**RMI Technical Conference – November 8, 2011**

**Customer Referral Program Discussion**

**Submit all deliverables to** [**ra-rmi@pa.gov**](mailto:ra-rmi@pa.gov)

**All discussion documents/deliverables available at**

[**RMI Discussion Documents & Deliverables**](http://www.puc.state.pa.us/electric/Retail_Markets_Investigation_Discussion_Documents.aspx)

**Action Items highlighted in yellow**

**Organizational Issues** – Karen Moury

* Moury: Offering call-in ability for 11/10/11 RMI en banc hearing – listen only. Will be transcribed and recorded and recorded by PCN.

**Customer Referral Program** – Kirk House

1. *New/Moving Customer Issues*: [RESA Discussion Document for New/Moving Customer Program & Related Customer Choice Education - 10/5/11](http://www.puc.state.pa.us/electric/docs/RMI/DD-NewMoving_Customer_Program_100511.docx)
2. *Discussion of NY Referral Program*: [DE - Description of NY Customer Referral Program](http://www.puc.state.pa.us/electric/docs/RMI/DD-DE-NY_Referral_Programs_093011.docx)
3. *RESA Customer Referral Program Proposal*: [RESA Customer Referral Program Proposal](http://www.puc.state.pa.us/electric/docs/RMI/DD-RESA_Mover_Customer_Referral_110811.docx)

* RESA: 3 subgroup conference calls regarding the 10/5/11 document. 1 subgroup call regarding RESA’s updated proposal. *Discussed contents of RESA Customer Referral Program Proposal*. Main points: Referral program only for residential and small business (based on EDC rate classifications) default service (DS) customers. 3-month introductory period w/EGS at rate 7% lower than current EDC PTC (will fluctuate with PTC quarterly changes). 3 months allows for EGS required notifications for rate changes. After 3 months, customer must affirmatively choose to leave EGS or remain on month-to-month plan with no cancellation fees. In NY, some customers revert to variable rate. EDC customer service representatives (CSR) inform customers of program and provide information to appropriate EGS for customer enrollment. Adopt prior to 6/1/13. Open to idea of outsourced call center, but concerned about dropping calls. Overarching concern: place EGS selection on equal footing with DS selection. Customers need clear decision point.
* EDCs: OK with 7% for 3 months if it follows EDC PTC. Don’t want customers reverting to a variable rate after 3-month intro period. Have customers reverted to fixed rate for months 4-12. Agree with EGSs enrolling customers. EDCs need to implement system upgrades. Utilize separate, statewide, outsourced call center. Risk of losing some customers due to lack of interest or technical problems is outweighed by use of outsourced CSRs. May not be able to implement till 2013. Want to phase out declining block rates. May not be cost-effective for small business customers.
* OCA: Concerned about use of intro price but if intro price is used, tracking PTC and giving reasonable discount off PTC, with additional consumer protections should be OK. Intro rate should be 4 months. Post-intro rate, provide fixed rate or return to DS. Some settlements, mergers, etc. have call center metrics that need to be adhered to. Don’t liberalize standards.
* AARP: NY – EDC ratepayers don’t fund implementation costs for programs. DS customers shouldn’t pay for program. Disagree with RESA’s proposed EDC call center scripts.
* PULP: Difference in customer assistance program (CAP) requirements/standards for shopping across EDCs. Concern with use of uniform scripts and call centers. Need to know CAP issues. Any indications about savings should be clearly indicated in relation to CAP rates.
* House: No regulatory requirements for call center metrics. Commission has found some EDC call center issues in past and contacted EDC directly. If placing mandates on EDCs, possibly relax standards keeping in mind customer is being served. Don’t negatively impact customers’ experiences.

**Future Meeting Dates:**

1. En Banc Hearing: Thursday, November 10, 2011 – 12:30-5:00 PM – Hearing Room 1, Keystone Building, Harrisburg

2. CC: Thursday, November 17, 2011 – 1:30 PM

3. CC: Wednesday, November 30, 2011 – 10:00 AM

4. CC: Wednesday, December 14, 2011 – 10:00 AM