



# *Proactive Automated Outbound Communications*

## *Not Just for Doctors' Appointments Anymore*

*Kim Knox*

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### **Executive Summary**

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Finding ways to reduce costs while maintaining good customer service is a chief concern for utility call-center managers. To that end, over the past few years utilities have started utilizing proactive automated outbound calls—the kinds of phone calls your customers may be familiar with receiving from doctors' offices for appointment reminders. Utilities are finding a number of ways to use the calls, such as to notify customers about power outages and estimated power-restoration times, to remind customers to pay their bills, or to confirm appointments for appliance service. Companies have found that employing proactive outbound calling is an effective and efficient way to reach a large number of customers in a short period. These calls have the potential to decrease the volume of inbound calls, reduce operating costs, and positively influence customer satisfaction. One utility found that after implementing automated confirmation calls for service appointments, the rate of missed appointments dropped by 34 percent.

There are several important steps to take when considering how to successfully employ outbound calling. First, think about delivering only accurate, timely, and relevant information to your customers. Second, take the time to make sure your messaging is right and consistent across all levels of the organization. Third, track the frequency, efficiency, and cost of inbound and outbound calls prior to investing in hardware or outsourced solutions that provide outbound calling services. This will enable you to measure results once calling campaigns are implemented. Finally, survey your customers after conducting these types of calls to gauge customer satisfaction and identify improvement opportunities.

Although automated outbound messaging might be considered somewhat impersonal, its considerable benefits support why it should be one of the channels included in your utility's communications toolbox.

## Utility Customer Care Focus

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## Why Use Proactive Automated Outbound Communications?

Your customers are used to receiving an automated telephone reminder about a doctor's appointment or a message confirming when their cable TV service will be installed. Over the past several years, more utilities have begun to utilize these types of proactive communications in order to communicate promptly with a large number of customers.

Proactive automated outbound calls can be easily managed and deployed in a relatively short time frame—normally a few weeks, but in as little as a few hours in emergency situations. Companies have the option to use a preconfigured message template provided by vendors that can be personalized with customer information, or they can completely customize their message to meet their unique needs. E.ON uses one of its call-center trainers to record scripts so that the company's customers will hear a familiar-sounding voice with the local dialect. Messages may also be static or interactive—calls can offer customers an option to be routed back to a live agent if, for example, a customer needs to make a payment arrangement. A calling campaign can be activated at any time of day or night via phone or Internet.

Many utilities have found that providing this type of communication has positively influenced customer satisfaction, increased efficiencies, lessened the volume of inbound calls, and reduced operating costs.

**To reduce inbound calls.** Utilities have found that making proactive outbound calls with power outage information and estimated restoration times, for example, can deflect calls that customers would

have made to the utility. The decrease in call volume can free up time for the customer service representatives to handle more complex calls. For example, Public Service Electric & Gas (PSE&G) has experienced a noticeable reduction in inbound calls since implementing automated calls to confirm service appointments.

**To increase efficiency.** Notifying customers with these automated calls is far more efficient than communicating with customers via other channels. Phone calls made manually from the call center simply cannot compete with the ability of this method to reach hundreds of thousands of customers in just a few hours. When NSTAR decided it needed to contact all of its customers to let them know how they could save energy and remain comfortable during a heat wave, the company was able to initiate a campaign in a matter of hours and successfully contact more than 650,000 customers that same day.

**To reduce costs.** One inbound agent call can cost anywhere from \$4 to \$8, whereas an automated outbound call costs between 5 and 26 cents. After implementing automated outbound calls to confirm appliance-service appointments, PSE&G's rate of missed appointments dropped from 6.5 percent to 4.3 percent—a 34 percent improvement that goes straight to the bottom line. According to Rodger VanderBrink, a strategic planner for the utility's customer operations group, this equates to "a significant cost savings based on the cost to dispatch a service truck to each appointment as well as a reduction in customer callbacks to reschedule the appointment."<sup>1</sup>

**To maintain or increase customer satisfaction.** Customer service and utility communications together make up 22 percent of the component weights in the 2007 J.D.

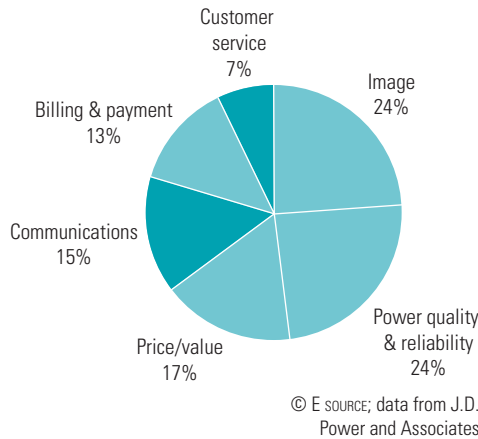
Power Electric Utility Residential Customer Satisfaction Index model.<sup>2</sup> Proactive outbound calling touches on these areas, both of which influence overall customer satisfaction (see **Figure 1**).

The J.D. Power survey showed the important role that automated outbound outage restoration callbacks played in residential utility customer satisfaction. Following an outage, utilities that returned calls to customers to confirm that power had been restored received a significantly higher score compared to utilities that did not recontact customers. The survey revealed that customers who receive an automated callback from their utility following a power outage are much more satisfied. When comparing top-quartile utilities to bottom-quartile utilities, a higher percentage of the best-performing utilities provided callbacks with estimated restoration times to customers who requested them after an outage (see **Figure 2**).<sup>3</sup>

Georgia Power can attest to the results of this survey. In addition to providing estimated restoration times, the utility provides post-outage callbacks to customers who request one verifying that their service has been restored. They also survey their customers who request callbacks to compare their satisfaction to customers who do not request a callback. They have found that this proactive communication has improved customer satisfaction and kept Georgia Power in the top quartile in the J.D. Power survey. “We think there’s value in communicating with customers where you’ve got good information to give them,” says Harvey Ellis, operations support manager at Georgia Power’s Customer Care Center.<sup>4</sup> However, he comments, “Customer expectations are going up and you constantly have to do things to keep up with that.”

**Figure 1: J.D. Power 2007 Electric Utility Residential Customer Satisfaction Index component weights**

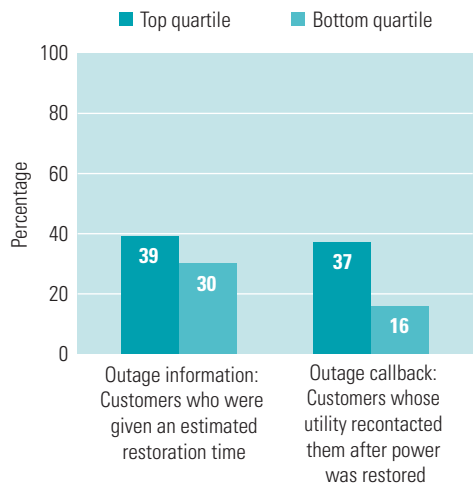
Communications accounts for 15 percent and customer service for 7 percent of residential electric utility customer satisfaction. Proactive automated outbound calls touch on both of these areas, which influence overall customer satisfaction.



**“Customer expectations are going up and you constantly have to do things to keep up with that.”**  
**—Harvey Ellis**  
**Georgia Power**

**Figure 2: Characteristics of the best utilities in the J.D. Power 2007 Customer Satisfaction Survey**

This chart illustrates the characteristics of the best-performing utilities compared to the worst when it came to communicating outage information to customers.



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***“If [our customers] know they are going to get the right answer from us, the best answer, then they just don’t call back.”***  
—Rodger VanderBrink  
PSE&G

## **What to Consider Before Making Outbound Calls**

So now you’re thinking it might be a good idea to reach out to your customers before they call you. What should you do first? What are some rules of the road that will help you navigate this technology? First, you should think about it as another communications tool that should be integrated into your workflow. But don’t stop there. There are several other things to consider before implementing an automated outbound campaign. We asked utilities about the lessons they learned from implementing proactive automated phone calls, and they offered several pieces of advice for other companies that are thinking about utilizing this type of communication.

**Find out how your customers want to be contacted.** Phone calls are still the most expected and widely used channel of rapid communication. Yet most vendors can provide e-mail, text, fax, or voice options as well, so consider asking customers about their communications preferences going forward.

**Provide only specific, relevant information to customers.** Let your customers know the cause of the outage, if possible, and the estimated time of restoration. Call them back if there are any updates to restoration times. This will empower your customers to make educated decisions about their health and safety. “Be sure you know what the customer wants. Be sure you know what they expect and that you’re giving them the information they want,” says Harvey Ellis.<sup>5</sup>

**Deliver accurate and timely information to your customers.** This seems like a no-brainer, but it can be a challenge to ensure that outage information and restoration times are correct and that the information is relayed to customers in a timely manner. Missing the mark on restoration times or calling your customers with an

estimated restoration time after the service has been restored will only serve to frustrate your customers more than if you had never called them. Rodger VanderBrink says this about PSE&G’s customers: “If they know they are going to get the right answer from us, the best answer, then they just don’t call back. In almost every case, I think we’ve proven it.”

**Ensure consistency across the organization.** Take the time in the beginning to make sure your messaging is right and that you have buy-in from the appropriate departments. When Progress Energy decided to begin making calls to confirm service initiation, Dawn Steighner, senior project analyst for the company, states, “We wanted to make sure the messaging was correct. We brought in corporate communications to make sure they were comfortable with what we were saying and how we were saying it.”<sup>6</sup> It is critical to inform the call centers that outbound calls are being made so customer service representatives can effectively respond to any queries—so keep them in the loop.

**Measure effectiveness.** Utilities should track the frequency, efficiency, and cost of inbound and outbound calls, develop metrics for success, and analyze the results. Bill Pennabaker, global sales director for proactive contact at Avaya, advises customers to “understand the value of the phone call to the organization. . . . How much is a phone call worth? Before you can do an ROI [return-on-investment] analysis, you need to understand that.”<sup>7</sup> Utilities should also recognize that some phone calls are worth more than others—calls that keep the system from shutting down have a much higher value than those that confirm a service appointment the next day.

**Survey your customers.** When conducting customer transactional surveys, ask customers about their experiences with automated outbound calls. All of the utilities

we spoke with cite anecdotal evidence that their customers appreciate receiving proactive outbound calls. Moreover, the utilities that can boast strong customer-satisfaction scores acknowledge that proactive calls have played a role in maintaining or improving this metric. As mentioned earlier, Georgia Power surveys its customers who receive outbound calls and E.ON is planning to include questions about proactive outbound calls in its surveys later this year to get more targeted and actionable feedback.

**Beware of saturation.** Don't overload customers with generic calls that relate to marketing or product or service offerings. Providing specific and carefully timed information—for instance, as triggered around an event—should keep customers from simply tuning out or feeling that your messaging is intrusive.<sup>8</sup> Progress Energy tells us that the company is strategic when planning which calls to make. Sharing knowledge across departments about anticipated calling campaigns helps identify and prioritize which calls should be made to which customer segments, and when.

These approaches should not only help guide your proactive automated outbound calling processes and overall communications strategy. Remember that even once your campaigns are up and running, you should still continually monitor your messaging and the call times to refine and maximize the effectiveness of the communications.

## **Partnering for Success**

There are several leading vendors that offer solutions for outbound calling, including Twenty First Century Communications, TeleVox, Varolii (a merger of PAR3 Communications and EnvoyWorldWide), and SoundBite Communications. These companies primarily sell a service,

managing the calls through a hosted platform. Other companies, such as Avaya and Dialogic Communications Corp., offer turnkey systems that utilities can manage in-house.

Several utilities we spoke with preferred outsourcing the calls and administration to a vendor. With no hardware to buy, you do not have to worry about your technology being up-to-date and functioning or have someone monitor it. "It's on an as-needed basis . . . It's supported externally so that's important for us. We don't have to keep up with technology or dedicate a lot of people to it; we just have to keep the contract current," says Exelon manager of resource management Oscar Velazquez.<sup>9</sup> Tim Melton, who manages customer commitment for E.ON U.S., echoes this sentiment: "Why should we purchase [an entire system]? Or have all the costs to maintain it when it's relatively inexpensive for us to outsource? You can take advantage of others' expertise and in turn make better business decisions. I've found it's a great way to partner with a third party that does it every single day."<sup>10</sup>

Utilities choose the group of customers that they want to call ("medical-need" customers that could be affected by a power outage, for example) and then transfer the data files via a secure channel to the vendor's system. It is typically a self-service process that the utility can manage online and it can be a one-time upload or it can continuously feed real-time updates to the automated dialer (see **Table 1**, page 6).

A few utilities told us that one downside of outsourcing is that it can be expensive on a per-call basis. Costs for these vendors vary widely and may depend on the volume of calls made and sometimes whether the calls are static messages or allow for interactivity with the customer. Average prices range from about 10 to 26 cents per call, so either way, it's a lot

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**Table 1: Vendors that provide outbound calling solutions**

There are a variety of outbound communications vendors that sell to the utility industry. This table shows how leading firms price and deliver their services.

Vendor	Contact information	Pricing structure	Type of service	Number of utility customers	Web site
Avaya	Bill Pennabaker, 425-201-9407, billpen@avaya.com	Priced by agent license; hardware pricing depends on company size and system needs	Turnkey solution	50	www.avaya.com
Dialogic Communications Corp.	Gary Aydelott, 800-723-3201, gary.aydelott@dccusa.com	Package price for on-site system; annual fee, calls priced per minute based on volume	Turnkey solution	20	www.dccusa.com
SoundBite Communications	Eric Keough, 781-897-2620, ekeough@soundbite.com	Usage-based pricing model, typically priced per minute in accordance with the terms of pricing agreement	Hosted platform	15	www.soundbite.com
TeleVox	Rob Gilpin, 800-644-4266, robertg@televox.com	One-time set-up fee, then priced per call	Hosted platform	65+	www.televox.com
Twenty First Century Communications	Janet Mushrush, 800-382-8356 ext. 244, janet.mushrush@tfcci.com	Contract; customer is charged per call minute	Hosted platform	80+	www.tfcci.com
Varolii	Steve Zirkel, 781-482-2101, steve.zirkel@varolii.com	Contract; charge is based on service-level agreement	Hosted platform	40	www.varolii.com

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cheaper than a first-class stamp and far less costly than the \$4 to \$8 it takes a customer service representative to handle an inbound call.

Choosing to bring a system in-house obviously requires more investment up-front but may result in cheaper costs per call once the system is paid off—as little as 2 to 3 cents per minute, according to two utilities we interviewed. Working across several departments to share the cost of the capital investment may help build the business case. Keep in mind that the system should be able to handle the number of calls you need to make now and allow for growth of calls in the future.

Whether they chose to outsource or invest in a turnkey system, the utilities and vendors we spoke with noted that the return on investment was very swift. PSE&G, which uses its own system, achieved a payback of less than six months for its appliance-service appointments and calls about power outages. For outsourced solutions, payback periods are similarly very short. E.ON’s Melton told us that “the biggest benefit we received since implementing the gas-leak notifications is

the consistent and improved communication with our customers—we have a better record of when the contacts are made. In evaluating cost effectiveness, reducing 1 or 2 unnecessary crew visits per month offsets the cost of using a third-party vendor for this customer communication.”<sup>11</sup>

Additionally, Melton estimates that E.ON has seen a 75 to 80 percent cost savings since it began making automated calls for planned outages, given that the company has been able to forgo printing door hangers, having field people distribute them, or having customer service representatives make the calls manually. These examples of short-term paybacks are not uncommon because making proactive automated calls often replaces more costly methods of communication.

Vendors for hosted services or turnkey systems should be able to address the challenges unique to the utility industry, let you know about any additional costs involved, and advise you on best practices in order to ensure that you and your customers are satisfied with the calls.

## Reaching Out to Customers

Proactive automated outbound calling can be effective when the information provided is relevant and saves the customer time or money. The case studies that follow showcase how three utilities have successfully used automated outbound calling campaigns in a variety of ways to do just that.

### PSE&G: Ingenuity Creates Cost-Effective Solutions

PSE&G is a regulated utility that serves 1.7 million gas customers and 2.1 million electric customers in New Jersey. Rodger VanderBrink, project manager for the company's Systems Integration Group, explains that the utility reconfigured its old interactive voice response system hardware and converted it into a dialer that can be used to make outbound calls. The company is using proactive automated outbound communications in several ways and has received positive feedback from customers thanking PSE&G for the information. VanderBrink estimates that in six to eight years of making outbound calls, the utility has "called two million customers and we've only had one customer request to be removed from the call list."<sup>12</sup>

First, PSE&G uses outbound calling during outages to contact every account that has a medical-priority status and to make automated callbacks to customers who have called in to report an outage. The outbound call tells customers the cause of the outage and the estimated time of restoration (ETOR). The idea is to allow customers to make whatever decision they deem necessary for their health and safety. Customers are called each time there is an update to the ETOR, or they can request a callback when service is restored. The message includes an interactive option for customers to be routed to a live agent if they are still without power.

PSE&G also uses automated outbound calls to confirm appointments for appliance-repair service and has seen its rate of missed appointments drop 34 percent. Within one hour after a customer schedules an appointment, he or she will receive a simple thank-you confirmation call through the automated outbound dialer. On the evening before the appointment, a reminder call is sent that offers customers the option to change or cancel the appointment if necessary. Calls will also be made to apologize if the technician is running late and to ask customers if they can wait or if they would like to reschedule. Customers who order replacement parts for appliances receive an automated call when parts they ordered come in.

VanderBrink notes that, "Prior to the automated campaigns, customers would often forget about the appointment or have a change of plans and not be available for our service person." Before the automated confirmation calls were made, 6.5 percent of appointments were missed. After implementing these campaigns, this rate dropped to 4.3 percent.

PSE&G also makes calls to people who pay their bills too close to the meter reading date. According to VanderBrink, the utility makes an average of 6,000 of these types of calls per month. The automated calls thank customers for sending in their payment, let them know the date the payment was received, and alert them that the next bill they receive may show a previous balance. "This has eliminated a tremendous amount of callbacks from people wondering if their payment was received," says VanderBrink. Finally, calls are also made to customers who have had six or more consecutive estimated meter reads. Automated outbound calls announce when meter reads are expected to take place and offer customers the option to schedule an appointment to have their meter read.

***"The biggest benefit we received since implementing the gas-leak notifications is the consistent and improved communication with our customers."***

***—Tim Melton  
E.ON***

Since initiating these calls, PSE&G has been able to substantially reduce the long-term estimated meter readings. Anecdotally, we have been told that customers dislike bills prepared from estimated usage—therefore, reducing estimated meter readings could help diminish customer dissatisfaction, a critical step that must take place before increasing customer satisfaction (**Figure 3**).

VanderBrink remarks that PSE&G has experienced a fast rate of return for investing in the infrastructure needed to implement these communications. The system of making the billing calls essentially paid for itself within six to nine months and the payback for power outage restoration and appliance-service confirmation calls took less than six months.

### **Progress Energy: Courtesy Calls Confirm Power Is On**

Progress Energy serves 1.4 million electricity customers in the Carolinas and 1.7 million customers in Florida. Progress is

not new to proactive outbound communications. The utility began making outage restoration calls to customers in the Carolinas in 2000 and in Florida in 2001. Dawn Steighner, senior project analyst at Progress Energy, states that customer feedback has been “extremely positive” about these types of calls. She comments, “One thing we hear consistently from our customers is the more information and communication we provide, the better they like it.”<sup>13</sup>

Progress Energy was one of the top performing utilities in the J.D. Power 2007 *Customer Satisfaction Study*.<sup>14</sup> Steighner notes, “We feel very strongly about the perception of the customer and their transactions with us.” Progress regularly conducts various surveys with customers based on transactions that they have conducted with the utility. For example, the utility conducts a survey of customers who disconnect, start, or transfer service.

About a year ago, Progress began making outbound calls for “read-only” service changes—those that are made mainly for billing purposes, such as an account-name change. One area in which Progress wanted to improve was in confirming with customers the terms of their service initiation. The utility tends to get a lot of calls from people who are setting up new service and want to find out if their service has been turned on. Often these are people who are out of state and haven’t arrived at their new location yet to check if the power is on. In order to improve customer satisfaction and reduce the number of calls from people checking on their requests for service initiation, Progress decided to start making courtesy outbound calls to all customers in Florida who had requested service initiation or transfer. The utility is using Varolii to make these outbound service-confirmation calls.

**Figure 3: Eliminate sources of customer dissatisfaction first**

To achieve higher customer satisfaction scores, companies must progress along a stair-step path. A utility should begin by understanding and fixing any aspects of its current basic service that dissatisfy customers, such as estimated meter reads, insufficient power reliability, hard-to-understand bills, or poorly designed interactive voice response systems. Customer dissatisfaction with the quality of service in these basic areas serves to highlight potentially ineffective or defective processes. Attempting to implement initiatives to improve customer satisfaction without first fixing things that are causing dissatisfaction will likely be a waste of time and money.



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During the first two months of this initiative, Progress has made more than 48,000 calls. The utility wants to collect data for several more months before drawing any trends or conclusions, but so far the company is happy with the results. Although Progress had only been making these calls for a short time when we spoke about the campaign, the utility had captured some comments through surveys with customers who appreciated receiving the courtesy call letting them know their power had been turned on. One customer commented: "I wasn't here, but the fact that they called me to let me know everything was complete was nice. It was nice not having to take time off from work to deal with the matter."

Steighner says that Progress Energy places a lot of value on the perception of its customers, and the company weighs this impact when building a business case for making outbound calls. Today, a number of work processes at Progress are utilizing this communication channel to improve customer satisfaction and performance.

Due to the outbound calling campaign's success, Steighner says that it hasn't been difficult to get buy-in internally because "everyone can see the value in it." In fact, she notes that because it's "cheaper than the cost of a stamp," there are many departments that are eager to use outbound calling for a variety of functions. However, they are cautious about how many calls are made; they want to avoid inundating customers with calls to the point where they start to tune out the messages being delivered.

### **NSTAR: Generating Goodwill During a Heat Wave**

In the summer of 2006, the northeastern United States experienced a heat wave with record-breaking temperatures. Utilities all over the East Coast carefully watched the demands on the power grid in

order to avert any outages. NSTAR, the largest Massachusetts-based, investor-owned electric and gas utility, serving 1.1 million electric and 300,000 gas customers, was among the utilities monitoring consumer demand closely. NSTAR received national attention for communicating to its customers about how to reduce energy consumption and save money.

NSTAR made the decision to deliver a public service message once it was evident that the heat wave was going to continue and that the next day could put a strain on the power grid. Penni Conner, vice president of customer care at NSTAR, explains how they were able to execute the campaign in about four hours: "We knew this impending heat wave was coming on, so we were really strategizing as to the best way we could communicate to customers. We could not have done it, though, without our partners—in this case TeleVox."<sup>15</sup>

NSTAR didn't want to panic customers, but wanted to let them know there were things they could do to make their homes more comfortable during the period of hot weather. Rob Gilpin, director of commercial sales for TeleVox, adds, "It was a proactive way to help consumers help themselves and help the utility to manage demand on their system during a heat wave."<sup>16</sup> This message was sent out to approximately 850,000 customers on August 1, 2006:

NSTAR reminds you there's a lot you can do to save energy and money during these hot days. Close blinds during the hottest part of the day, and keep air conditioning at 78 degrees. To keep your home cooler use your microwave instead of your oven and postpone using your dryer until later in the evening. For more ideas on saving energy and money visit our web site at [www.nstaronline.com](http://www.nstaronline.com). NSTAR. Bringing Energy Home.

***"One thing we hear consistently from our customers is the more information and communication we provide, the better they like it."***  
**—Dawn Steighner  
Progress Energy**

Although NSTAR didn't survey customers about the message, the company received a lot of positive feedback from customers. Conner says that the outreach created "a reservoir of goodwill" not only with its customers but also with other important stakeholders, such as its public service commission. She explains, "When you've got your local officials calling up and commenting to executives that they appreciated the outreach; that, in itself, was a very positive sign that people heard us and appreciated it."

Conner said it is difficult to know how deep an impact the calls had on the system load. "It's not like hitting a demand-response button where you know the exact amount of savings that resulted, but based on the customers who gave us feedback, they did respond to the message." Averting a systemwide event was crucial for NSTAR in its effort to boost the confidence and satisfaction of its various stakeholders, including customers and regulators.

### **Include Outbound Calls in Your Communication Plan**

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Many utilities now include outbound calling as a channel in their overall communications strategies. They are finding

that this technology opens up a lot of opportunities and there are benefits to being able to deliver important messages to a large number of customers quickly and cost-effectively. Providing relevant and timely information is key to maintaining or improving customer satisfaction. The more satisfied customers are with the messaging, the more likely it will be that simple inbound calls—such as calls to find out when power will be restored or to reschedule a missed appointment—will decrease.

Several utilities we spoke with found it difficult to quantify the impact that making proactive outbound calls has had on their organizations but are in the process of gathering data to measure and analyze this impact. Others have already seen tangible results, such as a reduction in the percentage of missed appointments and the elimination of a discernible number of simple callbacks. Utilities repeatedly mentioned that the positive effect that proactive communications can have on overall customer satisfaction was an important rationale behind the decision to initiate calling campaigns. A growing number of utilities have concluded that their investments in automated outbound calling have generated significant hard-dollar and soft-dollar benefits that more than outweigh their costs.

### **For More Information**

We invite you to contact us for more information or to get answers to your questions: Kim Knox, senior research associate, 303-345-9114, [kim\\_knox@esource.com](mailto:kim_knox@esource.com).

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