

BEFORE THE WASHINGTON UTILITIES AND TRANSPORTATION COMMISSION

**Dockets UE-170033 and UG-170034
Puget Sound Energy
2017 General Rate Case**

PUBLIC COUNSEL DATA REQUEST NO. 444

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RE: Get to Zero ("GTZ") initiative, Direct Testimony of David Mills, Exhibit No. DEM-1T, at 23:1-24:18.

Please refer to Exhibit No. DEM-1T at 24:11-14, "In the near-term, the metric for the "Get to Zero Initiative" will be call volume to the Customer Care Center. In 2015, PSE received two million calls to its Customer Care Center, which represents two million issues that customers needed help resolving."

- a. How does the volume of calls that PSE received in 2015 compare to the volume of calls that other similarly sized utilities receive annually?
- b. Identify and describe the programs, software changes, digital platform launches, or any other efforts already completed, underway, or planned by the Company that will help to meet the stated goals and metrics for the GTZ initiative.
- c. Over how many years does the Company currently plan to implement its GTZ initiative?
- d. Please confirm if the Company intends to cut Customer Care Center staffing levels as a result of this initiative? If confirming, please indicate the number of staff members who will be cut (or added) over the duration of the GTZ initiative on a year-by-year basis for the life of the program.
- e. If confirming part d, please further state whether the Company intends to maintain, decrease, or increase the number of "overflow" Care Center agents at any point of the year. Please describe how the Company intends to manage "overflow" staffing levels throughout the course of the GTZ initiative.
- f. Describe with particularity the impact that the GTZ initiative will have on any aspect of PSE's low-income rate assistance programs. Additionally, please describe the specific measures that will impact administration of the low-income programs. Please specify which measures are aimed at customers and which measures are aimed at community action agencies.

Response:

- a) Puget Sound Energy (“PSE”) received four million calls in 2015, approximately two million of which were handled by call center representatives. This equates to around 1.4 live calls per customer, which is in alignment with most utilities having between 1.1 to 1.4 live calls per customer. See [\(http://www.paconsulting.com/newsroom/expert-opinion/energy-central-will-utilities-be-able-to-fit-their-contact-centers-in-phone-booths-7-november-2016/\)](http://www.paconsulting.com/newsroom/expert-opinion/energy-central-will-utilities-be-able-to-fit-their-contact-centers-in-phone-booths-7-november-2016/).
- b) The Get to Zero (“GTZ”) initiative operates under five guiding principles from the customer’s point of view:
- a. Self-Service – I can easily locate the answers to my questions and resolve issues myself.
 - b. Proactive Communication – PSE will proactively inform me of things I care about through my preferred communication channel.
 - c. Consistent Experience – I get the same accurate information no matter how I contact PSE and I know what to expect at every action.
 - d. Confidence – PSE makes and acts on commitments to its customers with confidence.
 - e. Anticipation – PSE knows who I am and anticipates my needs.

PSE is looking at the customer from a holistic perspective by incorporating these guiding principles. To date, this has included enabling the customer to complete a self-service start/stop/transfer transaction on the PSE website, optimizing the design of PSE’s website layout, implementing proactive outage notification capabilities, improving PSE’s Interactive Voice Response (“IVR”) system, and improving billing performance. Over the coming years, PSE will be launching a new web platform, improving the PSE customer facing mobile application, further optimizing the IVR system with natural voice and predictive capabilities and enhancing PSE’s ability to communicate with its customers through social channels. Furthermore, PSE is investing in the development of an Integrated Work Management system. This system will enable PSE to plan and schedule customer-facing work streams and ultimately more self-service transparency for customers. Every project operates under the guiding principles to improve customer experience and eliminate the need for customers to call PSE.

- c) The GTZ initiative is a five-year program that started in 2016 and is planned to be completed by 2020.
- d) PSE’s Customer Care Staffing model is primarily based on call volumes, call handling time, and the ability to meet service levels. Through the GTZ initiative, PSE will be expanding our proactive communication ability with customers

through various channels; to that end, we expect some level of Customer Care Staffing reductions over time. PSE is currently evaluating the trajectory of the benefits realization for the GTZ initiative.

- e) PSE will assess the use of overflow call centers once PSE gains clarity regarding the persistence of call types. PSE is in the early planning phase and does not have a final schedule at this time.

- f) PSE is currently planning an effort that will directly improve the experience of customers seeking, and community action agencies administering, low income energy assistance. Today, the process to seek assistance is very labor intensive and requires multiple interactions between PSE, the community action agencies, and the customer. As part of the GTZ planning phase, PSE is evaluating a low income energy assistance scheduling tool that will streamline the process and improve the overall experience for customers seeking assistance from community action agencies throughout our service territory. The goal of the initiative is to enable easier access to funds for those who qualify for assistance by creating a more streamlined process between the community action agencies and PSE, while incorporating more self-serve capabilities for the customer. As this project is still in the planning phase, specific measurement details have not been established.