



Implementation Management Job Profile

Job Family: Implementation Management Department: Customer Engagement Function: Customer Care Reports to (title): Supervisor or Manager	Last Updated: September 2011
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Job Summary	Provides post sales project implementation support. Manage the implementation of energy efficiency projects from inception to incentive payment, working with clients to provide support to outline, scope, milestones and monitor budget and cost controls for cost effectiveness and feasibility. Manage energy efficiency projects by tracking and monitoring project progress and influence actions and decisions to help move to completion and maintain customer project information tracking systems. Responsible for arranging technical reviews and inspections as required. Projects have a distinct beginning and end and usually correspond to the energy efficiency program cycles. There are typically no direct reports; rather people and other resources and stakeholders are coordinated throughout a project			
Major Responsibilities	<ul style="list-style-type: none"> PROJECT MANAGEMENT: Manage the customized project pipeline and reporting. Manage the turnaround times for each step in the process of validating project energy savings. Ensure the implementation of program guideline, project scope and project objectives. Responsible for policies and procedures adherence by vendors and customers when implementing energy efficiency projects. Coordinate all stakeholders involved in the technical review of the projects. Obtain commitment on; schedule, cost and incentive payments per project, resources, contingency and communication plans. Obtain management approval of payment of project incentives as needed. Manage the integration of consultant's tasks and to track, review and approve consultants deliverables. ENERGY EFFICIENCY SUBJECT MATTER EXPERT: Responsible for eligibility of project measures and adherence to regulatory guidelines and standards when determining energy savings. Responsible to identify, analyze, and address project performance issues. Responsible to assess project risk, adhere to regulatory guidelines in the development of projects and develop contingency plans in more complex projects, as well as to identify and communicate lessons learned and best practices. Participate in regulatory measurement and verification audits and data request. PROJECT DOCUMENTATION: Ensure that proper project documentation is maintained and tracked in database and files to be used for reporting purposes and for regulatory evaluation and measurement audits. 			
Job Title	Cust Care Implementation Manager, Associate	Cust Care Implementation Manager	Cust Care Implementation Manager, Senior	Cust Care Implementation Manager, Expert
Position Title	Implementation Manager, Associate	Implementation Manager	Implementation Manager, Senior	Implementation Manager, Expert
PGE Job Level	Associate	Career	Senior	Expert
SAP Job Code	50419546	50419547	50419548	50419549
Distinguishing Characteristics	<ul style="list-style-type: none"> Manage the common and routine projects for which work steps, timelines and budget activities are routine and well established. Assist other Customer Energy Managers on other projects as directed Provide routine project status updates and reports as required or requested Maintain project status updates in database and project files used for regulatory reporting. 	<ul style="list-style-type: none"> Manage moderately complex projects that require knowledge of technical concepts, principles or practices in a specific discipline, field or area of expertise of energy efficiency in the Industrial, Agricultural and Commercial sectors. Identify and contract with or secure appropriate technical consultants to develop or review energy savings calculations, validate project incentive payments and perform pre and post field verifications. Advise clients on program options, costs and benefits, and structures project approach, timelines and budget accordingly. May participates in discussions at customer meetings with regards to technical feasibility, and compliance to program guidelines Provide QC management of projects and incentive 	<ul style="list-style-type: none"> Manage moderate to complex projects that require extensive knowledge of concepts, principles or practices in a specific discipline, field or area of expertise of energy efficiency in the Industrial, Agricultural or Commercial sectors Identify and contract with or secure appropriate technical consultants to develop or review energy savings calculations, validate project incentive payments and perform pre- and post field inspections. May advise technical consultants on the technical approach to take in the review of projects. Applies and adapts project management techniques and regulatory guidelines to assist customers in understanding the various energy efficiency programs and help them manage their energy use through energy efficiency 	<ul style="list-style-type: none"> Manage complex or major projects with high technical complexity that require extensive knowledge of concepts, principles or practices in a specific discipline, field or area of expertise in energy efficiency and regulatory requirements in the Industrial, Agricultural and Commercial sectors. Identify and hire appropriate technical consultants with special expertise to develop or review energy savings calculations, validate project incentive payments and perform pre- and post field inspections and monitoring. Serve as advisor in complex projects on technical approach and program policies. Applies and adapts project management techniques and regulatory guidelines to assist customers in understanding the various energy efficiency programs and organizational opportunities and help them manage their energy use through energy efficiency Leads in discussion in customer meetings and assists in the development of projects and the review of these projects to take



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		<p>payments by ensuring regulatory compliance and engineering and incentive calculation accuracy.</p> <ul style="list-style-type: none"> • Maintain project status updates in database and project files used for regulatory reporting and forecasting. 	<ul style="list-style-type: none"> • Participates or leads in discussions during customer meetings in the development of projects to take advantage of business and energy efficiency opportunities ensuring at the same time that all stakeholders (customer as well as ES&S rep) are in compliance with regulatory policies and procedures. • Provide QC management of projects and incentive payments by ensuring regulatory compliance and engineering and incentive calculation accuracy. • Participates in regulatory evaluations and internal audits and data request. • Maintain project status updates in database used for regulatory reporting and forecasting. • Present analysis, findings and recommendations to functional management and to management of customer organizations 	<p>advantage of energy efficiency and industry opportunities.</p> <ul style="list-style-type: none"> • Collaborate and participate in the development of program designs or enhancements and new measures to take advantage of business and industry opportunities to promote energy efficiency and organization. • Provide QC management of projects and incentive payments by ensuring regulatory compliance and engineering and incentive calculation accuracy. May conduct QC internal evaluation of project pipeline performance and implement process improvement strategies. • Projects have associated risks, high visibility, and can be sensitive or widely varied. Will serve as member of EM&V (Evaluation, Measurement and Verification) team during regulatory evaluations and internal audits • May provide training to staff on specialized expertise in the field of energy efficiency. • Present analysis, findings and recommendations to Directors and Managers across organization, and to senior management of customer organizations
Supervisory Responsibility	No supervisory responsibility	No supervisory responsibility	May provide direction and coaching to other customer energy managers.	May provide direction and coaching to other senior customer energy managers and may supervise 1 or 2 associate Customer Energy Managers.
Education	BA/BS or equivalent experience	BA/BS or equivalent experience	BA/BS or equivalent experience	BA/BS or equivalent experience
License/Certification	NA	NA	PMP desired. LEED Certification desired.	PMP and/or CEM certification desired. Must be LEED certified
Experience	Desired: 1 year related experience	Required: 3 years related experience Desired: specific functional area experience	Required: 6 years related experience Desired: specific functional area experience	Required: 10 years related experience Desired: specific functional area experience
Knowledge, Skills, and Abilities	<ul style="list-style-type: none"> • Business computer skills such as MS Office Suite (Excel, Word, Project, Visio) • Oral and written communication skills • Ability to handle multiple assignments and prioritize • Analytical/problem resolution skills 	<p>In addition to those for Associate, Career requires:</p> <ul style="list-style-type: none"> • Ability to manage team and personal dynamics to drive projects forward • Knowledge of projects, program and regulatory requirements • Ability to lead project meetings • Ability to perform data analysis and understand data points affecting business results • Projects require basic knowledge of concepts, principles or practices in a specific discipline, field or area of expertise • Regulatory expertise in the field of Energy 	<p>In addition to those for Career, Senior requires:</p> <ul style="list-style-type: none"> • Ability to lead complex project meetings • Thorough knowledge of projects, program and regulatory requirements • Knowledge and application of energy savings calculation tools and techniques. • Projects require extensive knowledge of concepts, principles or practices in a specific discipline, field or area of expertise in industry and energy efficiency. • Regulatory expertise in the field of Energy Efficiency to be able to advise clients in the development of projects in retrofit, new construction, or retro- 	<p>In addition to those for Senior, Expert requires:</p> <ul style="list-style-type: none"> • Ability to work effectively cross-functionally with EM&V, Products members and management to optimize portfolio performance and in the development of new products. • Advanced knowledge of projects, program and regulatory requirements. • Ability to effectively collaborate with external regulatory, governmental, business or customer groups. • Projects require extensive advanced knowledge of concepts, principles or practices in a specific discipline, field or area of expertise in industry and energy efficiency • Regulatory expertise in the field of Energy Efficiency to be able



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		<p>Efficiency to be able to advise clients in the development of projects in retrofit, new construction, or retro-commissioning programs.</p> <ul style="list-style-type: none"> Ability to utilize integrated audit results to advise clients in the development of projects and its verification. 	<p>commissioning programs.</p> <ul style="list-style-type: none"> Ability to utilize integrated audit results to advise clients in the development of projects and its verification. Limited EM&V expertise to assist in evaluations and audits 	<p>to advise clients in the development of projects in retrofit, new construction, or retro-commissioning programs.</p> <ul style="list-style-type: none"> Ability to utilize integrated audit results to advise clients in the development of projects and its verification. Advance EM&V expertise to serve as team member during audit and evaluation Ability to train team members in subject expertise, program guidelines and policies.
Working Conditions	Incumbents work in an office environment. Less than 10% travel may be required.			
Supplemental Information	NA			



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Technical Competencies	Technical Competency Descriptions	Proficiency Level*			
		Associate	Career	Senior	Expert
Project Management Skills	Effectively structures and controls work on a project; integrates all aspects, ensures that work progresses on schedule and that work meets specification or required standard. Plans the organizational aspects, communications, procurement, requirements gathering, quality standards, staffing, and risk identification associated with a project (including cost, time, effort, etc. estimates). Understands the activities and processes involved in defining the scope of a project and managing the project planning effort. Understands audit and oversight functions and the impact of QA Reviews and Inspection on the Project.	Novice	Proficient	Advanced	Master
Coordinating & Scheduling	Effectively coordinates activities, services, and schedules to ensure smooth and efficient operation of work.	Novice	Proficient	Advanced	Master
Financial and Business Results	Manages expense budget, while achieving consistent and appropriate levels of service. Demonstrates understanding about how businesses work and of trends and practices affecting the Company;	Novice	Proficient	Advanced	Master
Quality Assurance	Diligently attends to details and quality; shows a high level of care and thoroughness in handling the details of the job; maintains focus and quality under distracting working conditions and high workload.	Novice	Proficient	Advanced	Master
Resourcefulness	Finds ways to get the job done even when normal channels, materials, and methods don't work.	Novice	Proficient	Advanced	Master
Communication Management	Manages communication activities to ensure all communication pieces clearly and accurately describe information in common, understandable terms and are consistent with company guidelines, policies, and procedures.	Novice	Proficient	Advanced	Master
Resource Management	Manages time, money, and resources necessary to meet the business needs.	Novice	Proficient	Advanced	Master
Proactive Problem Solving	Anticipates, identifies and mitigates potential customer issues before they escalate into a significant problem.	Novice	Proficient	Advanced	Master
Project Management Tools	Understands and uses the hard tools (e.g. project management software, MDSS and Active Project Reports, Forecasting) and soft tools (e.g. how to facilitate startup meetings) to manage project activities. Specific applications may include: Microsoft Word, Excel, Access, Project, PowerPoint; Issue Management, Risk Management, Scope Management.	Novice	Proficient	Advanced	Master
Program Policies and Procedures	Understands how the CPUC regulations impact our program designs. Able to collaborate and draft polices and procedures to process improve our effectiveness in processing the project applications to payment.	Novice	Proficient	Advanced	Master

*Proficiency Levels

Novice: Demonstrates general understanding of knowledge, principles, and/or applications of the area; is able to complete routine assigned tasks with minimal guidance or supervision.

Proficient: Demonstrates solid understanding of knowledge, principles, and/or applications of the area; is able to complete moderately complex projects, with minimal guidance and supervision.

Advanced: Demonstrates advanced understanding of knowledge, principles, and/or applications of the area; is able to understand complex ideas and make recommendations in this area. May guide efforts of others on the team.

Master: Demonstrates mastery of knowledge, principles, and/or applications of the area; is able to lead and direct others in this area.