

Multifamily Residential Energy Pathways Participating Contractor Network



Management Plan – Customer Service Plan

This document is intended to help firms develop their customer service plans. Applicants can use their responses to the prompt questions to develop the plans. The Customer Service Plan will be evaluated based on how well the applicant addressed the following items: 1) lead and referral handling, 2) feedback mechanisms, and 3) customer dispute resolution policy. These three items must be included in the customer service plan to receive full points. The length of the plans may vary. Please note that a complete Management Plan compliant with the requirements of RFQL 5906 must also include a Quality Control Plan in addition to the Customer Service Plan. Refer to RFQL 5906 for details on what is entailed in the Quality Control Plan.

Lead and Referral Handling

For this section, please address the following questions.

- Describe your proposed methodology in detail for receiving leads and referrals from NYSERDA. Please specify how you organize leads and customer acquisition (i.e., Excel Spreadsheet, CRM, other software).
- Describe your established policy to return calls or web inquiries from prospective customers including response time and method.

Sample Plan Responses

The company will have dedicated staff appointed to monitor incoming NYSERDA and prospective customer referral emails and calls daily and be required to respond to each lead within two business days. All referrals and leads will be saved and tracked in a database with the contact information of the prospective project, the date the lead or referral was received and responded to, and the source of the lead or referral [from a prospective customer, web search, NYSERDA, etc.].

If upon the company's response [email, phone, etc], there is no follow-up from the prospective customer after [two weeks], the company will make a follow-up attempt to the prospective customer. If after [one month], there is no response from the prospective customer, then the company will issue one final attempt to contact the prospective customer. All outreach attempts to the prospective customer will be tracked in the database.

Feedback Mechanisms

Prompt Questions:

- Describe how the organization will solicit feedback from customers. Please detail communication and organization methods for receiving that feedback.
- Indicate how this feedback is used to improve business operations and customer service.

Sample Plan Responses

During the initial call with each client the company makes it clear that feedback, both positive and negative, is encouraged throughout the lifecycle of the project. The company provides a dedicated system to handle all customer feedback and concerns. When a project comes to a close, the customer is again asked to provide any feedback as to what they thought was done well, as well as any pain points in the project, and any areas for improvement. Below are the specific question prompts sent to customers of all completed projects [list of question prompts provided]. That feedback is captured through [survey instrument, customer interview with project manager, etc.]. Customer feedback is logged [saving the customer's email, logging notes from a call into a customer relationship management tool, etc.] to be reviewed and used for continuous improvement. Feedback is shared with the project management team to recognize what was done correctly and encourage it is continued for future projects and to brainstorm how to address and rectify any negative feedback in the future. Any notification of issues regarding a recently completed project will be addressed following our Customer Dispute Resolution Policy. The same parameters are used for each project review to establish a standard against which all projects are evaluated. This feedback is reviewed upon project completion and a summary of the feedback is available for semi-annual review.



Customer Dispute Resolution Policy

Prompt Questions:

- Describe your company's process for resolving customer complaints and/or disputes. Detail communication procedures and timeline for resolution.
- Describe your escalation procedures to resolve the customer concern.
- Describe the firm's protocol for continuous improvement learning from previous customer disputes.

Sample Plan Responses

When a complaint and/or dispute is reported, the company will record and save [email, database, CRM, etc.] a summary of the issue to monitor progress, ensure a timely resolution, and prevent further disputes. Within two business days of notification, the company will assign a senior staff member to work directly with the customer [and, if needed, a member of the NYSEERDA project team, if applicable for NYSEERDA funded projects] to gather and record all necessary information and come up with a resolution. The company will provide a written plan and timeline detailing their plan to resolve the customer complaint and prevent similar issues in the future that will be signed off by both the customer [and NYSEERDA, if applicable]. If the complaint remains open after [x amount of days], it is escalated to [manager, director, supervisor]. A new plan of action will be drafted and recorded [email, database, CRM, etc.]. If the complaint remains unresolved and trust between the customer and company is weakened, the company will bring in [mediator, trusted outside partner, etc.]. If an agreement is reached, then it is shared in writing with all parties involved, and site visit may be arranged to determine the scope of work needed to resolve the complaint, which all parties must agree upon before the commencement of any work.

To ensure continuous improvement, the company has a comprehensive process to prevent and identify fraud, waste, and abuse in its programs, ensuring continuous improvement across all initiatives. These initiatives include [set pricing, data validation, inspections, QA review process]. Data and process reviews are conducted every [month, quarter, etc.] Results are reviewed regularly by staff and partners [subcontractors, peers, etc] to determine the effectiveness of these strategies, with further interventions applied if necessary to ensure quality work through the program.

