

# Consumer Education



Coordination of Existing EDC Call Center  
Scripts and Process Proposals for Electric  
Choice

August 26, 2011

# Preliminary Objectives

---

- Provide existing EDC call center scripts used to support electric choice with focus areas on:
  - 1) New Customers
    - 1.1 – Call Center Scripts
    - 1.2 – Web Interaction
    - 1.3 – Direct Mailings / Welcome Packet
  - 2) Moving Customers
    - 2.1 – Call Center Scripts
    - 2.2 – Web Interaction
    - 2.3 – Direct Mailings / Welcome Packet
  - 3) Existing Customer Interactions
    - 3.1 – Call Center Scripts
    - 3.2 – Web Interaction
    - 3.3 – Direct Mailings / Bill Inserts
- Provide a high level summary of EDC information
- Provide process proposals
- Identify items for consideration in development of Interim or Long Term Measures

# New Customers – Call Center Scripts 1.1

---

## Existing EDC Process

**PECO** - Explains Release of Information process. For applicant shopping questions, PECO information includes an explanation of electric choice which can include a basic understanding of electric choice and information on how to shop. Information includes an explanation that you may be able to save money by shopping with a competitive electric generation supplier and provides PA Power Switch Web site information along with PECO Website location for PTC. Information includes an explanation that whether customers purchase their electricity from a competitive electric generation supplier or from PECO, PECO will continue to safely deliver electricity, provide billing and customer support and respond to outages and other emergencies for all customers. (PECO Attachment 1 and 2)

**Duquesne Light** - We currently do not have specific scripting for applicants in regards to supplier choice. If the applicant requests information from our CSRs or inquires about it the information can be provided in the form of mailings, Websites or directing the applicant to [www.duquesnelight.com](http://www.duquesnelight.com) for more information. Duquesne also offers a group of specific choice agents that customers and applicants can reach when inquiring about electric choice.

**PPL Electric Utilities** -- Call type is "start/stop service" (PPL Electric terminology). Call type is NOT "new service installation" (PPL Electric terminology) which is typically an interaction with a contractor or electrician and not with the customer. "Script" for "start service" is PPL Attachment 1. Script does not include a discussion of shopping, however, that information is provided in the Welcome Package (PPL Attachment 2, described elsewhere). If customer raises questions about electric choice or price-to-compare, the CSR engages the customer in accordance with talking points such as those in PPL Attachments 7 and 8 (described elsewhere).

**FirstEnergy** - FirstEnergy uses scripting for new applicants in regards to supplier choice. If the customer is interested, mailings are sent with supplier choice information. The mailing provides an explanation of electric choice and includes a basic understanding of electric choice, Electric Generation Suppliers, and information on how to shop. (See First Energy Attachments 1 and 2).

# New Customers – Web Interaction 1.2

---

## Existing EDC Process

**PECO** - Explains Release of Information process. Explains that you may be able to save money by shopping with a competitive electric generation supplier and provides PA PUC Web site information. PECO explains that whether customers purchase their electricity from a competitive electric generation supplier or from PECO, PECO will continue to safely deliver electricity for all customers. (PECO Attachment 3) To obtain additional electric choice information and the PTC the applicant can access PECO.Com and Pecoanswers.com. (PECO Attachment 4)

**Duquesne Light** - If the customer begins service with Duquesne online, our self service start service option does not currently provide any supplier choice information on that screen. The Website does include links to papowerswitch and other information. (Duquesne attachment 1). The customer can also Live Chat with an agent on this page of our Website if assistance is needed with starting service online, and the agent if asked can direct the customer to online information about choice located on [www.duquesnelight.com](http://www.duquesnelight.com), under customer service and selecting electric choice and also direct the applicant to [www.papowerswitch.com](http://www.papowerswitch.com) or provide mailings.

**PPL Electric Utilities** -- Self-service application on the Web for "start service" (PPL Electric terminology). No screens or options related to shopping, however, the customer will be provided information in the Welcome Package (PPL Attachment 2, described elsewhere).

**FirstEnergy** - When customer applies for service via the Web scripting is prompted to the customer asking about their interest in supplier related information. (See FirstEnergy Attachments 3, 4 and 5). If customer inquires about shopping, they would be referred to [papowerswitch.com](http://papowerswitch.com) for a supplier list .

# New Customers – Direct Mailings/Welcome Packet 1.3

---

## Existing EDC Process

**PECO** - Welcome packet explains that customers can shop for electricity from a competitive electric generation supplier. Whether customers purchase their electricity from a competitive electric generation supplier or from PECO, PECO will continue to safely deliver electricity, provide billing and customer support and respond to outages and other emergencies for all customers. Provides PUC phone number and PA Power Switch Web site information along with PECO Web site location for PTC. Directs customer to contact their previous supplier for service at their new home. (PECO Attachment 5)

**Duquesne light** - We mail out a welcome packet that includes information about electric supplier choice. It provides the OCA Website and phone number as well as PA power switch Website ([www.papowerswitch.com](http://www.papowerswitch.com)). It also includes an Electric Choice Brochure: What You Need to Know and Where to Find it. This brochure includes a checklist for customers to use. (Duquesne Attachment 2). Customer's can also get information regarding an explanation about what choice is, including the definition of electric generation vs. transmission charges (Duquesne Attachment 3).

**PPL Electric Utilities** -- Welcome Package is sent to all customers who are new to PPL Electric's service territory; i.e., Welcome Packages are not sent when an existing customer is transferring service to another address within the service territory. A former customer who has not been a customer for more than 30 days is considered a new customer and DOES receive a Welcome Package. The current Welcome Package is PPL Attachment 2.

**FirstEnergy** - FE provides customers with the ABCs of shopping for an electricity supplier which includes information for the PAPowerSwitch website and Pennsylvania Office of Consumer Advocate website and phone number in addition to FirstEnergy's Retail Choice Center phone number and PTC information. By June 1, 2012, all new customer welcome packets will include an insert promoting the Commission's PAPowerSwitch.com website and the OCA's Residential Electric Shopping Guide at [www.oca.state.pa.us](http://www.oca.state.pa.us). (See FirstEnergy Attachments 6 and 9)

# Moving Customers - Call Center Scripts 2.1

---

## Existing EDC Process

**PECO** - Explains Release of Information process. For customer shopping questions, PECO information includes an explanation of electric choice which can include a basic understanding of electric choice and information on how to shop. Information includes an explanation that you may be able to save money by shopping with a competitive electric generation supplier and provides PA Power Switch Web site information along with PECO Web site location for PTC. Directs customer to contact their previous supplier to reestablish a supply contract at the customer's new location. Information includes an explanation that whether customers purchase their electricity from a competitive electric generation supplier or from PECO, PECO will continue to safely deliver electricity, provide billing and customer support and respond to outages and other emergencies for all customers. (PECO Attachment 1 and 2)

**Duquesne Light** - The company currently does not use scripting for current customers moving from one location to another within our service territory in regards to supplier choice. This includes customers who have already selected a supplier. If the customer requests information or inquires the information can be provided such as website, phone numbers and mailings (Duquesne Attachments 2 and 3).

**PPL Electric Utilities** -- Call type is "transfer service" (PPL Electric terminology). Script does not include a discussion of shopping. If customer raises questions about electric choice or price-to-compare, the CSR engages the customer in accordance with talking points such as those in PPL Attachments 7 and 8 (described elsewhere). "Script" for "transfer service" is PPL Attachment 3.

**FirstEnergy** - FirstEnergy uses scripting for new applicants in regards to supplier choice. If the customer is interested, mailings are sent with supplier choice information. We advise the applicant to contact their EGS if they want service at their new location. The mailing provides an explanation of electric choice and includes a basic understanding of electric choice, Electric Generation Suppliers, and information on how to shop. (See First Energy Attachments 1 and 2).

# Moving Customers - Web Interaction 2.2

---

## Existing EDC Process

**PECO** - Provides an option for Release of Information. To obtain additional electric choice information and the PTC, the customer can access PECO.Com and Pecoanswers.com a Web site that provides customers with additional electric choice education and links to PA Power Switch Web site and the Office of the Consumer Advocate. (PECO Attachment 4)

**Duquesne Light** - If the customer begins service with Duquesne Light online, our transfer service option does not currently provide any supplier choice information on that screen. The customer can Live Chat with an available agent on this page if assistance is needed with moving, and the agent if asked can direct the customer to online information about choice located on [www.duquesnelight.com](http://www.duquesnelight.com), under customer service and selecting electric choice and also direct the applicant to [www.papowerswitch.com](http://www.papowerswitch.com). Once a transfer of service is completed, if the customer is moving from one location within Duquesne Light's service territory to another and they were at their previous location for 2 or more years, then they will get a Welcome packet as mentioned earlier.

**PPL Electric Utilities** -- Self-service application on the web for "transfer service" (PPL Electric terminology). No screens or options related to shopping.

**FirstEnergy** - When customer applies for service via the web scripting is prompted to the customer asking about their interest in supplier related information. (See FirstEnergy Attachments 3, 4 and 5). If customer inquires about shopping, they would be referred to [papowerswitch.com](http://papowerswitch.com) for a supplier list .

# Moving Customers - Direct Mailings/Welcome Packet 2.3

---

## Existing EDC Process

**PECO** - Welcome packet explains that customers can shop for electricity from a competitive electric generation supplier. Whether customers purchase their electricity from a competitive electric generation supplier or from PECO, PECO will continue to safely deliver electricity, provide billing and customer support and respond to outages and other emergencies for all customers. Provides PUC phone number and PA Power Switch Web site information along with PECO Web site location for PTC. Directs customer to contact their previous supplier for service at their new home. (PECO Attachment 5)

**Duquesne Light** - Duquesne Light currently does direct mailing to customers who are in Duquesne Light's service territory moving from one location to another if they were at the previous location for 2 years or more. The mailing includes the Customer guide which has info on supplier choice as well as the Electric Choice Brochure on What you Need to Know and Where to Find it. That brochure includes a checklist for customers to use (Duquesne Attachment 2). On request, the information can also be mailed to the customer

**PPL Electric Utilities** -- No direct mail is sent as the result of a "transfer service" transaction.

**FirstEnergy** - FE provides customers with the ABCs of shopping for an electricity supplier which includes information to the PaPowerSwitch website and Pennsylvania Office of Consumer Advocate website and phone number in addition to FirstEnergy's Retail Choice Center phone number and PTC information. By June 1, 2012, all new customer welcome packets will include an insert promoting the Commission's PAPowerSwitch.com website and the OCA's Residential Electric Shopping Guide at [www.oca.state.pa.us](http://www.oca.state.pa.us). (See FirstEnergy Attachment 6 and 9)

# Existing Customer Interactions – Call Center Script 3.1

## Existing EDC Process

**PECO** - For customer shopping questions, PECO information includes explanations of electric choice which can include a basic understanding of electric choice and information on how to shop. Information includes explanations that you may be able to save money by shopping with a competitive electric generation supplier and provides PA Power Switch Web site information along with PECO Web site location for PTC. Information includes explanations that whether customers purchase their electricity from a competitive electric generation supplier or from PECO, PECO will continue to safely deliver electricity, provide billing and customer support and respond to outages and other emergencies for all customers. (PECO Attachment 1 and 2)

**Duquesne Light** - Currently provides electric choice information to customers who inquire about a possible high bill. As part of our explanation of usage, we do indicate rate changes to customers and provide them with the website for a price to compare. Duquesne trains all of our employees who handle high bill or credit inquires with information about how to present electric choice options to customers following the guidelines set forth by the Pennsylvania Electricity Generation Customer Choice and Competition Act of 1996. (Duquesne attachment 4). Duquesne also provides an additional IVR upfront message to customers or applicants calling, allowing them a option for just supplier choice information. These calls are routed to a separate queue specifically available to support choice.

**PPL Electric Utilities** -- There are no call center scripts for "electric choice information". Calls range from straight-forward requests that can be addressed by a simple fulfillment (web referral, brochure, etc) to complex discussions of technical matters (16-day rule, bill components, etc.). Materials provided as fulfillments to customers requesting choice info are provided as Attachments 4 (Residential Choice), 5 (Business Choice), and 6 (PUC PaPowerSwitch). PPL Attachment 7 is a set of talking points available to CSRs to guide their conversations with customers regarding price-to-compare. PPL Attachment 8 is a set of talking points available to CSRs to guide their conversations with customers regarding enrollment with an EGS.

**FirstEnergy** - Provides general choice information to customers who inquire about alternate suppliers which can include a basic understanding of electric choice, suppliers, process timing and information on how to shop. FirstEnergy also explains that customers can shop but will still receive electricity, billing/outage support, etc from FirstEnergy. Provides power switch web site along with directing customer to FirstEnergy website for a list of suppliers.

# Existing Customer Interactions – Web Interaction 3.2

---

## Existing EDC Process

**PECO** - Website includes explanations of electric choice, information on how to shop and details on the PTC including the PTC calculator. Includes explanations that you may be able to save money by shopping with a competitive electric generation supplier and provides links to PA Power Switch Web site. Explains that whether customers purchase their electricity from a competitive electric generation supplier or from PECO, PECO will continue to safely deliver electricity, provide billing and customer support and respond to outages and other emergencies for all customers. Website also provides customers with a link to Pecoanswers.com a Web site that provides customers with additional electric choice education and links to PA Power Switch Web site and the Office of the Consumer Advocate. (PECO Attachment 4)

**Duquesne Light** - Duquesne provides current customers and/or applicants the ability to search for supplier information on our website. In addition, Duquesne Light offers a Live Chat option for billing inquiries where a CSR can also provide links to websites for the customer, supplier information and if requested, mailings.

**PPL Electric Utilities** -- PPL Electric's choice web site is at <http://www.pplelectric.com/choice/information/>. Customers may visit the site on their own or be referred there by CSRs or media messages (Connect newsletter, bill insert, press release, direct mail, etc.). There is no direct link from the PPL Corporation home page, but clicking on "customer" and "PPL Electric Utilities" takes the visitor to the PPL Electric Utilities homepage where there is a clearly marked direct link to Electric Choice.

**First Energy** - Does provide the ability to search for supplier information.

## Existing Customer Interactions – Direct Mailings / Bill Inserts 3.3

### Existing EDC Process

**PECO** - Beginning January 2010 through 2011, customers have been provided a bill insert of either Energy @ Home or Energy @ Work. Each issue features a column specifically devoted to Customer Choice/Shopping and can include an explanation of electric choice and information on how to shop. PECO explains that you may be able to save money by shopping with a competitive electric generation supplier and provides PA Power Switch Web site information along with PECO Web site location for PTC and Pecoanswers.com for additional electric choice education. PECO explains that whether customers purchase their electricity from a competitive electric generation supplier or from PECO, PECO will continue to safely deliver electricity, provide billing and customer support and respond to outages and other emergencies for all customers.

An article and a list of current Competitive Electric suppliers was featured in: July 2010, November 2010, March 2011 and July 2011. (PECO Attachment 5). In April of 2010 for 'Energy @ Home and May 2010 for 'Energy @ Work, a Consumer Education Guide was sent that outlined Deregulation, expiration of rate caps, impact on customers, programs to help save money, payment assistance programs and Customer Choice. (PECO Attachment 6)

**Duquesne Light** - When an existing customer contacts Duquesne with an inquiry about a high bill or other credit related/billing matter, upon request Duquesne will provide the mailings (Duquesne Attachment 3). Duquesne also provides a list of suppliers found on PA Power Switch to customers who do not have access to the internet, as well as the links and phone numbers customers would need to make an educated choice. Duquesne also provides newsletters in the bills with customer shopping information and other topics. This newsletter is also posted on the Duquesne website

**PPL Electric Utilities** -- PPL Attachments 9 and 10 are the price-to-compare mailings sent to Residential and Commercial customers, respectively, in October 2010. These were the last of the direct mass-mailed pieces on choice. PPL Attachment 10 is the price-to-compare bill insert provided to customers in the May, 2011 cycle of bills. This is typical of what is contemplated in the future as price changes occur quarterly.

**FirstEnergy** - FE provides customers with the ABCs of shopping for an electricity supplier which includes information to the PaPowerSwitch website and Pennsylvania Office of Consumer Advocate website and phone number in addition to FirstEnergy's Retail Choice Center phone number and PTC information. By June 1, 2012, all new customer welcome packets will include an insert promoting the Commission's PAPowerSwitch.com website and the OCA's Residential Electric Shopping Guide at [www.oca.state.pa.us](http://www.oca.state.pa.us). (See FirstEnergy Attachment 6 and 9)

# Additional Choice Information – Interactive Voice Recognition (IVR)

---

- PECO
  - Provides customers with an upfront message to select a specific option if they are calling for information regarding competitive suppliers or shopping for electricity:
    - Once the option is selected, the customer is routed to a separate queue specifically available to support choice
  
- Duquesne Light
  - Provides customers with an upfront message to select a specific option if they are calling for information regarding suppliers or shopping for electricity:
    - Once the option is selected, the customer is routed to a separate queue specifically available to support choice
  
- PPL
  - IVR has an Electric Choice option which is used to direct the call to the proper queue, but offers no self-service options
  
- First Energy
  - FirstEnergy has a dedicated 800 line which places the customer in the Choice section of the IVR. The Choice section of the IVR is also available for customers calling our other customer service lines. The IVR allows for self-service relative to recision and also offers FAQs for shopping. Customers who request to speak to a representative (based on selections made in the IVR), are transferred to our Choice skilled representatives

# Additional Choice Information – On Hold messaging

---

- PECO
  - On hold messaging provides customers with:
    - Information that they may be able to save money by choosing a competitive electric generation supplier as part of Pennsylvania Electric Choice
    - Directions to their individual Price to Compare on their bill and the calculator located on PECO's website
    - An explanation that whether you purchase your electricity from another supplier or from PECO, you can count on PECO to safely deliver your electricity, provide billing and customer support and respond to outages and other emergencies for ALL customers
  
- Duquesne Light
  - Duquesne does not have on hold messaging. We strive to meet our service level goals and our average customer hold time is 30 seconds
  
- PPL
  - Hold functionality has the capability to provide messages, but has not been used for choice messages. Company recently instituted a "virtual hold/automated call back" functionality which would eliminate customers being in the traditional hold queue
  
- First Energy
  - FirstEnergy does not currently play hold messaging relative to choice. We also use Virtual Hold which does limit the time customers spend in traditional hold and therefore may not have the opportunity to hear the messaging

# Summary

---

- ❑ Information reflects EDC compliance with current regulations such as adherence to code of conduct, call quality, and level of service
- ❑ Information reflects EDC support of customers' efforts to understand electric choice and make decisions that are appropriate for their circumstances

# Process Proposals

---

- RESA Discussion Document
  - Interim and Long Term Measures
- Direct Energy
  - New York Referral Programs

# Items for Consideration in Development of Interim or Long Term Measures

---

- ❑ Changes to existing policies and regulations
- ❑ Implications to call center operations
- ❑ Customer interaction options
- ❑ Equitable treatment of all suppliers
- ❑ Rules for standard offers
- ❑ Recovery of incremental costs

---

# Appendix

# General EDC Call Categories

---

- ❑ Connect / Disconnects
- ❑ Billing
- ❑ Credit / Collections
- ❑ High Bills
- ❑ Electric / Gas Emergencies
- ❑ Other