



NYSERDA

Introduction to New Contractor Support Plan & Help Center

Home Performance with ENERGY STAR[®]

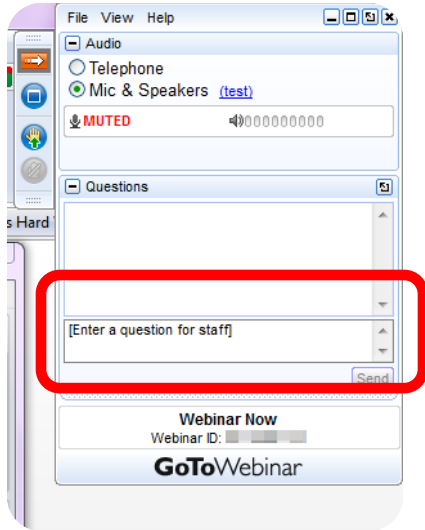
March 2, 2015

Introduction

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Partner Services Manager, Conservation Services Group

Questions



To ask a question, type into the *[Enter a question for staff]* field and click Send.

Agenda

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- Overview Contractor Support Plan
- Staffing Changes
- Process Changes
- Contractor Help Center Demo
- Conclusion w/ Q&A

Overview Contractor Support Plan

Overview Contractor Support Plan

- **Need:** Implementation of additional Program efficiencies & changes in contractor support requirements have resulted in the need to shift the Partner Support structure.
- **Solution:** The creation of the Centralized Support Plan which will feature:
 - New staffing and roles & responsibilities;
 - New technology solutions and
 - Changes to interactions between contractors and Program support;

Overview Contractor Support Plan

- Transition from regional Technical Field Representative (TFR) model to Centralized Support featuring the Contractor Help Center;
- Shift from in field support to remote support; and
- Ensure timely resolution, exceptional customer service, and high value interactions with Subject Matter Experts (SME).

Contractor Help Center

- Intuitive user interface with New Contractor Support site;
- Dynamic FAQ with Knowledge Base;
 - Self Help Access 24 / 7
- Fully mobile compatible;
- Ability for contractor to create and support their request within system;
- Instant chat for real-time online support; and
- Toll-free hotline – voicemail integration.

Technology Value-Adds

- As Help Desk matures, the dynamic Frequently Asked Questions (FAQ) and Knowledge Base will become more robust – enabling contractors to become more self-sufficient;
- Streamlined process with less “bouncing” around for answer and need to contact multiple individuals;
- More efficiently track, resolve, report, and analyze trends of issues; and
- Experience over past year with the various roll-outs have shown remote support works.

Contractor Help Center

- Methods of communication:
 - Ticket creation – Help Center located as part of Contractor Support site;
 - Email: contractorsupport@csggrp.com;
 - Instant chat for real-time online support;
 - Toll-Free hotline 1-800-284-9069.
- Help Center Hours
 - Monday – Friday
 - 8:30AM – 5PM

Changing Communication Channels

- Emailing
 - ContractorSupport@...
 - HPwES-Audit@...
 - HPwES-Info@...
 - NYSIncentiveInquiries@...
 - HPwES-DIPilot@...
 - SI.Salespilot@...
- Calling
 - Field staff
 - Program operations staff
 - Audit call center
 - Albany main line

Staffing Changes

The New Centralized Support Team

- Two Program Analysts
- Two Senior Account Managers (West/East)
- Two Senior Technical Support Analysts

The New Centralized Support Team

- Program Analysts
 - Program experts fluently versed in all Program related details and portal work flow;
 - Navigate Program approved modeling software for program compliance.
 - Ensuring the continuous flow of incoming requests into Help Center are addressed.

The New Centralized Support Team

- Senior Account Managers
 - Divided into Eastern and Western regions;
 - Provide region based support to the Customer Concern, QA/QC and Audit concern processes;
 - Provide higher level account operations and development support.

The New Centralized Support Team

- Senior Technical Support Analysts
 - Provide high value technical review and consultation services to support the Program and its Partners pertaining to their specific technical expertise.

Process Changes

Overarching Themes

- Availability and frequency of remote support provided should increase;
- Frequency of site visits to be minimized;
- Focus on photo evidence and customer verification;
- Help Center and contractors' use of Knowledge Base is important for a successful transition.

Affected Processes

- Quality Control Activities:
 - Customer Audit & Projects Concerns; DOC/PINS follow-up;
- New Contractor Support Activities:
 - On-boarding new contractors, new contractor training and oversight;
- Support for Existing Partners:
 - Technical support and training; business development & marketing support; software and Portal guidance;

Contractor Help Center Demo

Contractor Help Center Demo

The screenshot displays the Contractor Help Center interface. At the top left is the logo for "HOME PERFORMANCE WITH ENERGY STAR" and "New York Contractor Support". The navigation menu includes "Home", "Help Center" (which is highlighted), "Program Documents", "Training Videos & Webinars", and "Contacts". On the right side, there are buttons for "My activities", "Submit a request", and "Sign in". Below the navigation is a search bar labeled "Search the Help Center". The main content area features three large icons: a gear for "Submit a Request", a clipboard for "FAQ", and a briefcase for "My Requests". At the bottom, there is a "Trending Q's" section with a sub-header "Announcements" and a question: "Can my customers apply for Program Financing before they apply for the HPwES Audit? Where can I find more information on the Program Financing?".

HOME PERFORMANCE WITH ENERGY STAR
New York Contractor Support

Home Help Center Program Documents Training Videos & Webinars Contacts

My activities Submit a request Sign in

Search the Help Center

Submit a Request FAQ My Requests

Trending Q's Announcements

Can my customers apply for Program Financing before they apply for the HPwES Audit?
Where can I find more information on the Program Financing?

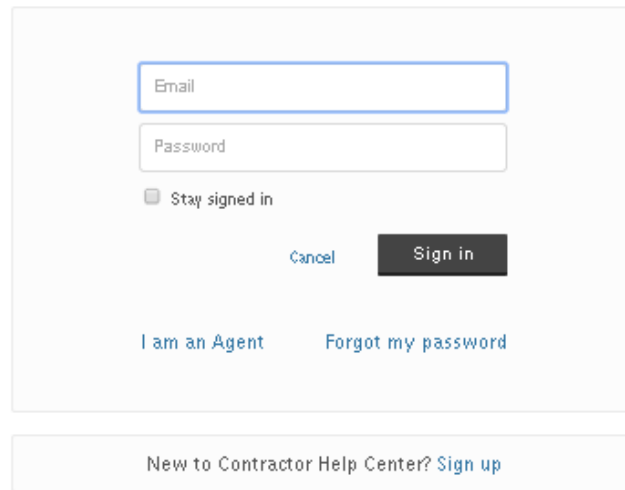
Contractor Help Center Tips

- Help Center sends out immediate response confirming receipt of support request
- Logging in is not required to reply to a support response
 - Simply reply to the email.
- Status of pending support requests
 - Open
 - Awaiting Your Reply
 - Solved
- User Login's have been distributed
 - Use the instructions in the email to set your password.

Contractor Help Center Tips

- For new users requiring a log-in either:
 - Send your first support request to contractorsupport@csggrp.com or
 - On the Help Center click Sign In and Select Sign Up
- Users can reset your Password by selecting “Forgot my password”
 - Or set up your initial password if you did not already.

Sign in to Contractor Help Center



The screenshot shows a sign-in form with the following elements:

- An input field for "Email".
- An input field for "Password".
- A checkbox labeled "Stay signed in".
- Two buttons: "Cancel" and "Sign in".
- Two links: "I am an Agent" and "Forgot my password".
- A footer link: "New to Contractor Help Center? Sign up".

Have you emailed us? [Get a password](#)

If you've communicated with our support staff through email previously, you're already registered.

You probably don't have a password yet, though.

Contractor Help Center Tips:

- Contractors able to provide feedback on experience within new Help Center system.
- Submit separate tickets for separate issues.
- If same issue for multiple customers/projects – can list them in the same ticket.
- Once a ticket is solved, do not reply to create a new ticket. Start new email or go to the ticket form.

Contractor Help Center Tips

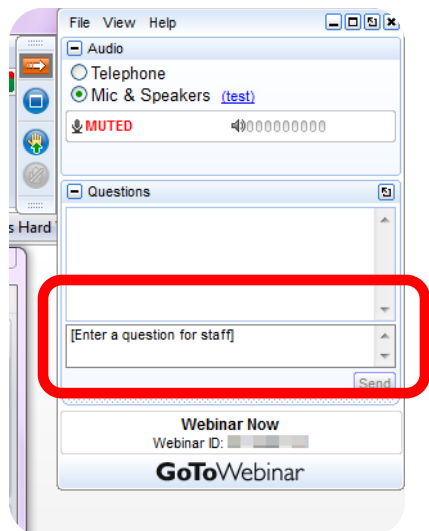
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Conclusion

Additional Training and Resources

- Upcoming Trainings:
- Next Webinar March 16:
 - More detailed review of changes to Process and Procedures
 - Additional Zendesk system training
 - Robust Q&A
- Additional Resource:
 - [End-User Guide](#)

Additional Questions



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Thank you