

1 Introduction

INTRODUCTION

HOW TO USE THIS MANUAL

This manual is designed to help customer service associates to provide great customer service and learn the proper procedures for setting appointments for the installation verification replacement or servicing of cycling devices for NRG Power, Inc.

ABOUT NRG POWER, INC.

NRG Power, Inc., has been responsible for installing thousands of cycling devices for Southern California Edison (SCE) since 1997. The procedures outlined in this manual were developed by customer service managers with proven productivity rates.

SCE SUMMER DISCOUNT PROGRAM



For overall system reliability in Southern California, SCE promotes the Summer Discount Plan (SDP), a load control program. In exchange for up to \$200 in credits on their bills, customers agree to let SCE control their air conditioners via a radio paging device. The cycling device turns off the system during power emergencies, usually when demand for electricity (and temperatures) are at their highest.

SCE hires subcontractors, such as NRG Power, to install the cycling devices on the central air conditioners and provide service for the devices.. Therefore, technicians and customer service associates are the face of both SCE and NRG Power.

Cycling Device- the cycling device is a small unit that is attached to the outside of air conditioners. Activated by a remote radio signal it allows SCE to temporarily turn off, or "cycle," air conditioner(s) when needed.

How Summer Discount Plans Work

The Summer Discount Plan operates only during the summer season (beginning the first Sunday in June and ending the first Sunday in October). The air conditioner is "cycled" off at the discretion of SCE for energy conservation, during emergencies and for testing.

Air conditioner cycling may occur when:

- SCE is directed by the California Independent System Operator (Cal ISO), the statewide electrical transmission authority, when electricity reserves have dropped below 5% (referred to as a Stage 2 emergency).
- Emergency situations declare a Storm Alert exists and we need to avoid a more widespread power outage.
- SCE needs to control the device. Air conditioner testing interruptions will last up to a maximum of 15 minutes, will be conducted only during peak hours, and will occur only once per summer season.

DUTIES OF CUSTOMER SERVICE ASSOCIATES

As a customer service associate, you will be talking to Southern California Edison customers participating in the Summer Discount Plan. Your duties will include calling customers, setting appointments, inputting data, keeping calendars for technicians and customer service.

You will be accessing data via SCE's ELMS (Enhanced Load Management System). There are separate manuals produced by SCE to help you with the software and data entry that are shown in "ELMS Phase 1 Contractor's User Guide" and "ELMS Phase II Contractor User Guide." These SCE manuals along with this manual should be kept within easy reach of your workstation for reference.

You are responsible for learning both ELMS and NRG procedures.

General rules to follow throughout the customer service process:

- Always identify NRG as a subcontractor for Southern California Edison.
- Maintain a positive happy attitude (customers can hear a smile over the phone.)
- Be patient, especially with older and non-English speaking customers.
- Talk clearly and slowly.
- Listen, repeat back any information to the customer any information, you do not hear clearly.
- Do not input or disclose any confidential information via any means including electronic means such as the SCE Web site. When the work order is printed all information is seen by the customer.
- Do not slam the phone onto the base, or make loud comments that may be heard by the customers on yours or another customer service associate's telephone.
- Do not leave drinks or food near the computer that could spill and cause damage.

OUTLINE OF CUSTOMER CONTACT PROCESS

The customer service process should be completed in the order that follows. There is a slight change in the steps for different types of work orders.

1	Access SCE Web site.
2	Retrieve customer data,
3	Note type of work order: a) Installation c) Checking/verification of device. d) Replace e) Reinstall. g) Service call.
4	Dial phone.
5	Greeting & customer contact.
6	Set appointment.
7	Verification: <ul style="list-style-type: none"> • Address • Location/Access to A/C • # of A/C units • Date Time
8	Input appointment and pertinent information.
9	Save data.
10	Mark information on technician's calendar.

2 Service

Customer Contact Processes

CALLING CUSTOMERS

You will be telephoning customers to set appointments for our technicians to install/verify/check replace or service cycling devices. The customers usually have contacted SCE first to sign up for the Summer Discount Program.

GREETING & APPOINTMENT SETTING

After you dial the customer's telephone number and someone answers the phone, say, **"Hello, may I please speak to Mr./Mrs. _____? Hi, my name is _____. I'm with NRG Power, we're a subcontractor for Southern California Edison's Summer Discount Program. . I would like to set up an appointment to (install/verify/check or replace) the cycling device on your air conditioner. We have a technician in your area on _____ (day and date) between _____ (time). Will there be an adult over the age of 18 present at that time?"**

The reason someone needs to be home is to turn the air conditioner on for us and to sign a work order.

The reason someone needs to turn on the A/C is for us to make sure the unit is working before and after we have completed our work. Then we will not be liable later should the customer claim that we've caused damage to the A/C.

If NO, offer the customer another time and date: **"How about _____ (day, date, and time)?"** If the customer does not accept the second offer, find out when the customer is usually available; then make the

appointment or tell the customer you'll call back to a schedule a better date. Note that you could not make an appointment in the database.

VERIFICATION

If the customer answers YES to the appointment, verify the address: **"I need to verify your address. Is it _____ (state customer's address)?"**

"May I also have the two nearest cross streets to this address?"

"Is it a gated a gated community? What is the access code?"

Record the access code on work order.

"You have #---- air conditioner(s), correct?"

If they have more air conditioners than listed on the work order, ask the customer, **"Are you interested in getting cycling devices installed on the other A/C units?"** If they answer yes, increase in number of installations on work order.

"Where is (are) the A/C unit(s) ?" Is (are) it (they)accessible? On the ground or on the roof?"

If the A/C is on the roof: **"Will a 12 foot ladder reach the roof?"**

If a longer ladder is required, make a note of it on the work order.

The reason we verify all the above information is to make sure that the technician will be able to complete the work order.

CLOSING

Before ending the phone call you will verify the date and time of the appointment.

"This is to let you know, that we are a subcontractor for Edison, the technician who will be coming to your house will be from our company, which is NRG Power. He will have an ID badge on him.

**We'll see you on _____ (repeat appointment day, date, and time).
Thank you very much and have a good day."**

ANSERING MACHINE MESSAGES

If the customer does not answer the phone and you hear an answering machine/voice mail, leave a message. Here is where it is very important to speak clearly and slowly especially when you leave the phone and work order numbers.

"Hi, my name is _____ with NRG Power. We are a subcontractor for Southern California Edison's Summer Discount Program. I am calling to schedule an appointment with you to (install/verify/check or replace) the cycling device (from/on) your air conditioner. Please call me at 1-800-560-3007. Your work order number is _____ (work order number.) Thank you and have a good day."

SCHEDULING LIMITATIONS.

You may set appointment in the following time frames:

8:00 am -12:00 pm (noon)

11:00 am – 3:00 pm

1:00 pm – 5:00 pm

You may make exceptions only for the following:

- 3-hour time frames may be scheduled in pressing situations
- An 8:00 am – 9:00 am appointment may be made as the first appointment of the day upon customer insistence or no other availability (NO midday options.)

You are limited to the number of appointments you can set a day by the proximity of the locations. During busy times, the appointments can be very closer together when the locations are closer together.

- 12-15 per day for non-localized customers.
- 14-17 per day for localized (close) customers.

Please also consider appointments with more than one device that needs to be installed and allow extra time.

CANCELATIONS & RESCHEDULING

For cancellations and rescheduling you will need to make sure that SCE, NRG staff and the technicians are aware of the change. Always call the technician to notify him of changes if he has already received his schedule, especially if it is the day of or day before the original appointment.

- **If a customer cancels**, record the change in the work order on the SCE Web site, remove the mark from installer's calendar and call the technician if he has already received his schedule.
- **If a customer reschedules**, record the change in the work order on the SCE Web site, remove the mark from installer's calendar and call the technician if he has already received his schedule.

DEALING WITH COMPLAINTS

When a customer calls with a complaint about their air conditioner or cycling device, you should remain calm and pleasant. Listen to the customer carefully and write down all their comments about their A/C, the NRG technician and when the cycling device was installed.

Tell the customer, **"I will give your information to my supervisor and she will call you back."**

Give the information to your supervisor immediately.

The supervisor will talk to the technician, and the manager to find out what happened. If the installation was within a week or less, NRG will send out a technician. If the installation was past a week, SCE will have to issue an additional work order.

Conclusion

We hope that this manual answers all of your questions, if for any reason, you do not understand the work process, please contact your supervisor for further information.