

System Forester Best Management Practices Customer Interface

Introduction

This paper summarizes key issues regarding customer interface of electric utility line-clearance programs. There are countless customer touch point opportunities involved with line-clearance operations. These opportunities manifest as direct or indirect contacts, community education activities, and/or training.

The Utility Arborist Association's (UAA) System Forester Task Force has researched and evaluated the typical practices involved in customer interface for line-clearance programs and provides these Best Management Practices (BMP's) as guidelines for their peers and the utility line-clearance industry.

Problem Statements

- Inconsistent message can confuse customers or give the wrong impression.
- Lack of a notification program may increase customer complaints.
- Improper training can worsen the day-to-day interactions between line-clearance workers and the customer base and may increase the number of refusals.

Overview

There are many varied ways in which electric utility companies have contact with their customers. Some of these methods involve direct face-to-face contact, while still others utilize indirect methods. Utility programs using BMPs showcase both of these types of contact methods. Each of the following elements is typically present in a BMP program:

- Notification process
- Public education programs
- Feedback loop
- Training programs
- Consistent refusal process

The following sections discuss these elements in further detail.

Customer Touch points

Notification

Historically, Utility Vegetation Management (UVM) programs have been known to have an enormous impact on customer satisfaction. UVM departments tend to be the one group within the company that has the most contact with customers. As such, it is imperative the UVM programs adopt some sort of notification program, which is an essential part of a BMP program. It serves to:

- inform customers of upcoming work.
- give the customer an opportunity to discuss work before commencing.
- provide the utility an opportunity to educate customers and learn of their expectations.

- give the company a chance to seek permission where required.

By using a notification program, the utility is able to communicate its intentions prior to the work commencing, thereby reducing potential complaints and/or refusals. The program leads to better customer satisfaction and can translate into higher company satisfaction scores.

Many states have positive notification and permission requirements. These requirements can range from a mailing – postcard or canned form letter – to a personal phone call in advance of the UVM work. Typically, at least a door card is used within a few weeks of the work commencing.

The door card will contain information regarding the process and what generally will be done on the customer's property. It may also have some educational information reasoning for UVM work and why it's important to them. Also, the card should provide utility contact information in case customers have questions or concerns about the proposed work. This card should be developed in conjunction with the utility company's corporate communications group to ensure it is aligned with the corporate message.

The door cards are distributed either by utility company personnel and/or contract personnel – either a tree company or third party pre-planning company. Some companies find it more effective to have a third party company do all pre-notification so as to allow the tree contractor to focus solely on vegetation management work. Removal of incompatible tree species or brush is often prescribed and may require the written permission of the homeowner/landowner. In these cases, it can prove efficient to have a pre-notification company responsible for tracking down the appropriate party and acquiring that signature.

The process of notification many times consists of face-to-face conversations with the customer or tenant. This presents a great opportunity to convey the utility's key messages in a beneficial way. Written communication lacks an essential element of effective communication – non-verbal. These direct customer contacts present an opportunity for the company to shine. The notification employee should be a skilled ambassador for the utility's UVM program.

Public Education

Many best-in-class UVM departments include a well-developed public education program. These programs serve to educate customers, agencies, and other groups about the reasons for UVM work and why it is important. It affords the utility the opportunity to communicate with the customer in a setting that is more conducive to learning. The pre-notification process for imminent UVM work can often evoke emotional responses from customers. This is not always the best time to attempt to educate the customer about the Right Tree-Right Place concept, for example. On the other hand, if customers are afforded an opportunity to speak with a UVM professional at a Home and Garden show, for instance, the chances that customer will be receptive to the utility's message

are significantly increased. And if the experience is a positive one, then the customer can act as an unofficial ambassador by passing on that information to friends and family.

Personal targeted presentations to groups of people can be extremely effective in conveying key messages and addressing many common concerns associated with UVM work. These presentations can be given to informal neighborhood groups, civic group luncheons (like garden clubs, Rotary Club, or Kiwanis Club, etc), or formal green-industry conferences. Presentations can include many of the same key messages contained in the door cards and other company publications, and should align with the corporate message. It is a way to reach large numbers of people in the least amount of time. Education of public utility commission staff is also a key way in which these targeted presentations can benefit the UVM program. Presentations provide a unique opportunity for state regulators to learn about the challenges associated with vegetation management activities, and can assist utilities during future rate case proceedings.

Most successful UVM programs have developed some type of publication, be it a tree care brochure, leaflet, or bill stuffer that seeks to inform customers about the utility's program. The tree care brochure and other corporate publications are invaluable in reaching yet another segment of the public. These items provide a chance to deliver more detailed explanations of the elements of the programs. Many utilities also provide information on proper tree care including planting, pruning, and proper placement of trees in relation to power lines. These brochures may give details of certain recommended tree species that are more compatible with power line rights-of-way. These publications can be used to supplement activities such as Arbor Day celebrations and tree planting events. Other messages that may be communicated include:

- Right Tree/Right Place
- Options Available to Customers
- Sustainability or "green" initiatives

Working collaboratively with corporate communications groups ensures that the publications meet the needs of the program and company as a whole.

Feedback

In order to measure the success of a program, it may be necessary to collect data related to customer satisfaction. Many UVM programs utilize customer satisfaction surveys to gather that data. The survey in many cases can be used to measure the different elements of the UVM program. Was your message effective? Did the tree crew perform professionally? Did you receive notification prior to the work commencing? These are examples of some commonly asked survey question. Some states mandate customer surveys.

The survey can be in the form of a door card left on the door after the tree crew has completed the work. These surveys typically come in a business reply format that is mailed to a central location for tabulation and for response to the customer if requested. Once this information is gathered it shows definitively the level of success of the program

and can be used in other arenas such as regulatory. Another format of a satisfaction survey can be a phone survey. This type of survey involves direct form of communication where customers are asked a series of question relating to UVM activities. Again the results are tabulated and can be used to justify the program.

Customer focus groups are used sometimes to gain insight into the needs and concerns of the certain customer groups. They can be used to benchmark performance against a goal or standard set by the company. Advantages associated with this method of feedback include a more in-depth process, opportunity to spend a longer period of time with key stakeholders, and personal one-on-one communications.

Those companies that are successful in communication often incorporate feedback received from these methods back into the UVM program. Development of new processes or tweaking of existing processes can be an output from the feedback received. It in turn can result in higher customer satisfaction scores. Tying survey results to employee and contractor performance can serve to encourage effective communications with the customer. Feedback can also be used to recognize and reward excellent performance, and drives some employees to strive for better results.

Stakeholder Training

There are a number stakeholders involved in UVM programs that benefit from on-going training. Most important are the front line UVM workers or the tree care company employees and third party pre-planners. They are the ones who have the largest amount of day-to-day contact with utility customers and are often looked at as ambassadors of the utility company itself. Therefore, it is imperative that these employees are skilled in communicating with the public. Training also increases their credibility with the customer. BMPs include regular, typically annual, training of UVM contractors. Offering effective communication training can enhance these skills. Other items that can be covered during an annual training session include proper arboriculture practices, environmental awareness and electrical hardware recognition.

Call center employees that may field calls from the public regarding vegetation management activities also should be trained regularly on proper ways to address common concerns about the UVM program. Because this department can experience high turnover rates, this training should be done on an as needed basis. Items to be included in this training session include: basic specifications of UVM program including notification process, clearances, and name of the company doing UVM work. This information can help to satisfy customers in short amount of time on the phone and minimize the number of complaints that may result from inaccurate or delayed responses from the company.

Company executives also may require some guidance in the policies and procedures of the UVM program. As with other employees, there can be turnover at the top levels of the company, and sometimes these individuals have little first-hand knowledge about UVM activities. This necessitates they be brought up to speed on the importance of the program and its key objectives. By keeping those key persons well versed, it can help to

build alliances and alleviate miscommunications in the future. Other departments within the utility company that can benefit from regular UVM training include:¹

- Legal
- Regulatory
- Environmental
- Supply Chain
- Engineering, Design, Construction
- Public Relations

Refusal Process

Although it is true the majority of utility customers agree to proposed UVM work or at least understand the significance of purpose of it, there remain a small number of individuals who can and do refuse to allow the work to continue. These few numbers of customers can consume a large portion of a Utility Arborist's time. Having a clear, consistent refusal process can minimize the time involved in resolving these issues.

Steps involved in an effective refusal process may have the following items:

- Documentation by UVM employee.
- Research easements/right-of-way agreements for legal rights.
- Refer to tariff or other regulations for procedure, if applicable.
- Progression of UVM employees meeting with customer all using same key messages.
- Evaluation of possible alternatives to required UVM work (i.e., relocation of lines, undergrounding lines, alternative construction).
- After multiple attempts to seek agreement, follow through with required work.

As previously stated, it is imperative that these steps are followed in the majority of cases, if at all possible, to establish the concept of consistency. Many utilities that have a similar process in place rarely have lingering refusals left on their systems. Most refusals are a result of a disconnect between the customer's idea of what is proper pruning and what is industry standard, scientifically proven arboricultural practices.¹ Once time is taken to explain this many of these refusals can be resolved cordially.

Summary

In conclusion, UVM programs have numerous customer touch points. Vegetation Management departments often have more day-to-day contact than most other utility company groups. Successful programs have well-developed customer interface programs to including but not limited to:

- Notification
- Public Education
- Feedback
- Stakeholder Training
- Refusal Process

¹ Utility Vegetation Management Final Report March 2004 – CN Utility Consulting, LLC

A key process to successful Customer Interface programs is notification of upcoming tree work. It is imperative that customers know, in advance, what work is required and in the case of removals, a signature may be required. Pre-notification typically takes place a few weeks in advance and can be done by utility employees, tree contractor, or third party pre-notification companies. Having a strong notification program reduces customer complaints and can result in increased production.

Public education can improve customer satisfaction scores by informing customers about UVM activities outside the sometimes emotionally-charged tree trimming scenario. Brochures, pamphlets, and bill stuffers are common ways to communicate with the general public about not only UVM activities but also proper tree care principles. These items should be developed in conjunction with the utility company's corporate communications department to ensure the publications align with the corporate message. Individual presentations to civic organizations and agencies can also be effective in educating people about the necessity of UVM work and answer questions that may arise in a more conducive environment.

Feedback is extremely important to measure the effectiveness of the UVM program and to cost justify the elements of the program. Data is typically collected through the use of a customer satisfaction survey – usually in the form of a door card. This data can confirm what may already be known – that most customers are either satisfied or very satisfied with the line clearance work being performed by the utility company. Another method of collecting data includes hosting customer focus groups and gathering even more detailed information. These results become more effective when incorporated into existing programs.

On-going training must be part of any UVM program to include: contract tree workers, third party pre-notification personnel, call center employees, and a number of other internal departments. Special attention must be paid to upper management as these positions are subject to turnover. Many times these individuals are not aware of the importance of the program and its key objectives. High-level managers who have been trained can become effective advocates for the program.

Even after all these educational efforts, oftentimes customer refuse to allow needed UVM work to commence. In these instances, it will be necessary to enact a strong refusal process. This process must be consistent in its application. It involves documentation, research of easements, rights-of-way agreements, tariffs, or other documents to determine the utility's rights under the law. If the utility is well within its rights and the offending vegetation has the potential to interfere or is already interfering with system reliability then work must be completed. Although it happens infrequently, it may be necessary to provide notification to the customer and then following through with the needed vegetation management work. Many times the repeated contacts from utility and contractor personnel are enough to convince reluctant landowner of the necessity of the work and it does proceed uneventfully.

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