

# Speeding up front-line customer service

IMPROVING THE CONTENT AND EXPERIENCE FOR AGENTS REDUCES CALL TIME AND CUTS COST

The logo for Content Strategy Inc., consisting of the text "Content Strategy" in a large white font and "Inc." in a smaller white font, all set against a solid green square background.

Content  
Strategy Inc.



Ken Bell

Manager

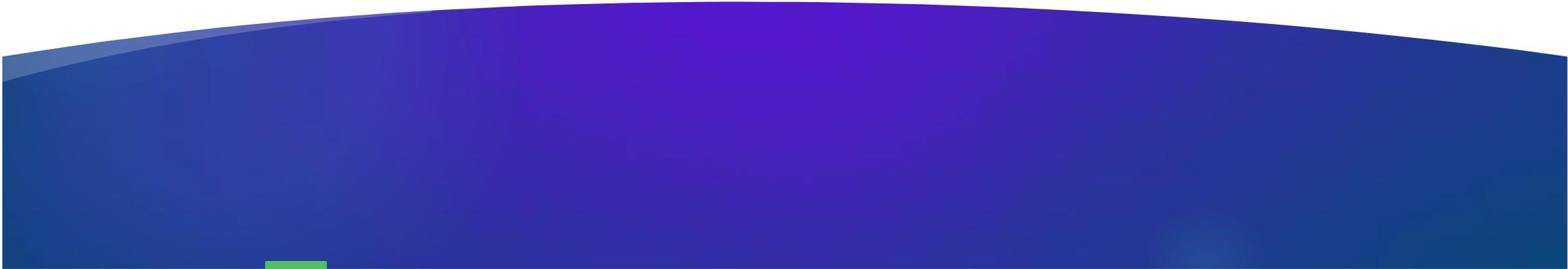
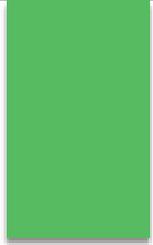
Business Innovation and Operations  
Customer Service

The logo for Content Strategy Inc., consisting of a solid green square with the text 'Content Strategy Inc.' in white, sans-serif font. 'Content' and 'Strategy' are stacked vertically, with 'Inc.' in a smaller font size to the right of 'Strategy'.

Content  
Strategy Inc.

Blaine Kylo

Senior content strategist





**CX/UX is important for internal audiences, too**

# Knowledge Centre user requirements

- Speed
- Accuracy
- Ease of use





## The Customer Experience

# Back to basics

- User research
- IA and navigation
- Taxonomy and metadata
- Templates and style guides
- Writing fundamentals



When the  
experience is  
interacting with  
content,  
*improving content*  
improves the  
experience.



Log in / create account

navigation

- Main Page
- Community portal
- Current events
- Help

index

- A
- B
- C
- D
- E
- F
- G
- H
- I
- J
- K
- L
- M
- N
- O
- P
- Q
- R
- S
- T
- U
- V
- W

article discussion view source history

## New Connections

NEW CONNECTIONS	
Call Flow	System Steps
<p>a. <b>Verify the caller</b> (energy biller or agent ie. electrical contractor, general contractor)</p> <p>b. If caller is the <b>energy biller</b>, <b>confirm if they have an existing BP#</b> in SAP (validate birthdate in SAP). Obtain billing information for the new account including phone#, email address &amp; mailing address and DOB (if required).</p> <p>c. <b>Determine service address</b>. Confirm if there is an existing connection object in SAP.</p> <p>d. <b>Determine service details</b> (amps, voltage, phase ie. 1 phase or 3 phase), specifics of the dwelling /building and what the connection is for.</p> <p>e. <b>Verify if connection is permanent or temporary</b>. If temporary see: <a href="#">New Temporary Construction Service</a>.</p> <p>f. <b>Determine type of heating</b> for building</p> <p>g. <b>Determine BCH connection point</b> (ie. Overhead <a href="#">Pole ID#(Pg21)</a> or Underground stuboff at <a href="#">LPT/PMT#(Pg7)</a> or <a href="#">Service Box(Pg25)</a> and approx. distance from conn point to service location. If OH and unable to find lot/address in <a href="#">DAD</a>, have caller provide pole ID#).</p> <p>h. <b>Inquire about electrical contractor's</b> name and contact information and populate ONLY if coming in on paper. IF using web portal leave blank and have the electrician input on own.</p> <p>i. <b>Advise on standard charges</b> if determined as EC job</p> <p>j. <b>Advise on next steps</b> (paperwork requirements, possible design involvement, timeline). Provide connection request # and request electrical contractor include on paperwork.</p> <p>k. <b>Summarize the caller's request</b> &amp; give timeline expectations and remind the customer can go online and link request to profile. check status and manage other requests <a href="#">web enablement</a> if</p>	<ol style="list-style-type: none"> <li>1. Check <a href="#">Gateway</a> to ensure no duplicate orders, <a href="#">SAP</a> for BP# and possible existing connection object# and <a href="#">DAD</a> (for existing plant details ie. pole has existing transformer or secondary) to understand client situation.</li> <li>2. If new customer, put "NEW BP" in reference tab in <a href="#">Gateway</a>. If BP is company not existing in SAP, confirm whether company is registered in BC by searching <a href="#">BC Online</a>.</li> <li>3. If overhead, run O/H transformer Report with proposed load. (<a href="#">DAD-Checking Transformer Load (Pg41)</a>)</li> <li>4. Create or update an order in <a href="#">Gateway-Creating New Orders (Pg26)</a></li> <li>5. Fill in <a href="#">Gateway - Information for Creating New Orders (Pg16)</a> (BP#, connection object#, site details, service details including correct service instructions, meter info, load info, electrical contractor info, standard charges etc...)</li> </ol> <p><u>After the Call:</u></p> <ol style="list-style-type: none"> <li>1. Await paperwork from electrical contractor and authorization from customer if still required.</li> <li>2. Await Design approval if design referral was sent</li> </ol> <p><u>Follow up calls:</u></p> <ol style="list-style-type: none"> <li>1. Upon processing of paperwork, check if all prerequisites have been met. If so, create order in <a href="#">SAP</a> &amp; schedule if required. <a href="#">Create DAD</a> job if required</li> </ol>

# Before

## Set up a new connection

### Process Detail

This process is for permanent connections. If the customer wants a connection for construction purposes, see [Set up a temporary connection](#).

If the customer wants to set up three or more meters at one service address, see [Set up a multi-development connection order in Gateway](#).

### Verify the caller

1. Identify whether the caller is a customer or electrical contractor and ask for their name and phone number.
  - If the caller is the customer, [verify their identity](#) by asking for their date of birth or other personal detail.
  - If the caller is the electrical contractor, remind them that the customer must call to

### Related Links

- [Set up a temporary connection](#)
- [Set up a multi-development connection order in Gateway](#)
- [BC OnLine](#)
- [Estimate peak demand \[PDF, 125 KB\]](#)
- [Design referrals](#)
- [Verify the identity of a caller](#)
- [Standard charges for common electrical connection field work](#)
- [Overhead and underground declarations](#)

# After

## Credit Bureau Check (Equifax)

A customer applying for a residential account in their personal name may decide they would like to prove their creditworthiness by giving BC Hydro permission to obtain their credit information from a credit reporting agency (Equifax).

The Credit Bureau check is the preferred method of securing accounts.

If CCB is requesting security on the account, a Credit Bureau check must be offered to all new residential customers applying in their personal name at the time of the Move In.

When a customer chooses a Credit Bureau check, BC Hydro is collecting the customer's personal information for an indirect purpose and the customer must be made aware of this.

### Canadian (Equifax) Credit Check - Verbal Permission

In order to perform the Canadian Credit Bureau (Equifax) check, the agent must:

- Obtain verbal permission from customer for BC Hydro to:
  - Disclose customer's personal information to credit reporting agency
  - Conduct credit check and obtain credit decision from credit reporting agency
- Advise customer the collection, disclosure, and use of personal information is:
  - Conducted per the Hydro and Power Authority Act and Electrical Tariff
  - Regulated by the BC Utilities Commission
- Advise customer they are not obligated to provide this information

### Conversation example:

"Do you agree to have BC Hydro disclose your personal information to the credit reporting agency and obtain a credit decision about you from that agency? The collection, disclosure and use of this personal information is conducted per the Hydro and Power Authority Act and the Electrical Tariff and regulated by the BC Utilities Commission. You have no obligation to agree."

- If customer provides permission:
  - Perform credit check
  - Create required Contact and ensure customer's verbal authorization is included
- If customer denies permission:
  - Do not perform credit check
  - Ensure customer's denial is included in a Contact

### Customer Asks How Check Affects Credit Score

If a customer asks how an Equifax Credit Bureau check could affect their credit score, they should be advised that a credit check completed by a Utility (e.g. BC Hydro):

- Will show on customer's credit report
  - Can affect customer's credit score, but not to the same degree as if check were completed by a bank or lending institution for a product that has a higher risk of default (e.g. credit card)
- If further information is required (e.g. customer asks for exact number of 'points'), the customer should be advised:

- A single inquiry will generally have very little impact to an overall credit score; however, the 'weighting' is an individual calculation by Equifax and inquiries (credit checks) can affect a person's score in different ways:
  - If a person keeps all of their payments to creditors up to date, their payment history will generally offset any points deducted for an inquiry (credit check)
  - If a person has defaulted on loans or applied for more credit, an additional inquiry will have a greater impact to their overall credit score

have a greater impact to their overall credit score.

- BC Hydro does not have access to the specific impact that an inquiry will have to a customer's overall credit score.

If the customer still requires further information, refer them to [www.equifax.ca](http://www.equifax.ca).

### Perform Canadian Credit Check

Ensure verbal permission is received.

Sign on to Equifax via the Internet:

- Client ID: CBR002
- User ID: LAN ID
  - Example: jdoe
- Password:
  - Created by agent

If the agent cannot log into the Equifax web site (e.g. password expired), contact the Hotkey (78889) to perform the search. E-mail CABC, Credit Admin requesting to reset the password. Once logged into Equifax, in the 'Session Info' section, select **DecisionX Gang**.

### Session Info

DecisionX Gang

It is mandatory to enter the postal code and customer's date of birth while performing a Credit Bureau check.

- Example: jdoe

When initiating a Credit Bureau check for customer in 100 Mile House, enter the name of the town/city as onehundredmilehouse.

When initiating a Credit Bureau check, it is critical to confirm that the correct customer has been located.

If difficulty is encountered in obtaining a customer's credit record on Equifax:

- Advise the customer that the use of their Social Insurance Number (SIN) will increase the chances of finding the match
- Advise the customer they are not obligated to provide this information
- In the event that a new customer has not had an account with any Utility company or a credit card, it is unlikely that an Equifax check will prove Creditworthiness

If the customer provides their social insurance number in order to facilitate a Credit Bureau check, enter the information directly into the Equifax website only. Under no circumstances should any sensitive customer personal data be written down or distributed electronically.

Under no circumstances should credit card information be requested for any reason.

After submitting the Credit Bureau check, the Equifax Web Credit-reporting site will display one of the following replies:

- Credit Information Not available - Customer must have their account secured by Cash Security Deposit
- Secured Plan Required - Customer must have their account secured by Cash Security Deposit
- Customer Accepted - Establish the customer on a Billing Plan of their choice, and waive Security Deposit

If customer's Credit Check states 'Credit Information Not Available' or 'Secured Plan Required', a Credit Reference letter is no longer an option. Customer must be secured with a Cash Security Deposit or Guarantor. Do not offer or discuss the Guarantor option until the Cash Security Deposit

Deposit or Guarantor. Do not offer or discuss the Guarantor option until the Cash Security Deposit option has been offered and declined, or unless customer specifically requests or inquires about it.

### Required Contact - Canadian Credit Check

Whether or not the customer's Credit Check returns as 'Accepted', it is a requirement to create a Contact (Class 1300, Action 2300, and Follow Up None) indicating:

- Credit Check was performed
- Name of customer
- Verbal authorization for credit check was received
- Result of Credit Check

### Examples:

COMPLETED C/B CHK ON [BP NAME] PER CUST VERBAL AUTH/CUST ACCEPTED/WAIVED SEC DEP  
COMPLETED C/B CHK ON [BP NAME] PER CUST VERBAL AUTH/SEC PLAN REQ

### After Completing Credit Bureau Check

- Advise customer if the Credit Bureau check was accepted or denied
  - Do not discuss any details of the Credit Bureau check with a customer. If a customer wants further information about their credit score, refer them directly to Equifax at: 1-800-469-7166 or 604-291-6800

- It is vital the correct Contact is used to show that the Credit Bureau check was completed
  - BC Hydro must keep a record of authorization while also enabling tracking of the credit check volumes
  - Refer to Required Contact - Canadian Credit Check for full details

- If Credit Bureau Check indicates 'Customer Accepted':
  - Advise customer the Credit Bureau check was accepted and Security Deposit will be waived; however, because they are a new customer with BC Hydro, if an invoice is not paid by the due date, a Security Deposit will be requested at that time
  - Do not change the Billing Procedure

If customer specifically requests a Credit Bureau Check letter (rare):

- Create a Contact (Class 1300, Action 2300, and Follow Up Regular)
- Add text stating a Credit Bureau check was performed, authorization for the credit check, the name of the customer, the result of the check, and that the customer specifically requested a confirmation letter

### Examples:

COMPLETED C/B CHK ON [BP NAME] PER CUST VERBAL AUTH/CUST ACCEPTED/WAIVED SEC DEP/CUST REG CNFRMTN LETTER  
COMPLETED C/B CHK ON [BP NAME] PER CUST VERBAL AUTH/ SEC PLAN REQ/CUST REG CNFRMTN LETTER

Equifax Helpline - BC Hydro employees only: 1-877-227-6800. Press 1 for English, and press 1 to indicate you are a business customer.

### United States (US) Credit Check

New customers from the United States will require a US credit check performed.

In order for the US credit check to be performed, the agent must:

- Obtain verbal permission from the customer for BC Hydro to:
  - Disclose the customer's personal information to the credit reporting agency
  - Conduct a credit check and obtain a credit decision from the credit reporting agency
- Confirm to the customer the collection, disclosure and use of the personal information is

# Before

## Perform a credit check

### Perform a Canadian credit check

Before performing a credit check, ensure verbal permission has been confirmed by the customer.

1. Sign in to Equifax:
  - a. In the **Client ID** box, type **CSR002**.
  - b. In the **User ID** box, type your LAN ID.
  - c. In the **Password** box, type your password.

Note: If you can't log into Equifax, contact the work leader to perform the search. Email CASC, Credit Admin requesting to reset the password.

2. Once logged into Equifax, in the **Session Info** section, click **iDecisionX Cons**.
3. Enter the customer's postal code and date of birth while performing the check.
  - When performing a credit bureau check for customers in 100 Mile House, enter the name of the town/city as **onehundredmilehouse**.

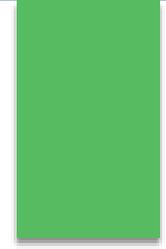
4. Confirm that the correct customer has been located.

- If you have difficulty in finding a customer's credit record on Equifax:
  - d. Tell the customer that their social insurance number (SIN) will increase the chances of finding their credit record.
  - e. Tell the customer they are not obligated to provide this information.
  - f. If the customer provides their social insurance number in order to facilitate a credit check, enter the information directly into the Equifax website only. Under no circumstances should any sensitive customer personal data be written down or distributed electronically.

Note: Under no circumstances should credit card information be requested for any reason.

5. Once you submit the credit check, the **Equifax Web Credit Reporting** site will display one of the following replies:
  - **Credit Information Not Available.** The customer must have their account secured by cash security deposit.
  - **Secured Plan Required.** The customer must have their account secured by cash security deposit.

# After

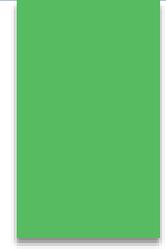


That all you got?

# ROI: \$240,000 annually

- Elimination of errors and duplicates
- 25% efficiency gains with re-written pages





## What's next

# Lessons learned

- ▶ Content and structure matters in a knowledge management system.
- ▶ Process experts and SMEs are not the best people to develop and maintain your knowledge centre.

# Lessons learned

- ▶ Involve the process experts and SMEs in the development of the new knowledge system and structures to get buy in.
- ▶ Simplifying content search and look-up results in more efficient CSRs, happier customers, and cost savings for your organization.

# Knowledge Centre “hacks”

- ▶ Improve page titles
  - ▶ “Reverse a move out” not “Reversing a move out done in error”
- ▶ Create content models and templates
- ▶ Create a glossary; include acronyms



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