



APPA Customer Service Benchmarking Program

Your Company Name should appear here.
DO NOT proceed if this is not your company name or if this is blank.

Do not edit this name.
 If the name is incorrect, please contact debi.mclain@1QConsulting.com

Contact Name	Phone Number
<input type="text"/>	<input type="text"/>

Email Address

In which region of the country is your utility located?

- Northeast
- Southeast
- Midwest/Plains/Texas/Louisiana
- West of the Rockies

Which commodities do you provided?

- Electric
- Gas
- Water
- Waste Water/Sewage
- Solid Waste
- Telecom
- Cable
- Transportation
- Other

View the glossary at www.1QConsulting.com/2008_APPA_Glossary.mht

View the data collection guide at www.1QConsulting.com/2008_APPA_Data_Collection_Guide.htm

General rules:

- 1) enter percents as whole numbers. 2% = 2, 0.05% = 0.05
- 2) leave unanswered questions blank -- don't enter N/A, none or anything else
- 3) don't add % or \$ signs to numbers. Don't enter any text with numbers (or else they won't get graphed)
- 4) provide most current Fiscal year end or last calendar year, whichever is more recent.

Statistical

1 | What was the average number of customer accounts you had last year? We'll do some analysis and make some adjustments when using these counts for denominators. For rows 1 to 5, the avg. no. of commodities is "1". For rows 6 to 10, the avg. no. of commodities is "2". For row 14, the avg. no. of commodities is "3". All other rows, please provide the avg. no. of commodities based on your account population.

	Accounts	Average Number of Commodities on Account
1 Electric Only [1 commodity]	<input style="width: 100px;" type="text"/>	<input style="width: 100px;" type="text"/>

2 Gas Only [1 commodity]	<input type="text"/>	<input type="text"/>
3 Water Only [1 commodity]	<input type="text"/>	<input type="text"/>
4 Waste Water Only [1 commodity]	<input type="text"/>	<input type="text"/>
5 Solid waste Only [1 commodity]	<input type="text"/>	<input type="text"/>
6 Telecom Only [1 commodity]	<input type="text"/>	<input type="text"/>
7 Cable Only [1 commodity]	<input type="text"/>	<input type="text"/>
8 Electric & Gas [2 commodities]	<input type="text"/>	<input type="text"/>
9 Electric & Water [2 commodities]	<input type="text"/>	<input type="text"/>
10 Gas & Water [2 commodities]	<input type="text"/>	<input type="text"/>
11 Electric, Gas & Water [3 commodities]	<input type="text"/>	<input type="text"/>
12 Electric, Gas & Other [3 or more commodities]	<input type="text"/>	<input type="text"/>
13 Electric, Water & Other [3 or more commodities]	<input type="text"/>	<input type="text"/>
14 Gas, Water & Other [3 or more commodities]	<input type="text"/>	<input type="text"/>
15 Electric, Gas, Water & Other [>3 Commodities]	<input type="text"/>	<input type="text"/>
16 Other	<input type="text"/>	<input type="text"/>

2| What is the number of customers you use when reporting customer counts in company documents such as annual reports? Use your own definition of a customer – whether accounts or meters or something else. This is a checkpoint to compare against the previous question.

Customers

Internal customer count

3| What percent of customers are residential?

4| Please provide the following statistics.

	Stats
Square Miles in Service Territory	<input type="text"/>
Electric Distribution Structure Miles	<input type="text"/>
Gas Distribution Main Miles	<input type="text"/>
Water Distribution Main Miles	<input type="text"/>

5| In which functional area are the following major activities located? Note: this assumes that a different VP/Director is in charge of each of the three functions.

	Customer Service	Distribution	City Department	Other
Contact Center	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Meter Reading	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Field Service non-credit activities	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Field Service credit activities	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Billing	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Payment Processing	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Credit & Collections Office activities	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

6| What were the incident rates for the following safety measures in 2007?

	Recordable Incident Rate	Lost Time Incident Rate	Vehicle Incident Rate - Company Vehicles [Preventable and non-]	Vehicle Incident Rate - Private Vehicles [Preventable and non-]
Total Customer Service organization	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
Meter Reading [field staff]	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
Field Service [field staff]	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>

Financial

7| In the table below enter your O&M costs for the year.

	Contact Center	Field Service	Meter Reading	Billing	Payment Processing	Credit Office
Company Labor	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
Contract Labor	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
Contracted Services	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
Technology	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
Vehicles	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
Telephone Service Charges	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
Transaction Fees	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
Materials	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
Postage	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
Write-offs	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
other	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>

8| Please allocate your contact center costs to the following locations. The total of table should equal total of Contact Center column in the main matrix.

Costs

Call Center	<input type="text"/>
Local Office	<input type="text"/>

9| Please allocate your meter reading costs to the following activities. The total of table should equal total of meter reading column in the main matrix.

Costs

AMI – Fixed Network	<input type="text"/>
AMR - Mobile	<input type="text"/>

Manual Reads

10| Please allocate your field service costs to the following activities. The total of table should equal total of field service column in the main matrix.



- Billing Issue Orders [includes high bill investigation in field, check reads, rereads]
- Credit Orders [includes notice delivery, field collections, disconnects, reconnects]
- Change of Account Orders [new and moves, turn-ons/turn-offs]
- Dispatch
- Other

Cost

<input type="text"/>
<input type="text"/>
<input type="text"/>
<input type="text"/>
<input type="text"/>

11| How much were the average fees per transaction for each activity? [Enter 0 if no charge] [Provide data only for your company, not third party providers]

	Residential	Commercial/Industrial
New account initiation [\$]	<input type="text"/>	<input type="text"/>
Same day new connection [\$]	<input type="text"/>	<input type="text"/>
Pay by credit card [%]	<input type="text"/>	<input type="text"/>
Late fee [%]	<input type="text"/>	<input type="text"/>
Disconnect notice [\$]	<input type="text"/>	<input type="text"/>
Reconnect after non-pay [\$]	<input type="text"/>	<input type="text"/>
After hours reconnect fee [\$]	<input type="text"/>	<input type="text"/>
Charge for field visit [\$]	<input type="text"/>	<input type="text"/>
Returned Check fee [\$]	<input type="text"/>	<input type="text"/>
Other [\$]	<input type="text"/>	<input type="text"/>

12| How much revenue did you generate from the following fees?

	Residential	Commercial/Industrial
New account initiation	<input type="text"/>	<input type="text"/>
Same day new connection	<input type="text"/>	<input type="text"/>
Late fee	<input type="text"/>	<input type="text"/>
Disconnect notice	<input type="text"/>	<input type="text"/>
Reconnect after non-pay	<input type="text"/>	<input type="text"/>
After hours reconnect fee	<input type="text"/>	<input type="text"/>
Charge for field visit	<input type="text"/>	<input type="text"/>
Returned Check fee	<input type="text"/>	<input type="text"/>
Other	<input type="text"/>	<input type="text"/>

12a| How much operating revenue [from sales of commodity to ultimate customers] did you collect last year?
2007

Revenue

13 | What percent of revenue was from residential customers?

14 | What percent of write-offs was from residential customers?

15 | What was the standard adder for Pensions & Benefits expense?
 Adder
 Percent adder for P&B

16 | What percent overhead rate do you apply to direct labor for your budget?
 Rate (Percent)
 Overhead Rate

Contact Center

17 | How many locations do you have for handling customer contacts?

	Locations
Contact centers [company-staffed, separate and distinct from Local Offices]	<input type="text"/>
Secondary or satellite contact centers [full-time, smaller, company-staffed centers]	<input type="text"/>
Local offices [customers can perform utility transactions]	<input type="text"/>
Kiosks [company owned]	<input type="text"/>
Pay agencies or locations [e.g. supermarkets, convenience stores]	<input type="text"/>

18 | How many customer contacts (calls, email, fax, correspondence) are completed by each of the following?

	Contacts
Company Phone Answering Reps	<input type="text"/>
Contract Phone Answering Reps	<input type="text"/>
Local Office Reps	<input type="text"/>
IVR/VRU (autocompleted)	<input type="text"/>
Website (autocompleted)	<input type="text"/>

19 | What percent of incoming contacts were related to each activity?

	Contacts
New Service or Change of account [turn-on/turn-off]	<input type="text"/>
High bill complaint or investigation	<input type="text"/>
Service disruption	<input type="text"/>
Accept payments or deposits	<input type="text"/>
Credit activities	<input type="text"/>

Other

20| What was your average speed of answer [ASA] for each after calls leave IVR?

Seconds

Calls answered in Call Center

Calls answered in Local Office

Blended and/or Breakdown not available

21| What percent of calls were answered in 30 seconds?
Percent [%]

Calls answered in Call Center

Calls answered in Local Office

Blended and/or Breakdown not available

22| What percent of calls were abandoned?

23| Please describe any initiatives or activities that you have undertaken recently or in the past to improve Contact Center.

Self-Service IVR/Internet Transactions

24| Which transaction types can be autocompleted on IVR and Web?

IVR Website

New Customer or Change of Account

Sign up for other/additional commodity services/Dereg

High bill or billing issue

Pay bill

Pay deposit

Sign up for E-bill

Provide meter read

Credit [arrange credit extension, etc]

Low Income Assistance

Streetlight trouble

Gas/Water Leak or Electric Interruption

General Company Information

Get Account information [view bill, view usage]

Other

25| What activities or initiatives have been successful, recently added, or attempted and dropped with the goal of

improving IVR or Website transactions?

Field Service

26 | How many field orders were completed during the year for each commodity?

	Change of account	Credit related	Billing investigations	2006YE	2005YE
Electric	<input style="width: 90%; height: 20px;" type="text"/>	<input style="width: 90%; height: 20px;" type="text"/>	<input style="width: 90%; height: 20px;" type="text"/>	<input style="width: 90%; height: 20px;" type="text"/>	<input style="width: 90%; height: 20px;" type="text"/>
Gas	<input style="width: 90%; height: 20px;" type="text"/>	<input style="width: 90%; height: 20px;" type="text"/>	<input style="width: 90%; height: 20px;" type="text"/>	<input style="width: 90%; height: 20px;" type="text"/>	<input style="width: 90%; height: 20px;" type="text"/>
Water	<input style="width: 90%; height: 20px;" type="text"/>	<input style="width: 90%; height: 20px;" type="text"/>	<input style="width: 90%; height: 20px;" type="text"/>	<input style="width: 90%; height: 20px;" type="text"/>	<input style="width: 90%; height: 20px;" type="text"/>

27 | How many field orders were completed during the year for each credit activity?

Orders

Field visit to leave disconnect notice	<input style="width: 90%; height: 20px;" type="text"/>
Field visit to collect or disconnect customer	<input style="width: 90%; height: 20px;" type="text"/>
Field visit to disconnect only	<input style="width: 90%; height: 20px;" type="text"/>
Field visit to reconnect – standard business hours	<input style="width: 90%; height: 20px;" type="text"/>
Field visit to reconnect – after-hours service	<input style="width: 90%; height: 20px;" type="text"/>

28 | What percent of your change of accounts (turn-off service) are handled in these ways?

Percent

Disconnect	<input style="width: 90%; height: 20px;" type="text"/>
Read the meter (manual or AMR)	<input style="width: 90%; height: 20px;" type="text"/>
Read the meter (AMI)	<input style="width: 90%; height: 20px;" type="text"/>
Estimate	<input style="width: 90%; height: 20px;" type="text"/>
Use last read	<input style="width: 90%; height: 20px;" type="text"/>
Use next read	<input style="width: 90%; height: 20px;" type="text"/>
System proration	<input style="width: 90%; height: 20px;" type="text"/>
Other	<input style="width: 90%; height: 20px;" type="text"/>

28a | Explain 'Other' in question 14.

29 | What percent of field service reps are dispatched using mobile data terminals?

30 | What have you done, if anything, to reduce trips to the field for high bill investigations?

31 | Please describe any initiatives or activities that you have undertaken recently or in the past to improve Field Service.

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Meter Reading

32 | How many meters did you have on your system that are read by each method?

	Manual	AMR - Mobile	AMI - Fixed Network
Electric	<input style="width: 95%;" type="text"/>	<input style="width: 95%;" type="text"/>	<input style="width: 95%;" type="text"/>
Gas	<input style="width: 95%;" type="text"/>	<input style="width: 95%;" type="text"/>	<input style="width: 95%;" type="text"/>
Water	<input style="width: 95%;" type="text"/>	<input style="width: 95%;" type="text"/>	<input style="width: 95%;" type="text"/>

33 | How many meter reads by reading method did you perform last year? [for billing purposes only]

	Manual	AMR - Mobile	AMI - Fixed Network
Electric	<input style="width: 95%;" type="text"/>	<input style="width: 95%;" type="text"/>	<input style="width: 95%;" type="text"/>
Gas	<input style="width: 95%;" type="text"/>	<input style="width: 95%;" type="text"/>	<input style="width: 95%;" type="text"/>
Water	<input style="width: 95%;" type="text"/>	<input style="width: 95%;" type="text"/>	<input style="width: 95%;" type="text"/>

34 | What percent of your meters are scheduled to be read monthly [for billing purposes]?

	Residential	Commercial	Industrial
Electric	<input style="width: 95%;" type="text"/>	<input style="width: 95%;" type="text"/>	<input style="width: 95%;" type="text"/>
Gas	<input style="width: 95%;" type="text"/>	<input style="width: 95%;" type="text"/>	<input style="width: 95%;" type="text"/>
Water	<input style="width: 95%;" type="text"/>	<input style="width: 95%;" type="text"/>	<input style="width: 95%;" type="text"/>

35 | How many meter reading errors were identified before bills were sent to customers?

	Errors
Manual	<input style="width: 95%;" type="text"/>
AMR - Mobile	<input style="width: 95%;" type="text"/>
AMI - Fixed Network	<input style="width: 95%;" type="text"/>

36 | How many meter reading errors were found after bills were mailed to customers?

	Errors
Manual	<input style="width: 95%;" type="text"/>
AMR - Mobile	<input style="width: 95%;" type="text"/>
AMI - Fixed Network	<input style="width: 95%;" type="text"/>

37 | How many meter reads were missed on their planned meter read date?

	Missed Reads
Manual	<input style="width: 95%;" type="text"/>
AMR - Mobile	<input style="width: 95%;" type="text"/>
AMI - Fixed Network	<input style="width: 95%;" type="text"/>

38 | How many meter reads were not completed during their scheduled window?

	Reads
Manual	<input style="width: 95%;" type="text"/>

39| What is your typical meter read window [days]?

AMR - Mobile

AMI - Fixed Network

40| Please describe any initiatives or activities that you have undertaken recently or in the past to improve Meter Reading.

Billing and Payment

41| How many bills did you issue through each channel? If you issue a paper and electronic bill, count only once and count as paper.

Via paper

Via internet [customer must look up info, include here even if a reminder e-mail is sent]

Via e-mail [customer gets billing information via email, doesn't have to visit web-site to view their bill]

Bills

42| How many bills did you issue that were estimated? List according to the reason for estimating.

Bills

Reading Error

Missed Read

Planned Estimate

Other

42a| Explain 'Other' in question 3.

43| How many billing problems were identified?

Problems

Pre-bill audit [flagged for review]

Errors found before the bill was mailed to the customer

Errors found after the bill was mailed to the customer

44| Please describe any initiatives or activities that you have undertaken recently or in the past to improve Billing.

45| How many payments were by each payment method? [should be roughly equivalent to bills issued]

Payments

Cash

Check

Credit card/Debit card

Electronic transfer

ACH

46| What percent of payments were received through the IVR or internet?

EDI

47| What percent of payments were processed using in-house image processing?

Percent of Payments

In-house image processing

48| Please describe any initiatives or activities that you have undertaken recently or in the past to improve Payment Processing.

Credit & Collections

49| What percent of customers are 60 days or more past due?

Percent of Customers

Residential

C/I: Small [or Commercial]

C/I: Large [or Industrial]

50| During an average month, what percent of your receivables are ...

Total

Current

30-59 days

60-89 days

90+ days

51| What are your average days sales outstanding?

52| From what percent of new customers did you collect a deposit?

53| Please identify your calculation approach for determining appropriate deposit amounts. [Check one box in each row.]

	More than one month's average usage	Average of one month's usage	Formula other than average usage	No deposit required	Depends on customer credit history
New residential customer	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Existing customer with change of service location	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Reconnected Residential Customer After Disconnect For Non-Pay	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
New Commercial Customer	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
New Industrial Customer	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

54| Please check any factors or other formulas used for determination of deposit requirements in the table above.

External credit-scoring service

- Prior service with your utility
- Prior service with another utility with which you share data
- Prior write-offs/disconnections at the premise location
- Provision of a valid Social Security # or equivalent
- Positive Identification
- Internal credit-scoring system
- Other

55 | Which analytical tools do you use?

- Credit scoring for new customers
- Behavioral scoring for existing customers
- Credit management software for delinquent accounts
- Other

56 | Please describe your behavioral scoring system and what actions [e.g. change in deposits] you take when a customer's credit behavior changes.

57 | What percent of your write-offs were covered by deposits at the time of write-off?

58 | Please describe your disconnection policies.

Calendar Days

Minimum days past due before allowed to disconnect

Average days past due when field order issued for disconnection

59 | Do you collect payments in the field?

- Yes
- No

60 | Please describe any initiatives or activities that you have undertaken recently or in the past to improve Credit and Collections.

Staffing

61 | How many FTEs were in each category?

	Call Center	Local Office	Meter Reading	Field Service	Billing	Payment Processing
Full-time	<input style="width: 100px; height: 20px;" type="text"/>	<input style="width: 100px; height: 20px;" type="text"/>	<input style="width: 100px; height: 20px;" type="text"/>	<input style="width: 100px; height: 20px;" type="text"/>	<input style="width: 100px; height: 20px;" type="text"/>	<input style="width: 100px; height: 20px;" type="text"/>
Part-time	<input style="width: 100px; height: 20px;" type="text"/>	<input style="width: 100px; height: 20px;" type="text"/>	<input style="width: 100px; height: 20px;" type="text"/>	<input style="width: 100px; height: 20px;" type="text"/>	<input style="width: 100px; height: 20px;" type="text"/>	<input style="width: 100px; height: 20px;" type="text"/>
Shared	<input style="width: 100px; height: 20px;" type="text"/>	<input style="width: 100px; height: 20px;" type="text"/>	<input style="width: 100px; height: 20px;" type="text"/>	<input style="width: 100px; height: 20px;" type="text"/>	<input style="width: 100px; height: 20px;" type="text"/>	<input style="width: 100px; height: 20px;" type="text"/>
Contract	<input style="width: 100px; height: 20px;" type="text"/>	<input style="width: 100px; height: 20px;" type="text"/>	<input style="width: 100px; height: 20px;" type="text"/>	<input style="width: 100px; height: 20px;" type="text"/>	<input style="width: 100px; height: 20px;" type="text"/>	<input style="width: 100px; height: 20px;" type="text"/>

63 | What are the average hourly wage rates in each of the following direct labor categories?

Avg. Wage Rate

Contact Center: Call Center Rep

		64 What percent of direct customer contact activity is outsourced in each functional area? We would like outsourced to a 3rd party, not contract labor.	Percent
Contact Center: Local Office Rep	<input type="text"/>	Contact center incoming calls	<input type="text"/>
Contact Center: Training	<input type="text"/>	Contact center outbound calls [not including credit or outage]	<input type="text"/>
Meter Reader	<input type="text"/>	Outage notification: outbound	<input type="text"/>
Field Service Rep	<input type="text"/>	Meter Reading reads	<input type="text"/>
Billing Clerk	<input type="text"/>	Field Service Orders	<input type="text"/>
Payment Processing Clerk	<input type="text"/>	Billing bills issued	<input type="text"/>
Payment Processing: Cashier	<input type="text"/>	Payment processing: payments processed	<input type="text"/>
C&C Office Rep	<input type="text"/>	Credit & Collections: outbound calls	<input type="text"/>
		Credit & Collections: delivery of notices	<input type="text"/>
		Revenue Assurance	<input type="text"/>

Customer Satisfaction

65 | How do you measure customer satisfaction? Indicate whether this is a formal or informal process, how it's administered, how often it's performed, etc.

66 | What is your overall percent of customer satisfaction?

67 | If you've seen an improvement in customer satisfaction recently, to what do you attribute this change?

Indicates Response Required