



NYSERDA

Contractor Support Plan & Help Center Advanced Training

Home Performance with ENERGY STAR[®]

March 30, 2015

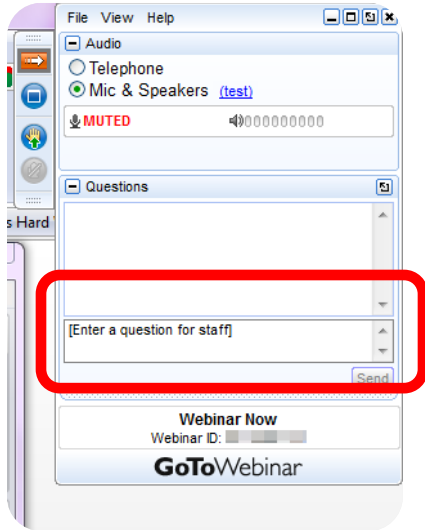
Presenters:

Bou Reed, Partner Services Manager, Conservation Services Group

Assisting:

Cara Sherwood, Associate Project Manager, Conservation Services Group

Questions



To ask a question, type into the *[Enter a question for staff]* field and click Send.

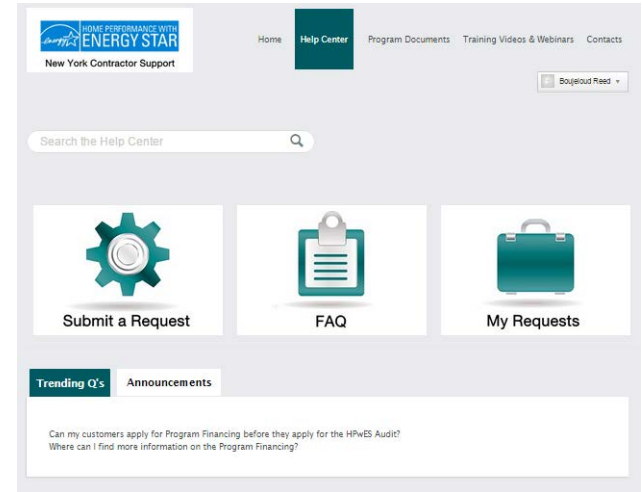
Agenda

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- Introduction
- Introducing Support Team
- Help Center Support Stats & Contractor Feedback
- Process Changes
- Q&A
- Wrap-Up

Introduction

- On March 2nd, 2015, CSG successfully launched the Centralized Support initiative with a seamless roll out of a fully integrated Contractor Help Center and revamped support team.
- The March 2nd Introduction to Help Center webinar slides and recording are located on the [Contractor Support Site](#).



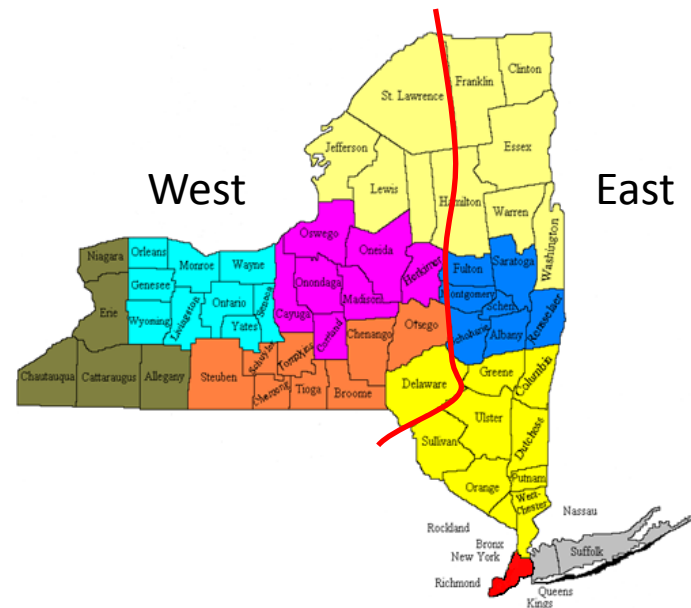
Introducing Support Team

Introducing Support Team

- **Help Center Program Analysts**
 - Sarah Knoell & Steven Smith
 - Program experts providing accurate timely solutions to the majority of support requests.

Introducing Support Team

- **Senior Account Managers**
 - Peter Hoke (East)
 - Ryan Moore (West)
 - Providing account management services to all partners.



Introducing Support Team

- **Technical Support Analyst**
 - Earl Hicks
 - Providing remote technical support and consultation services to partners. Assisting contractors in resolution of complex technical issues.

Help Center Support Stats

Overview of Support Stats

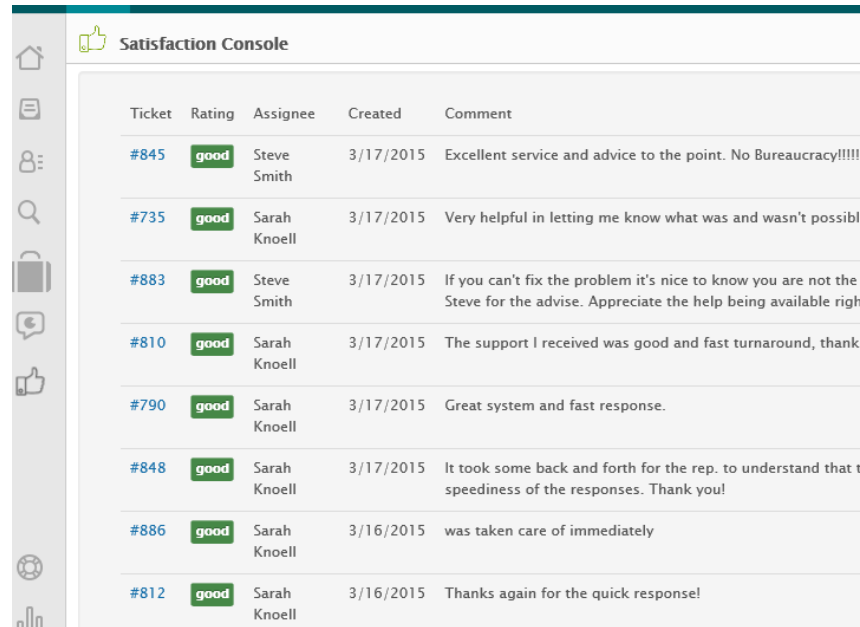
- 144 participating contractors have submitted support requests
- 945 tickets solved from March 2nd - March 27th

Top 10 Help Center Users	
Home Energy Performance By HALCO	64
Powersmith	25
ZeroDraft	25
Kalex Energy Co Inc	21
Green Home Solutions	20
Isaac Home Energy Performance	17
Next Step Living, Inc.	17
Taylor Home Energy	16
Crossfield Home Energy Solutions	15
Comfort Home Improvement	13

Help Center Survey Responses

Contractor Feedback

- Satisfaction rating 99.1% positive since launch with 233 positive responses out of 758 surveys sent for a 31% response rate



Ticket	Rating	Assignee	Created	Comment
#845	good	Steve Smith	3/17/2015	Excellent service and advice to the point. No Bureaucracy!!!!
#735	good	Sarah Knoell	3/17/2015	Very helpful in letting me know what was and wasn't possible
#883	good	Steve Smith	3/17/2015	If you can't fix the problem it's nice to know you are not the Steve for the advise. Appreciate the help being available right
#810	good	Sarah Knoell	3/17/2015	The support I received was good and fast turnaround, thank
#790	good	Sarah Knoell	3/17/2015	Great system and fast response.
#848	good	Sarah Knoell	3/17/2015	It took some back and forth for the rep. to understand that the speediness of the responses. Thank you!
#886	good	Sarah Knoell	3/16/2015	was taken care of immediately
#812	good	Sarah Knoell	3/16/2015	Thanks again for the quick response!

Process Changes

How Centralization Effects Support

- Availability and frequency of remote support provided should increase;
- Frequency of site visits to be minimized;
- Focus on photo evidence and customer verification;
- Contractors' use of Help Center Knowledge Base is important for a successful transition.

Affected Processes

- Quality Control Activities:
 - Customer Audit & Projects Concerns; DOC/PINS follow-up;
- Support for Existing Partners:
 - Technical support and training; Software and Portal guidance; marketing & business development support;
- New Contractor Support Activities:
 - On-boarding new contractors, new contractor training and oversight;

Quality Control Activities

- Audit & Project Concerns:
 - Contractors to manage concerns & communicate with Account Managers using Help Center;
 - Support to transition to remote support activities and negotiating resolution in lieu of infield inspection and onsite monitoring;
 - Stricter adherence to Program policies and set deadlines to be enforced;

Quality Control Activities

- Quality Assurance QC Follow-up:
 - DOCS/PINS follow-up will be handled using emails generated from Help Center
 - Contractors to simply reply via email to issued DOC with signed documents and photographs of resolved items;
 - Account Manager and Sr. Technical Analyst available for assistance.
 - Health & safety correction will be subject to Program verification in addition to the contractor providing photographic proof of compliance.

Support for Existing Partners

- Utilizing the Help Center:
 - Technical Assistance (Building Science) to be provided by Account Managers and Tech Analysts.
 - Programmatic and Portal support to be provided by Program Analysts.
 - Process Improvement & Marketing support to be provided by Account Managers and Program Analysts.
- Software support to be provided by energy modeling software vendors.

New Contractor Support Activities

- Senior Account manager to provide initial introduction to Program rules and services
- Program Analysts available to assist with Portal workflow and job submission trainings.
- Focus to be on leveraging contractor support site and Help Center knowledge base.

Additional Affected Processes

- New employee trainings;
- CBO Aggregation (remote support);
- In-Field Technical Training;
- Supporting Low-rise Multi-unit projects;
- Monthly technical webinar series (coming soon)

Q&A

What is the most helpful feature of the Help Center or Knowledge Base?

Actual Contractor Survey Responses

Contractor Comments

- Availability - when a call or ticket is created, someone responds quickly;
- Ease of use;
- Frequently asked questions can be answered without hesitation;
- The speed with which I receive help with all of my issues;

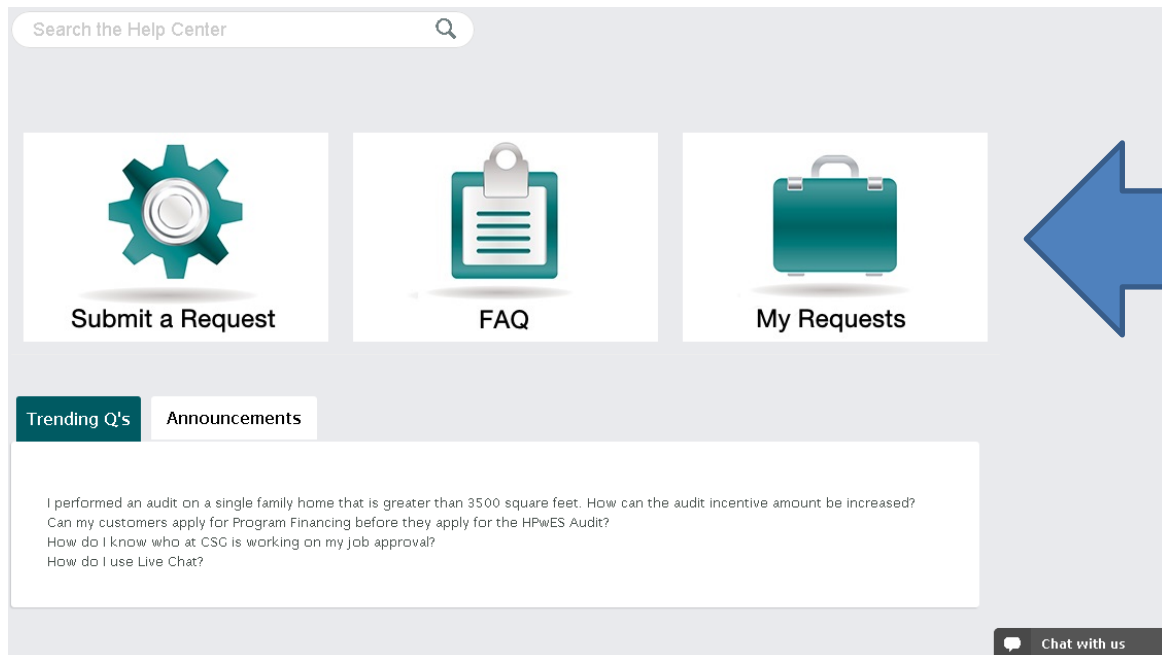
Actual Contractor Survey Responses

Contractor Highlighted Features

- I love that I can search for the most recent & relevant information in a search bar!
- If I start typing in the subject, it shows me all the related questions it finds! Super helpful;
- Being able to attach files regarding a problem or issue;
- The live chat;

Actual Contractor Survey Responses

- Seeing up-to-date information on items submitted.



Search the Help Center

Submit a Request

FAQ

My Requests

Trending Q's

Announcements

I performed an audit on a single family home that is greater than 3500 square feet. How can the audit incentive amount be increased?
Can my customers apply for Program Financing before they apply for the HPwES Audit?
How do I know who at CSG is working on my job approval?
How do I use Live Chat?

Chat with us

A large blue arrow points from the right side of the interface towards the 'My Requests' button.

Features of My Requests

- See My Requests, Organization Requests, Ticket Details
- Ability to Search Requests
- Status of pending support requests
 - Open, Awaiting Your Reply, Solved

My activities

Requests

Contributions

Following

My requests

Organization requests

Status: Any

ID	SUBJECT	CREATED	LAST ACTIVITY	STATUS
425	Test	23 days ago	21 days ago	SOLVED

Features of My Requests

- Provide additional responses to open requests
- Ability to change satisfaction rating from bad to good
- Create follow up ticket to closed requests

Contractor Help Center > My activities

This request has been rated as:

Good, I'm satisfied

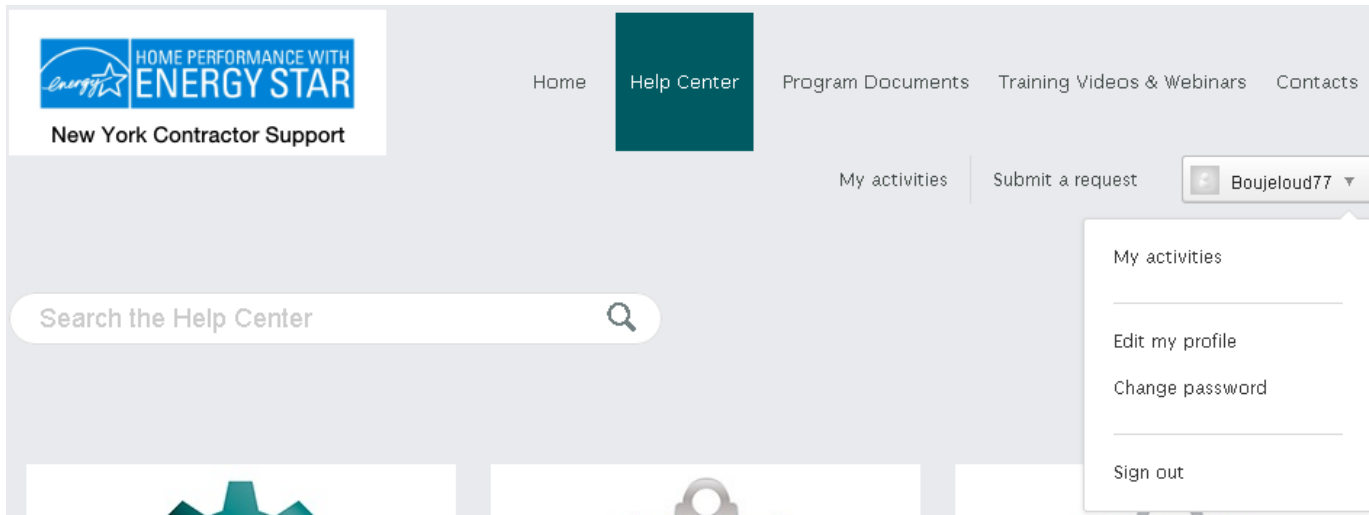
You submitted this request

Status
SOLVED

Assigned to
Sarah

Features of My Requests

- Or access My Activities from Name Dropdown
- Edit your profile
- Change password



Features of My Requests


- Or access My Activities from Name Dropdown
- Edit your profile
- Change password

The screenshot displays the user interface of the 'New York Contractor Support' website. At the top left is the 'HOME PERFORMANCE WITH ENERGY STAR' logo. The navigation bar includes links for 'Home', 'Help Center' (highlighted in a dark teal box), 'Program Documents', 'Training Videos & Webinars', and 'Contacts'. Below the navigation bar, there are links for 'My activities' and 'Submit a request'. A user profile dropdown menu is open, showing the username 'Boujeloud77' and a list of options: 'My activities', 'Edit my profile', 'Change password', and 'Sign out'. A search bar labeled 'Search the Help Center' is located below the navigation bar. The bottom of the page features a decorative teal mountain range graphic.

Features of My Requests

- Edit your Name
- Change your Profile Picture
- Add a phone number

The screenshot displays the user interface of the Energy Star New York Contractor Support portal. At the top left is the Energy Star logo with the text "HOME PERFORMANCE WITH ENERGY STAR" and "New York Contractor Support". The navigation menu includes "Home", "Help Center" (highlighted in dark teal), "Program Documents", "Training Videos & Webinars", and "Contacts". Below the navigation, there are two buttons: "My activities" and "Submit a request". A user profile dropdown menu is open, showing the user's name "Boujeloud77" and a profile picture icon. The dropdown menu is titled "Edit my profile" and contains the following information:

Name	Boujeloud77
Avatar	
Phone	-

Below the navigation menu is a search bar with the placeholder text "Search the Help Center" and a magnifying glass icon. At the bottom of the page, there is a teal mountain graphic.

What feature do you
require more
training on?

Actual Contractor Survey Responses

- How to find forms relative to portal sequence;
- Where to locate program info;
- Is there a location holding all the available webinars for training?
- Is it ok to contact CSG staff directly?
- What happens to the people and contact numbers we have used in the past?
- Closing a ticket;
- How to communicate via share screen;
- Portal Troubleshooting;

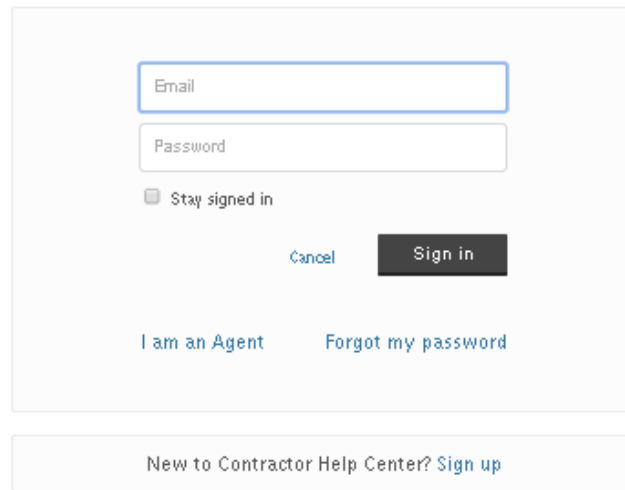
How do I contact the Contractor Help Center?

- Methods of Communication:
 - Ticket Creation – Help Center located as part of Contractor Support site;
 - Email: contractorsupport@csggrp.com;
 - Instant chat for real-time online support;
 - Toll-Free hotline 1-800-284-9069.
- Help Center Hours
 - Monday – Friday
 - 8:30AM – 5PM

How do I get a Login?

- For new users requiring a log-in either:
 - Send your first support request to contractorsupport@csggrp.com or
 - On the Help Center click Sign In and Select Sign Up
- Users can reset your Password by selecting “Forgot my password”
 - Or set up your initial password if you did not already.

Sign in to Contractor Help Center



The screenshot shows a sign-in form for the Contractor Help Center. It features two input fields: 'Email' and 'Password'. Below the 'Password' field is a checkbox labeled 'Stay signed in'. To the right of the checkbox are two buttons: 'Cancel' and 'Sign in'. Below the 'Sign in' button are two links: 'I am an Agent' and 'Forgot my password'. At the bottom of the form is a link: 'New to Contractor Help Center? Sign up'.

Have you emailed us? [Get a password](#)

If you've communicated with our support staff through email previously, you're already registered.

You probably don't have a password yet, though.

Updating or Deleting Users?

- Submit a request to Contractor Support to:
 - Edit an email address for the Help Center
 - Edit an email address for the Portal
 - Add a user for Portal
 - Add or remove QA recipient
 - Delete a user for Portal
 - Delete a user for Help Center

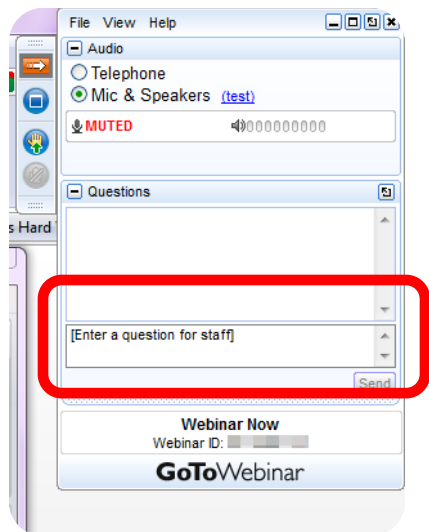
Contractor Help Center Tips

- Help Center sends out immediate response confirming receipt of support request
- Logging in is not required to reply to a support response
 - Simply reply to the email.
- User Logins have been distributed
 - Use the instructions in the email to set your password.

Contractor Help Center Tips:

- Contractors able to provide feedback on experience within new Help Center system:
 - FAQs comments
 - Article Rating
 - Ticket Satisfaction Rating
- Submit separate tickets for separate issues.
- If same issue for multiple customers/projects – can list them in the same ticket.
- Once a ticket is solved, do not reply to create a new ticket. Start new email or go to the ticket form.

Questions



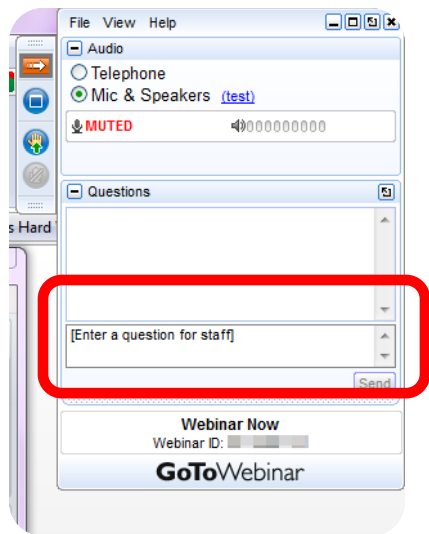
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Wrap-Up

Additional Training and Resources

- Upcoming Trainings - Monthly Technical Webinar Series:
 - April - Truing Up to Billing Data: The Imperative for Accurate Software Estimations
- Additional Resource:
 - [End-User Guide](#)

Additional Questions



To ask a question, type into the *[Enter a question for staff]* field and click Send.

Thank you