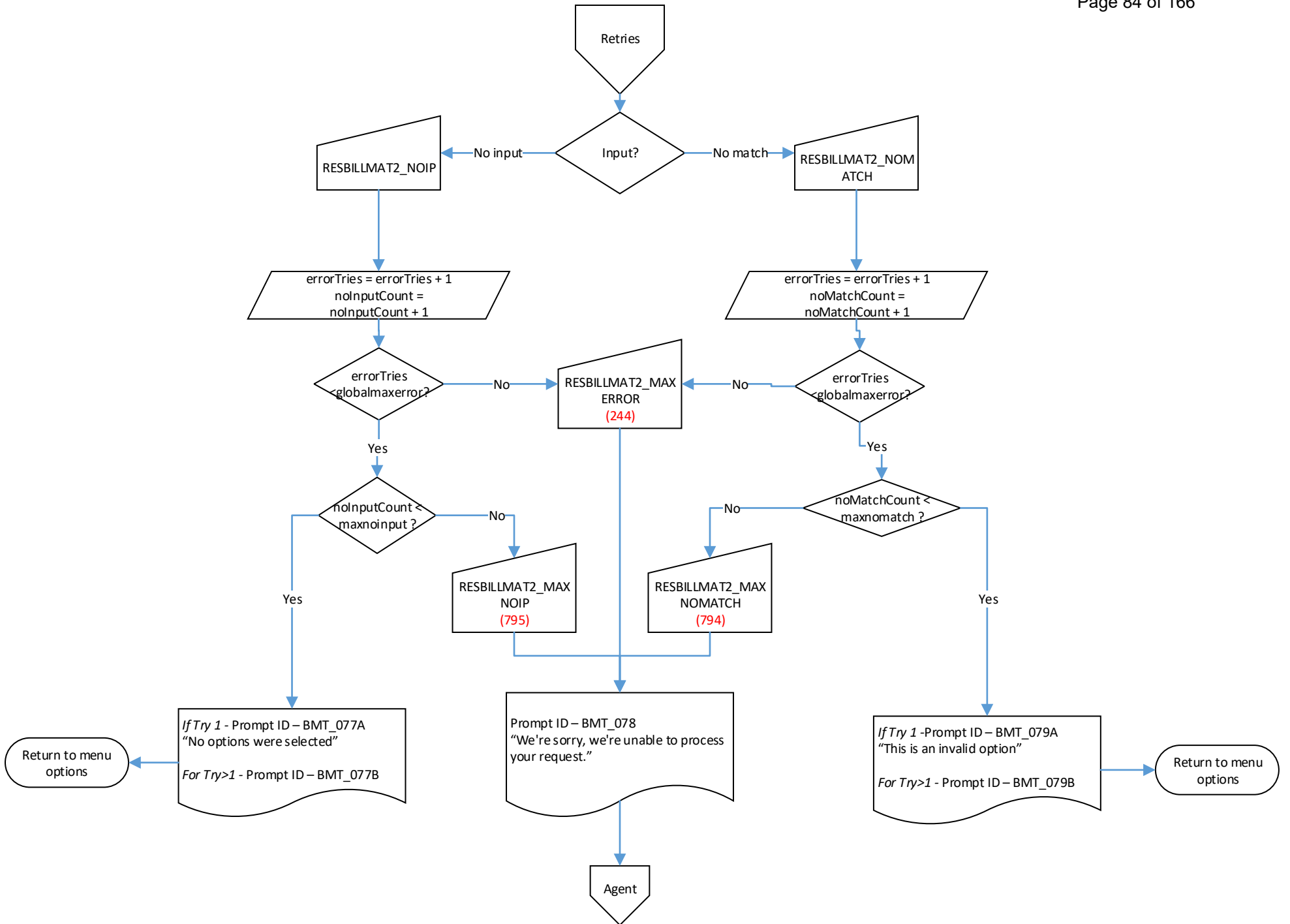


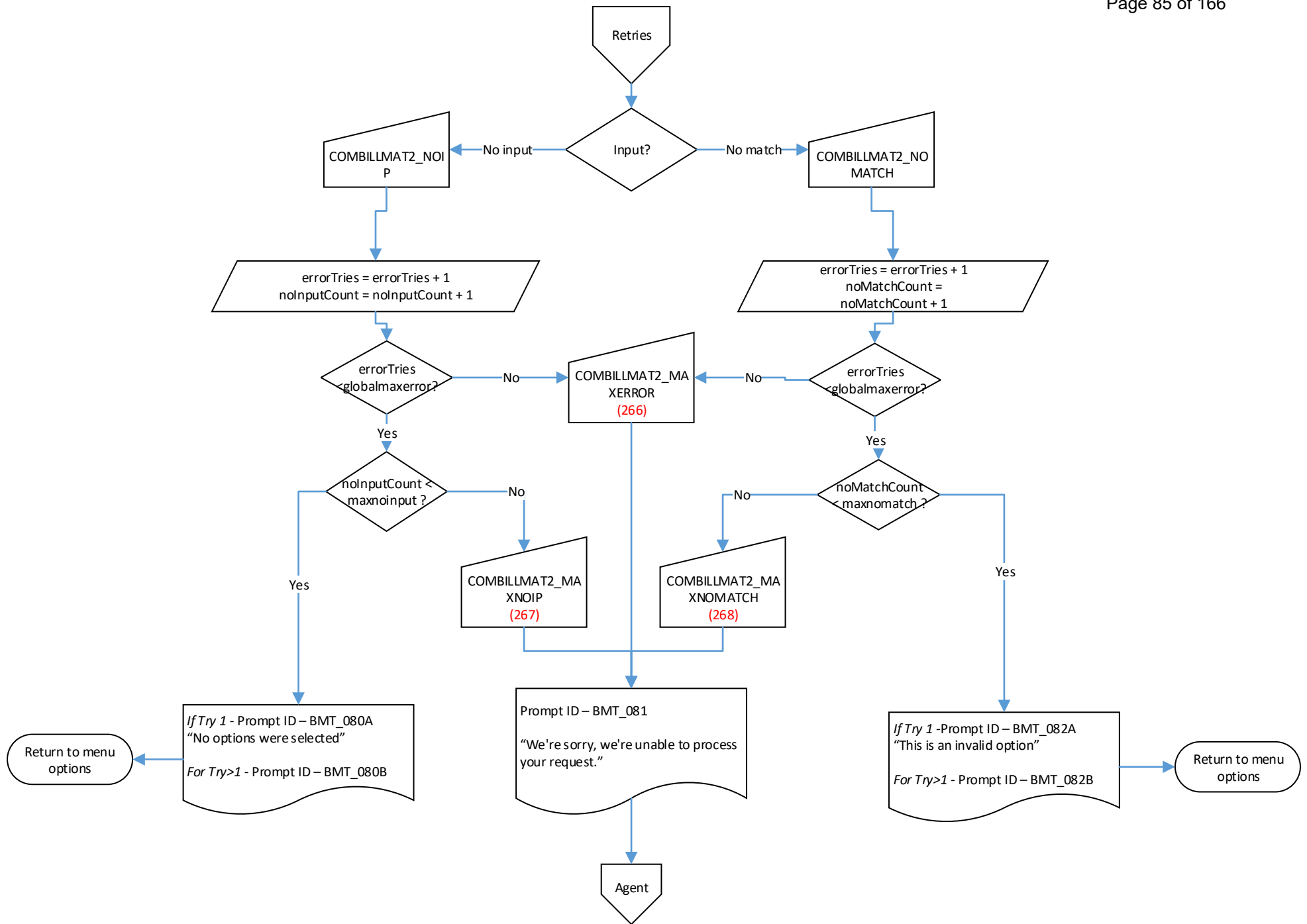


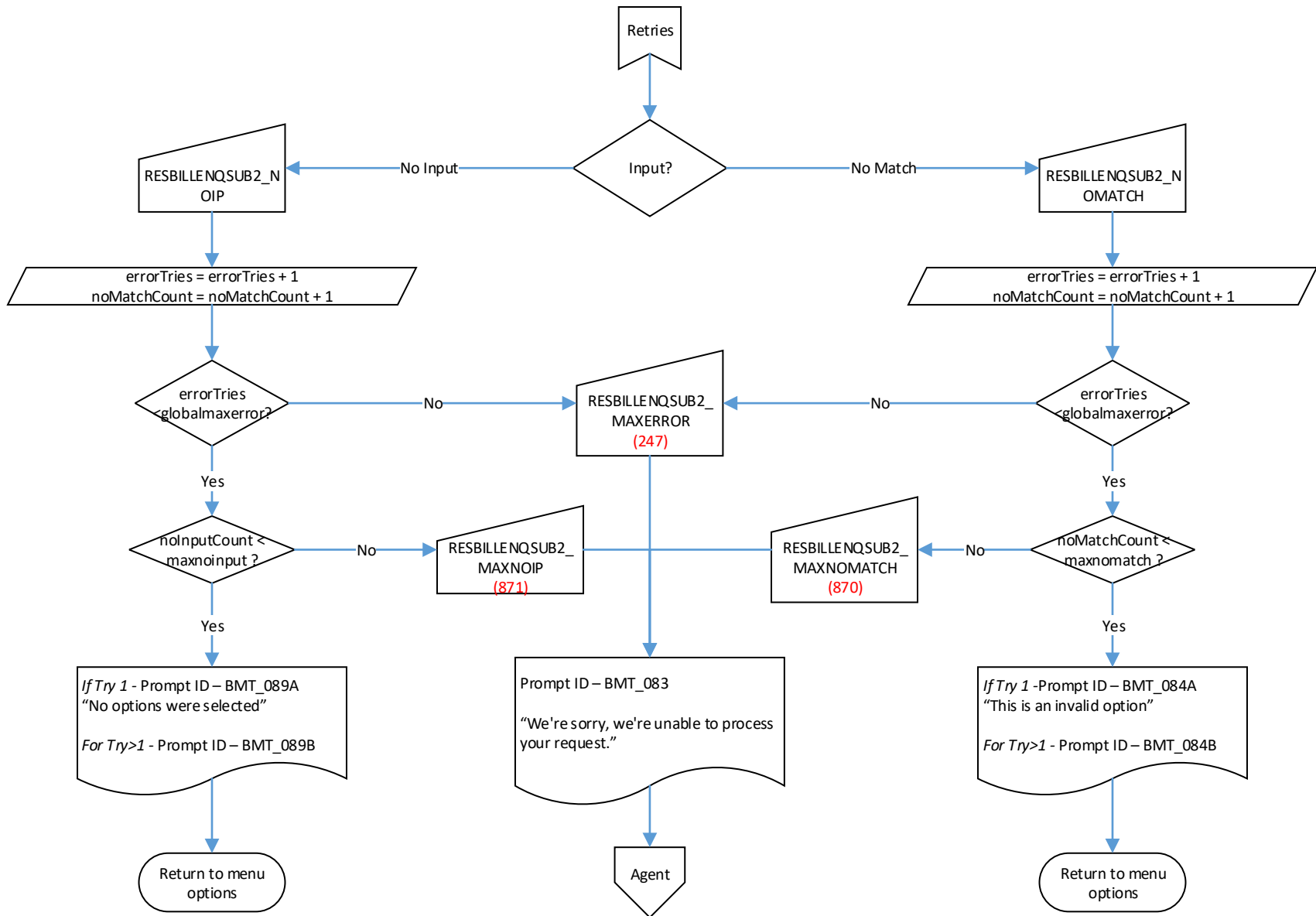


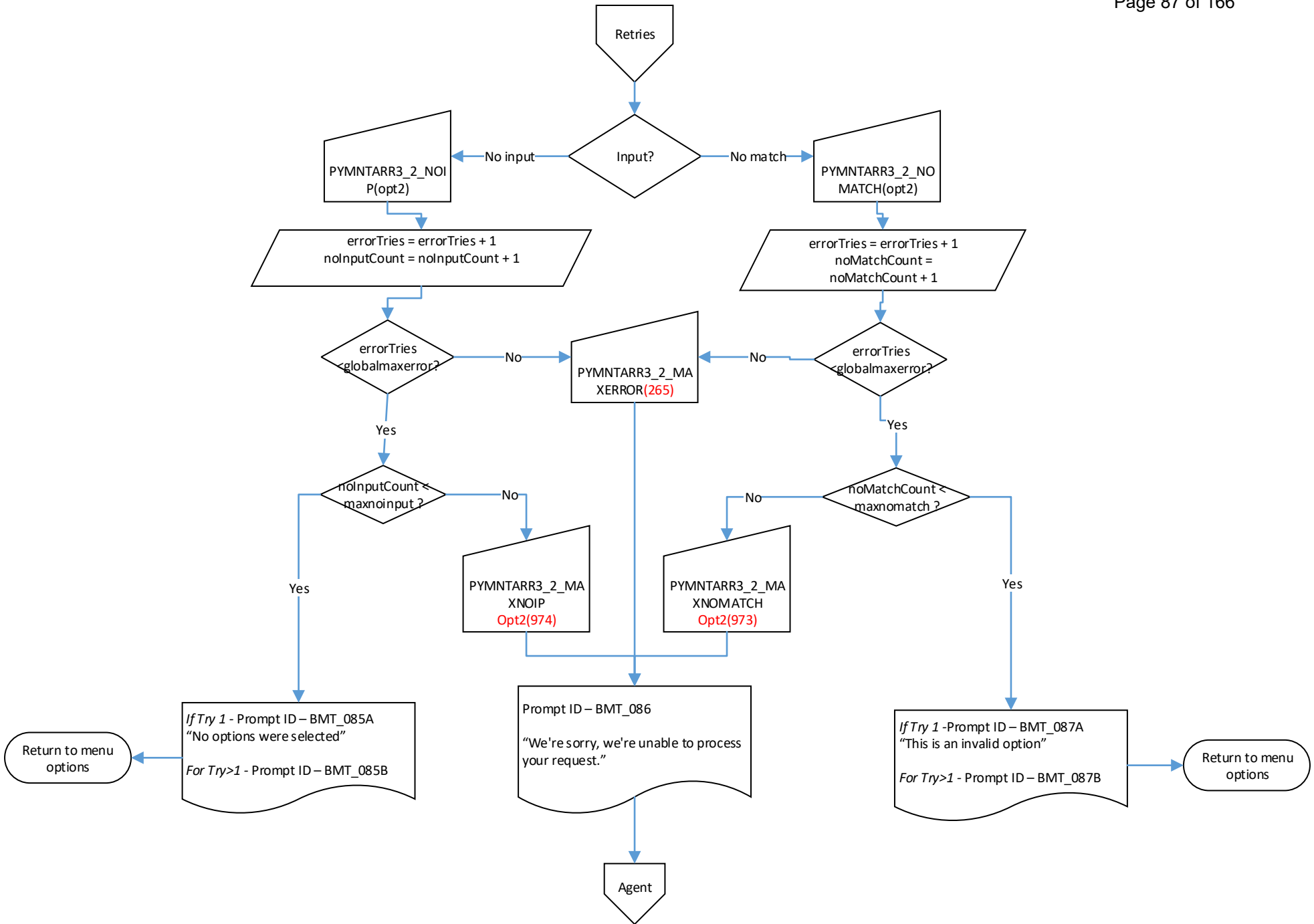




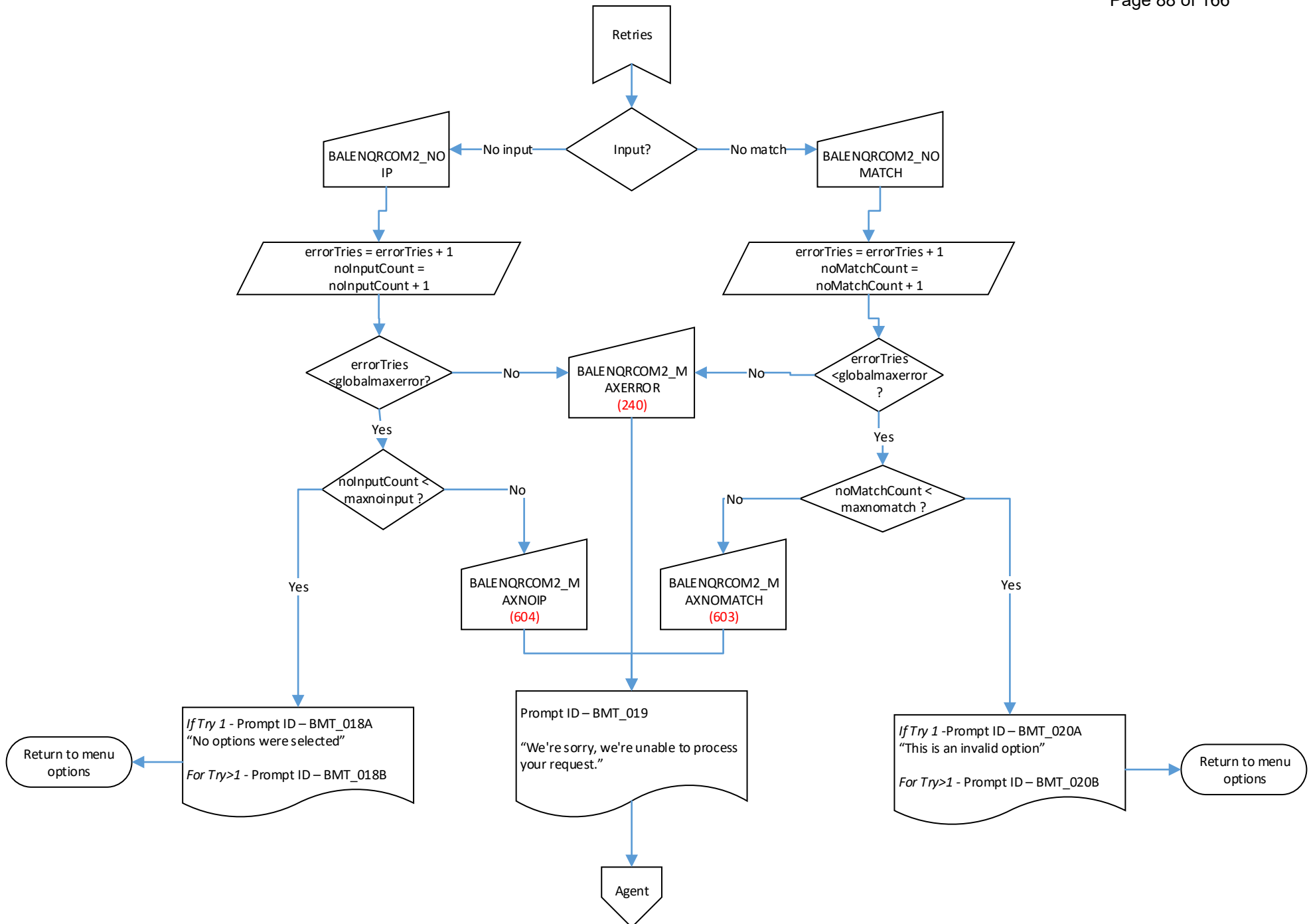


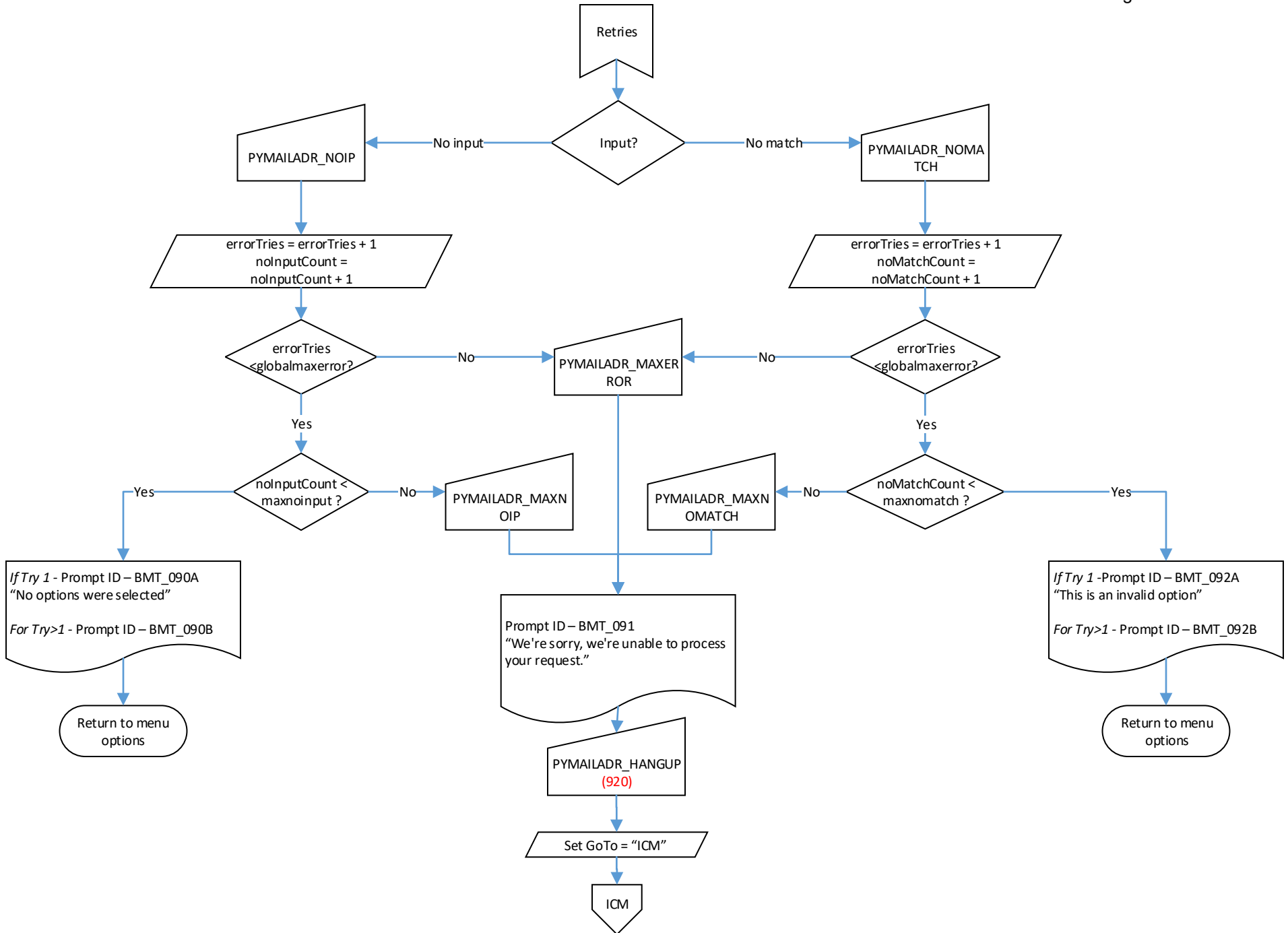


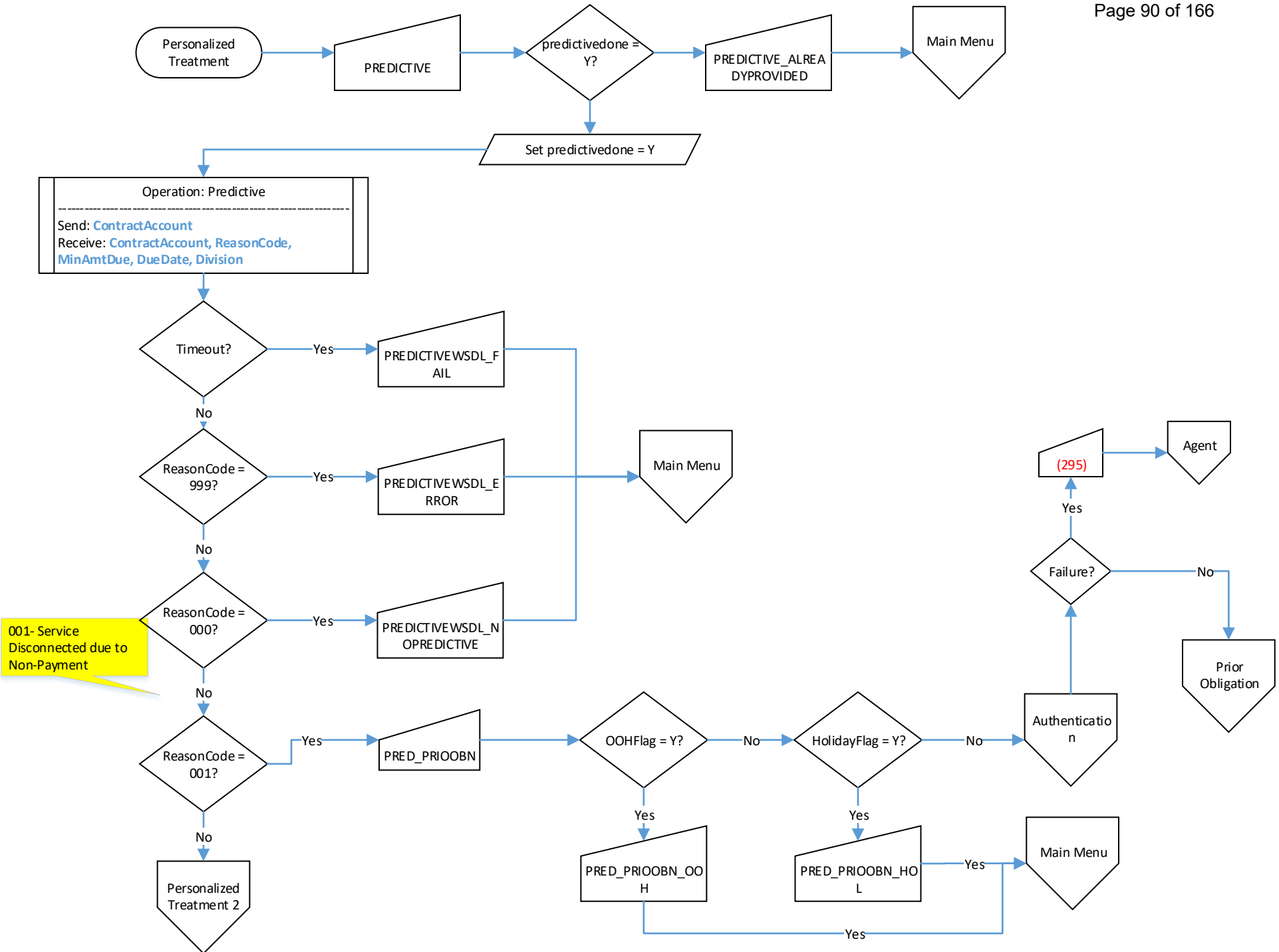


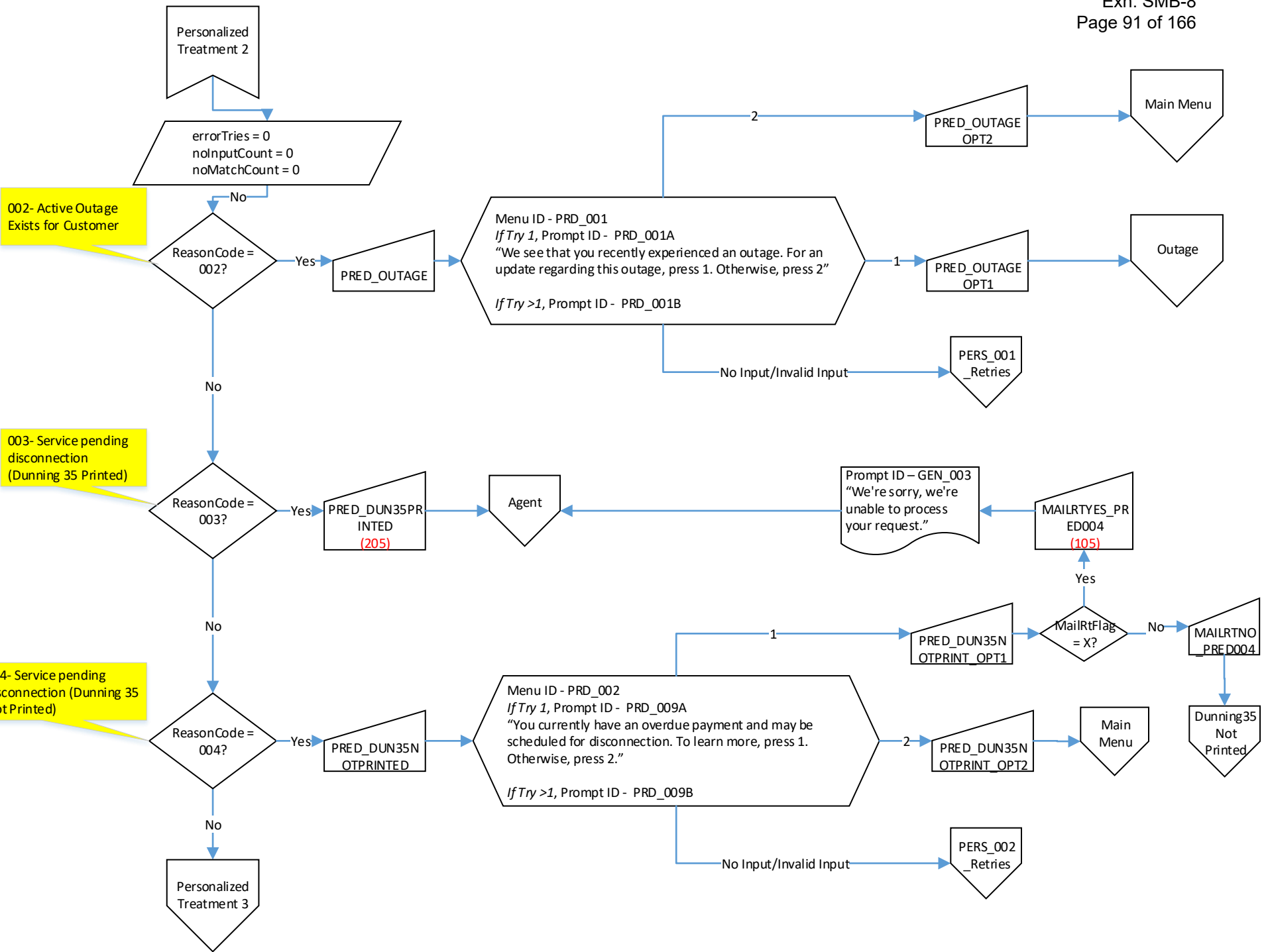








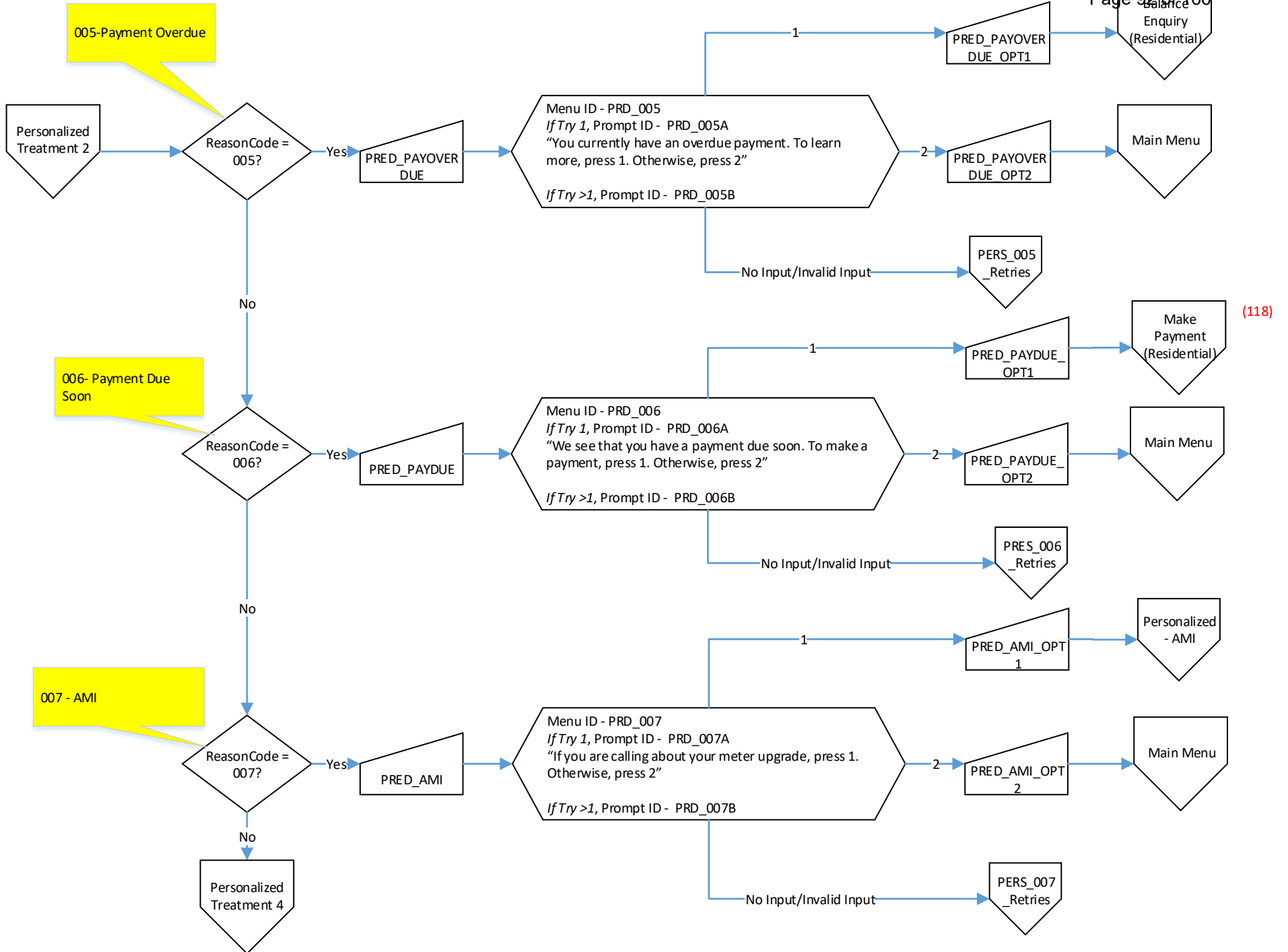


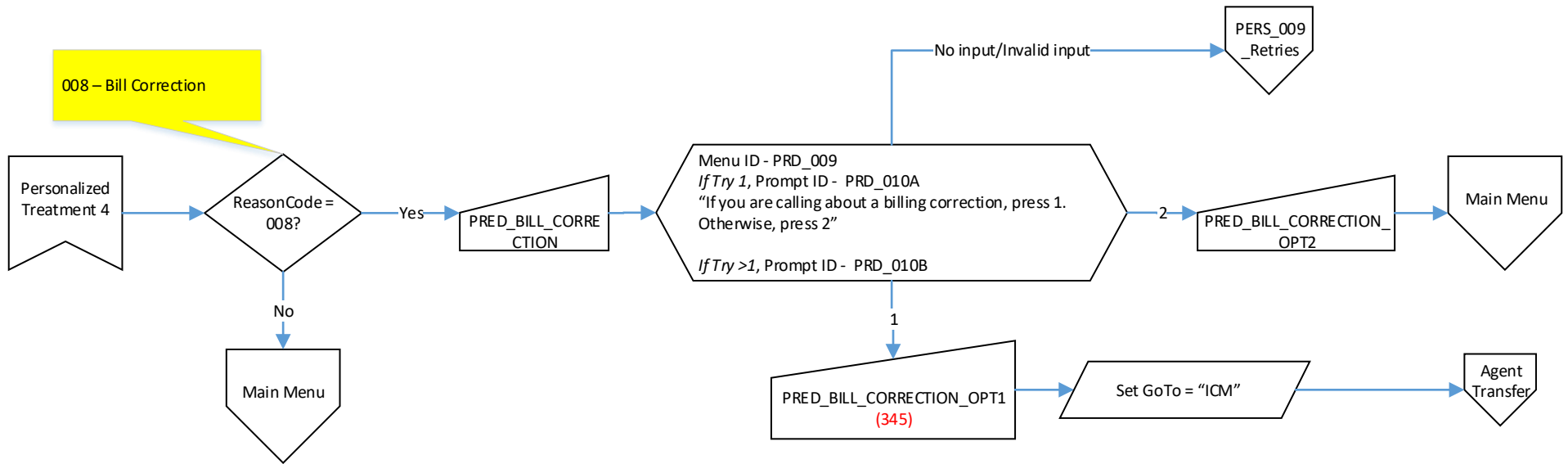


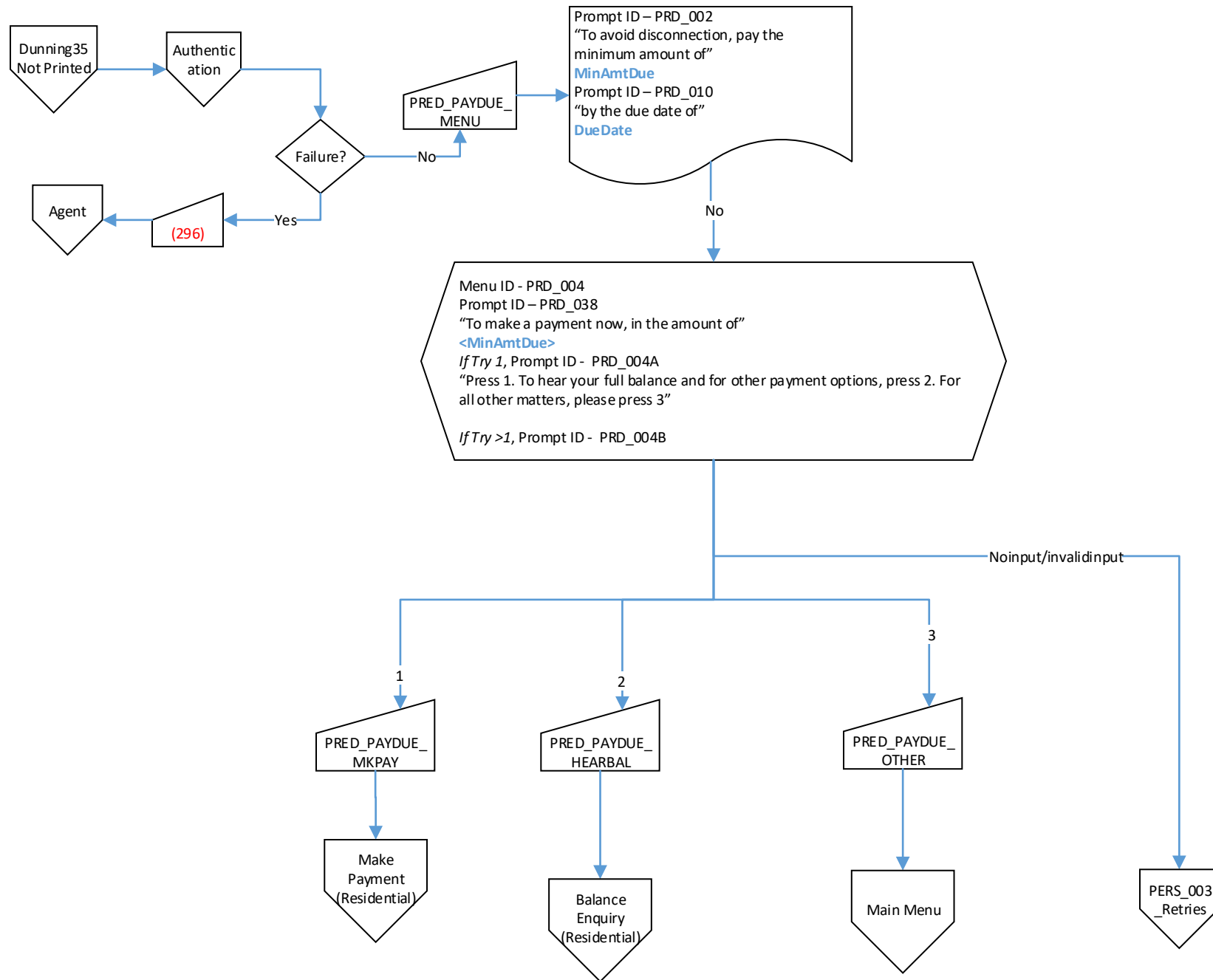
002- Active Outage Exists for Customer

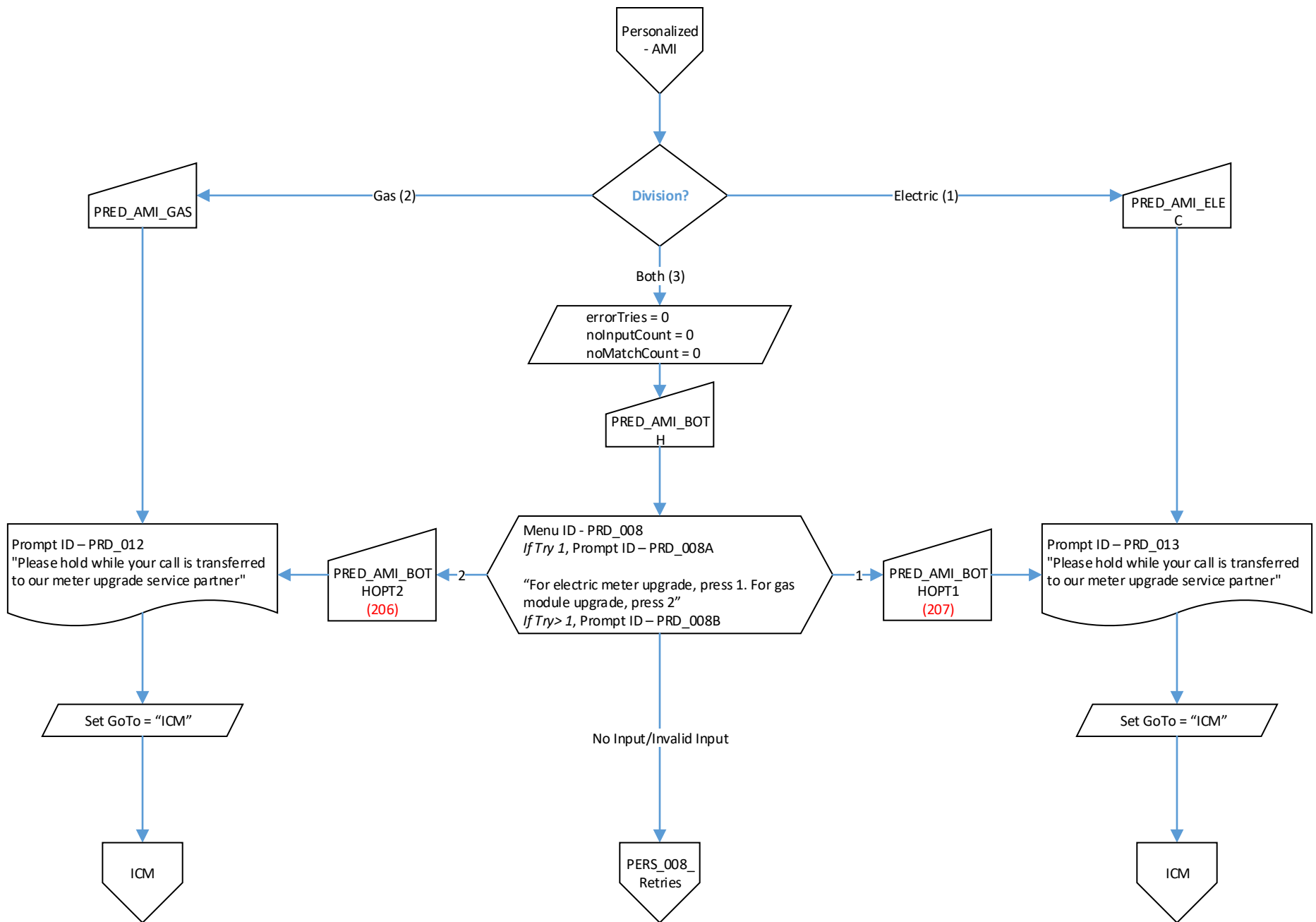
003- Service pending disconnection (Dunning 35 Printed)

004- Service pending disconnection (Dunning 35 Not Printed)

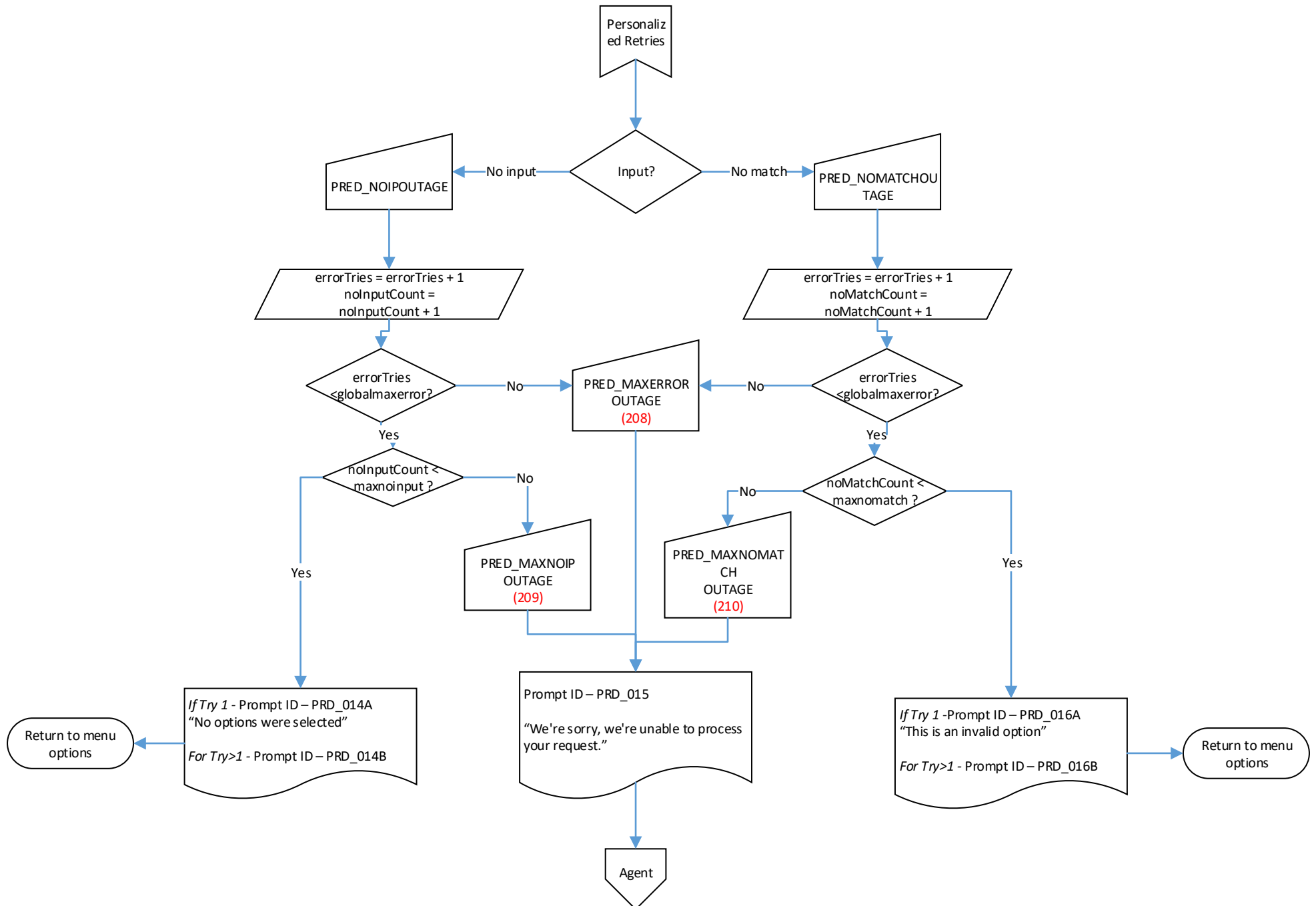


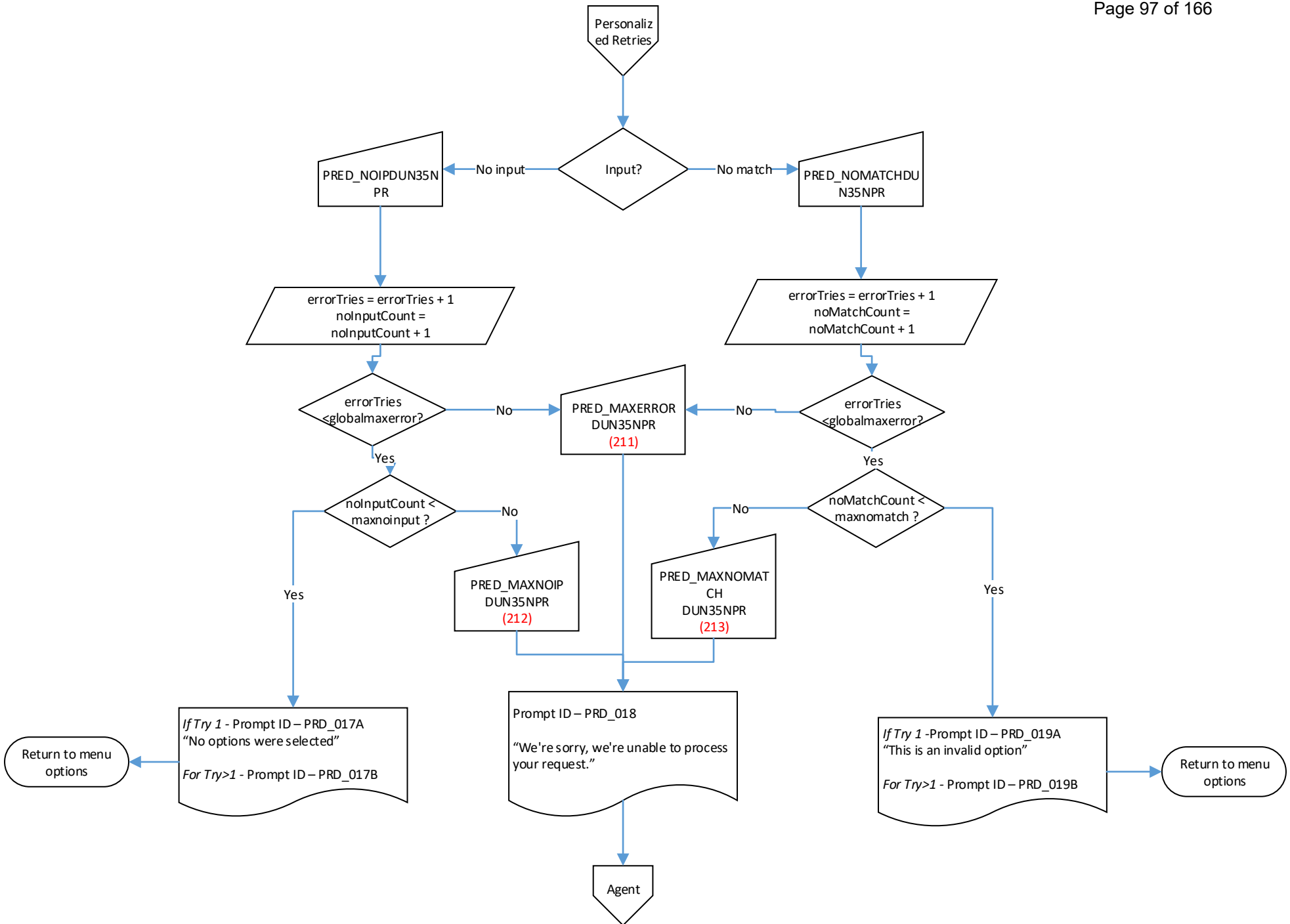


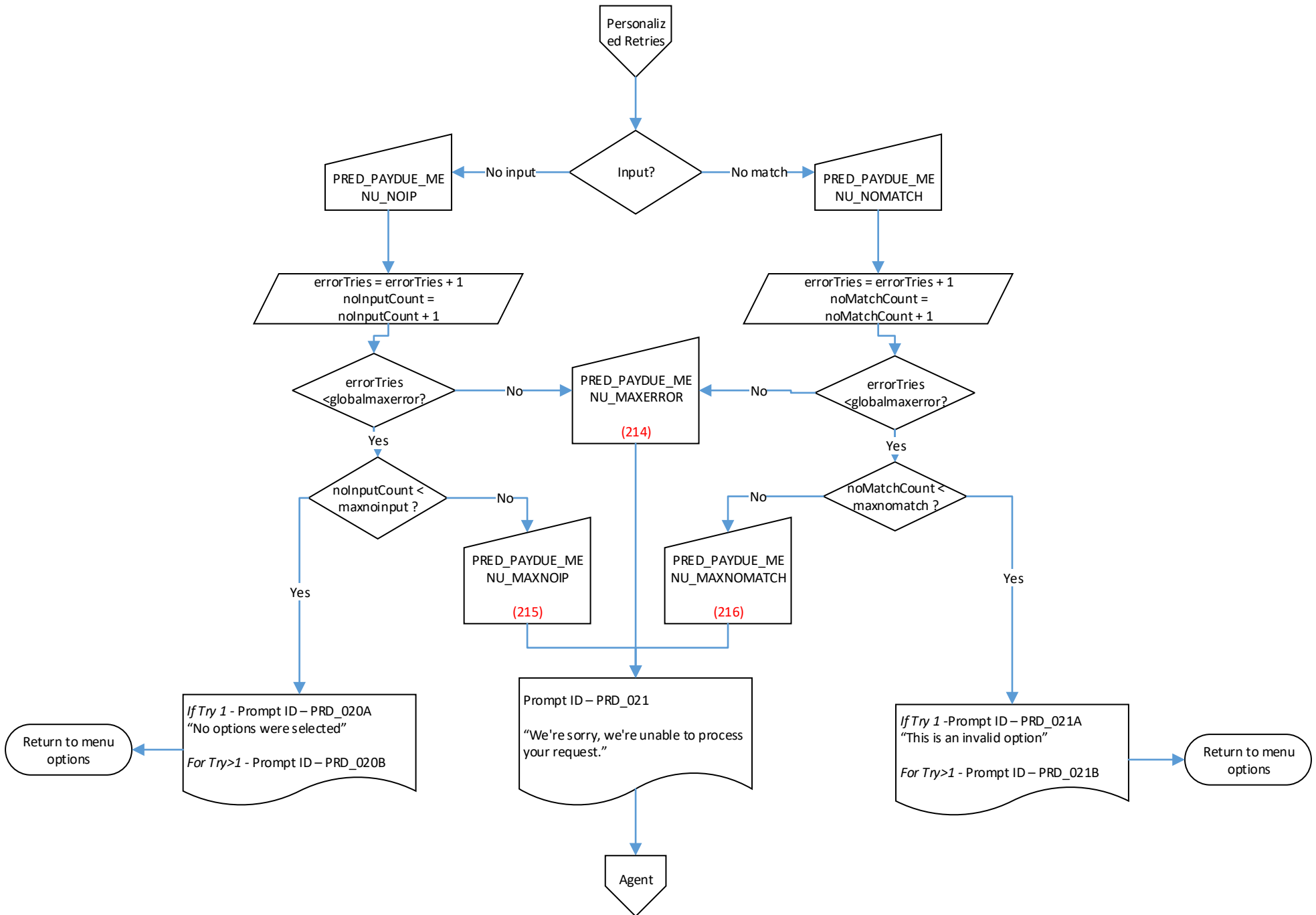


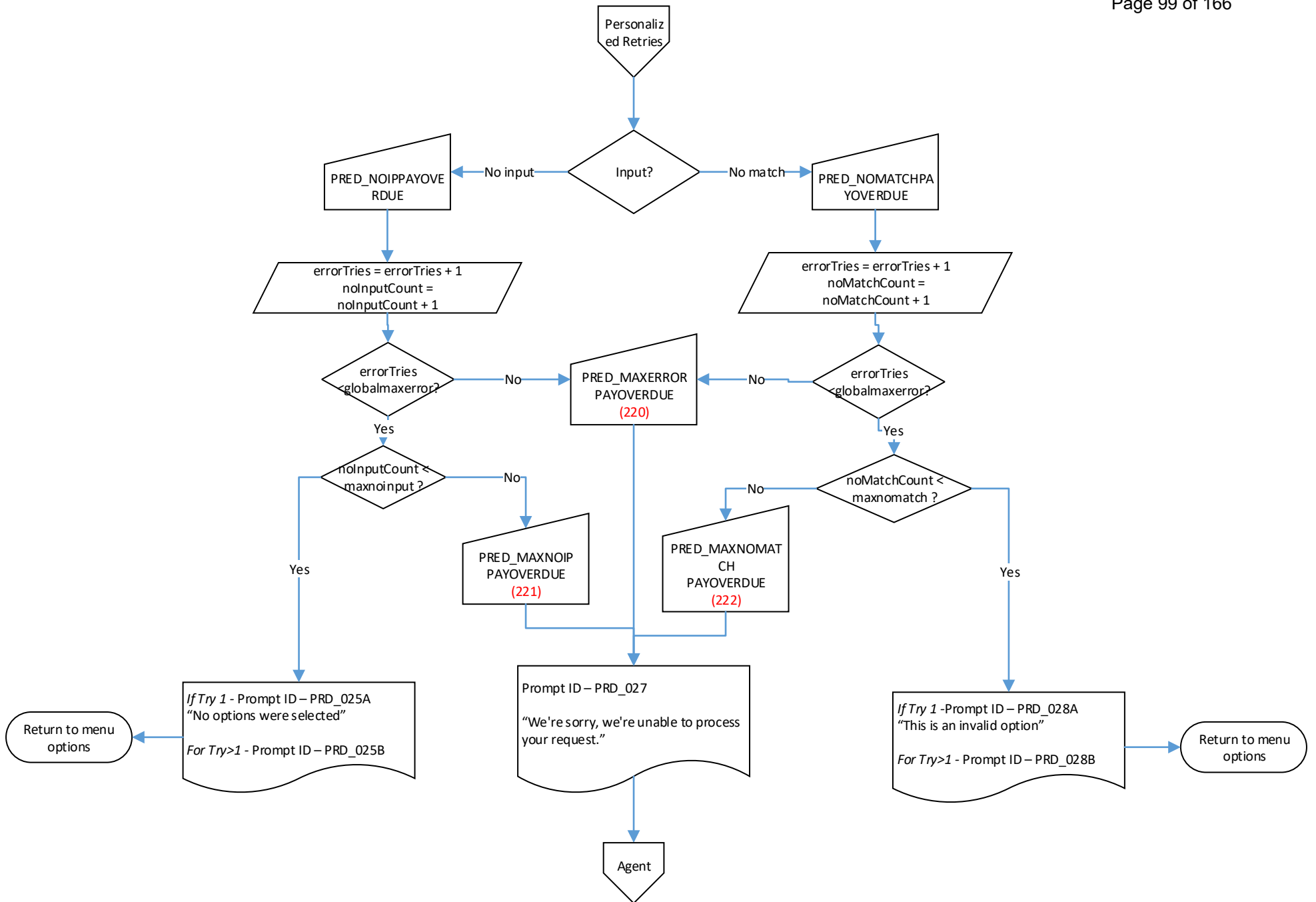


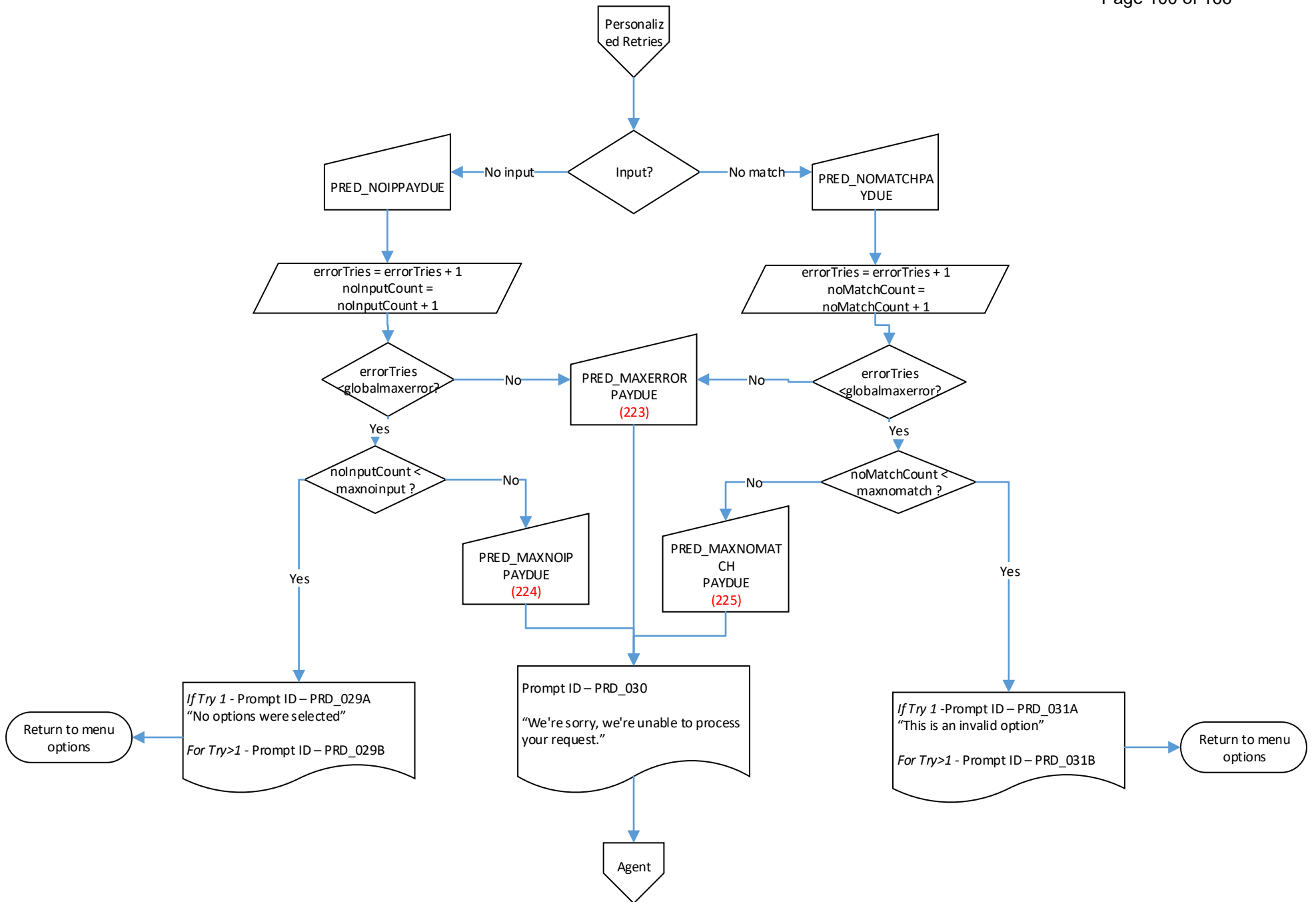


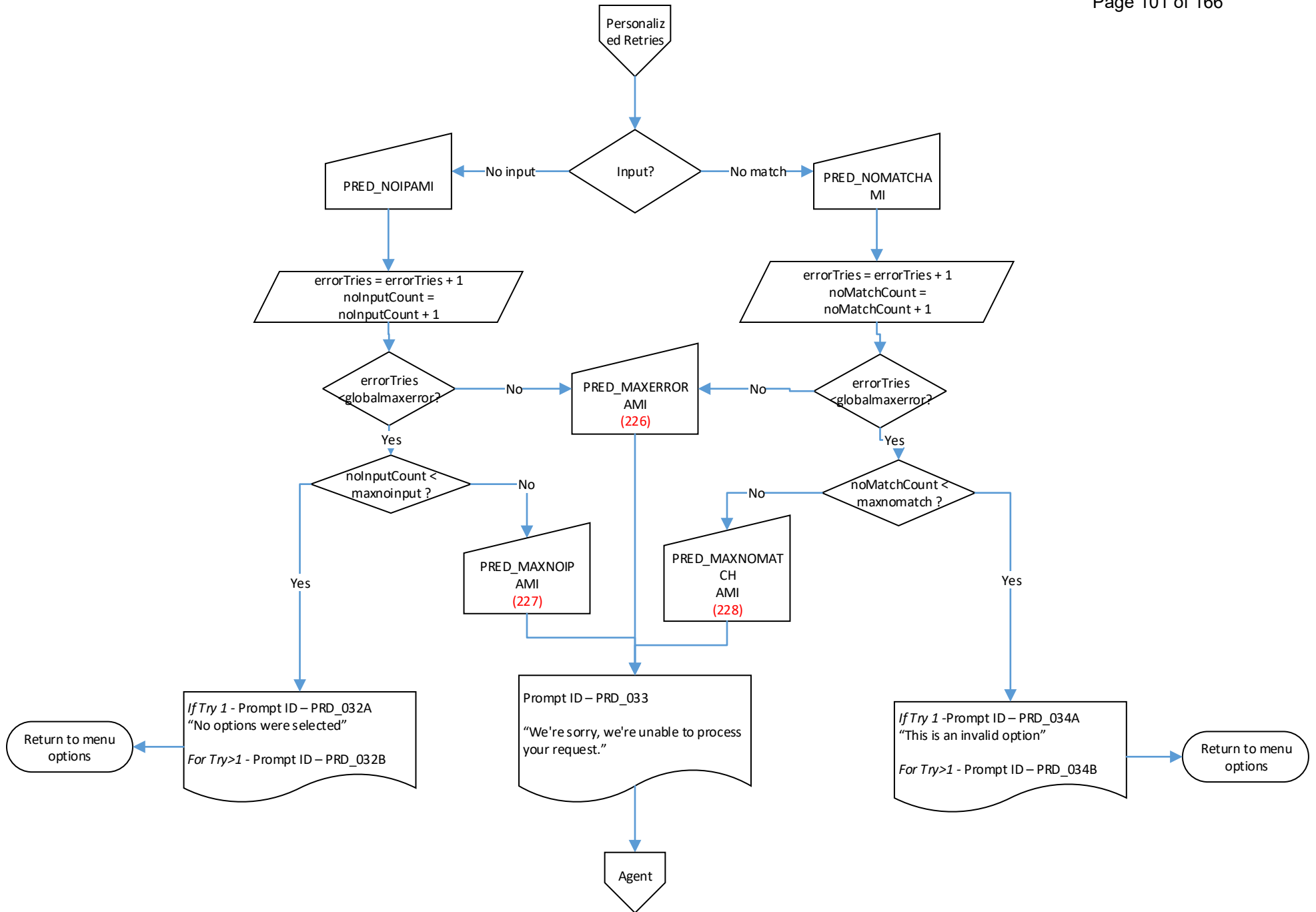


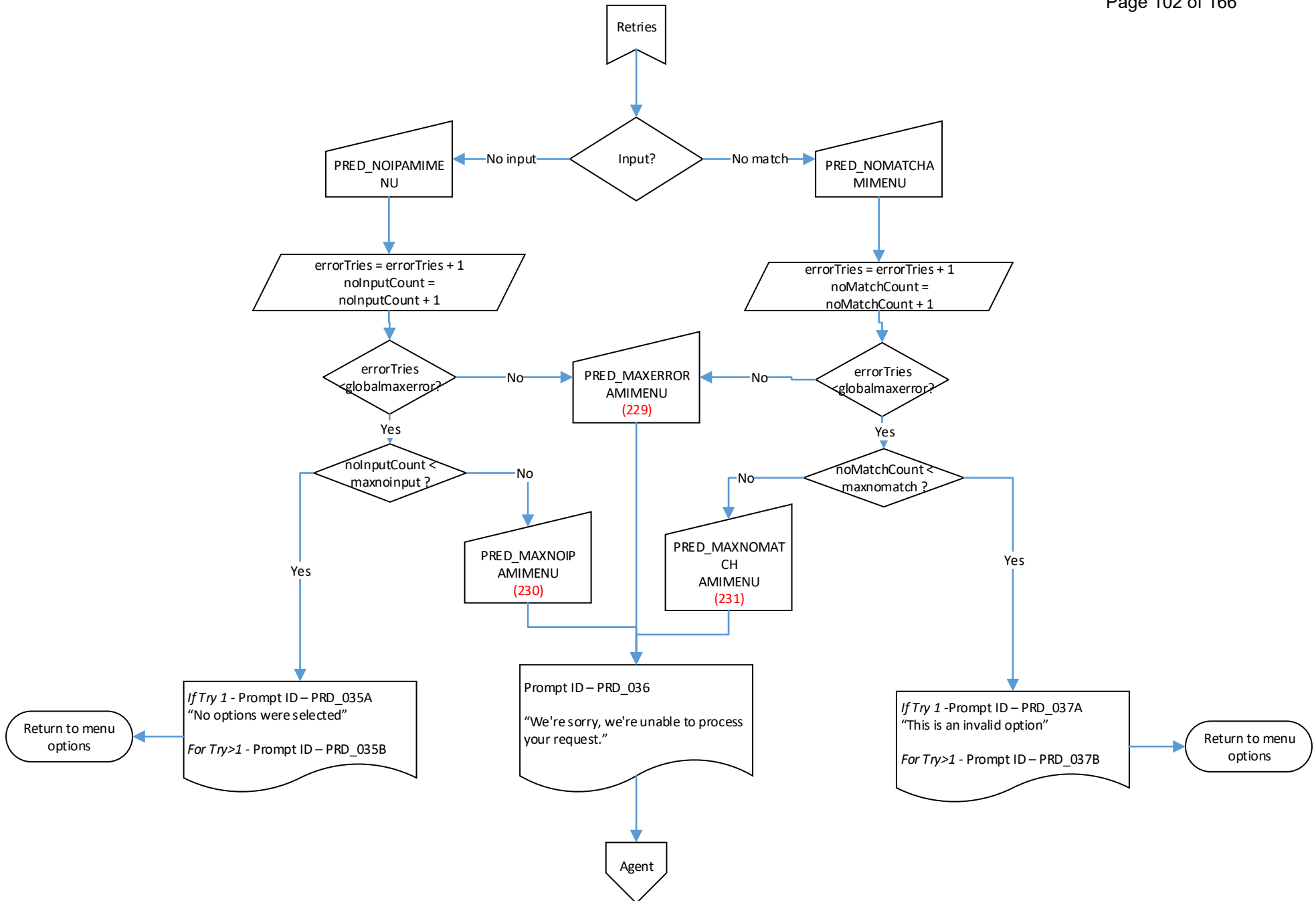


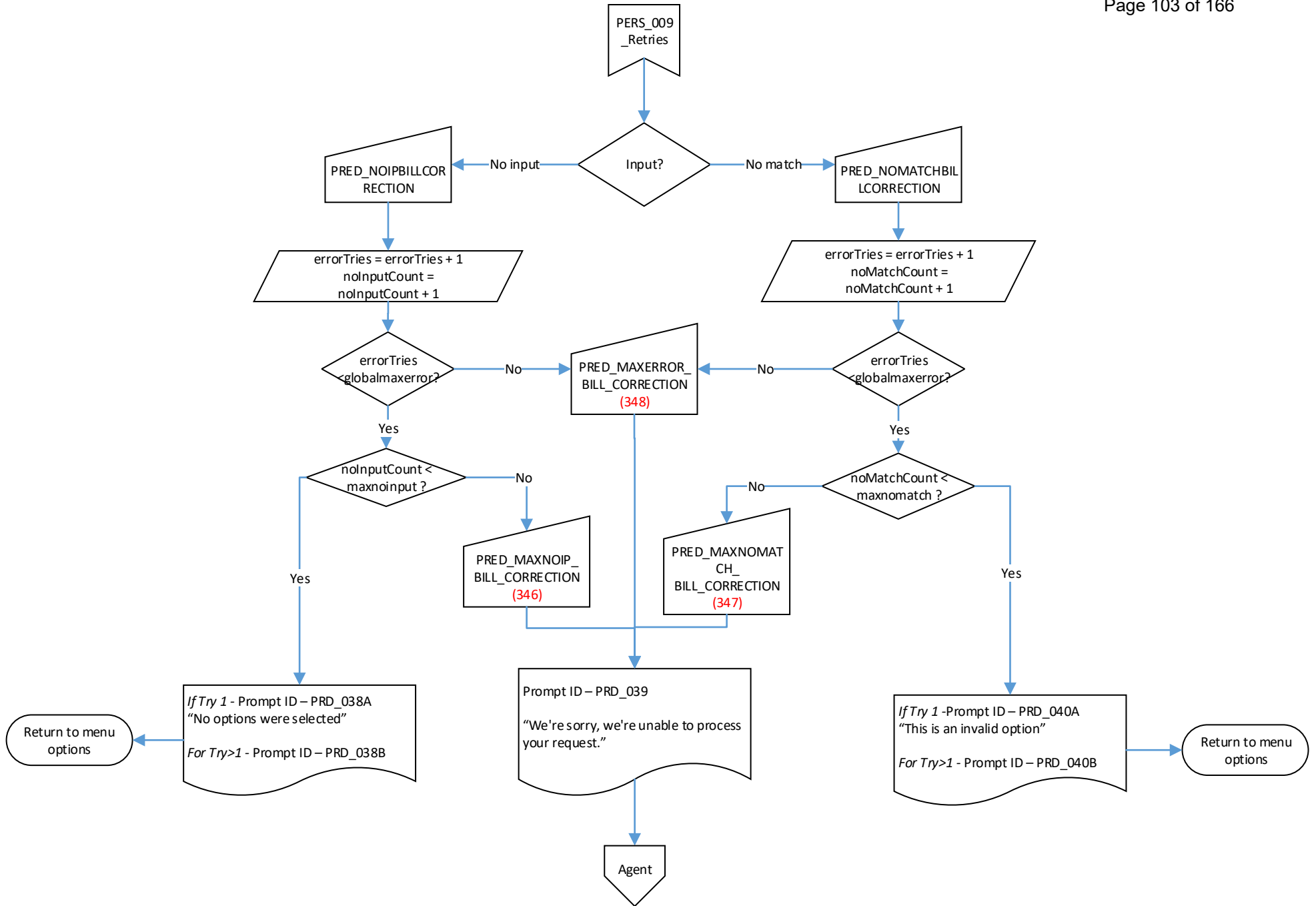




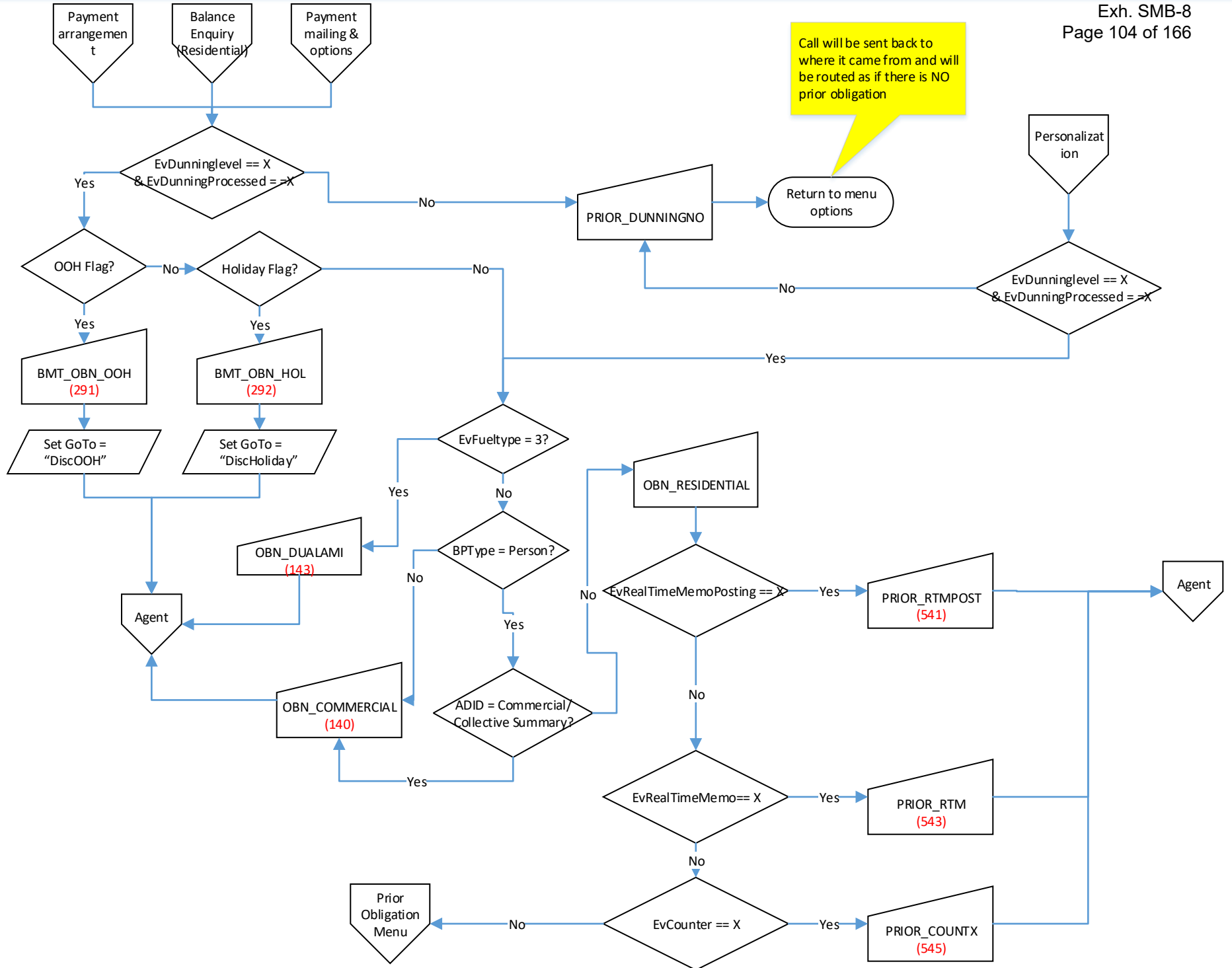


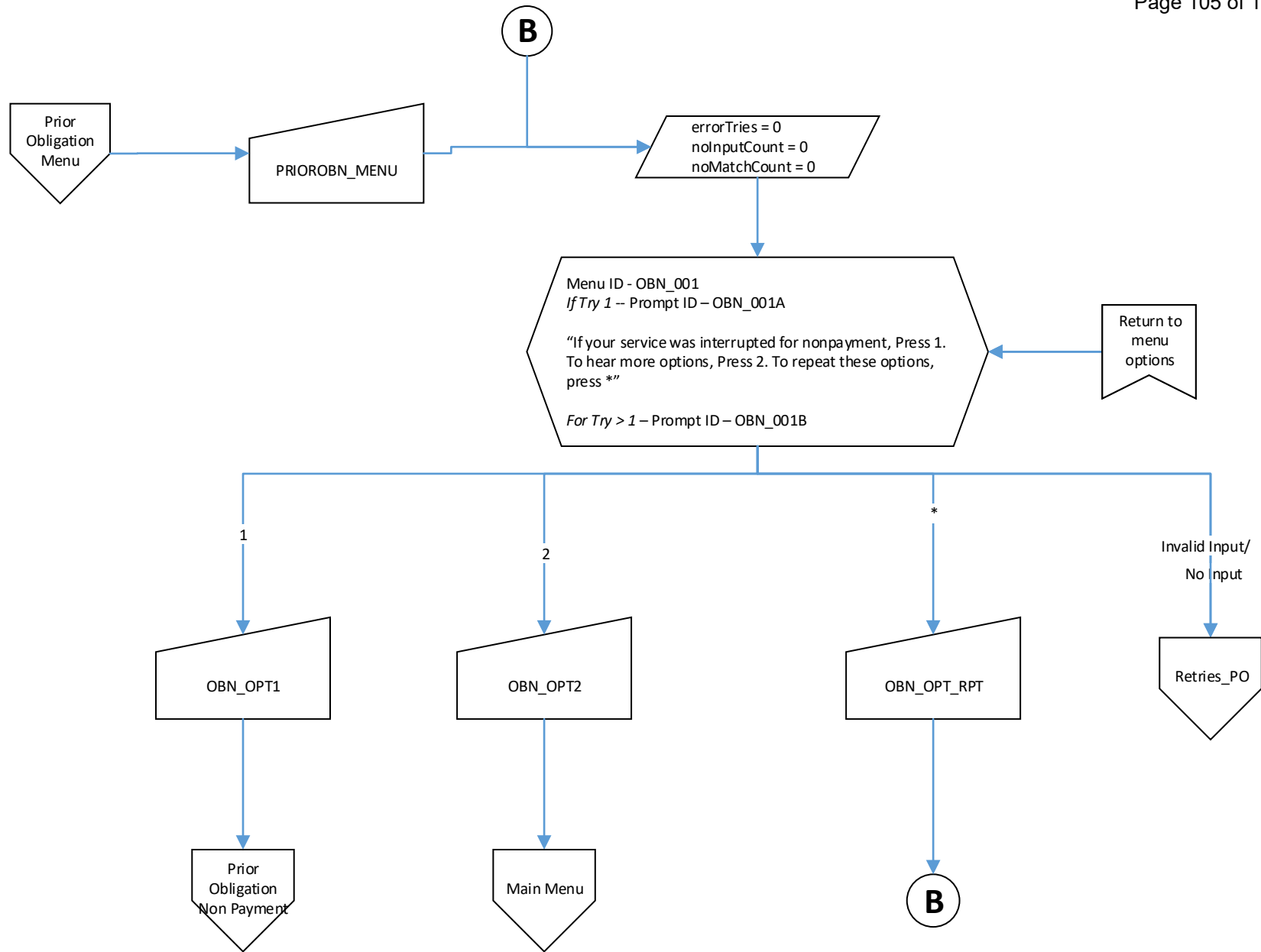


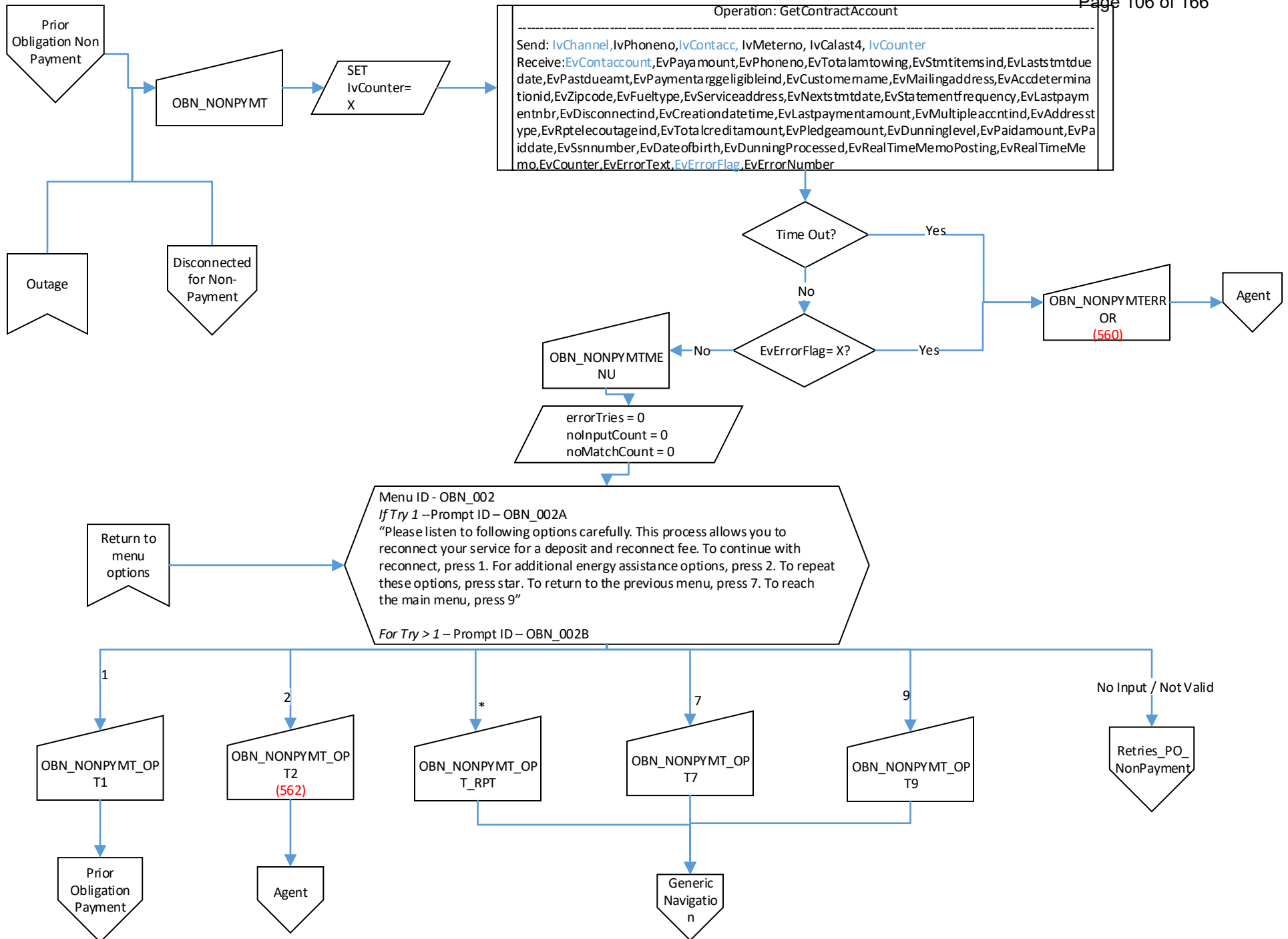


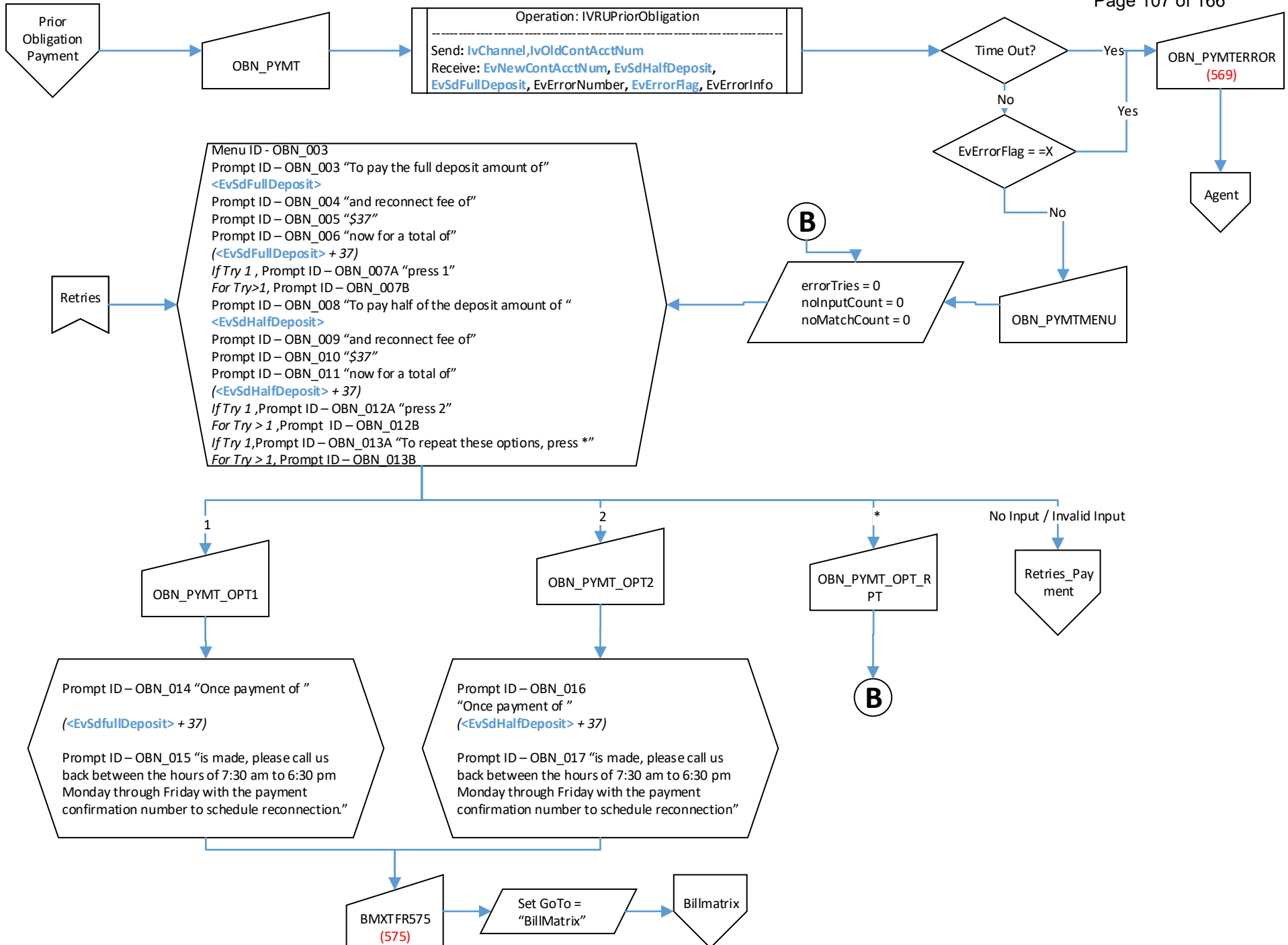


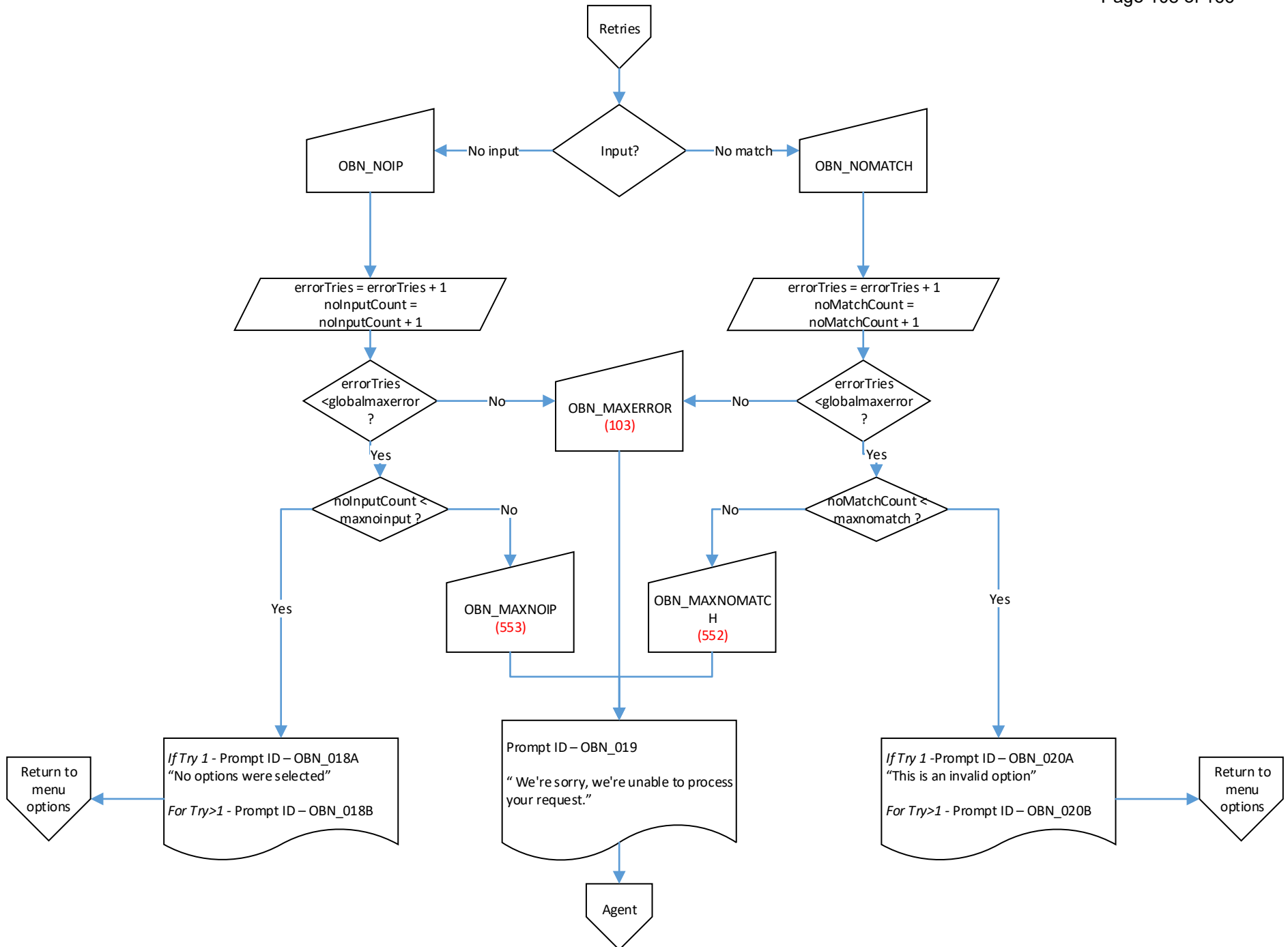


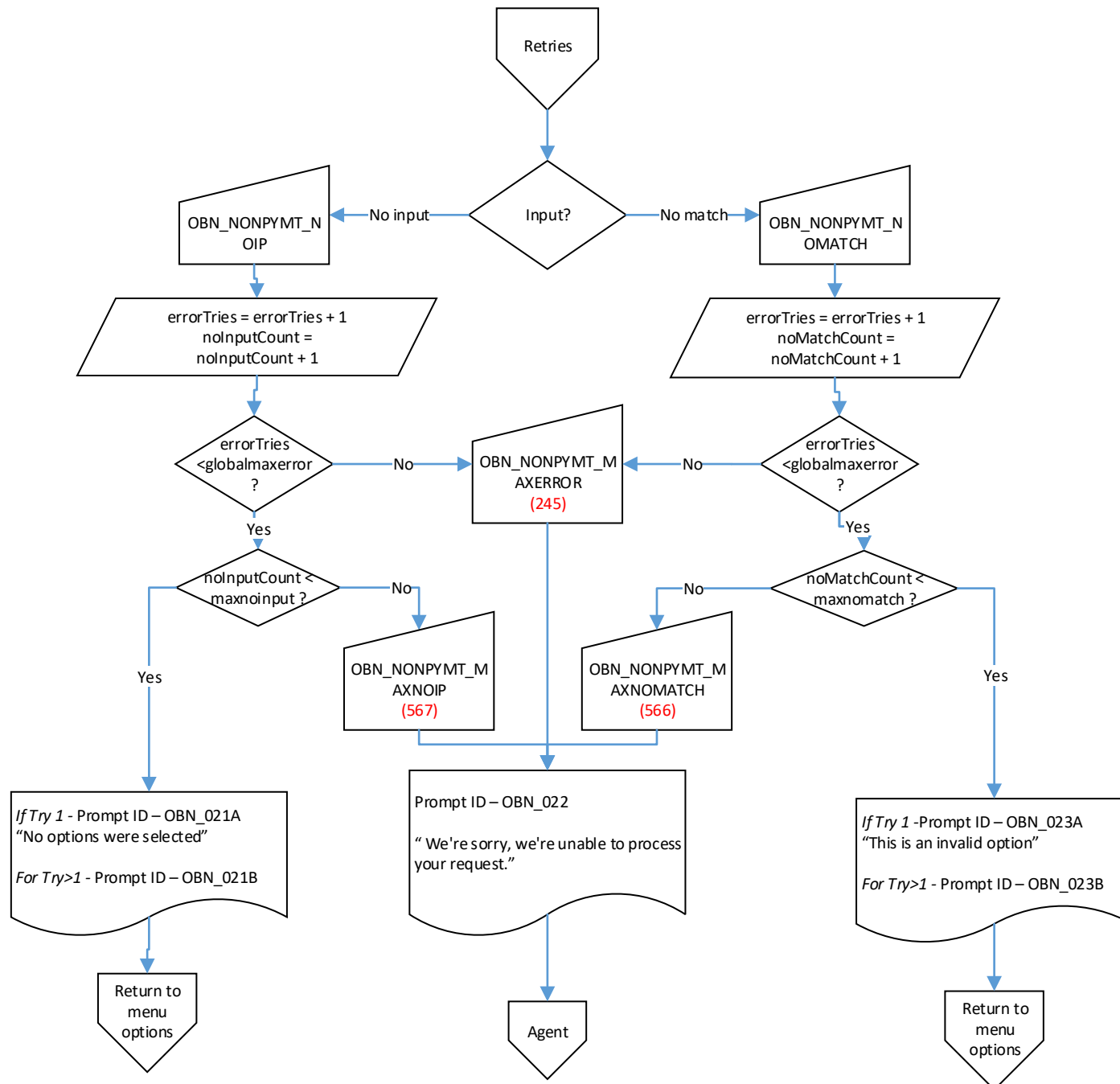


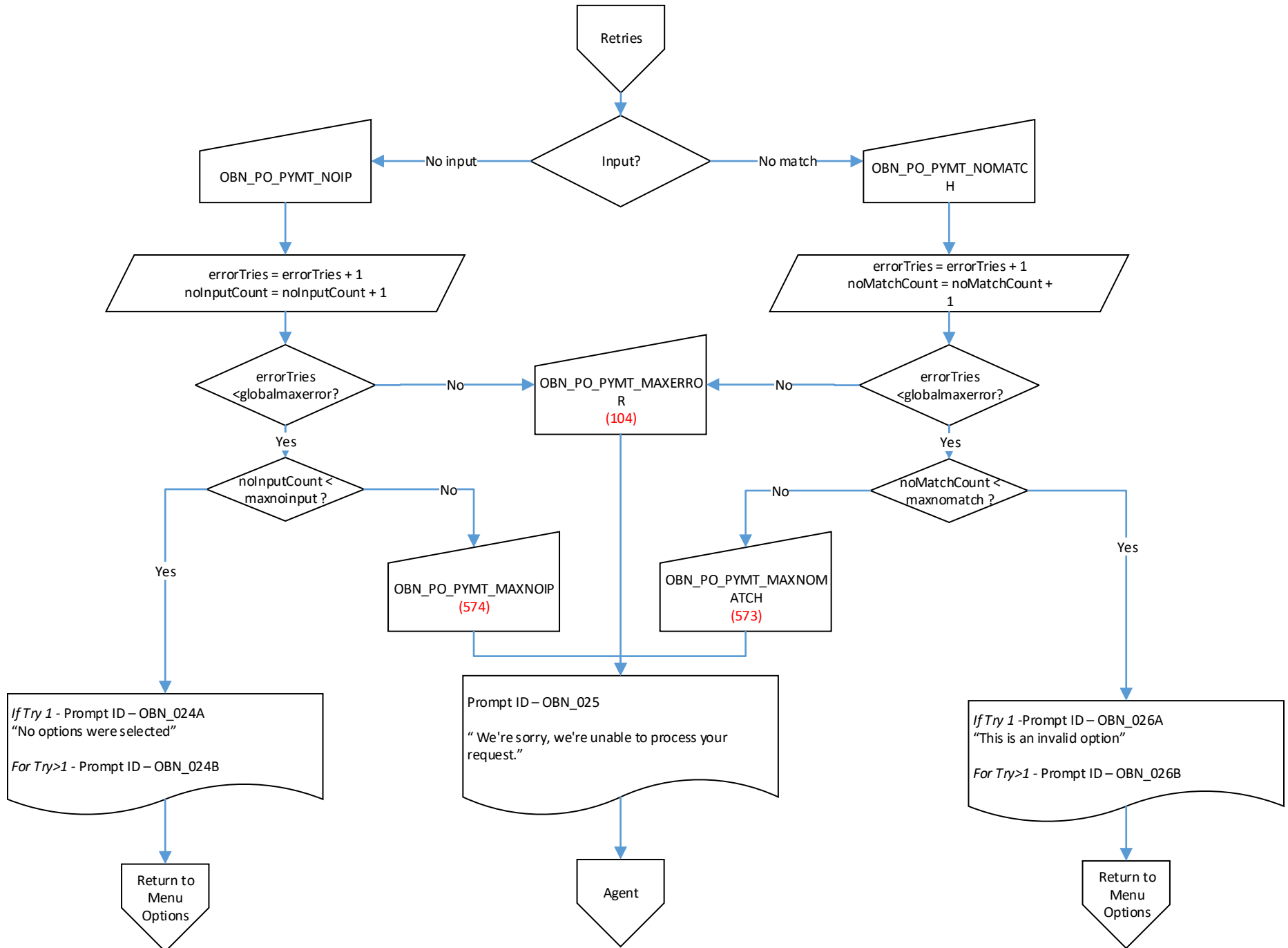


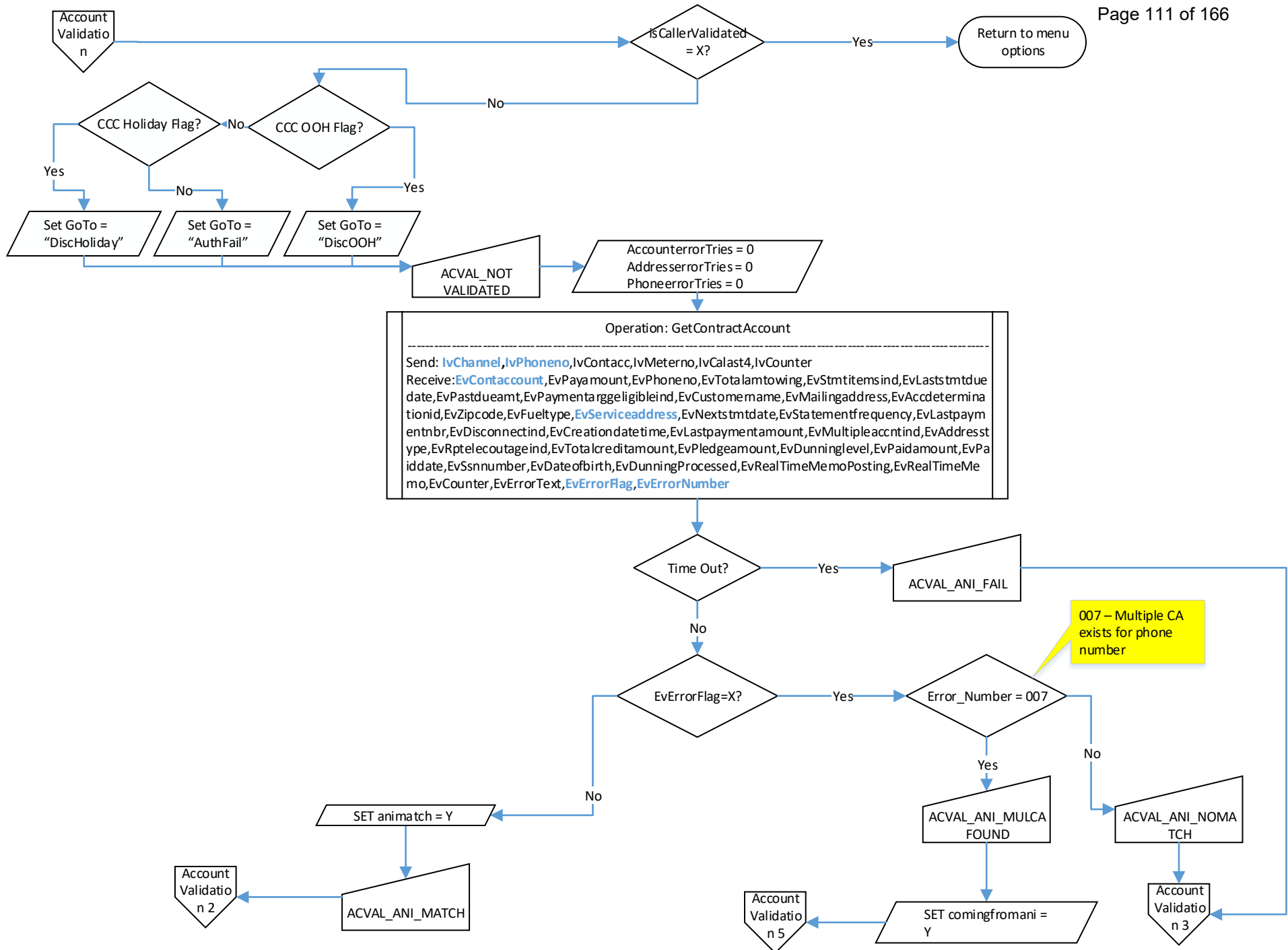








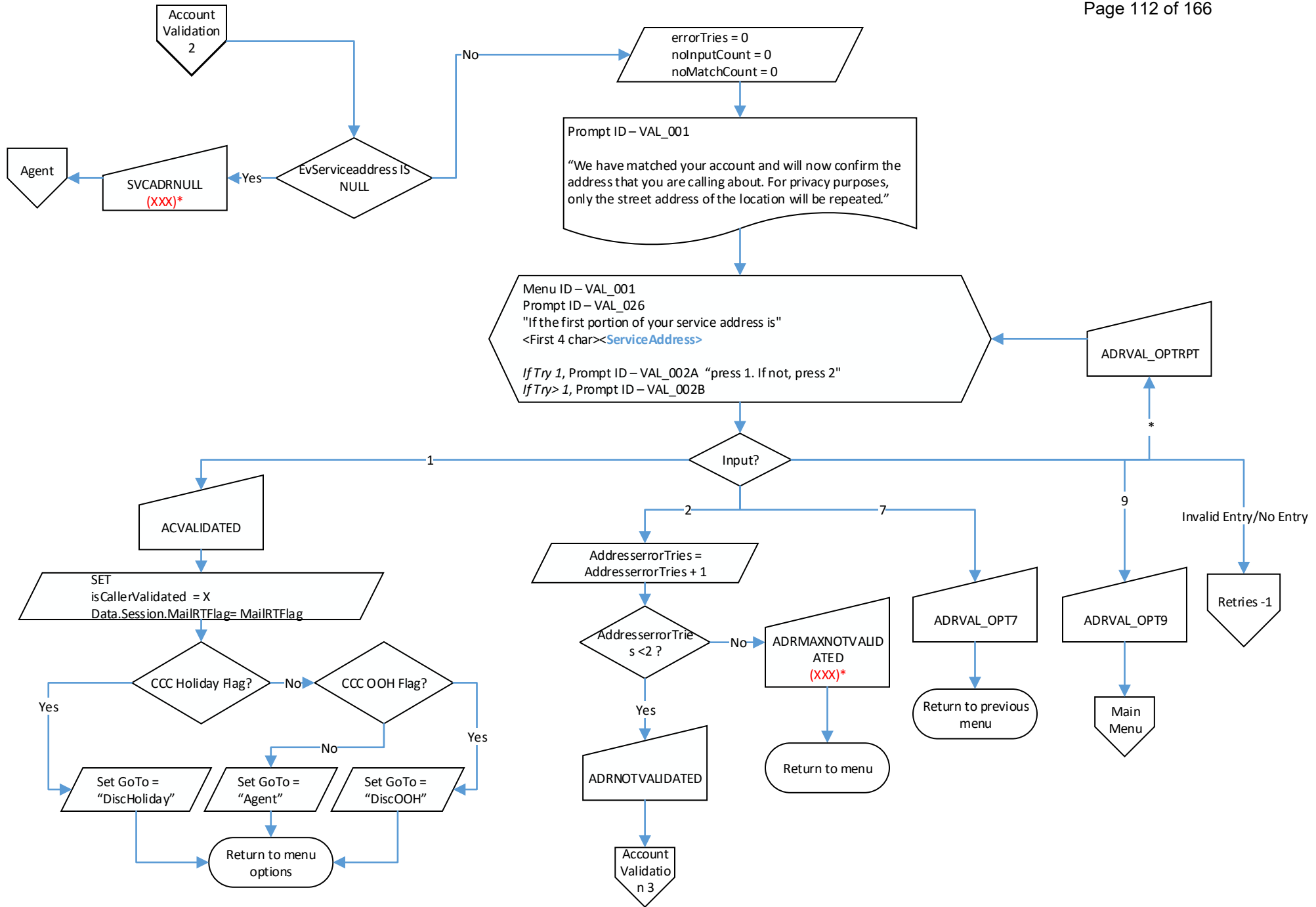




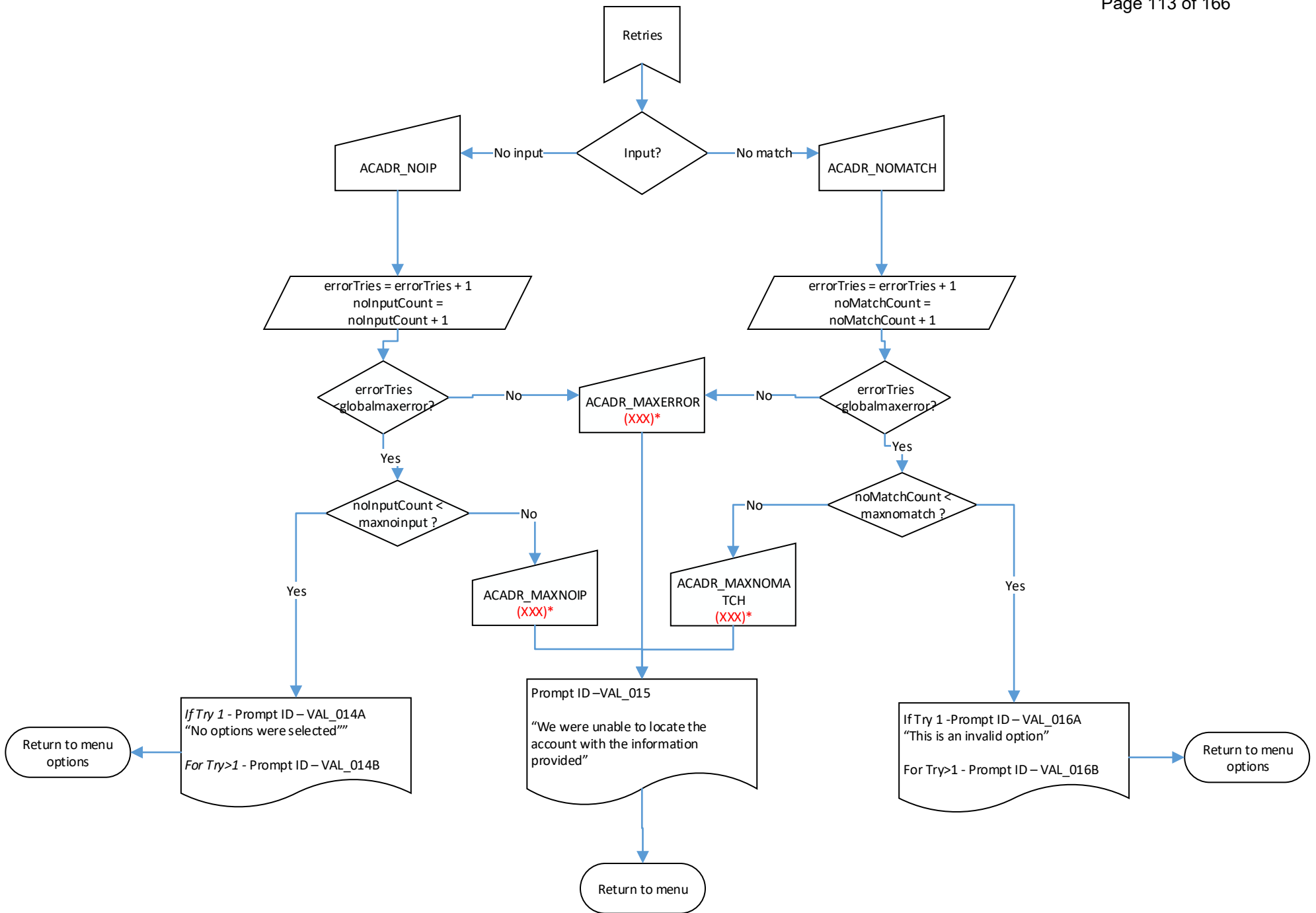
007 – Multiple CA exists for phone number

\* Please refer tab 'Loccode List' for the milestone that will be set based on point of entry.

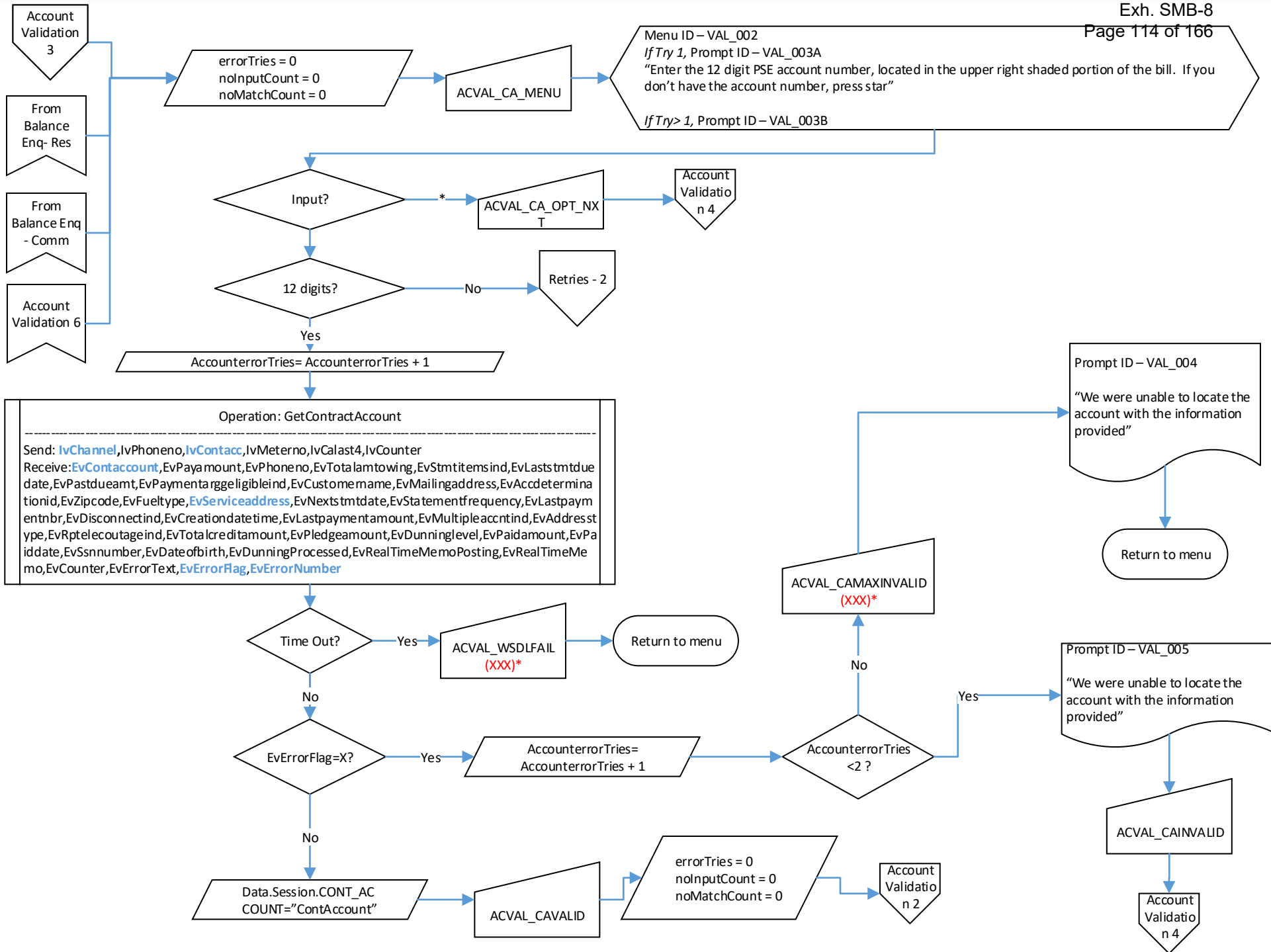




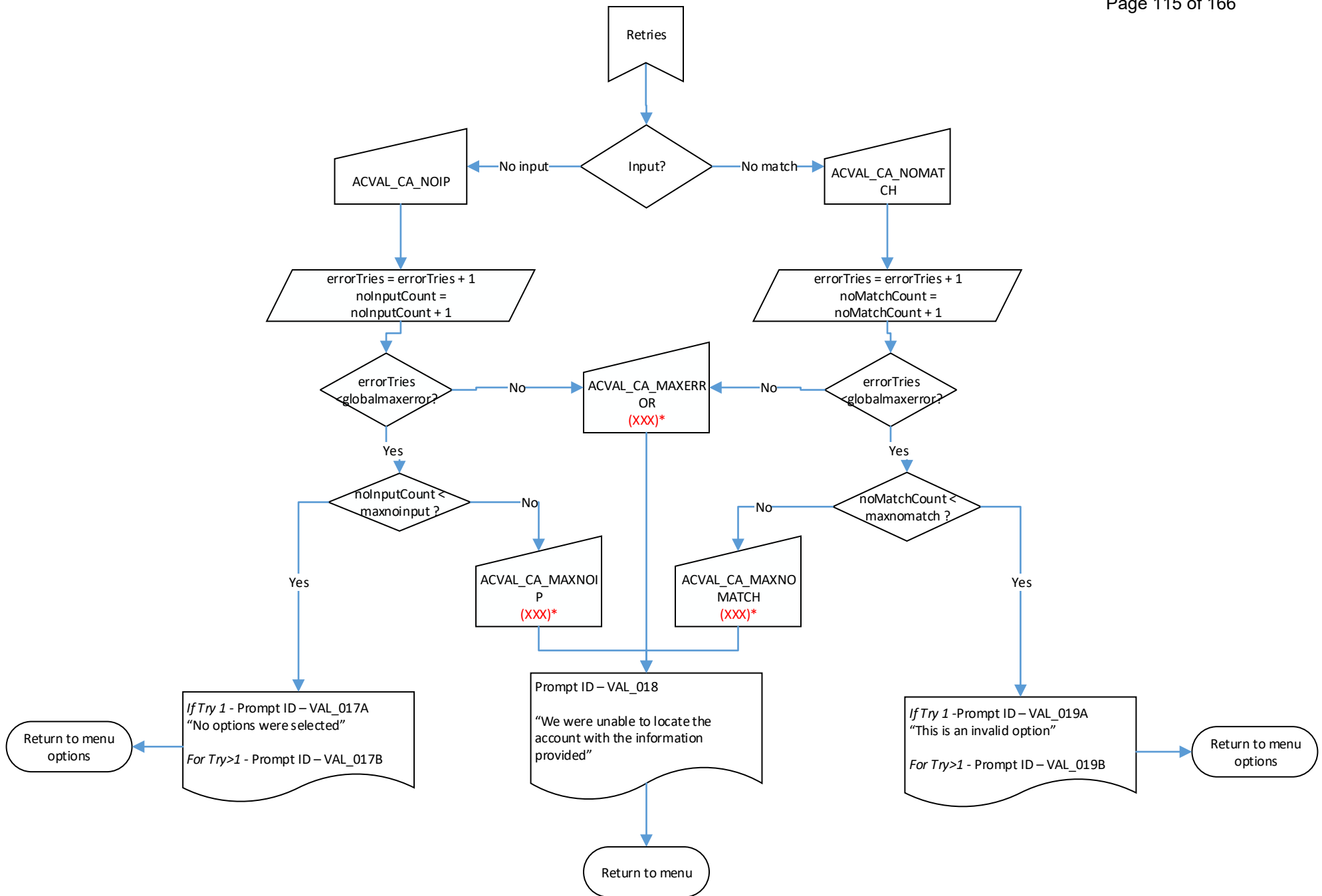
\* Please refer tab 'Loccode List' for the milestone that will be set based on point of entry.



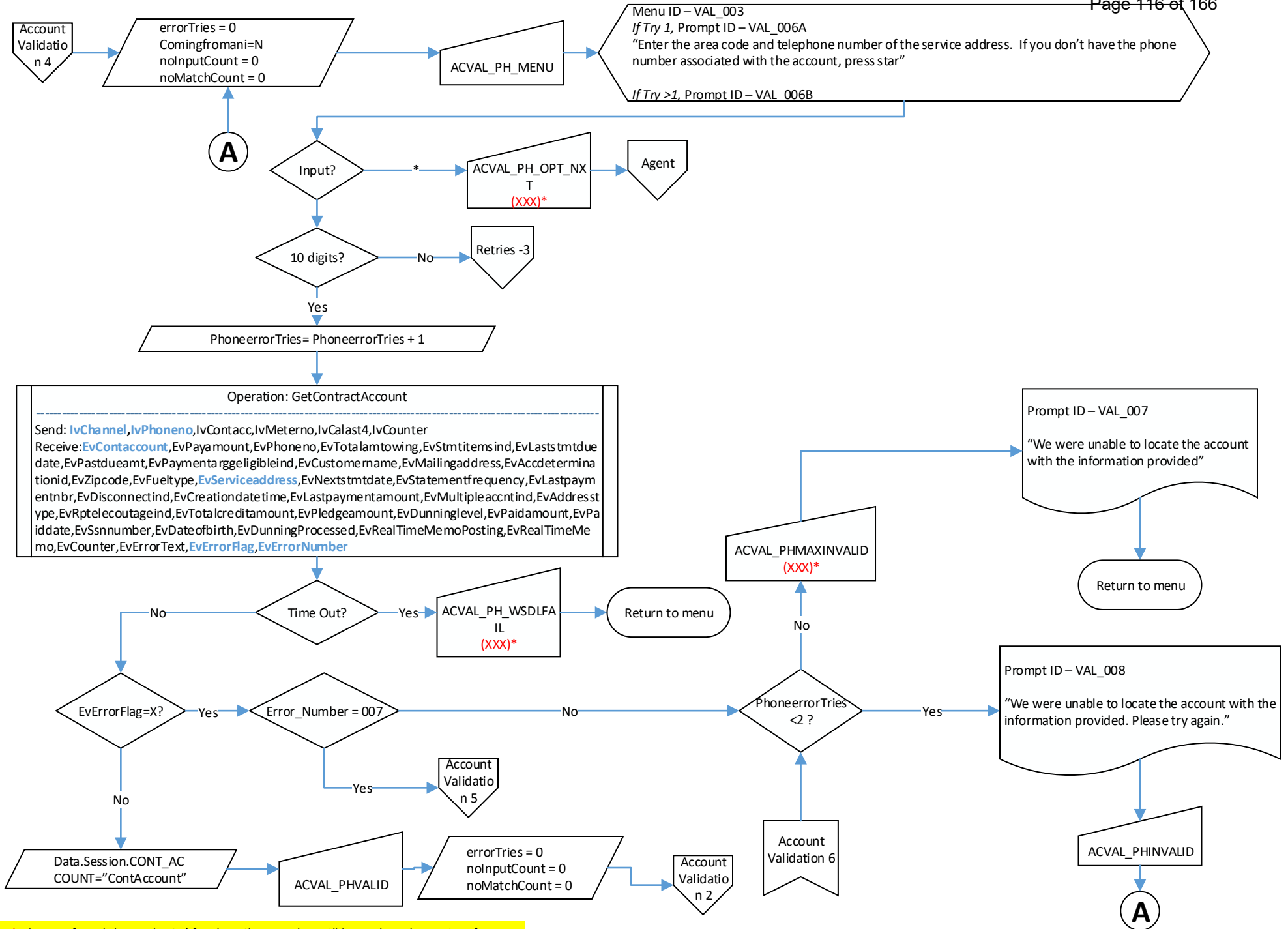
\* Please refer tab 'Loccode List' for the milestone that will be set based on point of entry.



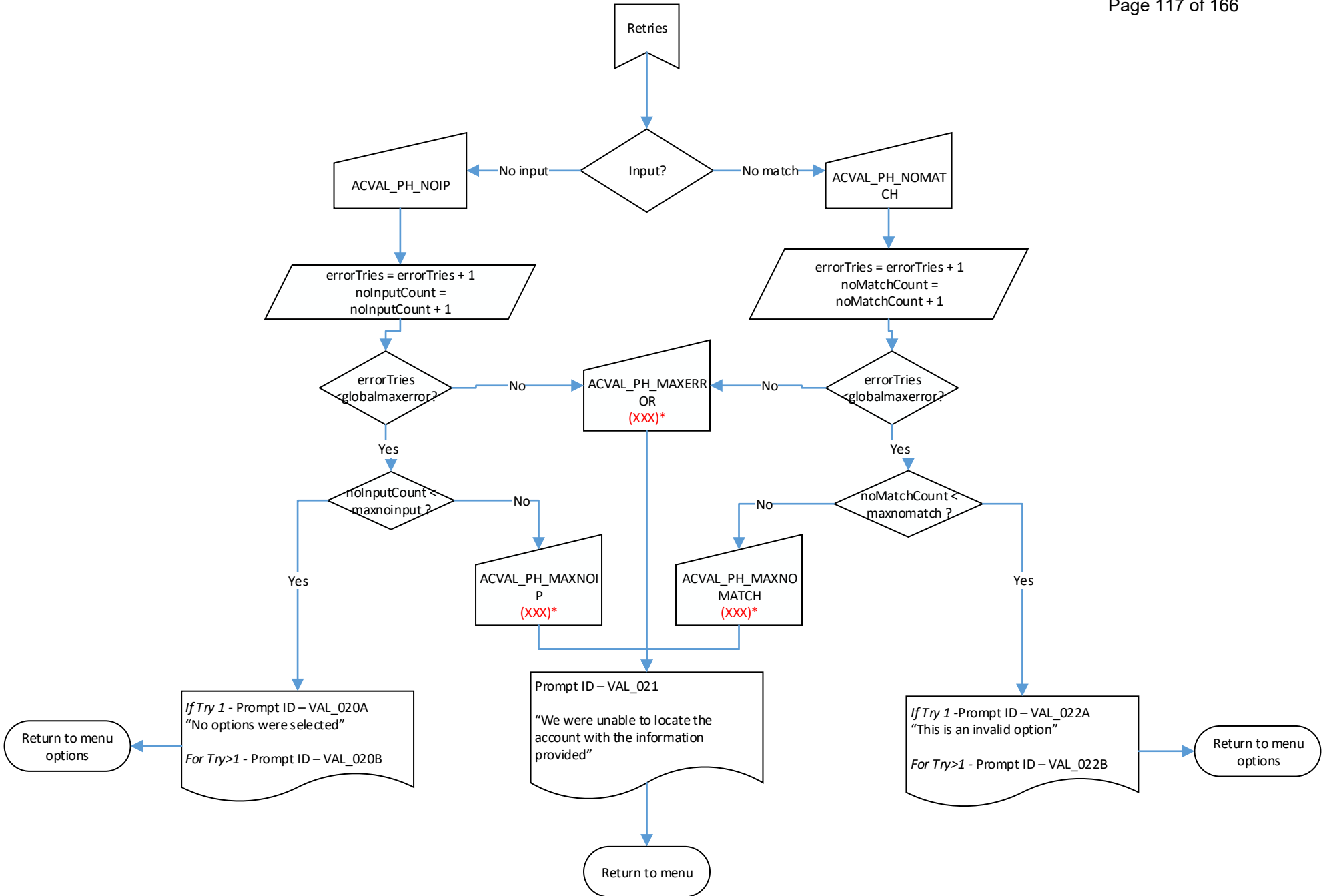
\* Please refer tab 'Loccode List' for the milestone that will be set based on point of entry.



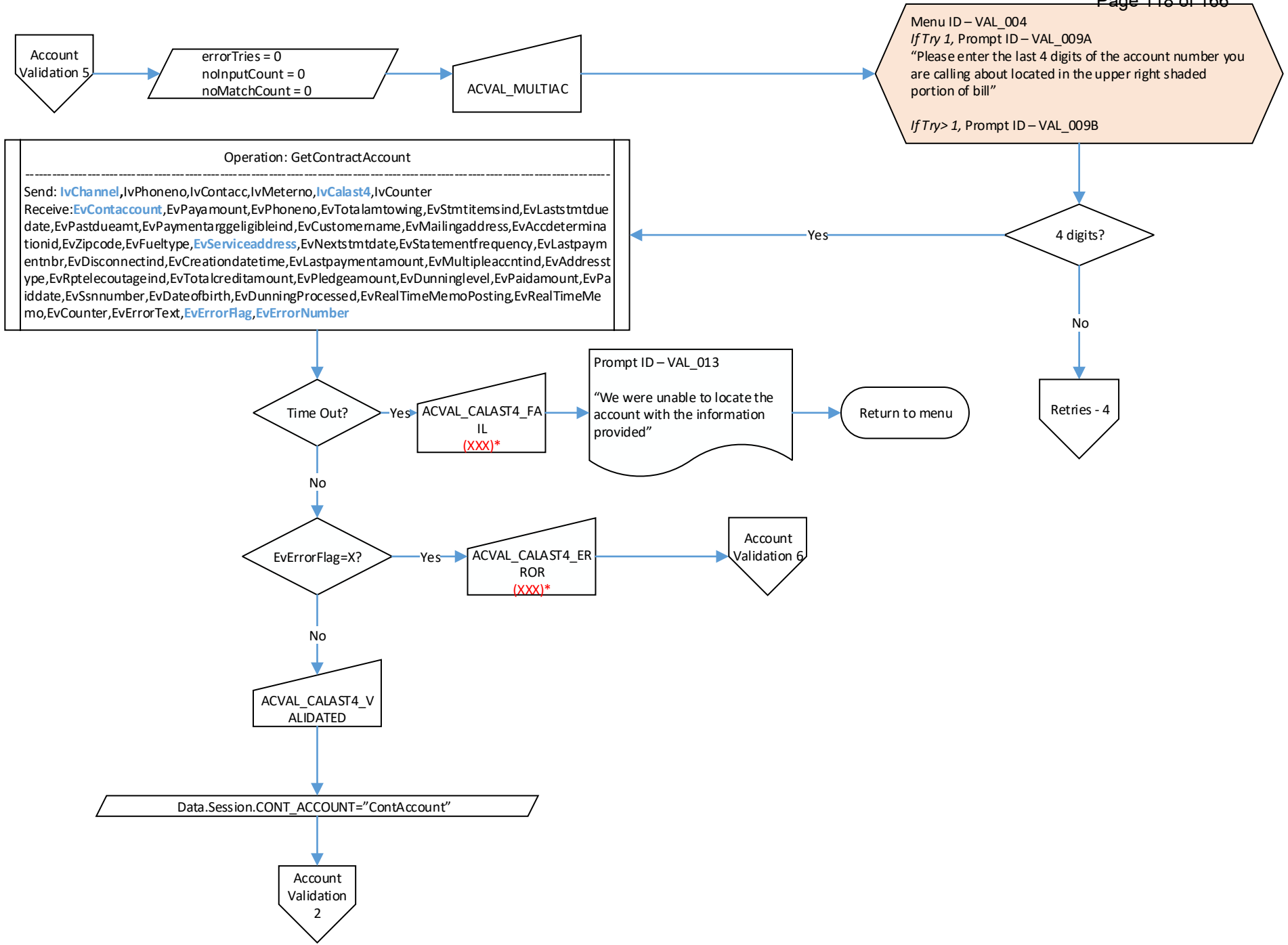
\* Please refer tab 'Loccode List' for the milestone that will be set based on point of entry.



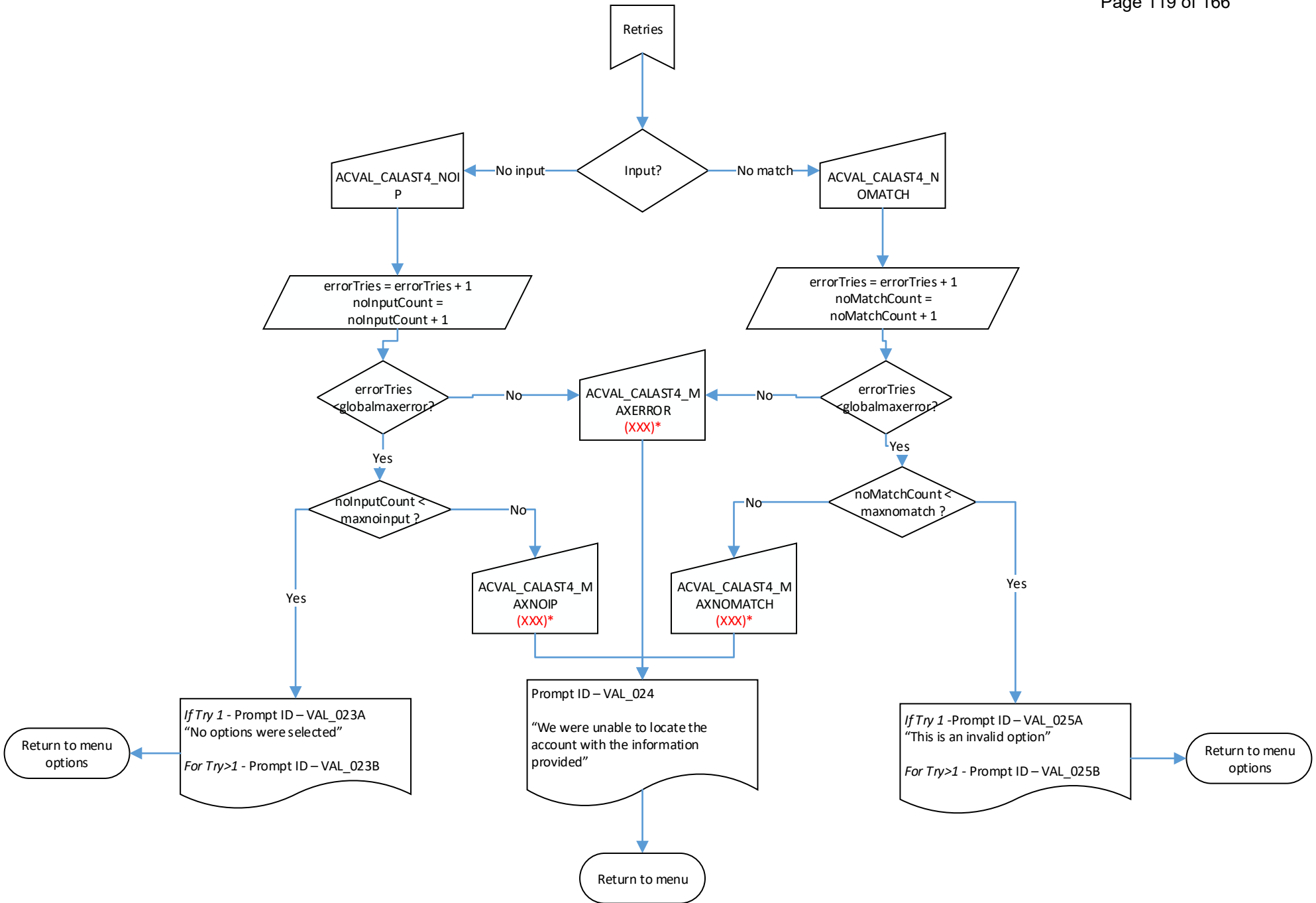
\* Please refer tab 'Loccode List' for the milestone that will be set based on point of entry.



\* Please refer tab 'Loccode List' for the milestone that will be set based on point of entry.

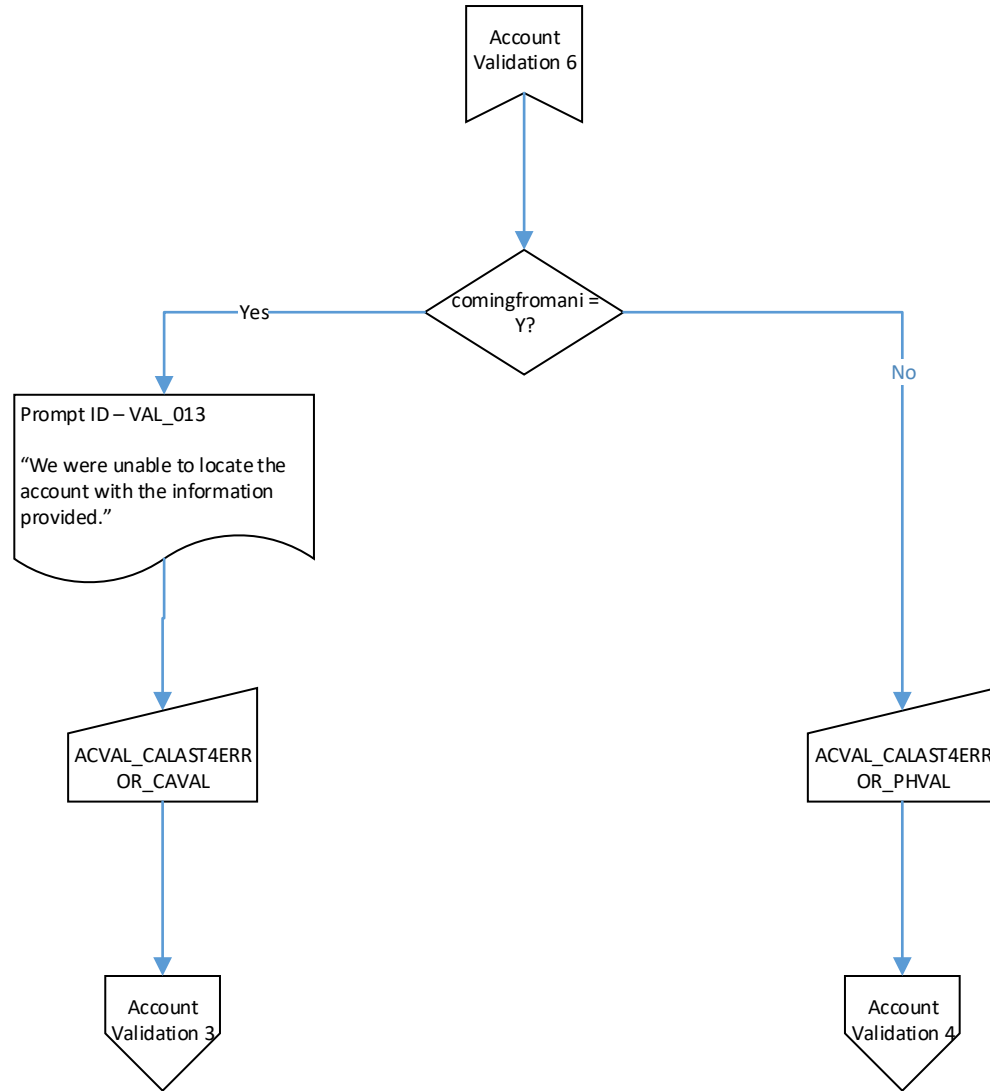


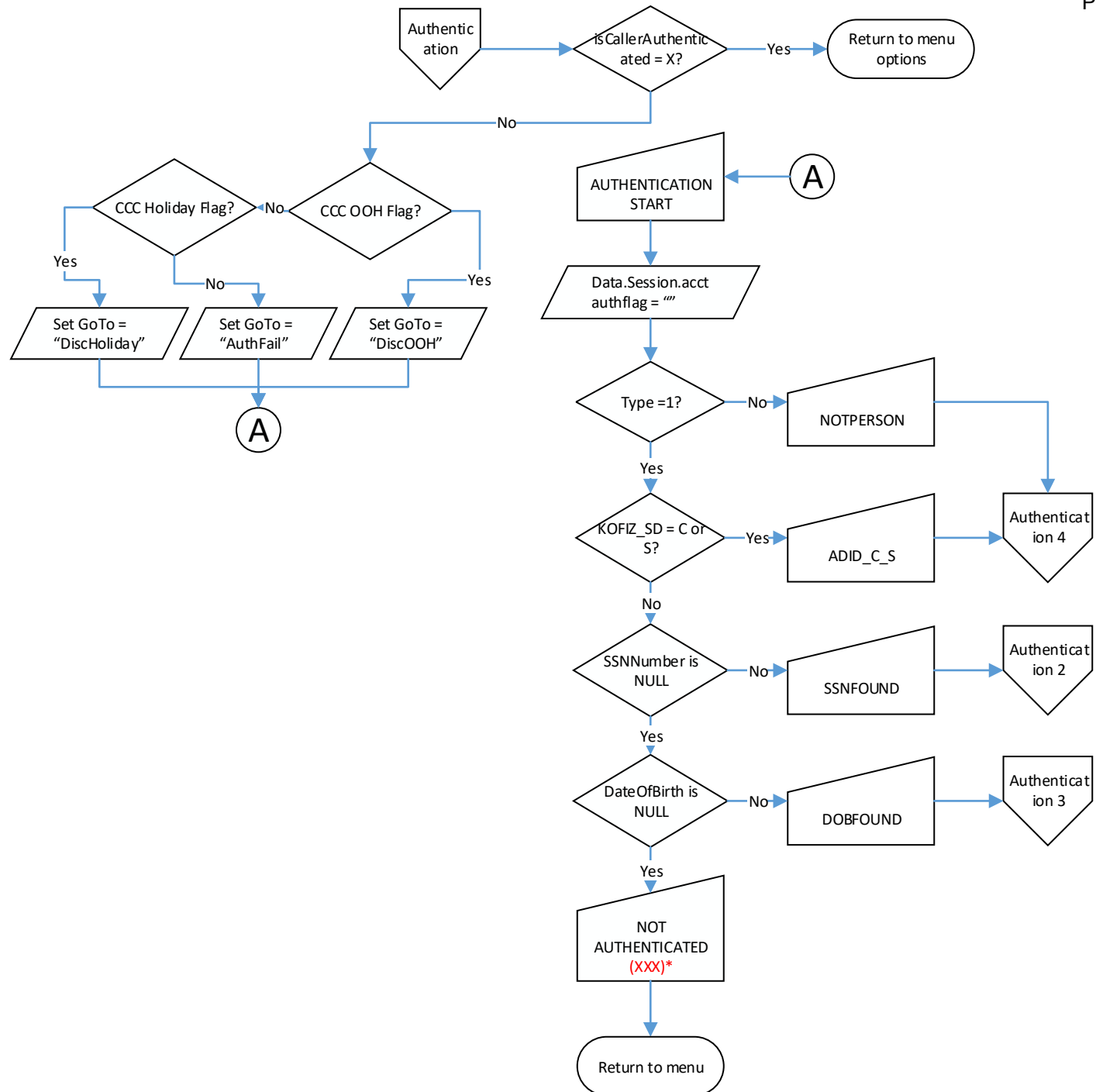
\* Please refer tab 'Loccode List' for the milestone that will be set based on point of entry.



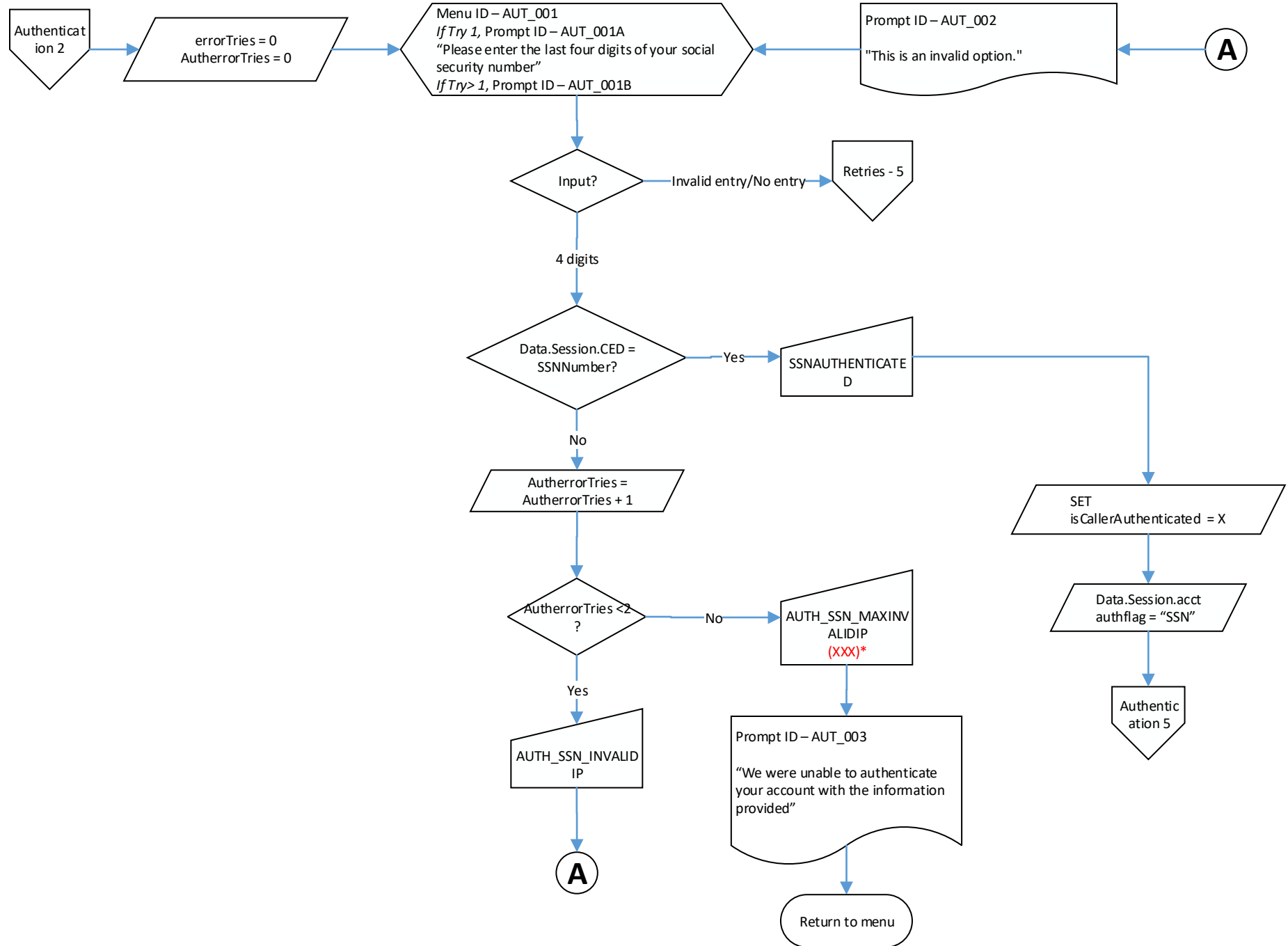
\* Please refer tab 'Loccode List' for the milestone that will be set based on point of entry.



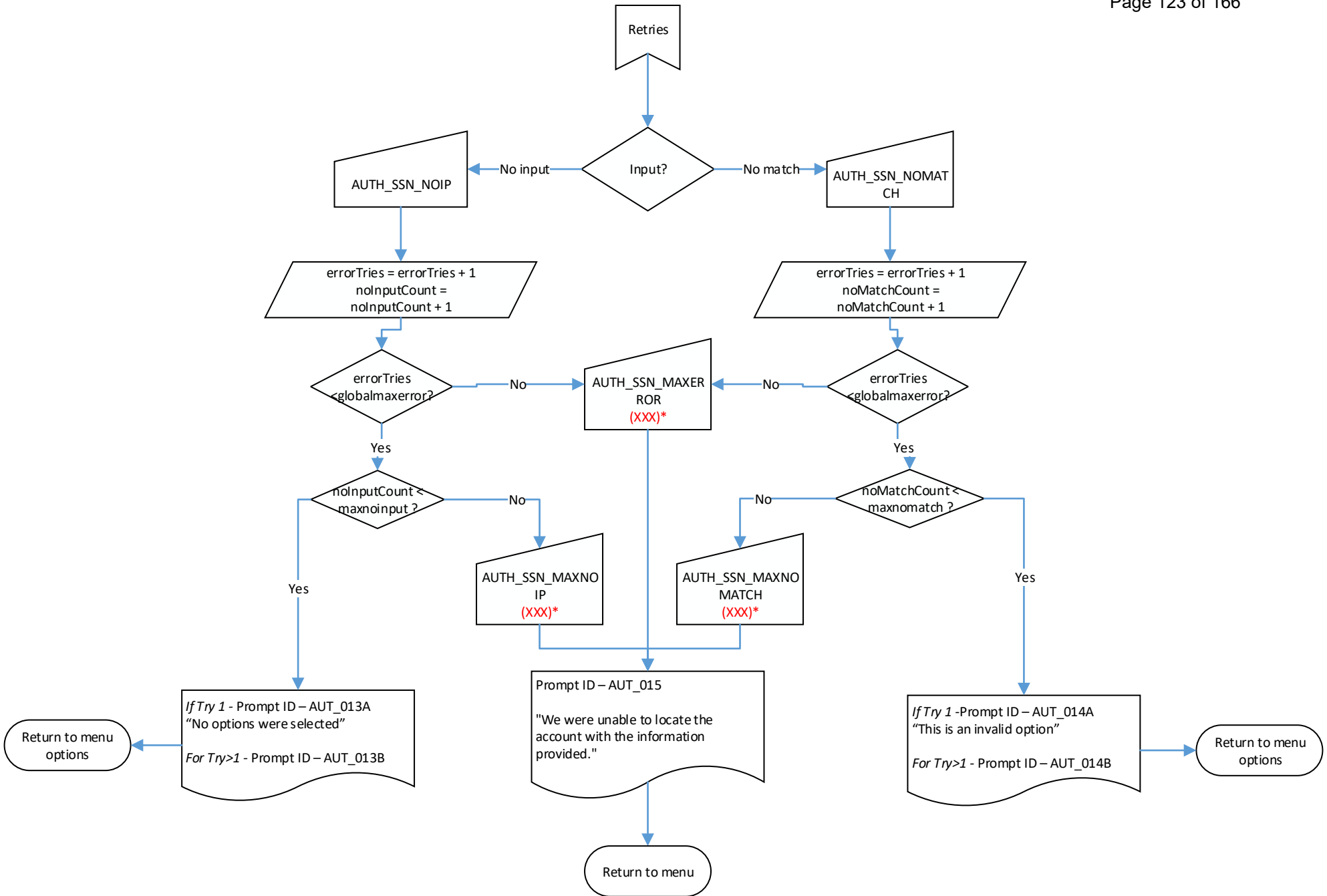




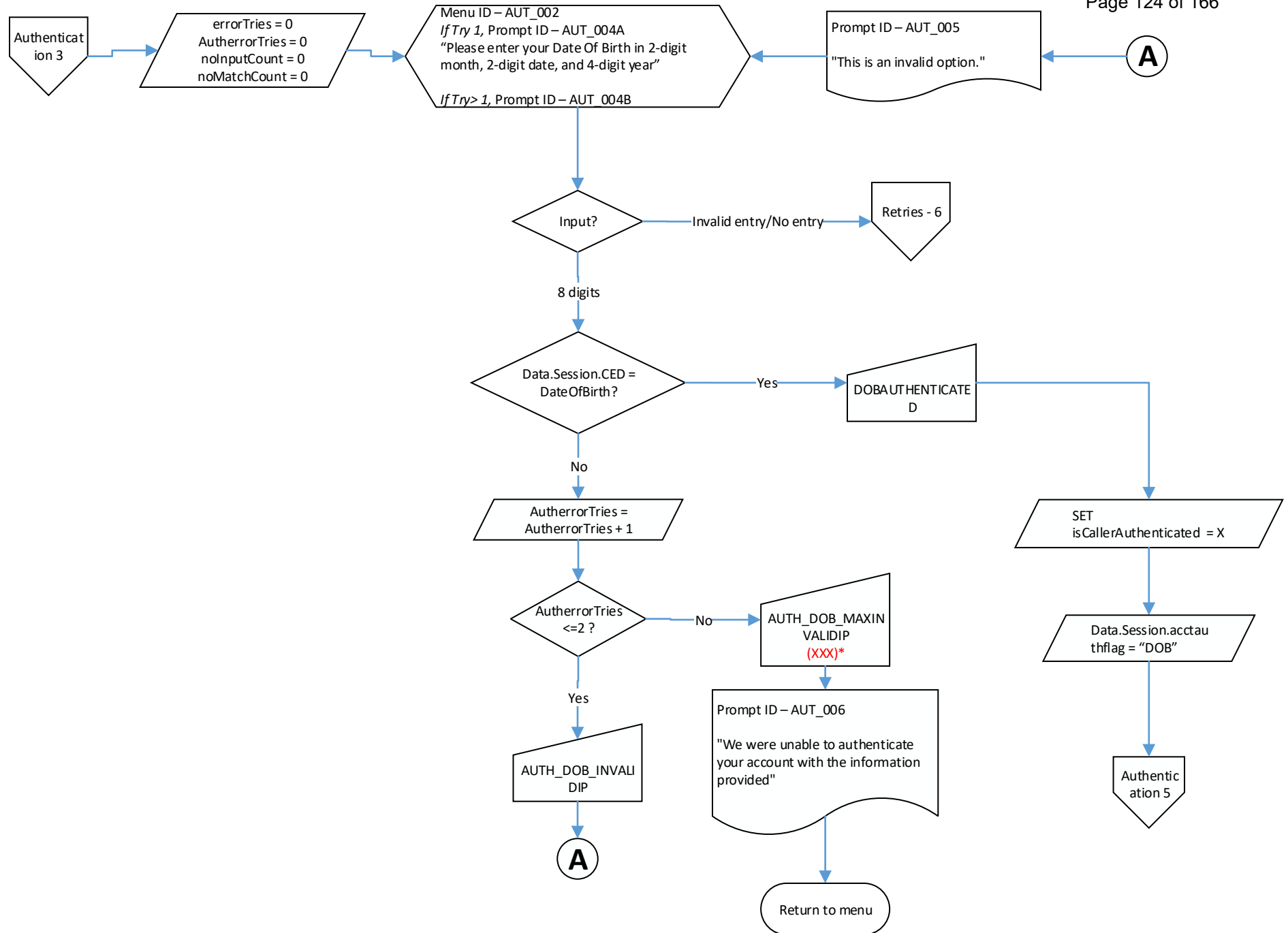
\* Please refer tab 'Loccode List' for the milestone that will be set based on point of entry.



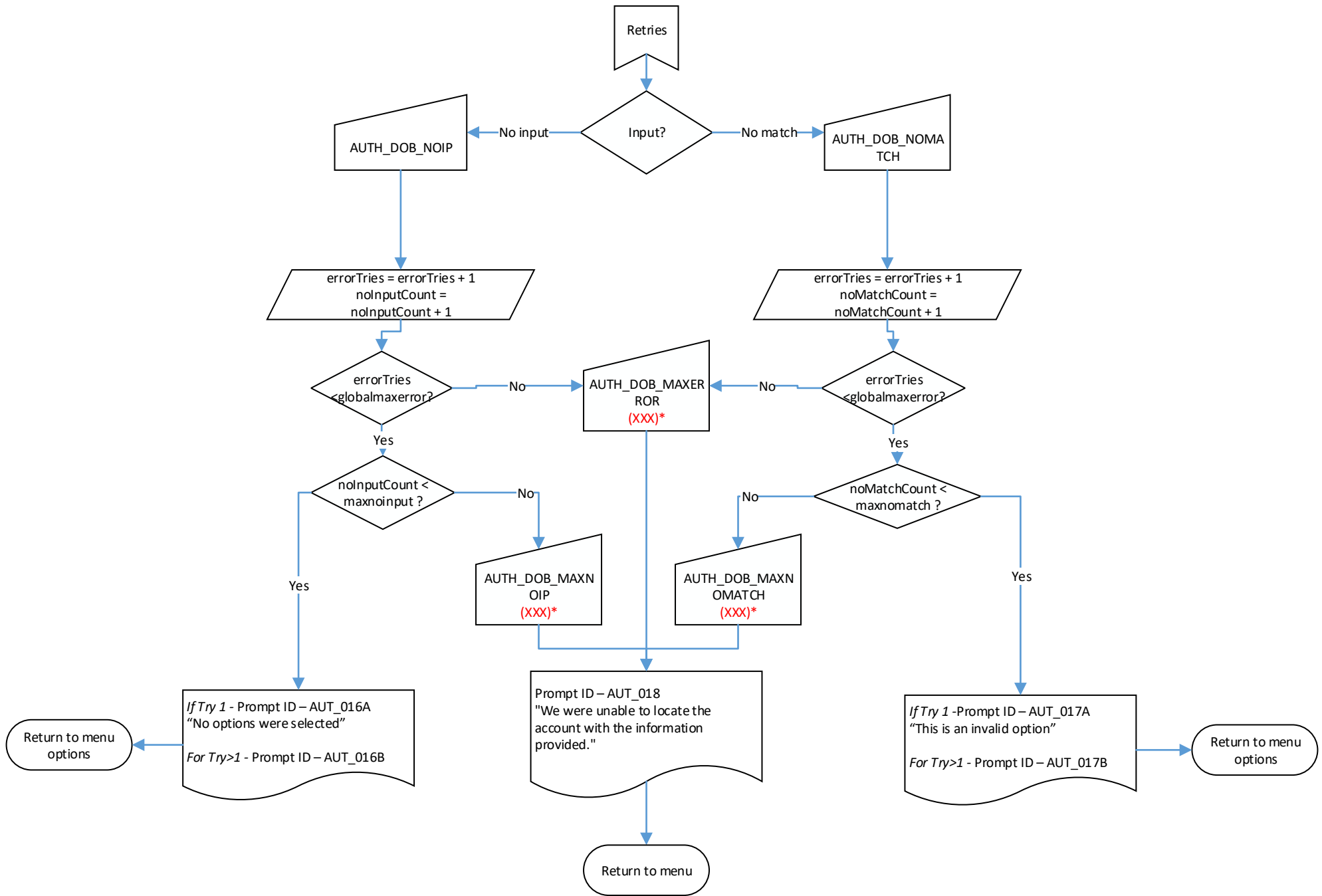
\* Please refer tab 'Loccode List' for the milestone that will be set based on point of entry.



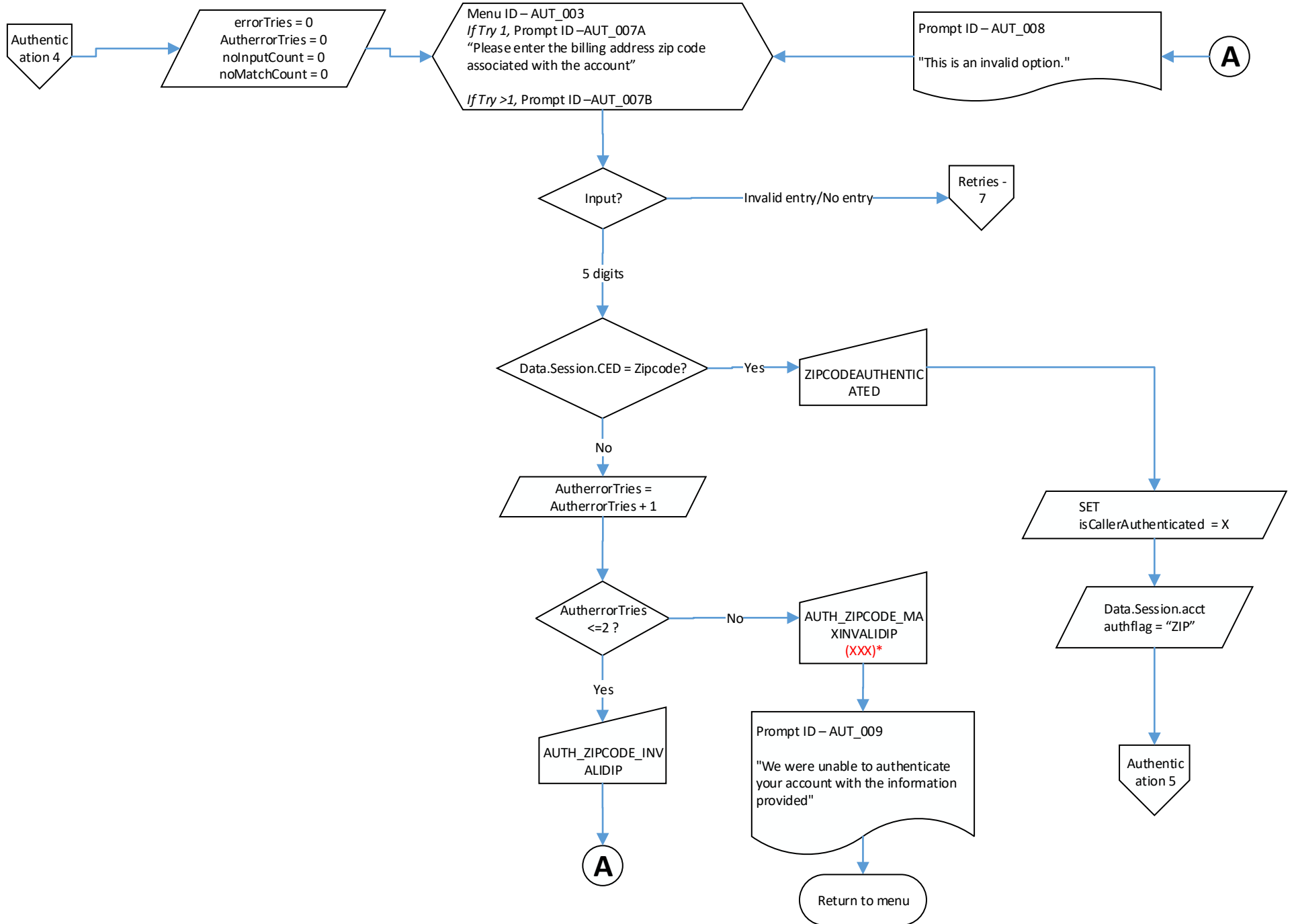
\* Please refer tab 'Loccode List' for the milestone that will be set based on point of entry.



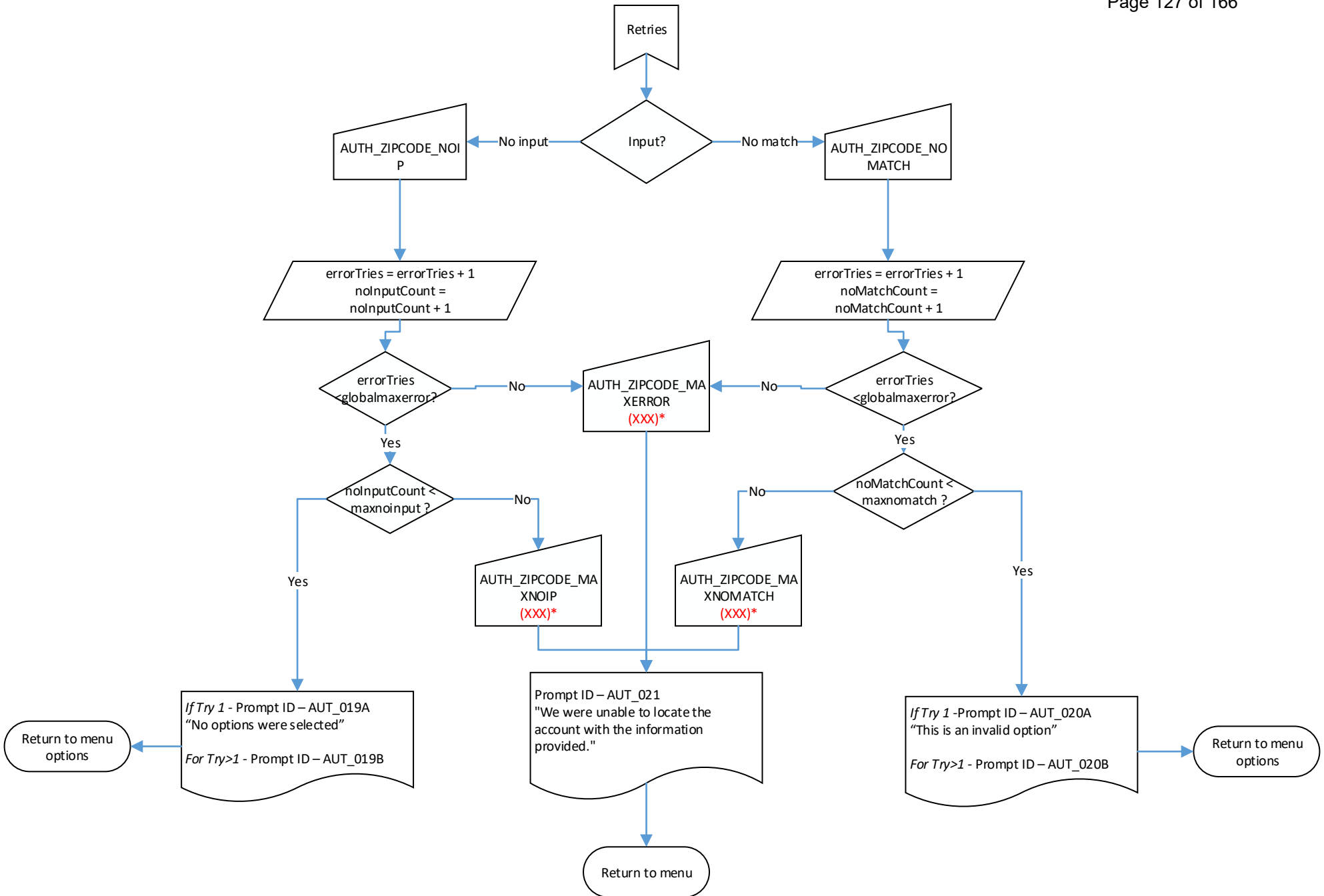
\* Please refer tab 'Loccode List' for the milestone that will be set based on point of entry.



\* Please refer tab 'Loccode List' for the milestone that will be set based on point of entry.

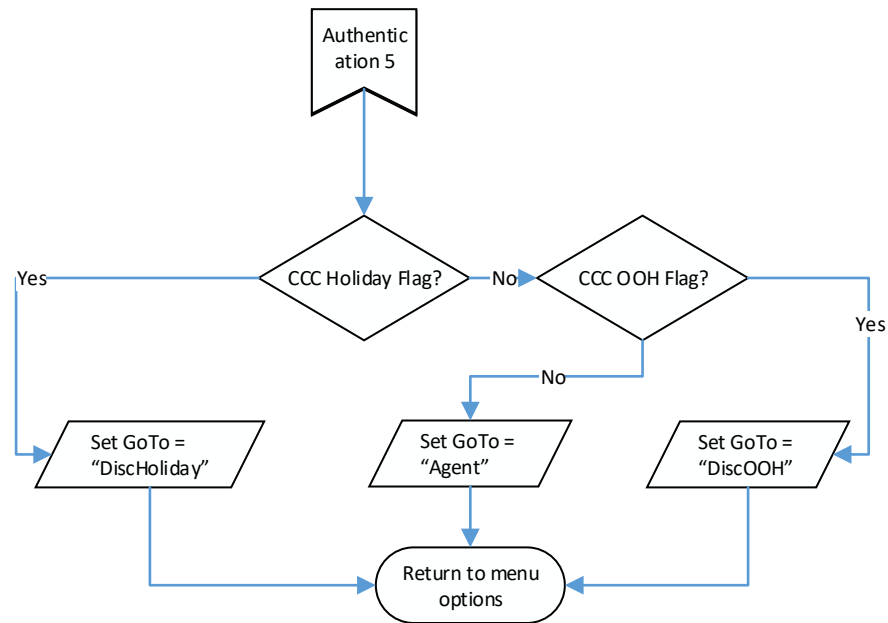


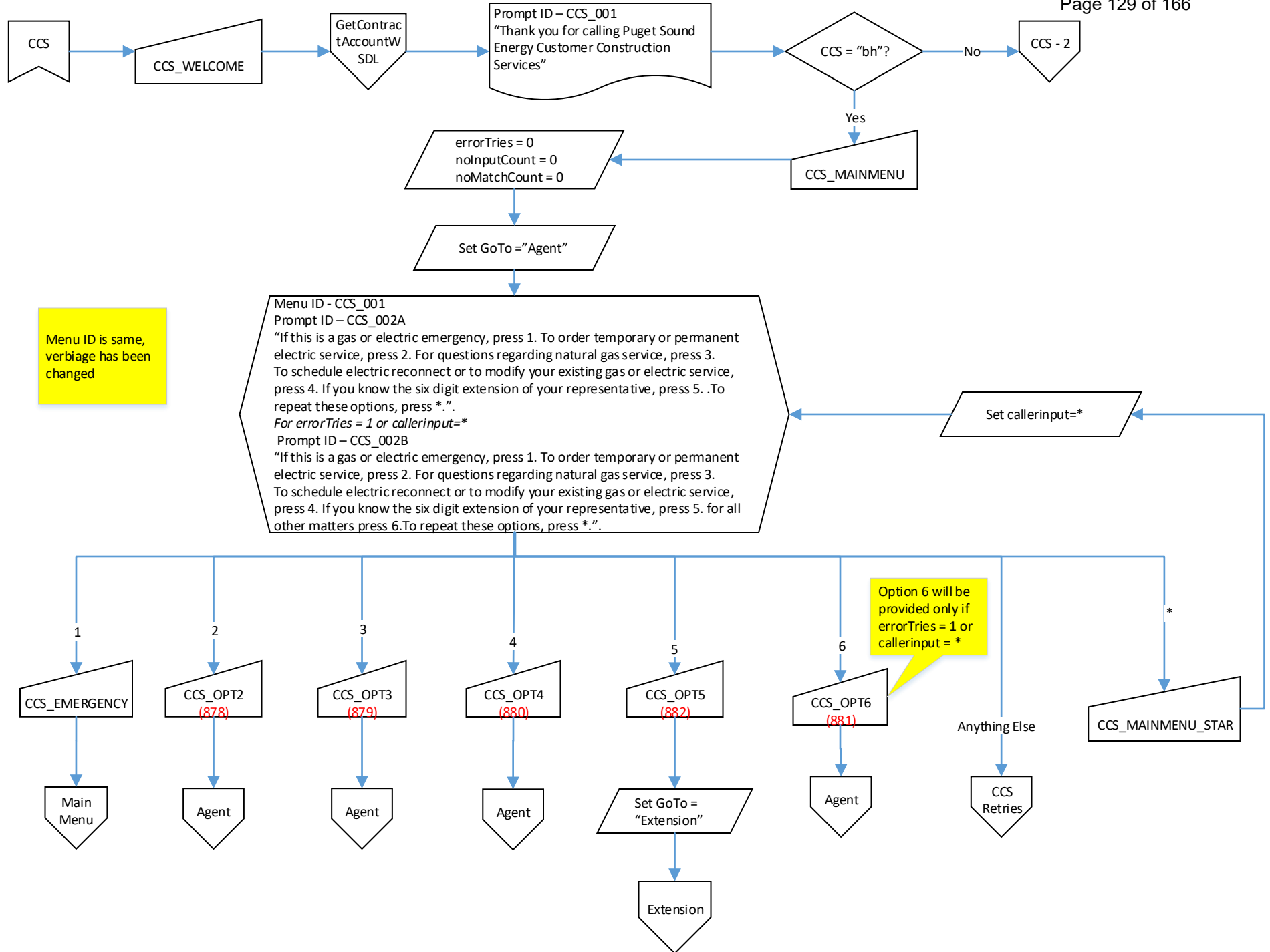
\* Please refer tab 'Loccode List' for the milestone that will be set based on point of entry.



\* Please refer tab 'Loccode List' for the milestone that will be set based on point of entry.

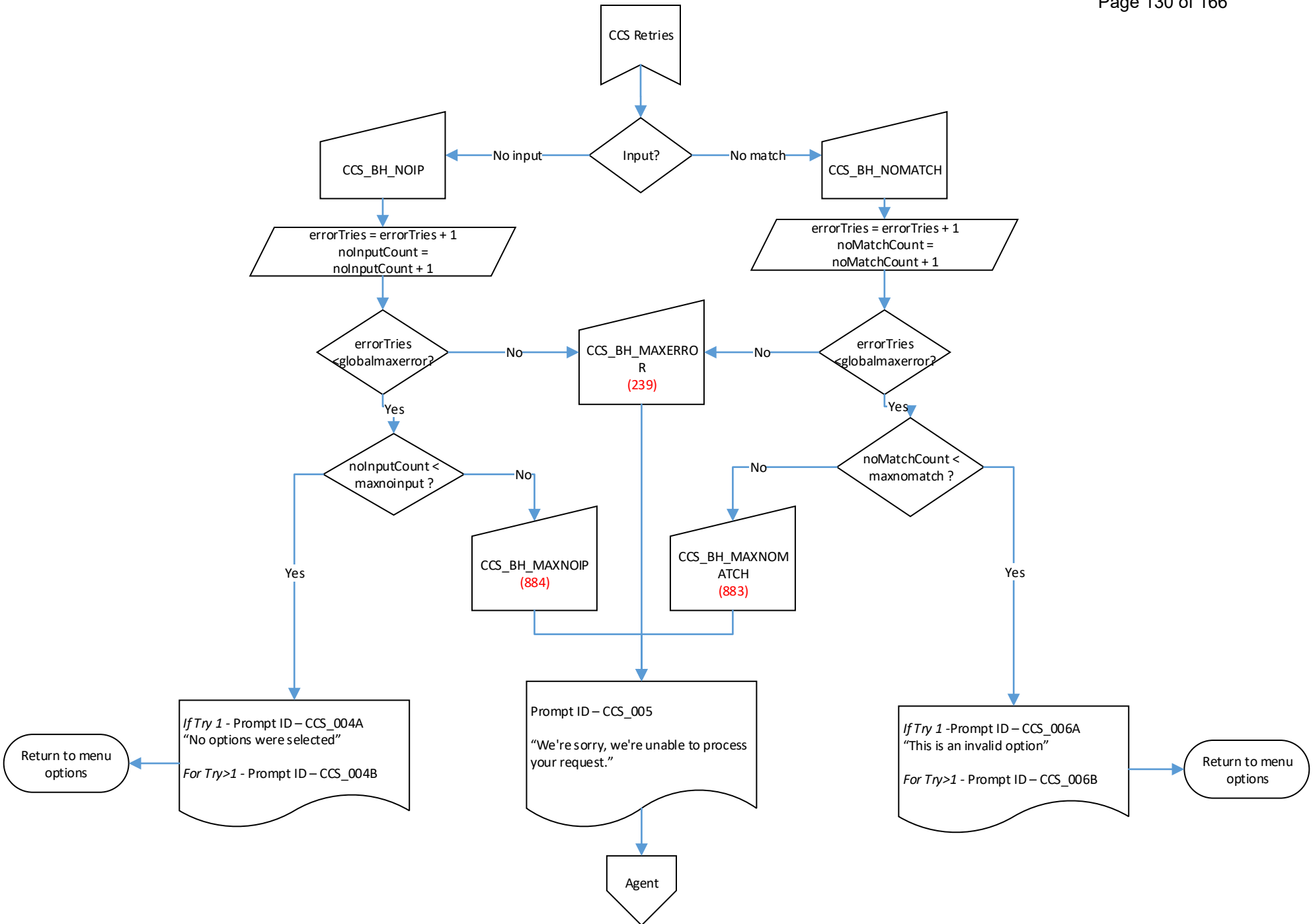






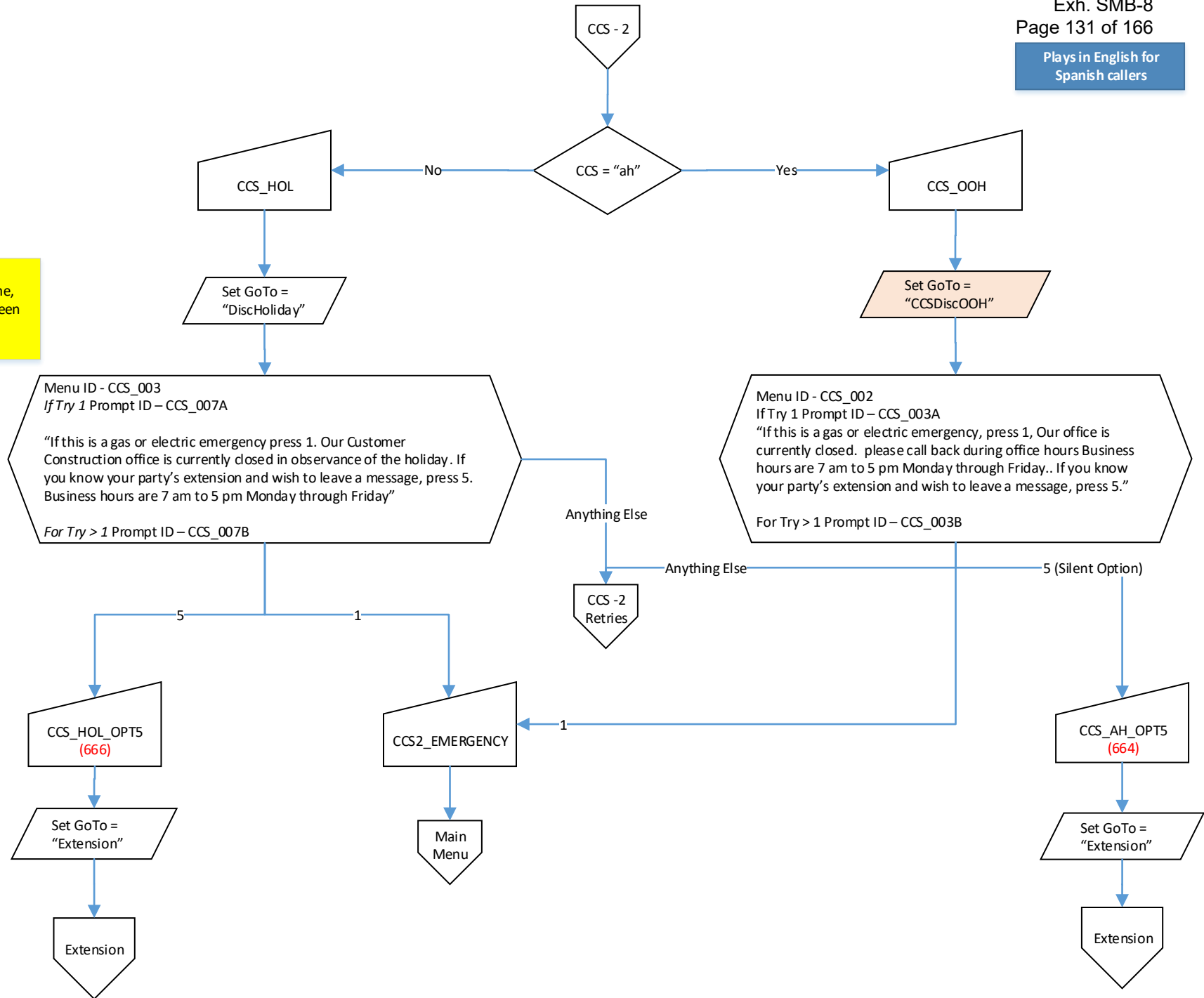
Menu ID is same, verbiage has been changed

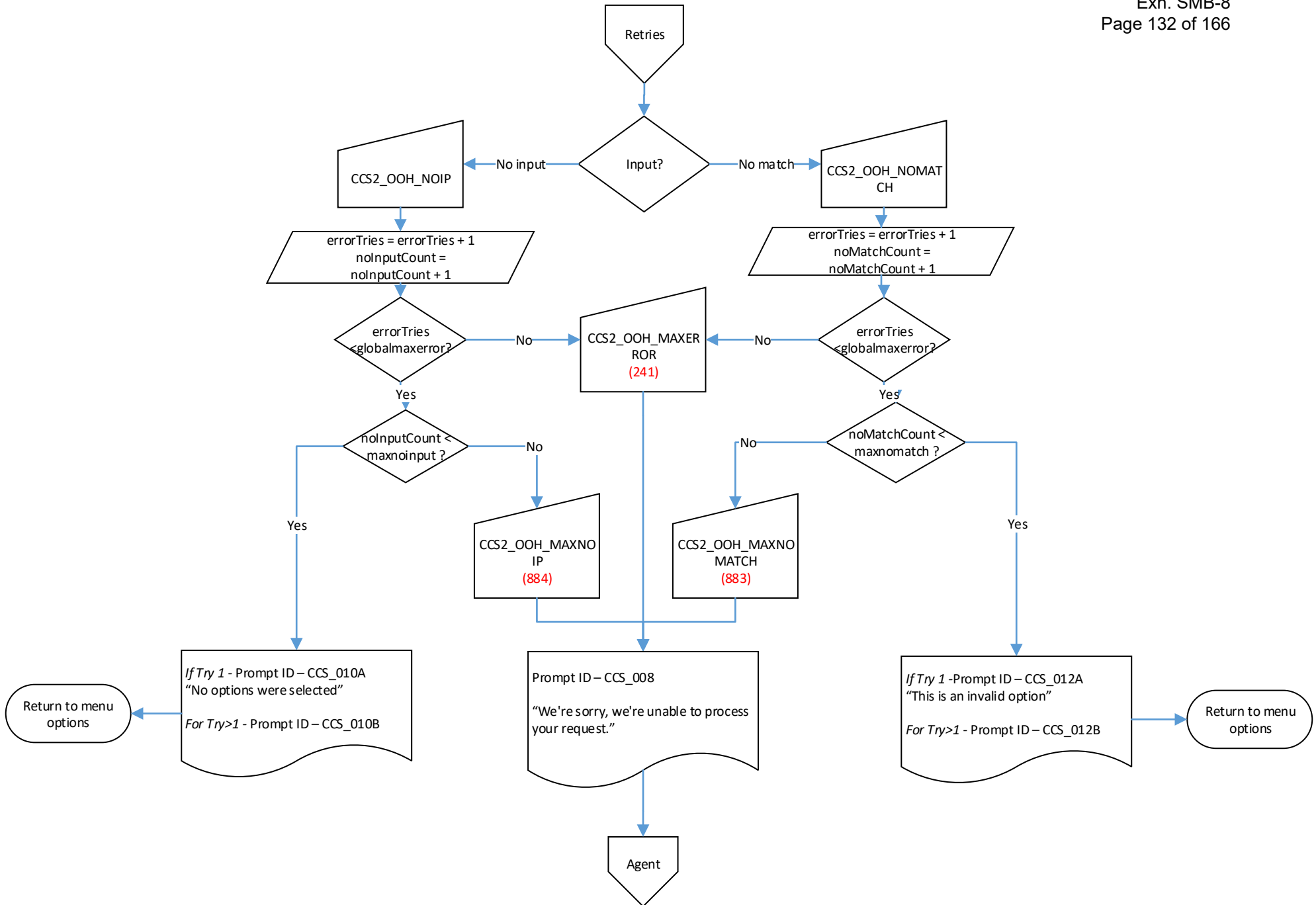
Option 6 will be provided only if errorTries = 1 or callerinput = \*

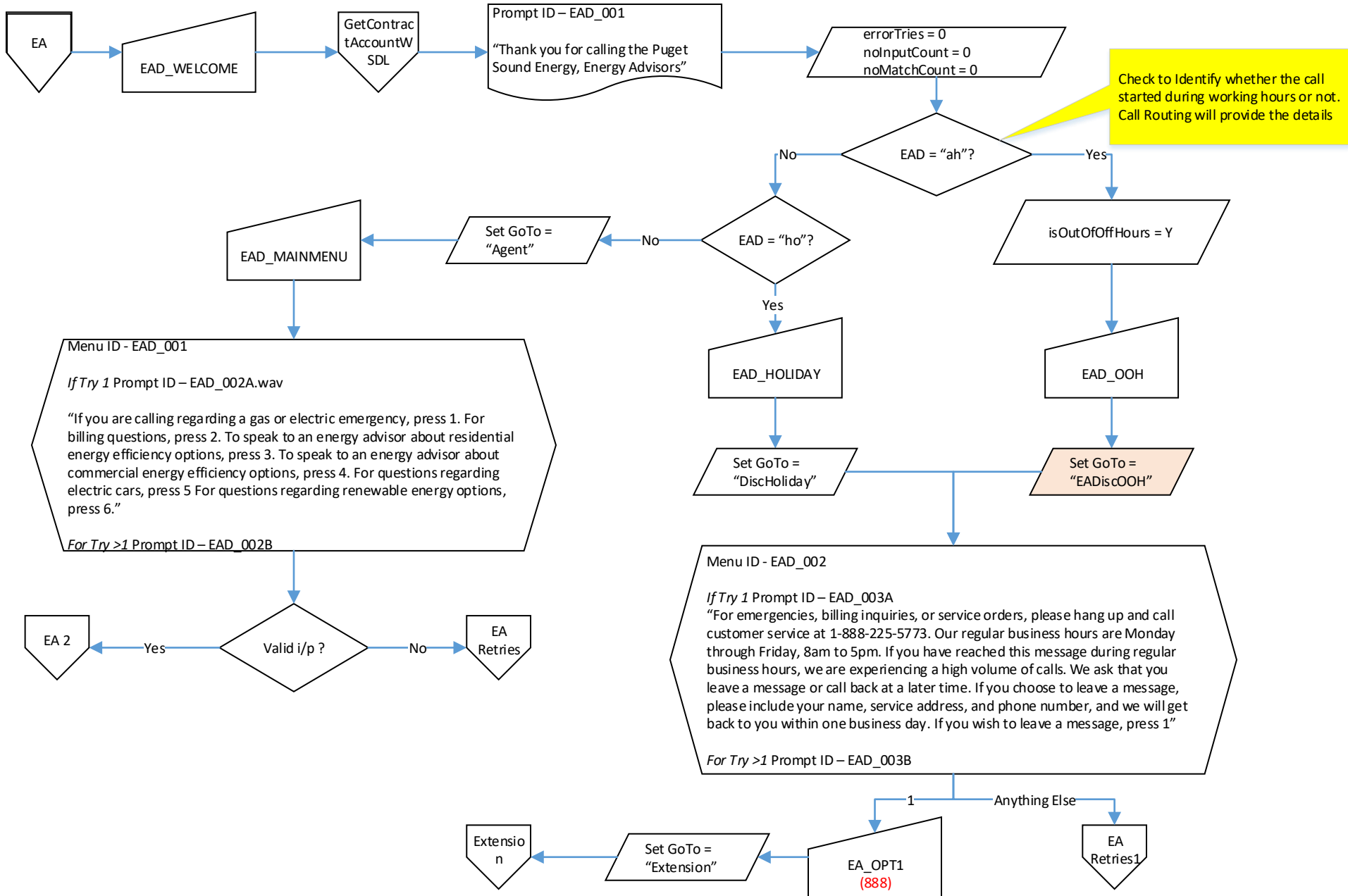


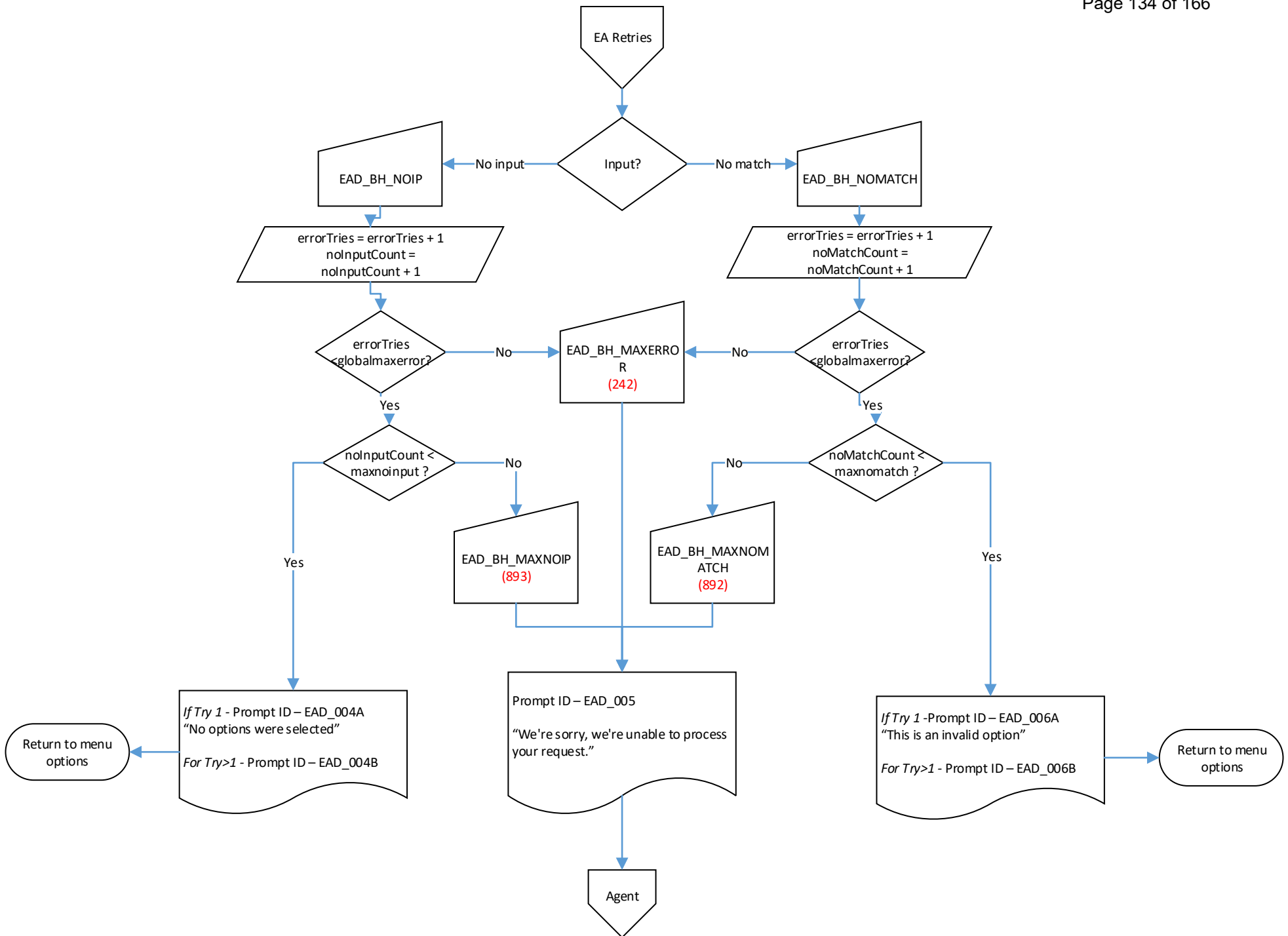
Plays in English for Spanish callers

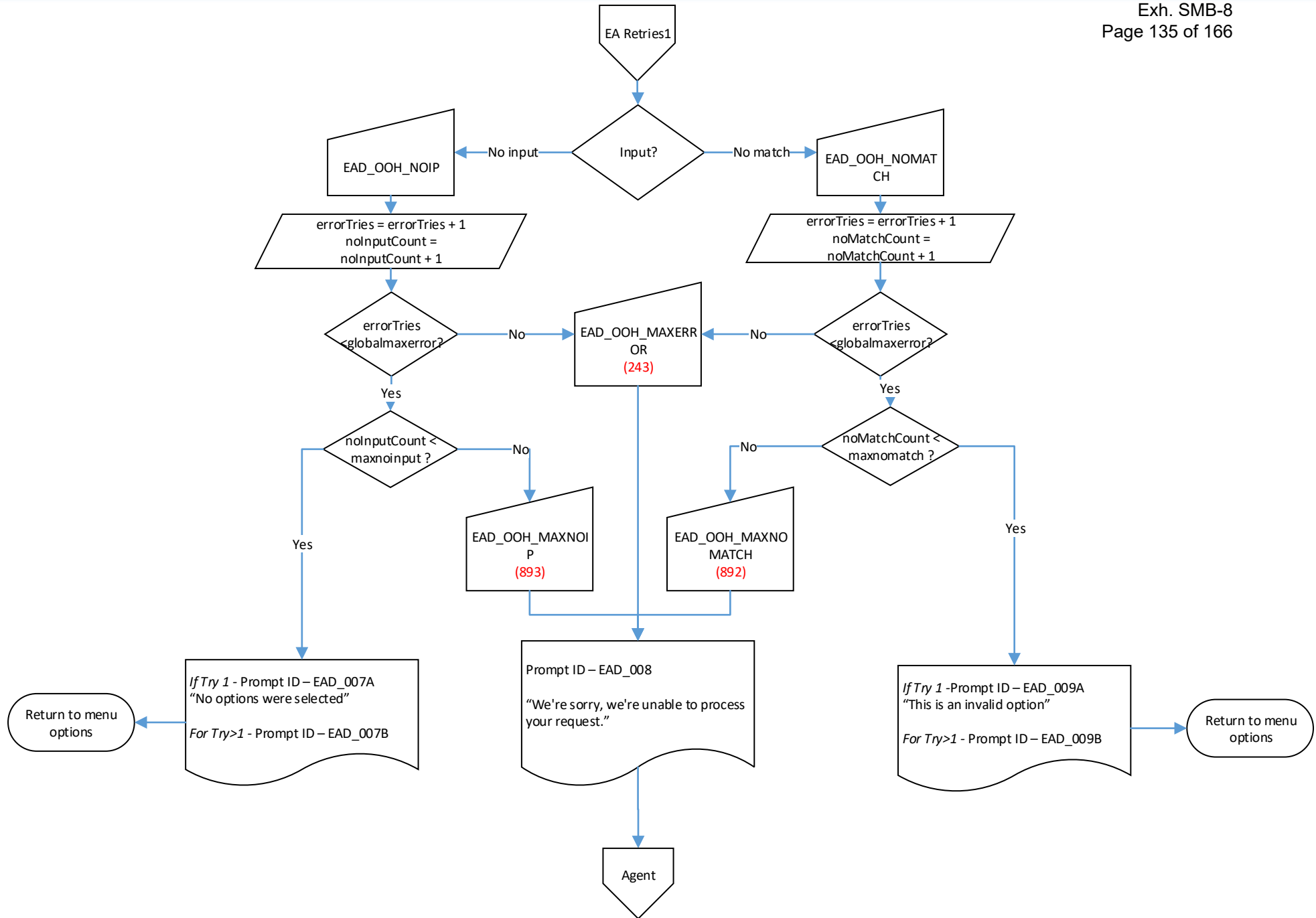
Menu ID is same, verbiage has been changed



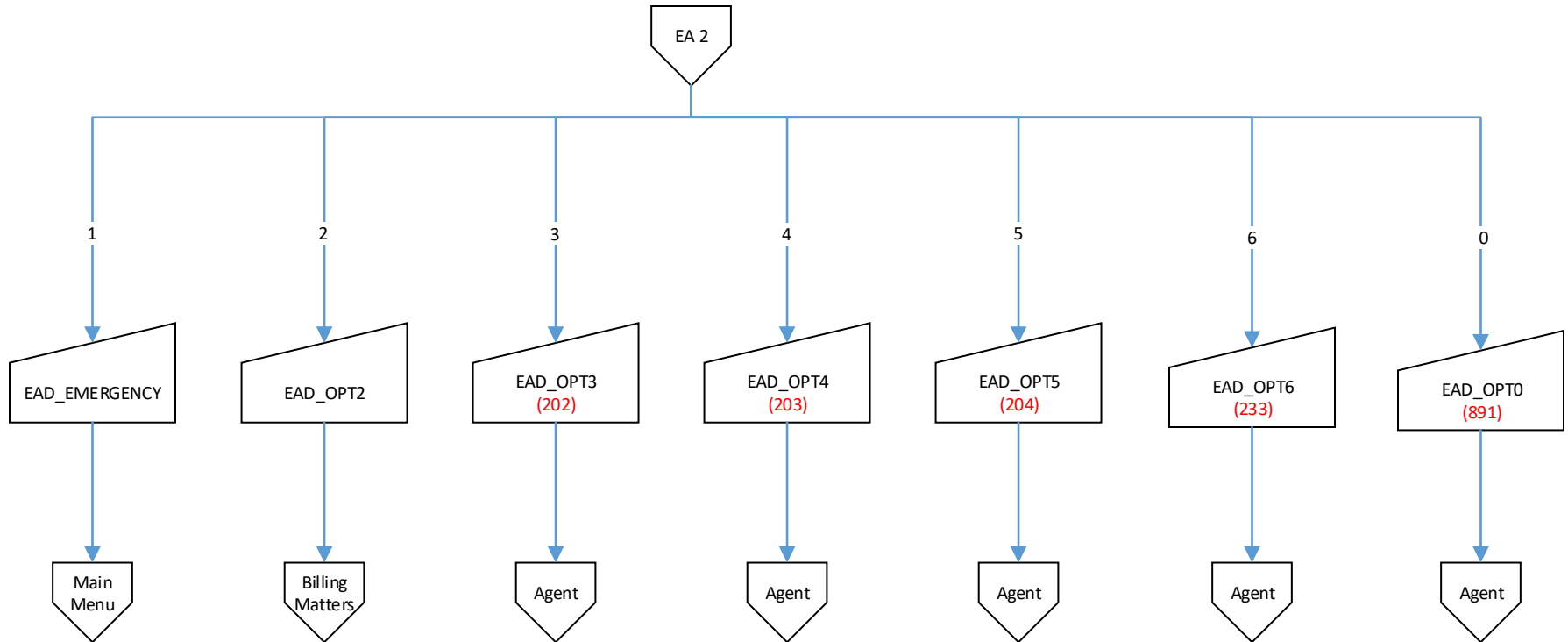




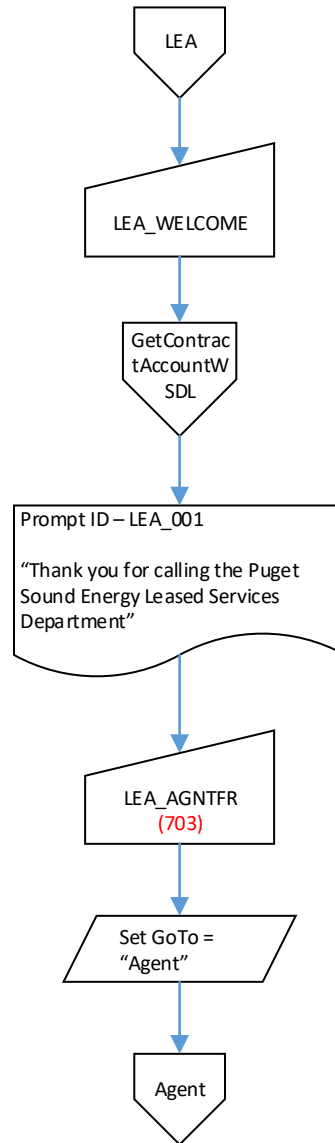


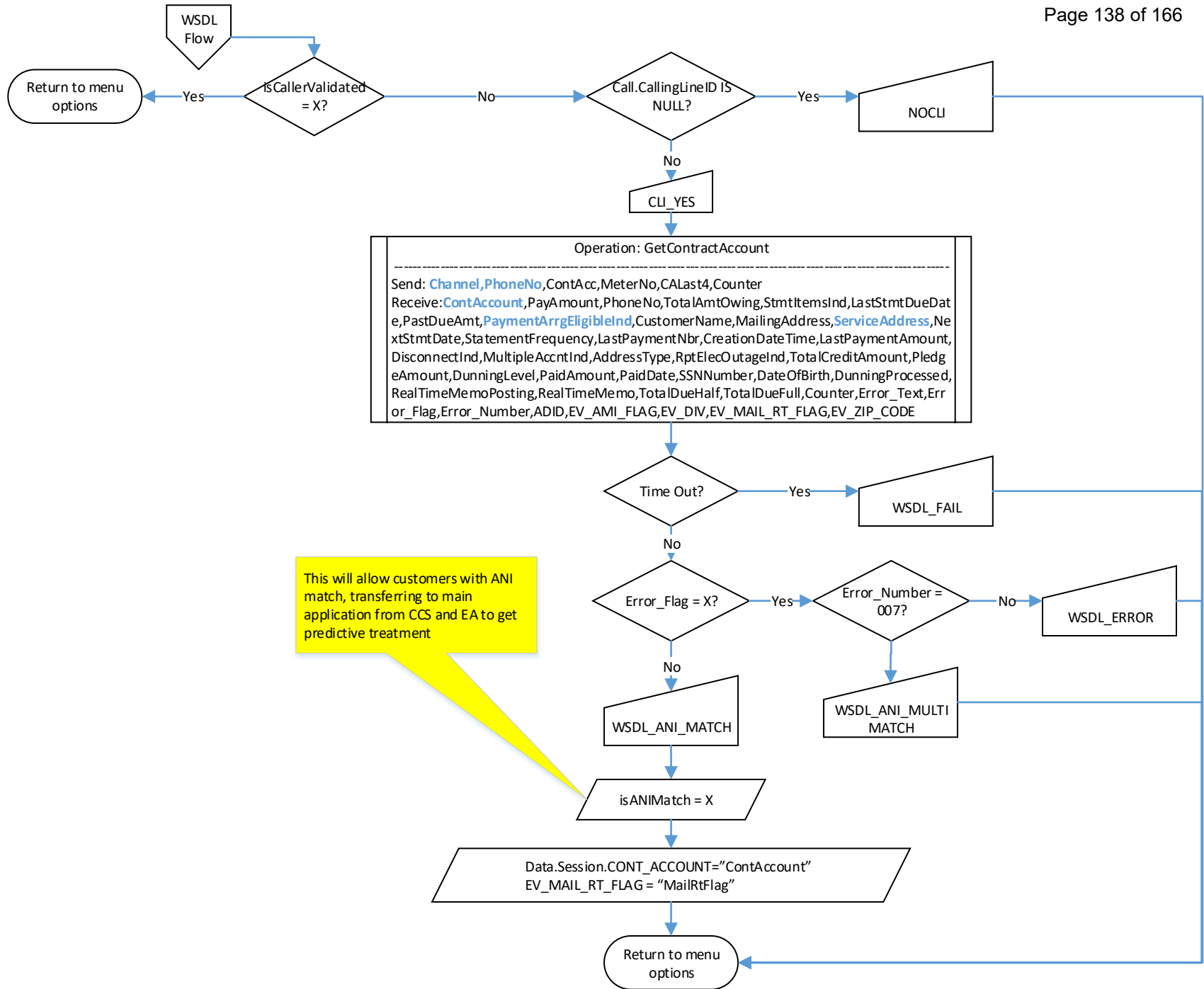


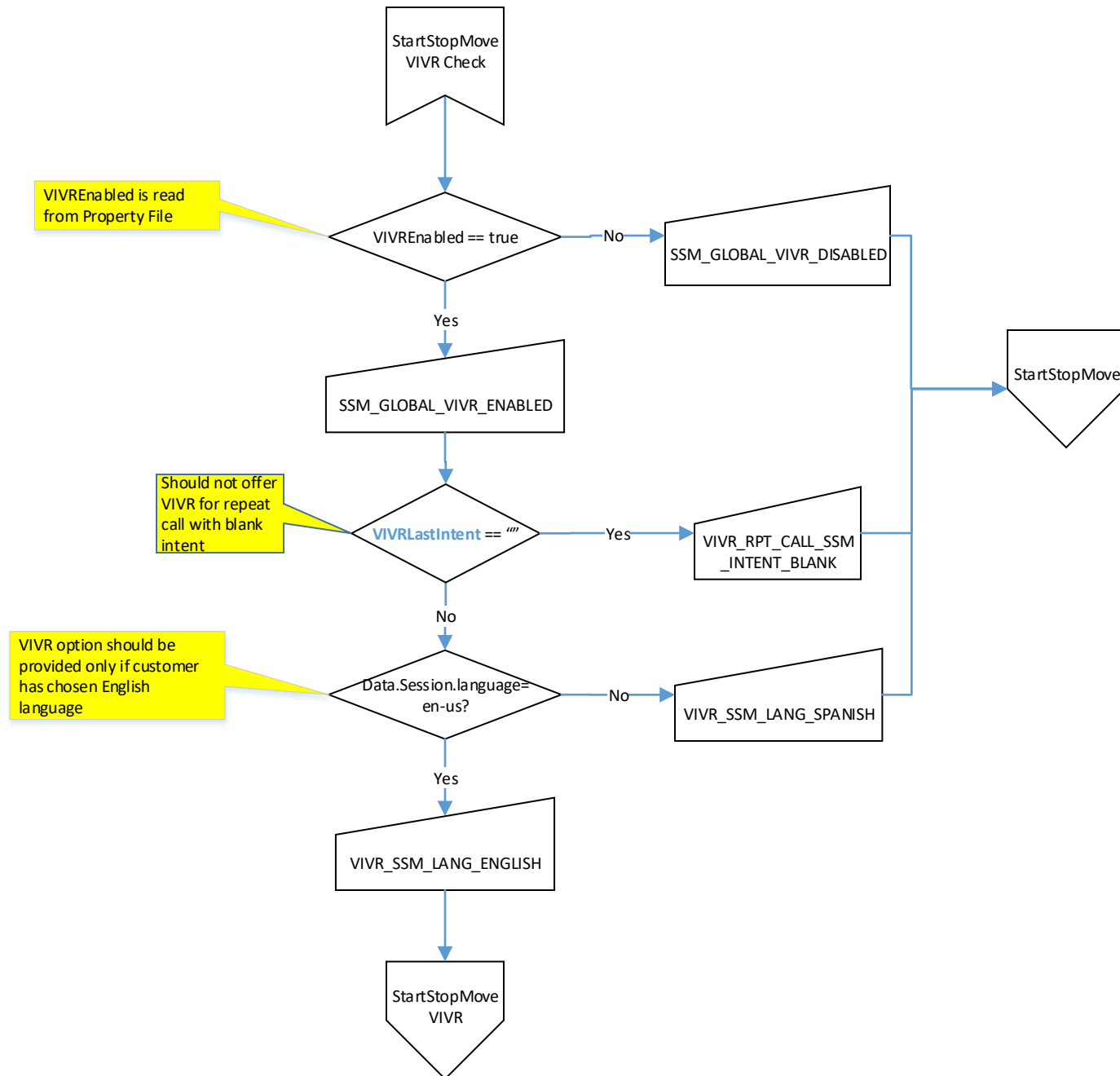


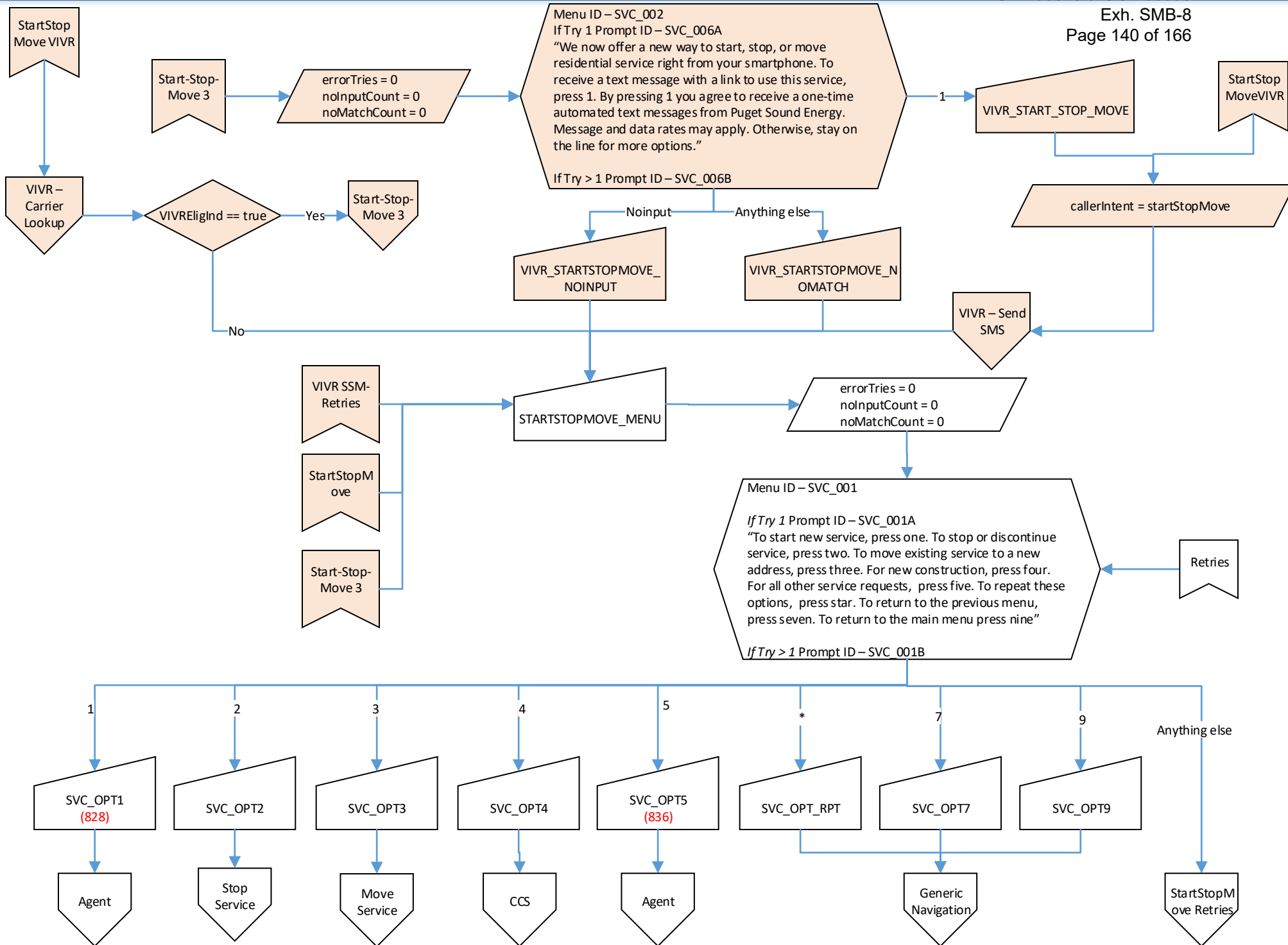


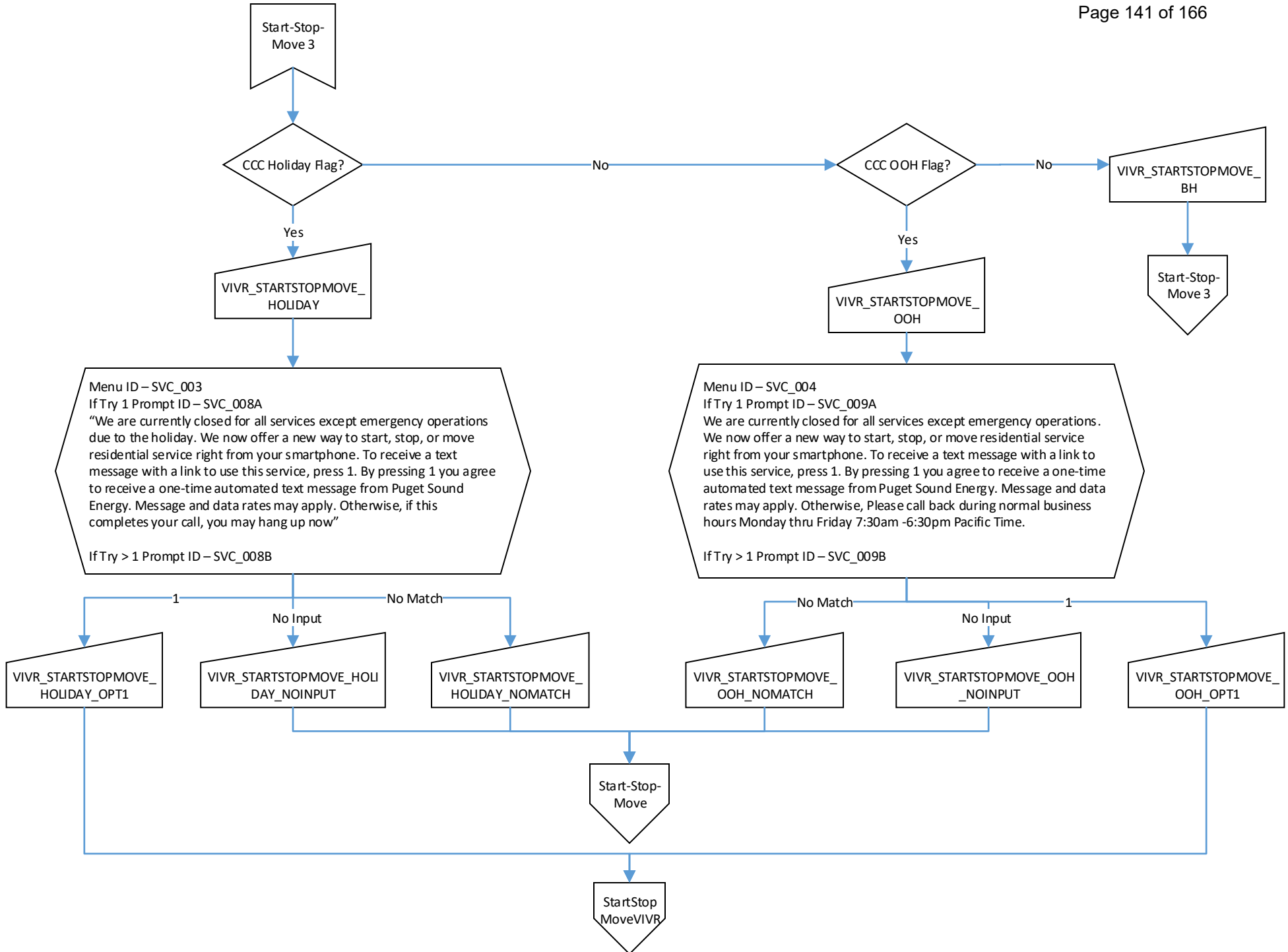
Plays in English for  
Spanish callers

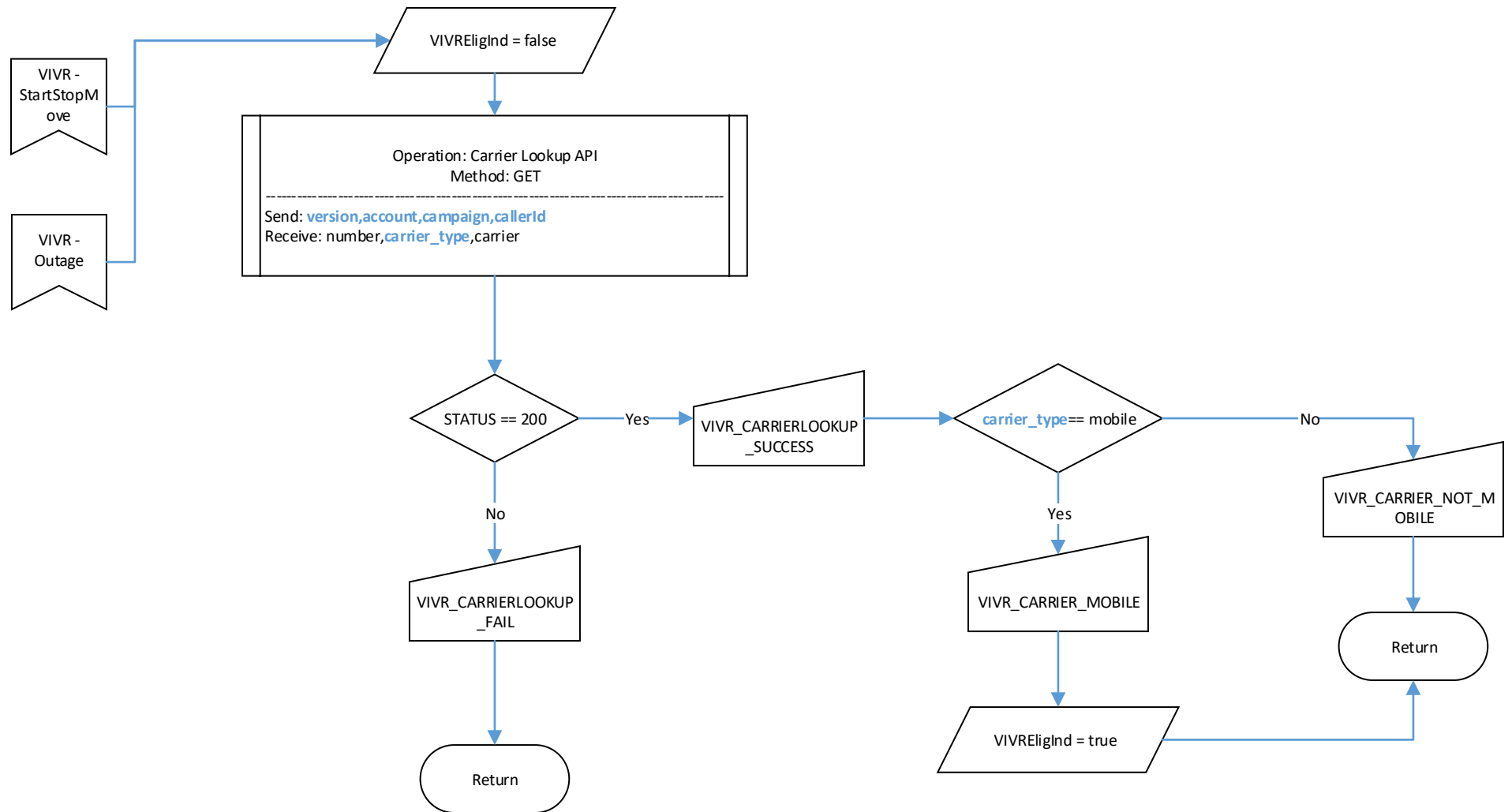


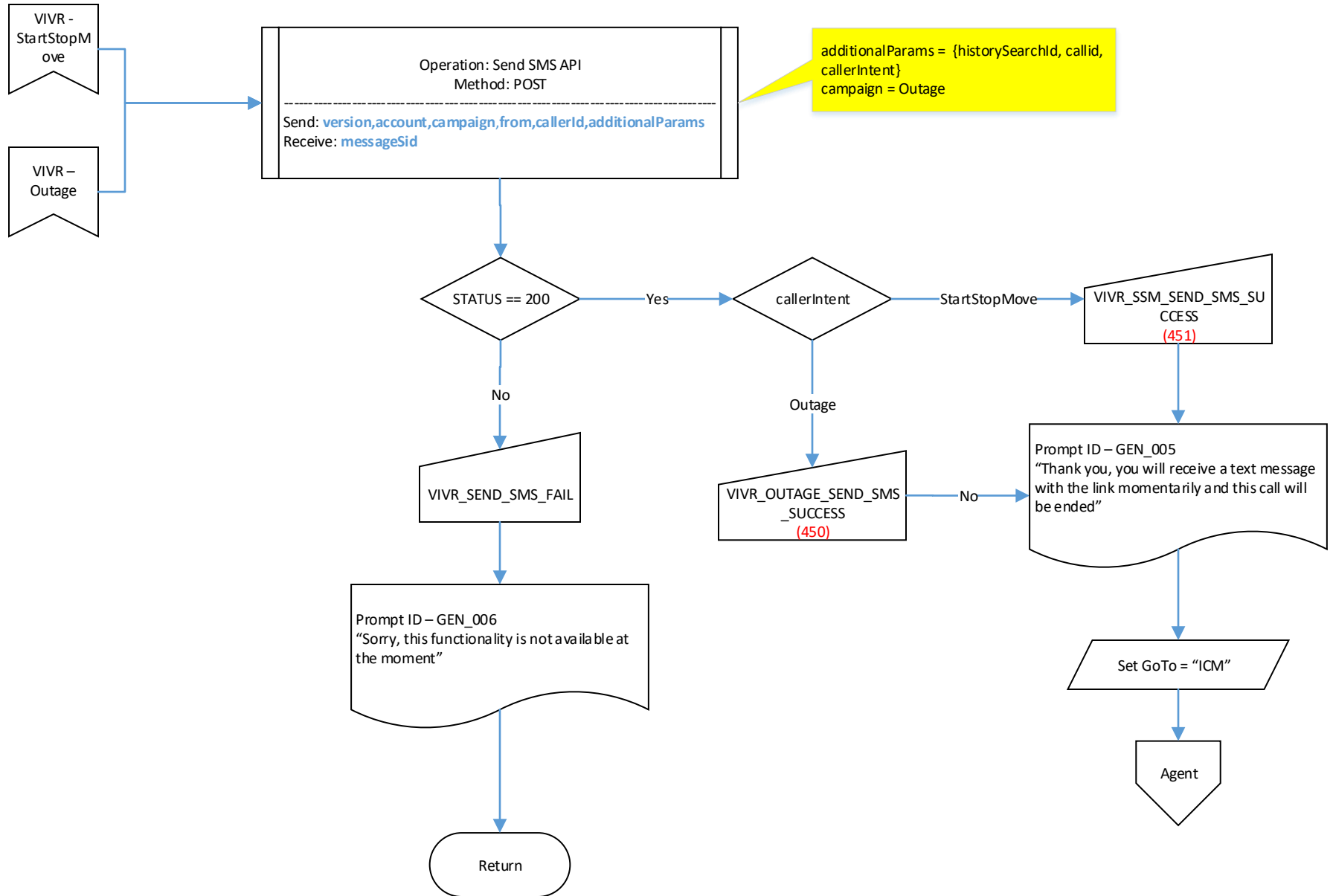




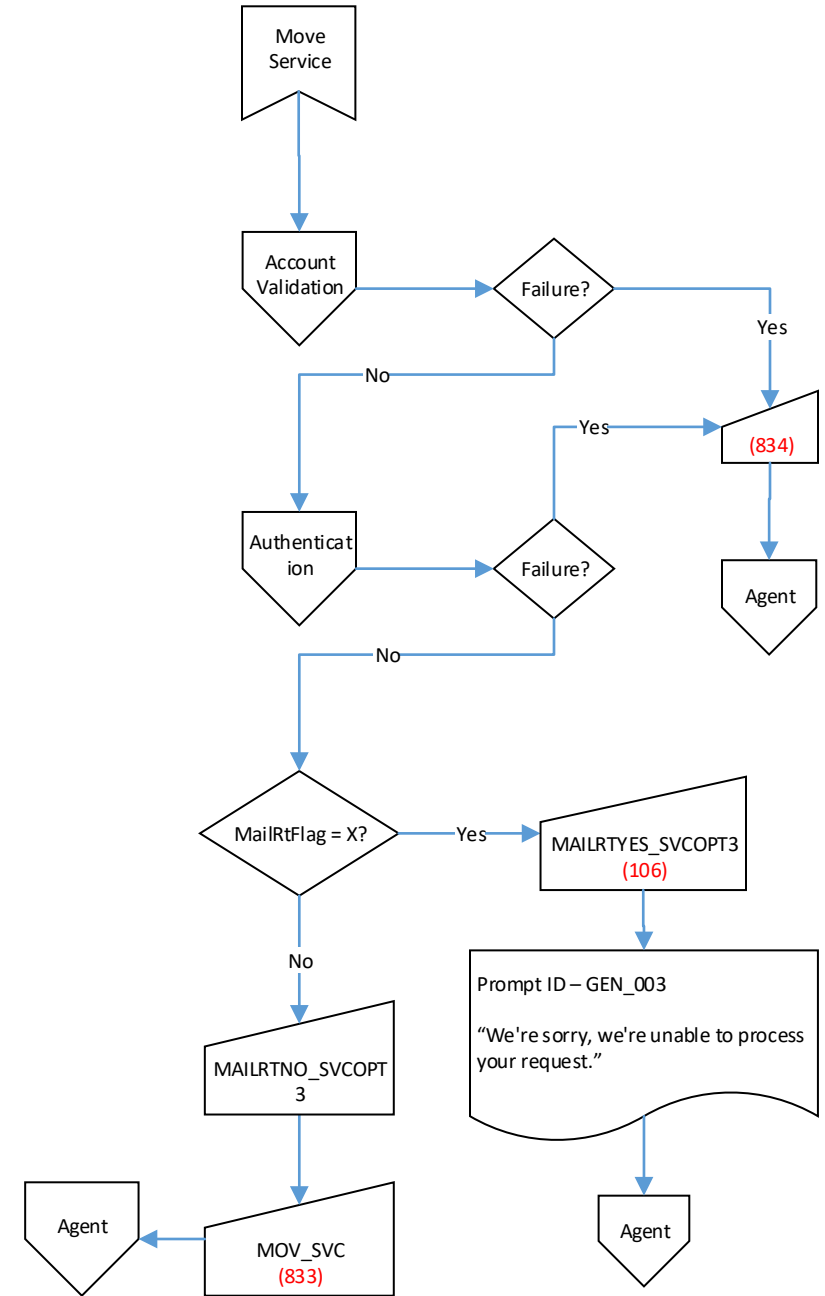
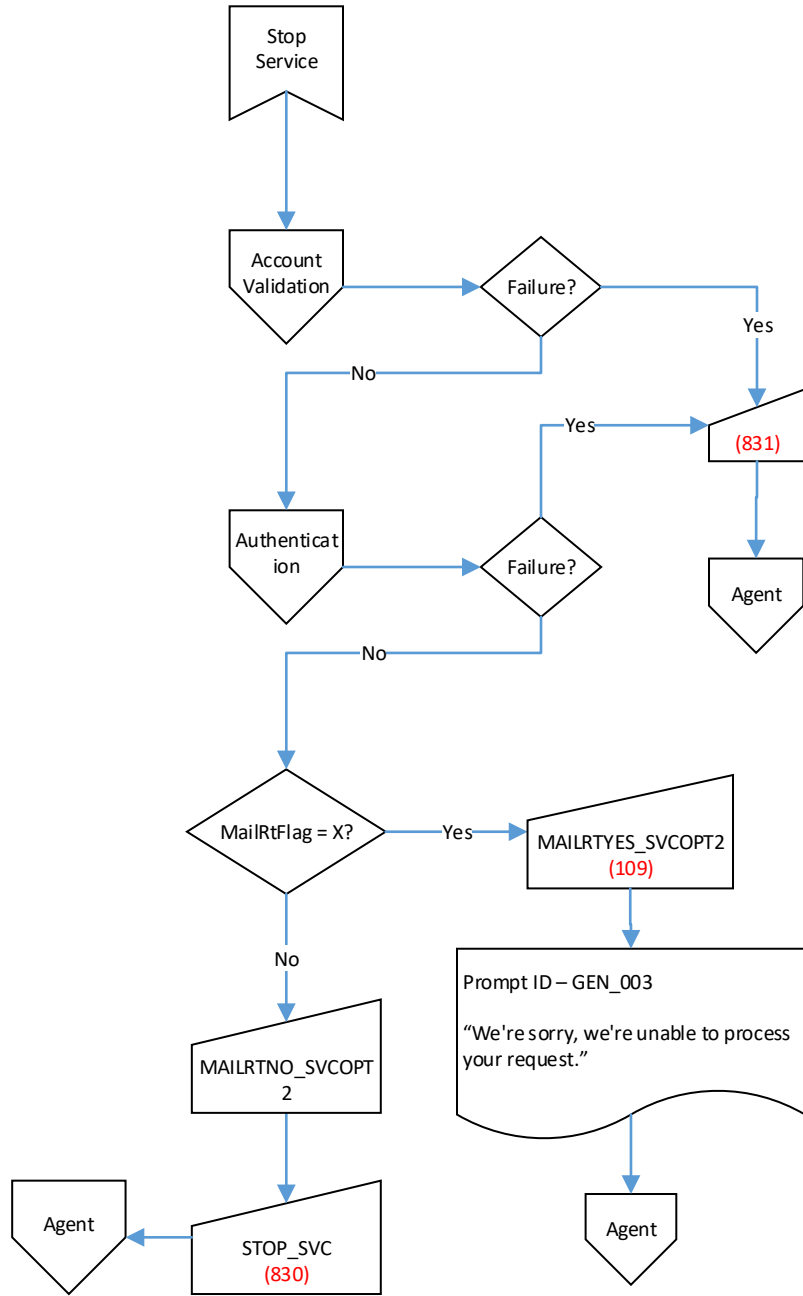


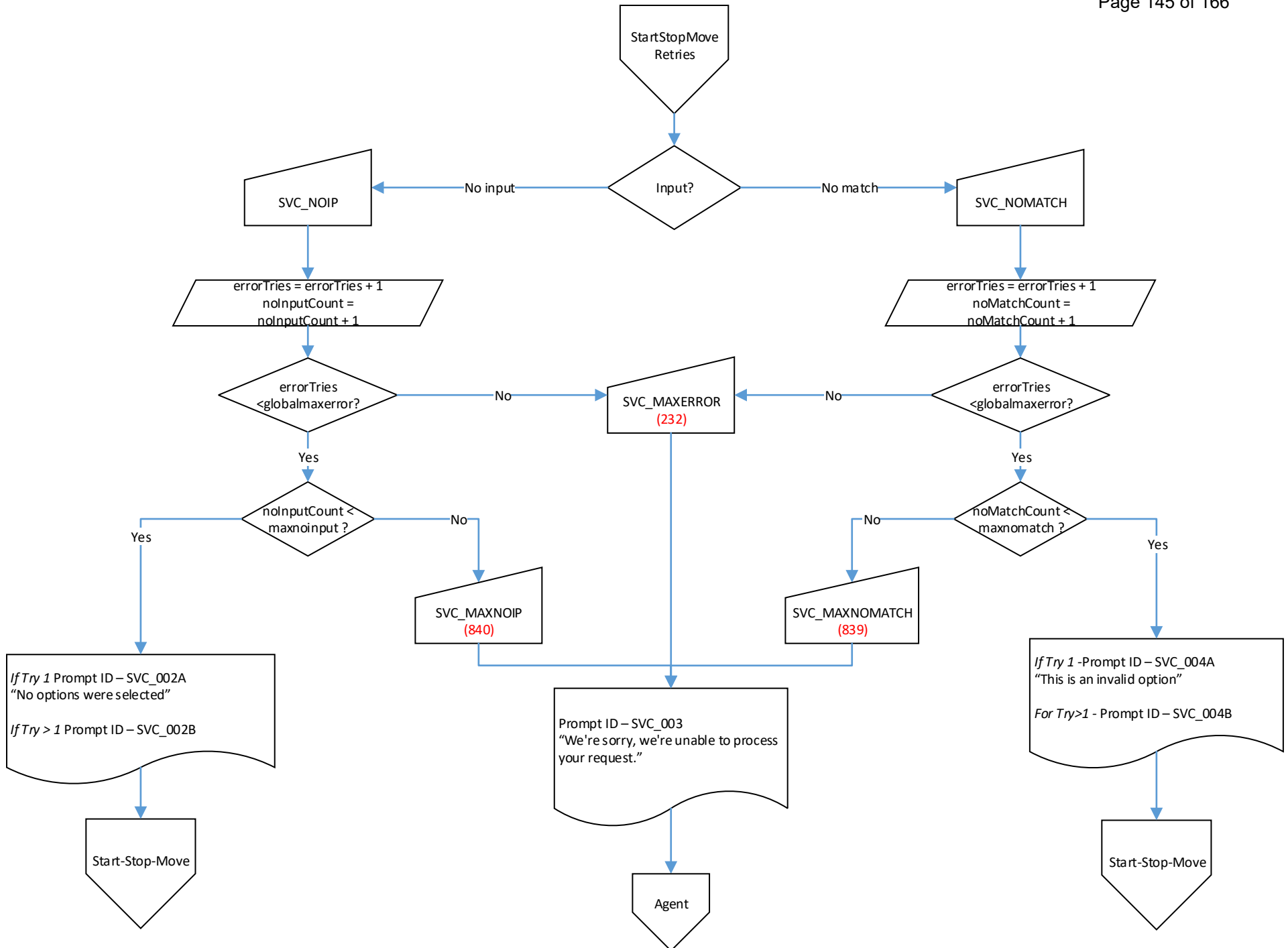


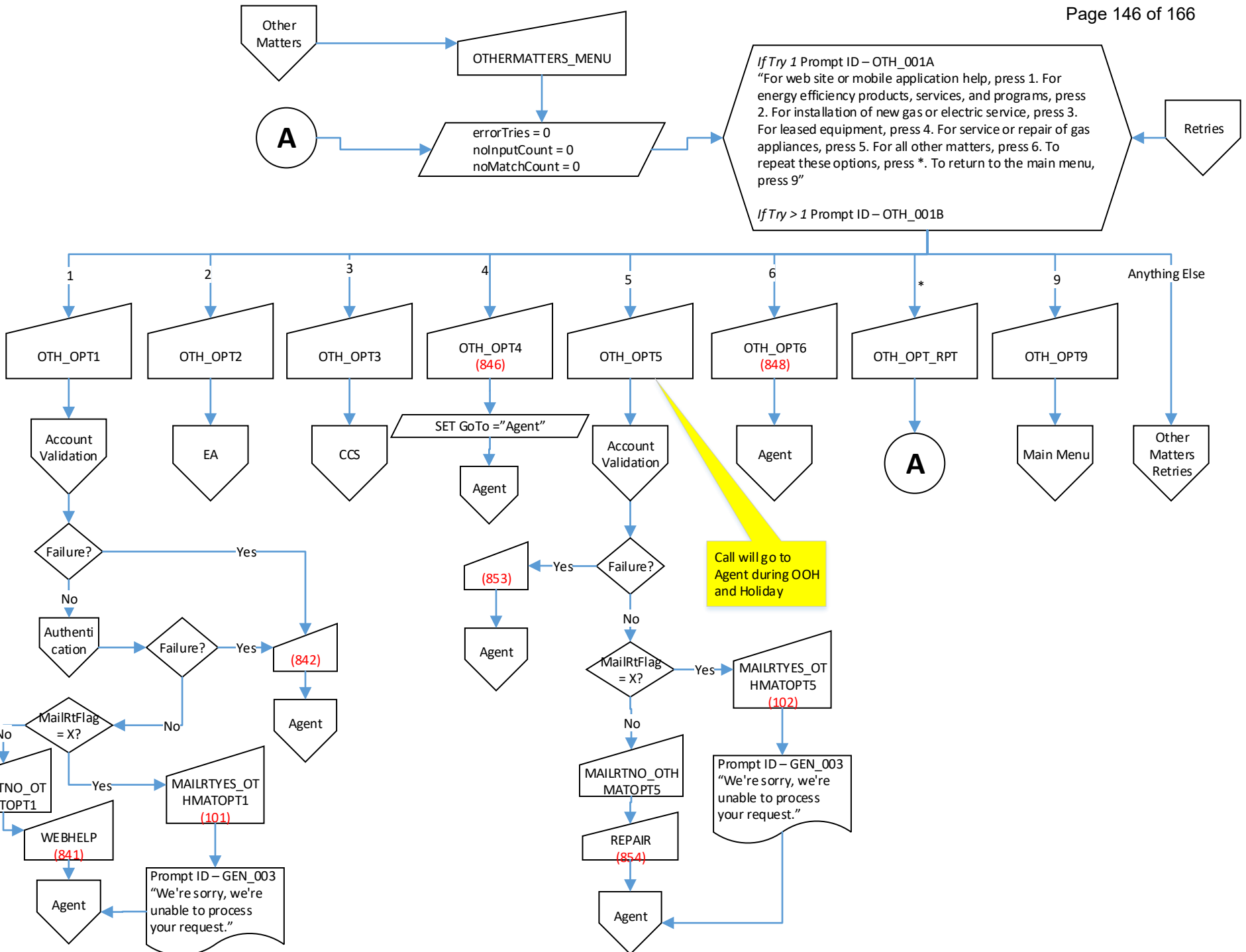


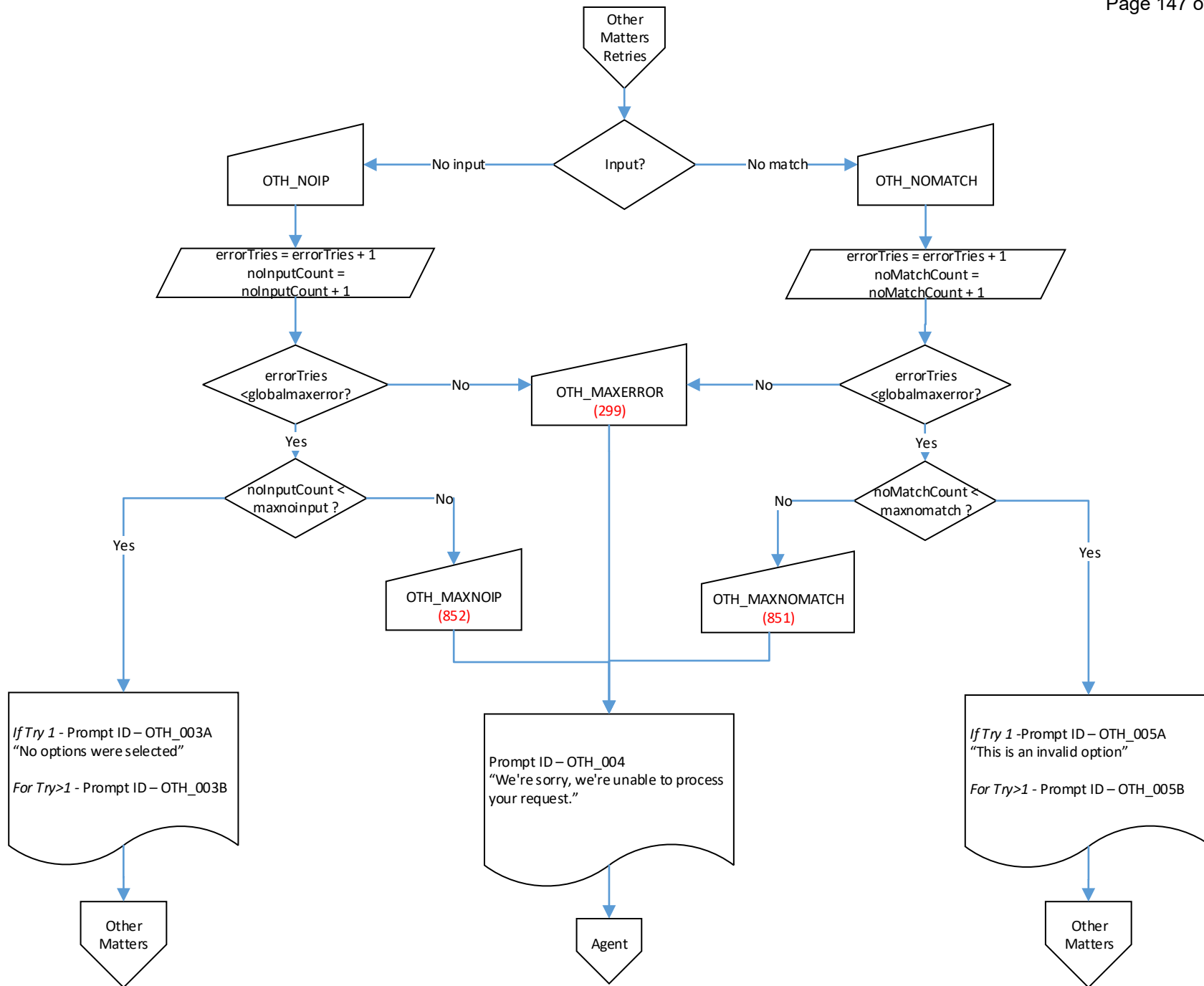


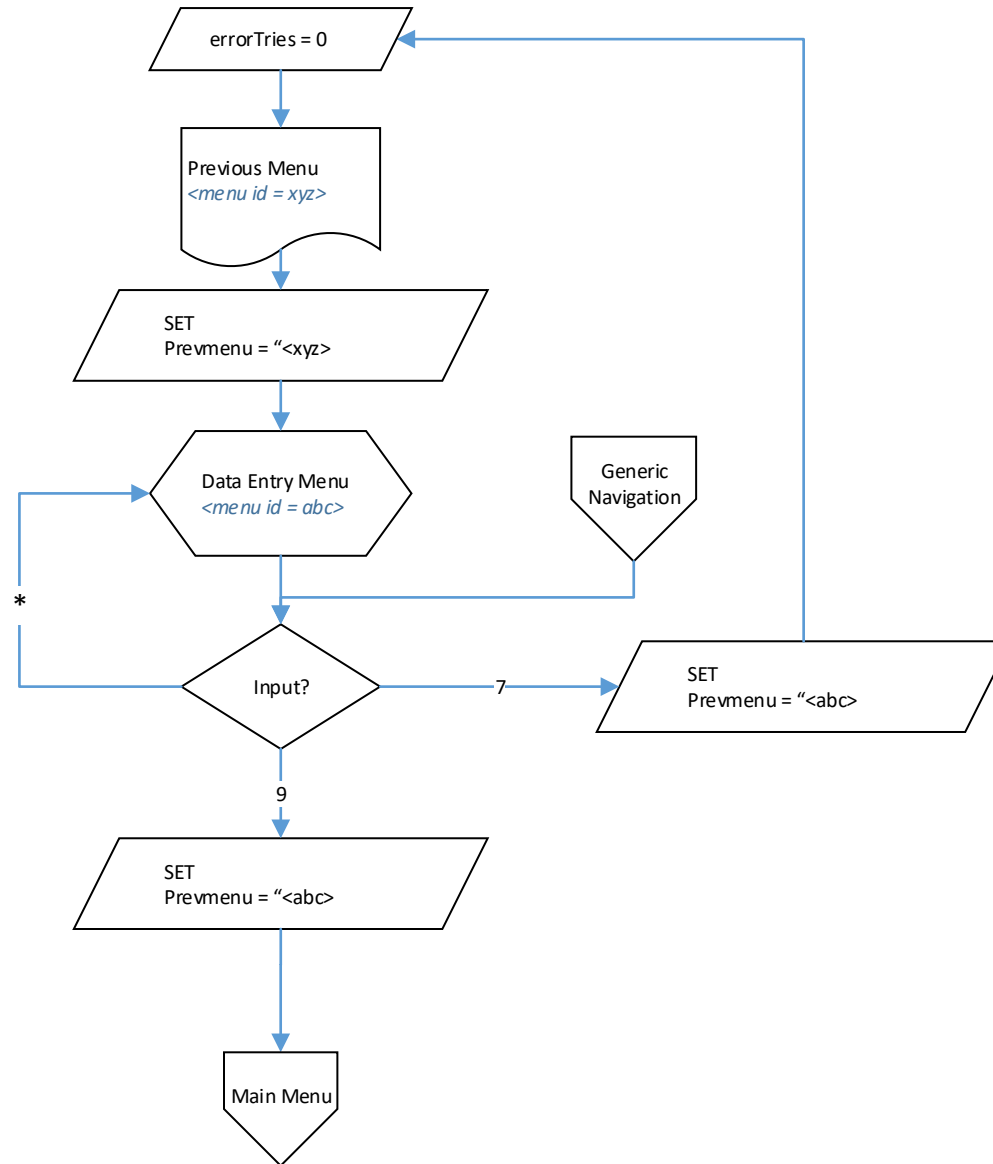


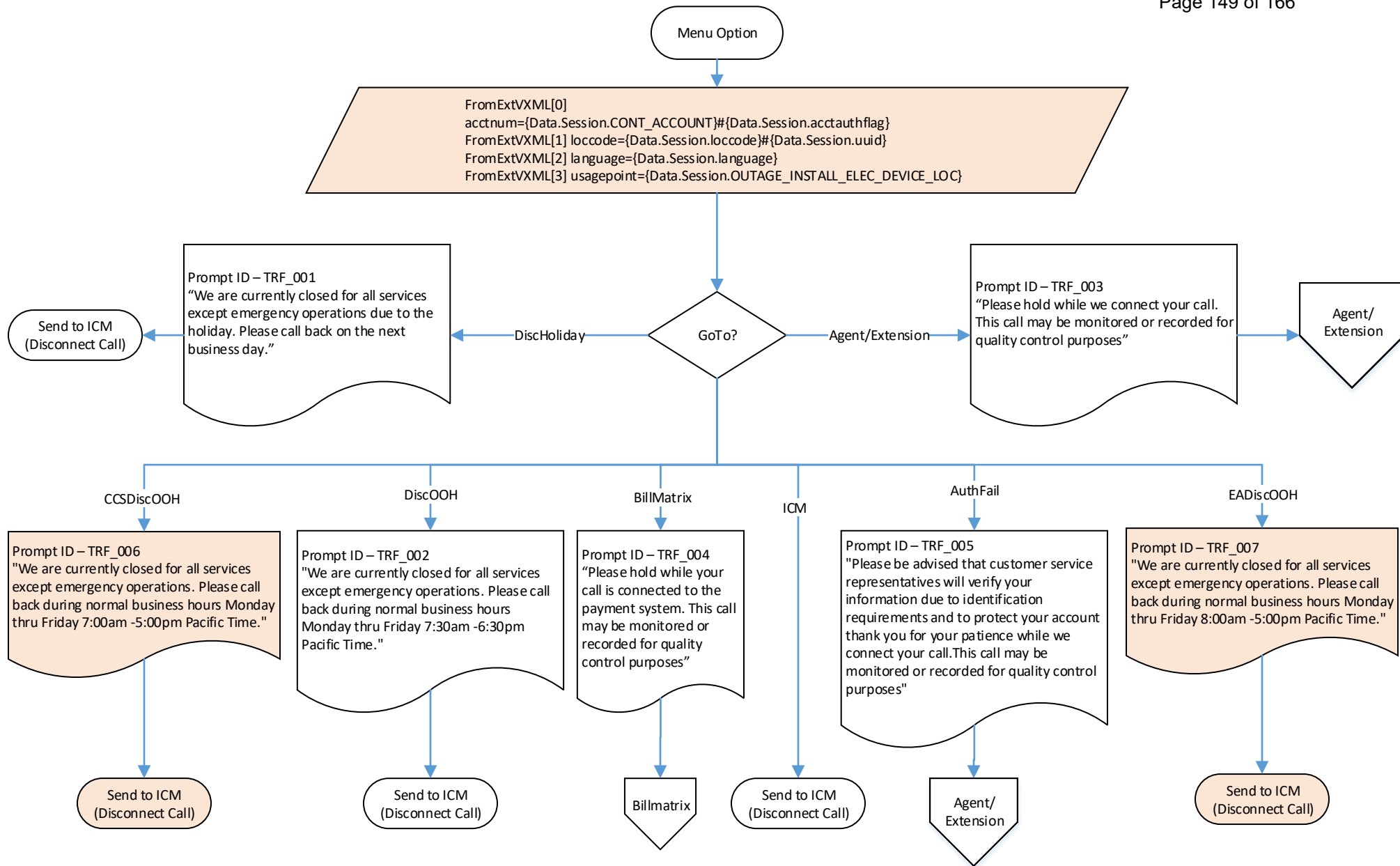


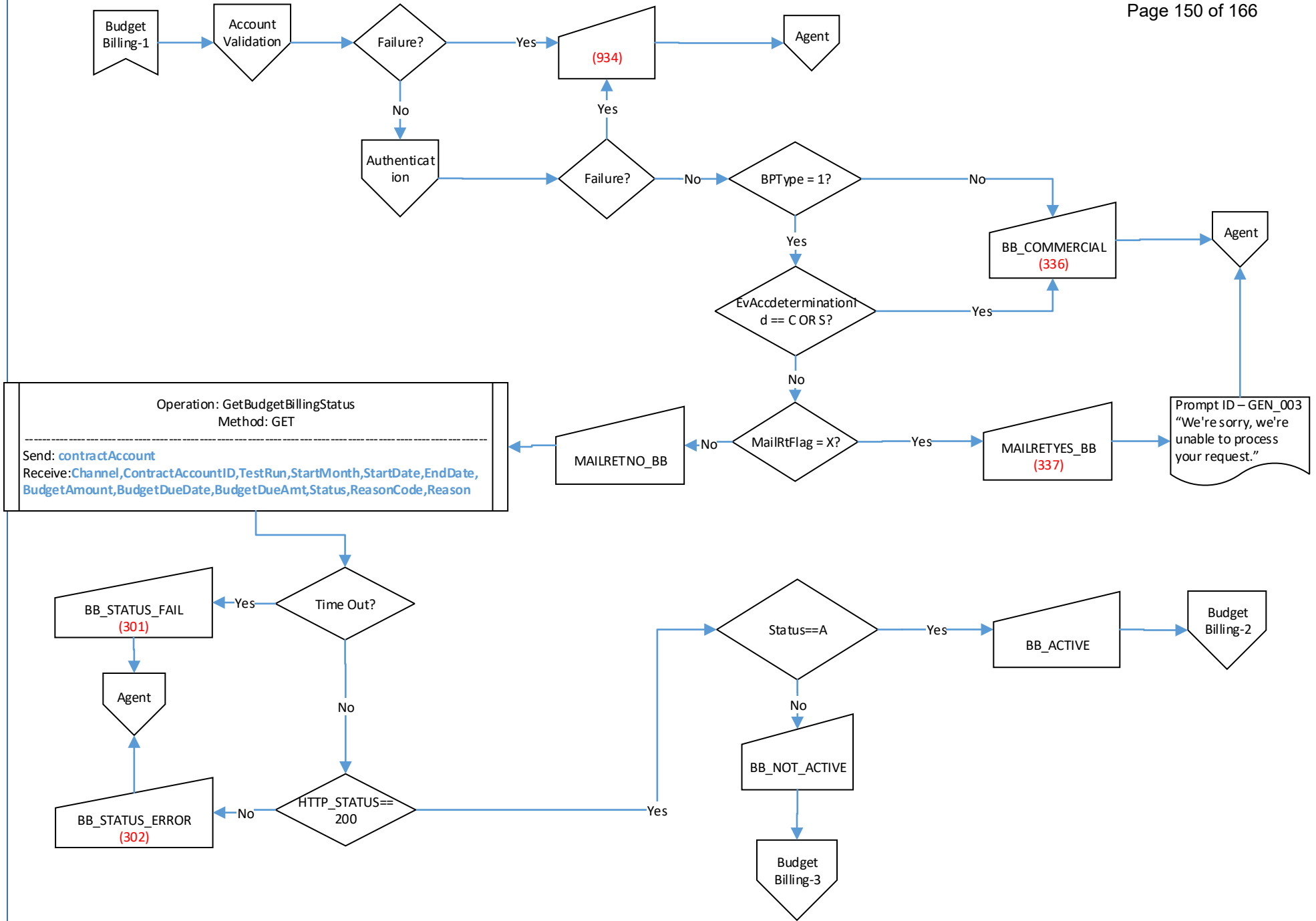


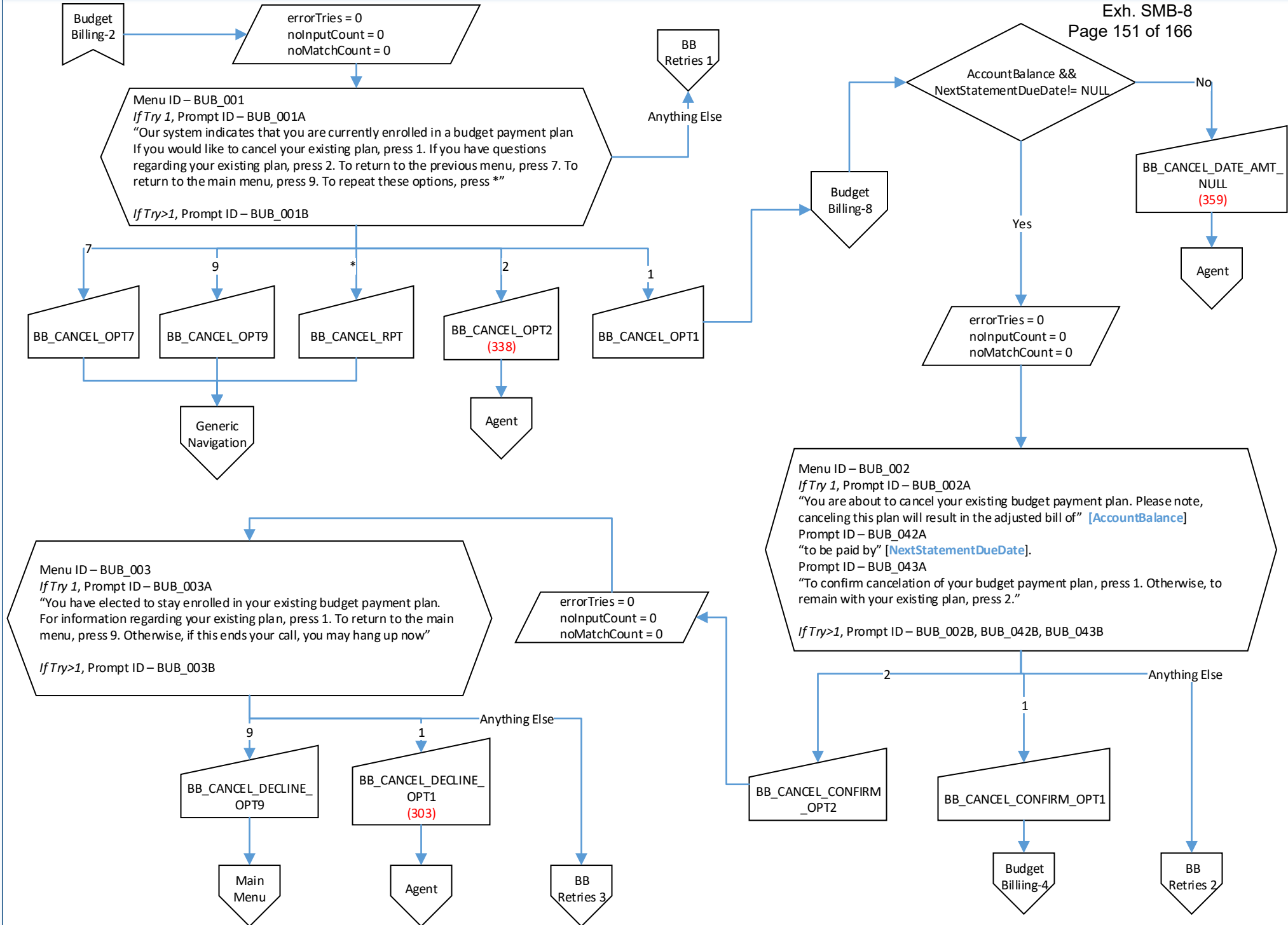




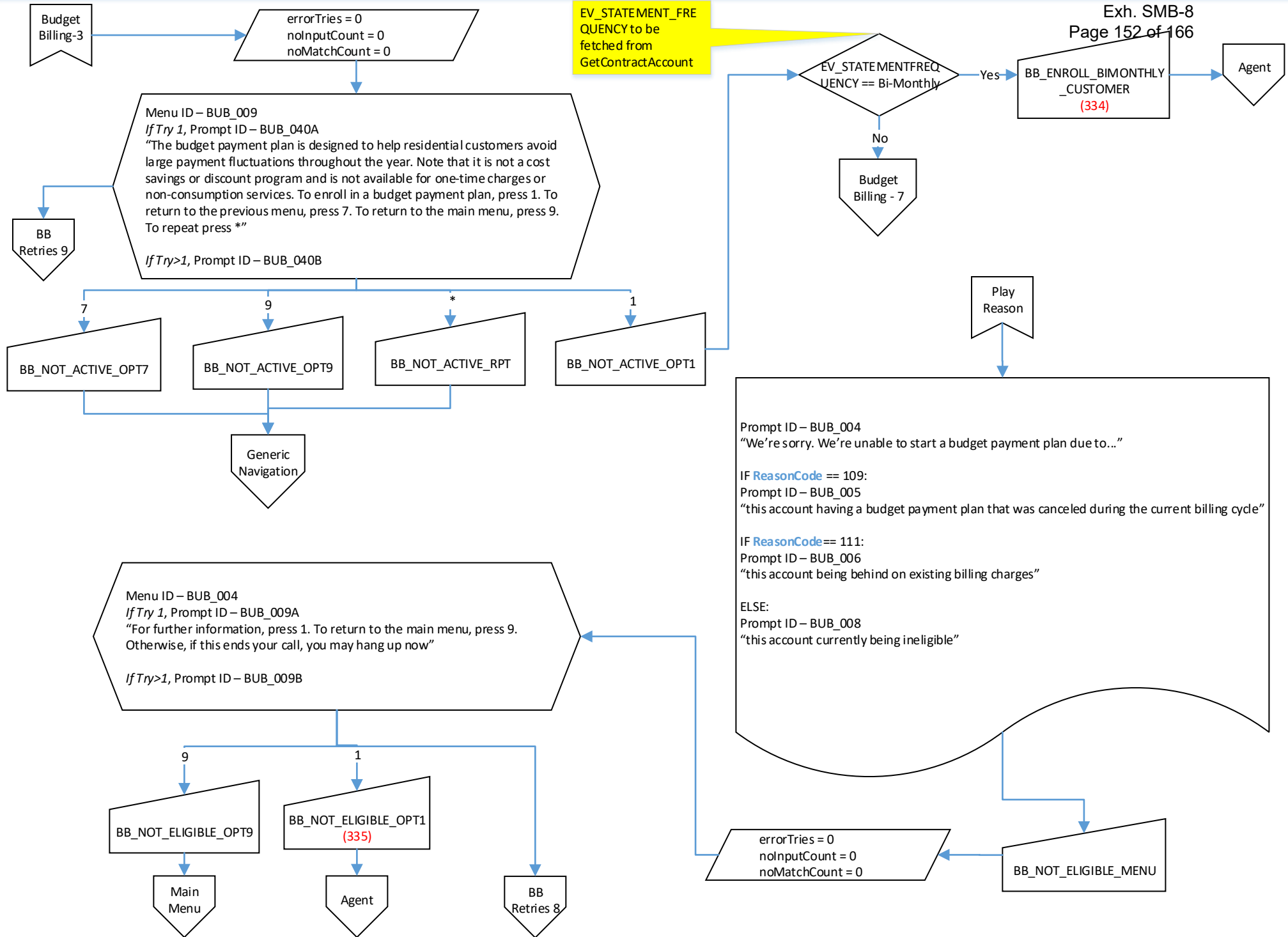










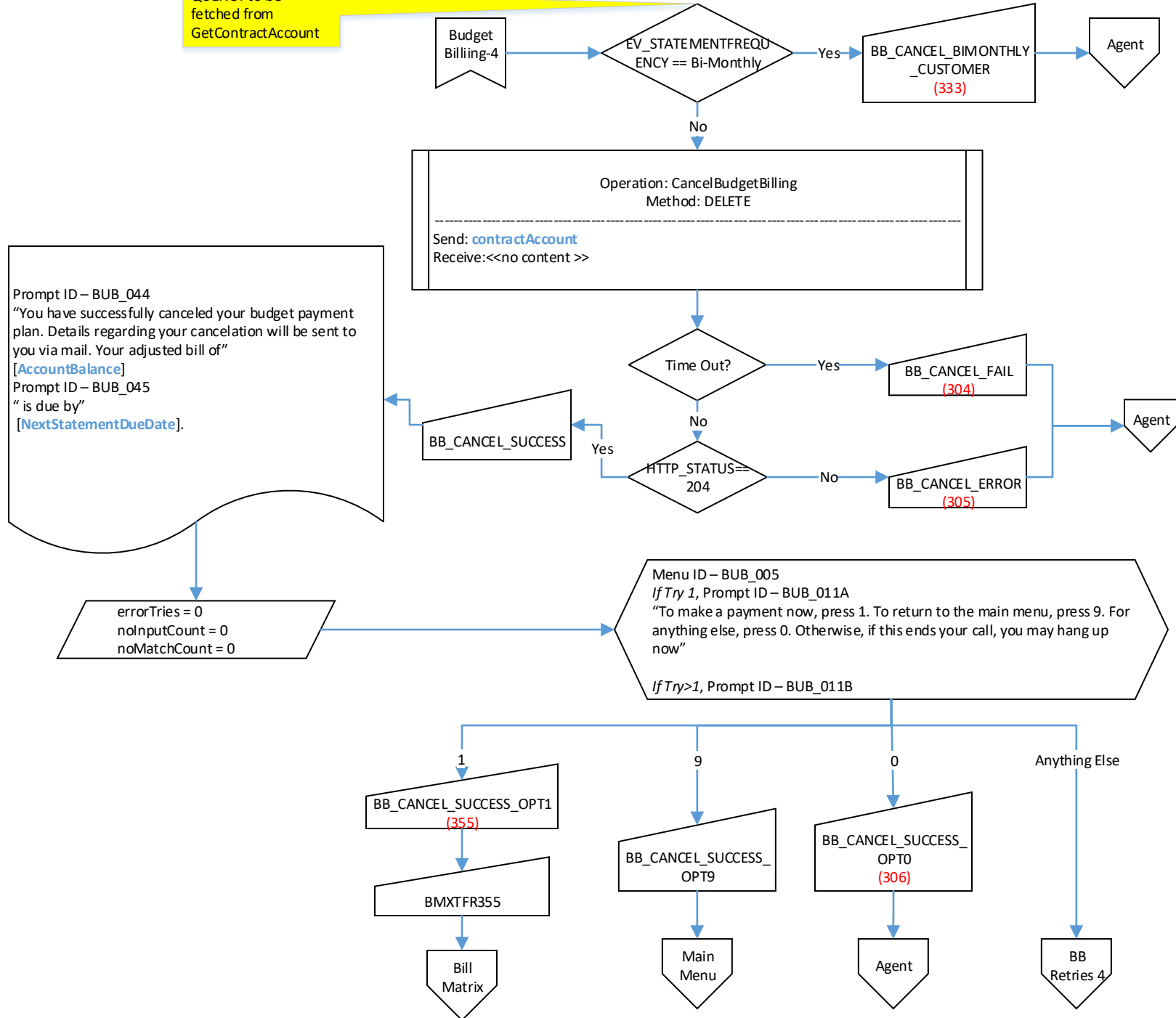


EV\_STATEMENT\_FREQUENCY to be fetched from GetContractAccount

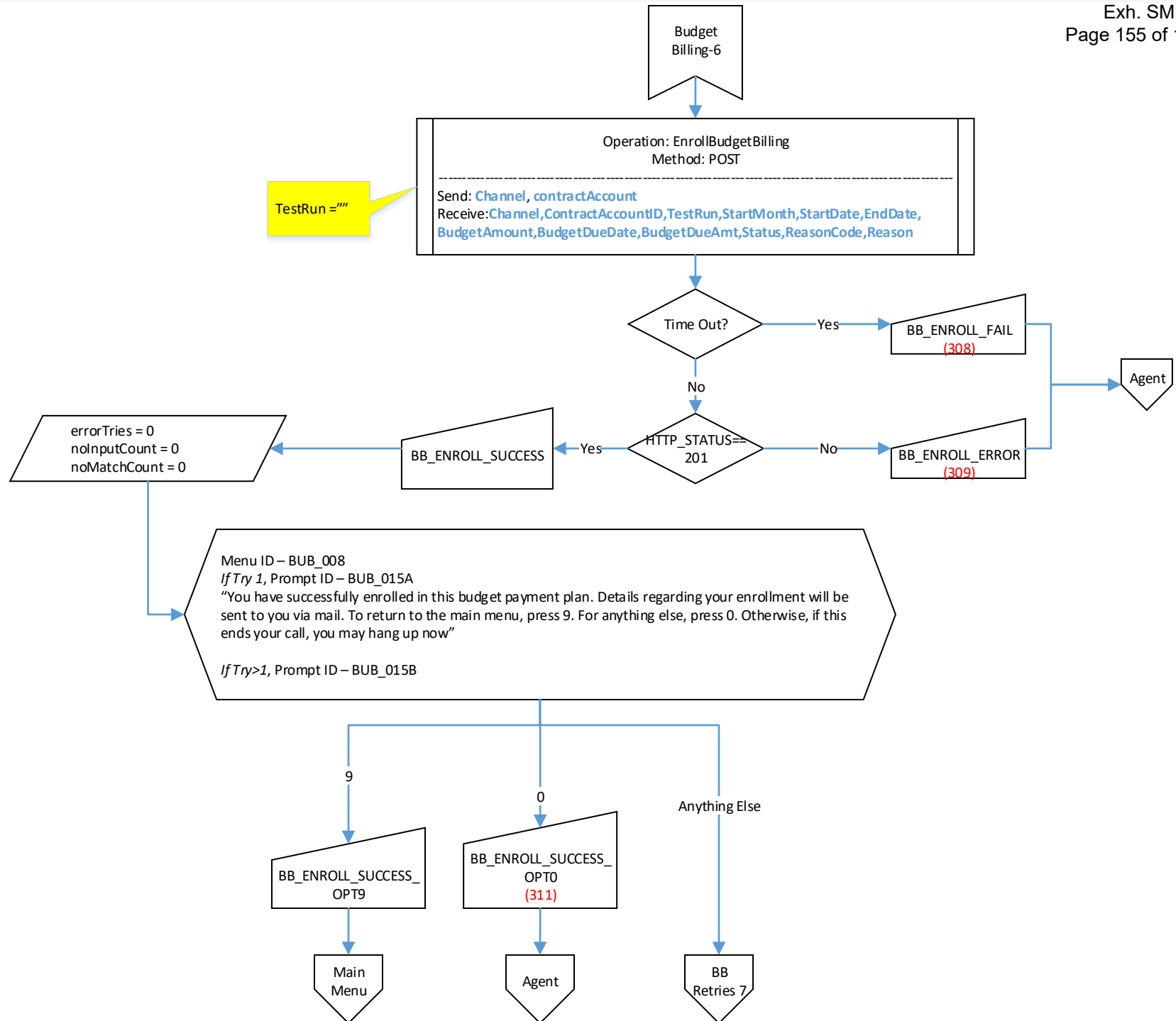
Menu ID - BUB\_009  
If Try 1, Prompt ID - BUB\_040A  
"The budget payment plan is designed to help residential customers avoid large payment fluctuations throughout the year. Note that it is not a cost savings or discount program and is not available for one-time charges or non-consumption services. To enroll in a budget payment plan, press 1. To return to the previous menu, press 7. To return to the main menu, press 9. To repeat press \*"  
If Try > 1, Prompt ID - BUB\_040B

Prompt ID - BUB\_004  
"We're sorry. We're unable to start a budget payment plan due to..."  
  
IF ReasonCode == 109:  
Prompt ID - BUB\_005  
"this account having a budget payment plan that was canceled during the current billing cycle"  
  
IF ReasonCode == 111:  
Prompt ID - BUB\_006  
"this account being behind on existing billing charges"  
  
ELSE:  
Prompt ID - BUB\_008  
"this account currently being ineligible"

EV\_STATEMENT\_FRE  
QUENCY to be  
fetched from  
GetContractAccount







TestRun = X  
(Simulate)

