



Member Services Model

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Customer Care Model

Previous service options and member (customer) care operations:

- One centralized contact center with distributed call center support in district offices.
- District offices support walk-in, drive-thru, and lock box payments in addition to phone support and other complex member requests.
- Credit cards, cash, and checks are processed on-site at each office.
- Centralized call center handles approx. 42% of call volume (17 Agents).
- District offices handle approx. 58% of call volume (44 Agents).
- Without front-office duties, a call center agent can handle up to 3x the number of calls compared to office agent due to the focused scope of responsibility.
- Engineering and planning agents are member-facing and support walk-up service requests of members.

Challenges of Maintaining Existing Model

Requirements:

- Requires more staff to operate due to cash handling processes and procedures.
- Requires more staff to provide desired member response of call volumes (service levels).
- Places staff in dispersed work environments that makes advanced training difficult.
- Attrition and phone coverage is easier to manage in contact centers compared to dispersed front offices.
- Onsite check acceptance requires processes and technology that currently exists for high volume in HQ.
- Requires cash courier services and other security needs for both check and cash processing.

Eliminating cash and check processing at district offices enables PEC to offer alternative customer care model that can continue to serve the majority of the membership more cost effectively.

Shift in Service Model

Create a balanced front-office space for multiple functions and service:

- Redirect Member Relations staff currently in front offices to call center environments, which will allow a shared front-desk presence for both Member Relations and Engineering Planning in District Offices.
- Members will be assisted in District Offices by:
 - Engineering Planning staff with assistance of Member Relations (ideally Planners with MR experience).
 - Ability to process credit card payments with Planning staff or kiosk transactions for cash and check options.
 - Provide (and assist if necessary) with access to SmartHub.
 - Provide a direct hot-line to Member Relations staff.
 - MR Agents can also assist Engineering Planning with payment matters.
- Engineering Planners will also continue to support engineering needs:
 - Line extension applications and payments (credit card).
 - Engineering and design coordination.

Balanced Front Office

Staff can assist members:

- Answer billing questions.
- Process credit card payments.
- Assist with cash and check kiosk payments.
- Navigate SmartHub.
- Direct members to payment hotline.
- Engineering planning support.
- After-hour kiosk in drive-thru lane.



Front Office Change

Benefits:

- Transitions Member Relations to a service model which is focused on quality, training, and member response.
- Support member growth, increasing call volumes, and complex member inquiries/requests in a cost-effective manner.
- Call center environments offer more productive training solutions and quality member contacts.
- Enables staff availability for chat and SMS (text) capabilities.
- Provides Engineering Planning with the expanded workspace needed in district service offices to avoid costly expansions and renovations.
- Help alleviate overlapping service functions between Member Relations Agents and Engineering Planning.
- Allows staff to help members acclimate to digital payment and cost-saving options.

Payment Options

Objectives for continuing a transition to digital payments:

- Safeguard employees and processes from security requirements:
 - Physical security reinforcements
 - Cash management controls and oversight
 - Security cameras
 - Armed cash couriers
 - Legal and IT requirements for PCI compliance to process credit card payments in-person
- Member benefits:
 - Billing discounts for automatic and paperless billing options are up to \$30/yr.
 - PEC will continue to support and receive check payments mailed and processed at the HQ location.
 - Ability to respond to member inquiries more quickly (service level improvement).
- Payment trending reflects a trend for options other than traveling to an office (2% of all payments are cash/check).
 - 54% of the membership utilize automatic payments for convenience and billing discounts.
 - 27% utilize self-service options such as online, mobile, phone system, or kiosks.

PEC Payment Options

Volume and support of major payment types per month, data from October 2022:

	#	%	Workforce Required to Support
Remit Payments	273,472	70%	
Autopay	209,457	54%	
Mail	34,617	9%	Member Relations Remit Team
Receiver	29,021	7%	
Self-Service	105,014	27%	
SmartHub	48,067	12%	
Mobile App	23,919	6%	NISC Systems No day-to-day management Periodic IT support
Secure Pay (phone system)	19,451	5%	
Pay Now	13,186	3%	
Kiosk	391	0.1%	
Offices	8,082	1.8%	
Lobby	4,826	1.0%	
Drive-Thru	1,863	0.5%	Member Relations Office Agents Office and phone support
Drop Box	1,393	0.3%	
Total Payments	389,346		



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