CALL CENTER GET WELL PLAN UPDATE
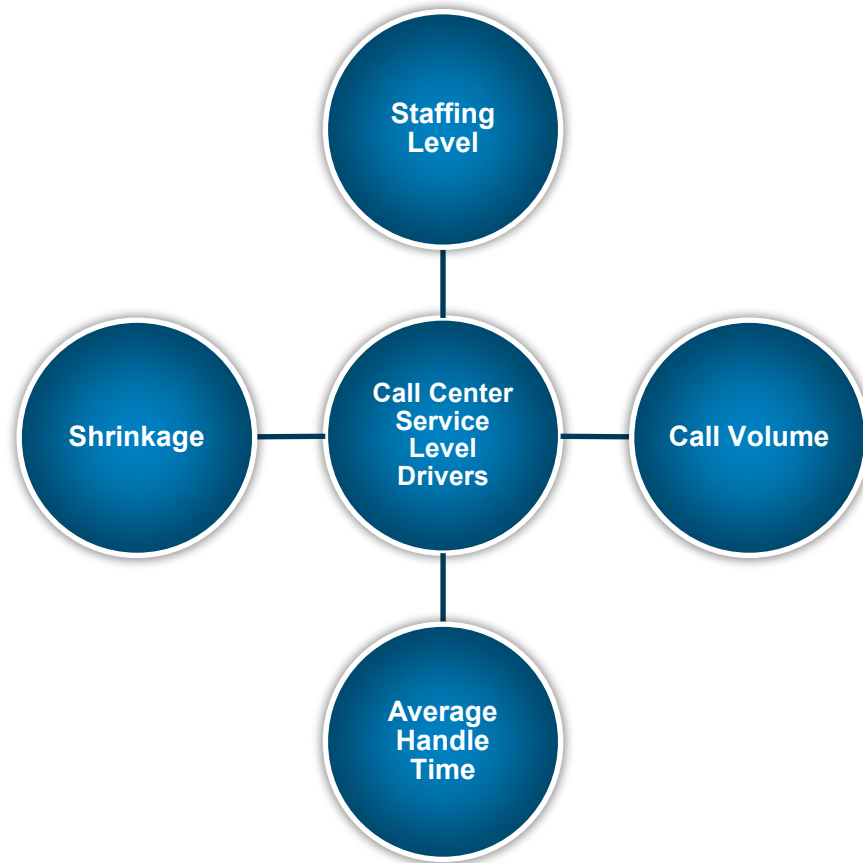
June 28, 2023

KEY STATISTICS ON CALL CENTER PERFORMANCE

	2019 Baseline	Jan	Feb	March	April	May	Jun** (MTD)
Union Headcount* + Convergent	132	147	142 + 9 Convergent	140 + 9 Convergent	135 + 31 Convergent	138+ 31 Convergent	N/A
Rep. Average Speed of Answer	38	351	348	341	126	147	183
% Calls Answered in 30 Seconds	76.6%	35.3%	33.9%	30.7%	56.5%	54.4%	51.1%
Rep Call Volume '23	1,234,293***	97,426	88,243	111,311	84,604	103,704	62,623
Versus 2019	1,351,945	112,542	101,943	100,683	99,835	105,071	69,480
Average Handle Time (minutes)	6.0	7.4	7.0	7.7	7.3	7.1	7.0
Rep. Abandon Rate	1.8%	15%	15%	15%	6%	6%	9%

LIPA
Long Island Power Authority

* Headcount is # of employees on staff; a portion are in training or on LTD
**June data through 6/20/23
*** 2023 YTD actual + forecasted volume from most recent plan

PERFORMANCE DRIVER & ROOT CAUSES

Performance Drivers

Root Cause Identified

Insufficient Staffing
Leadership decision to not hire for open positions
Poor forecast model indicated less people were needed
Challenging labor market
Long recruitment process
Long training with attrition

Increased Call Volume
More customers in collections
Non-operational call back functionality created repeat unanswered calls
Long wait times caused repeat calls (increased abandonment rate)

Increased Average Handle Time (AHT)
New leadership requiring performance management skill development
Apologizing for long wait time
Move to work from home increased AHT by 30 seconds
Collection call length increased due to COVID-19
Limited tracking of AHT underlying data (long duration calls)

High Shrinkage
Representative fatigue
Lack of expectation management
Work from home obstacles
Lack of effective monitoring and communication tools

STAFFING RECOMMENDATION

Increase the call center staff

- An additional 20 temporary agents were supposed to complete training by the end of February
  - **Actual results = 22 temporary agents started answering phones in April with smaller scope than planned. The contract design, planning, and execution was poorly performed and placed all risk in PSEGLI's hands without an effective support structure or sound plan to manage.**
- New class of 30 full-time agents started training in January were supposed to be fully trained by end of April yielding 25 rep
  - **Actual results = 19 full time agents remaining with a targeted training completion for end of June with 17 reps**
- Previously proposed new class to start in June
  - **Actual results = Class moved to August and unclear on Convergent plan or effectiveness**

Improve the staff utilization - Timing pushed out to Q3

- Implement overtime strategy, processes, procedures, rules, and communication plan for mandatory overtime based on call conditions
- Proactively address staffing use based on call traffic patterns as they emerge

Conduct organization assessment - Timing pushed out to Q4

- PSEGLI partner with LIPA to assess operational needs to support a top performing call center organization
  - **Actual results = High level conversations have begun, LIPA concerned over new proposed timing**
- Identify improvement opportunities with when and how to utilize agents who support the call center during surges as part of organization assessment

Enhance the hiring-to-on-phone process - Timing pushed out to Q3 & Q4

- Analyze the HR process to reduce recruiting and hiring timing, including evaluating continuous recruiting
- Investigate tiered call center agent job (i.e., associate level, full rep)

LIPA Long Island Power Authority

CALL VOLUME RECOMMENDATION

Enhance workforce management - Timing pushed out to Q4

- Adjust staffing needs based on call driver activities and monitoring of intraday metrics
- Review and refresh forecast model inputs given changes from historical performance
- Implement enhanced work force management tools as part of Call Center as a Service (CCaaS) project (2023 Metric)
  - **Actual results = CCaaS project delayed from May to August or Q4**

Reduce repeat calls

- Implement new credit card vendor to reduce repeat call (2023 Metric) - **Implementation delayed from May to July**
- Identify and suspend or re-engineer processes that drive repeat calls - **Results unclear**
- Fix the call back feature - **CCaaS project delayed from May to August or Q4**
- Provide short-term debt forgiveness to decrease % of customers in collections - **Complete**

Improve management and monitoring of call driving activities

- Establish bi-weekly cross functional team meeting to understand and control planning for initiatives that drive call volume, including collection disconnect activities - **LIPA concerned about effectiveness of design & execution**
- Establish weekly capacity planning to agree on inputs, staffing, and potential deviation from plan - **Moved Q1 to Q3**

Expand self-service options - No longer in plan

- Improve the deferred payment agreement self-service utilization (2023 Metric) - **Not referenced in new plan**
- Assess additional self-service options focused on top 5 call types/drivers - **Initiative Dropped**
- Implement self-service options for customer moves (2023 Metric) - **Initiative Dropped**

AVERAGE HANDLE TIME AND SHRINKAGE* IMPROVEMENT RECOMMENDATION

Leadership development

- Providing training and coaching to support new supervision and workforce management
  - **Actual results = New plan has an improved structure and plan for training for supervisor & reps.**
- Conduct Tuesday/Thursday "all hands" supervisor meetings to review team scorecard, share best practices and address emerging issues **(Complete - Started in January, put on pause in June)**
- Calibrate on top 5 things supervisors should do daily for maximum employee engagement impact and to drive down AHT
  - **(Complete - Deliverable lack details to execute, PSEGLI working on improvements)**

Improve Work From Home - Moved from April implementation to Q4

- Address the 30 second increase in average handling time resulting from Work From Home

Performance Management enhancements

- Understand and address improvement opportunities relative to metric outliers
  - **Actual results = Performance management executed. Outlier data and impacts not provided**
- Dedicate additional resources to provide "real time" monitoring of "longer than normal" calls & other anomalies **(Complete - Effectiveness being assessed)**
- Review and update agent scorecard to align with drivers in partnership with Union **(Complete)**
- Create back-up support for real time monitoring for supervisor **(Complete)**

Technology - Initiative dropped

- Improve access to required applications

LIPA
Long Island Power Authority

* Shrinkage is time when representatives are being paid but are not available to handle interactions

LIPA OVERALL VIEW OF GET WELL PLAN

Based on the updated June 16th Get Well Plan, the performance forecast does not include improvement to key drivers (Average Handle Time, shrinkage) relative to the proposed tactics

Performance improved in April; it is unclear if internal performance improved given the addition of 22 Convergent staffing in April

The plan thus far has not produced the expected outcomes, with numerous target dates being missed or delayed. The revised plan has eliminated specific task work plan target dates.

Knowledgeable talent is crucial for success. In June, PSEGLI hired a seasoned Call Center resource lead and additional leader focused on addressing performance challenges. We need more experience with the deliverables and outcomes to assess impact to current trajectory

Quality of deliverables is raising concerns (e.g. Thoroughness of supervisor best practices training document and the underperformance of cross functional team in execution)

The tactics within the Plan still necessitate more in-depth analysis. While PSEGLI has linked these tactics to components, they haven't yet translated these into specific performance outcomes that improve the projected service level

NEXT STEPS

LIPA is concerned about the overall status of the plan and the lack of improvement in performance demonstrated in Q2 and forecasted for the remainder of the year. LIPA looks forward to working collaboratively with the new Get-Well Plan team members.

Actions will include:

- Reestablished regular bi-weekly meetings with PSEGLI on execution of the plan
- Begin research impact of normal business hours change to operational performance
- Partner with PSEGLI to improve the quantification of tactic improvements measurement and inclusion of dates in the work plan
- Provide Board monthly updates on the Get-Well Plan relative to execution and appropriateness of the proposed tactics
- Perform deeper dive into training and staffing once information is received
- Analyze data on Convergent contributions and future plans
- Continue to evaluate and monitor underlying Call Center metric performance in light of Get-Well Plan efforts

THANK YOU!

Questions?