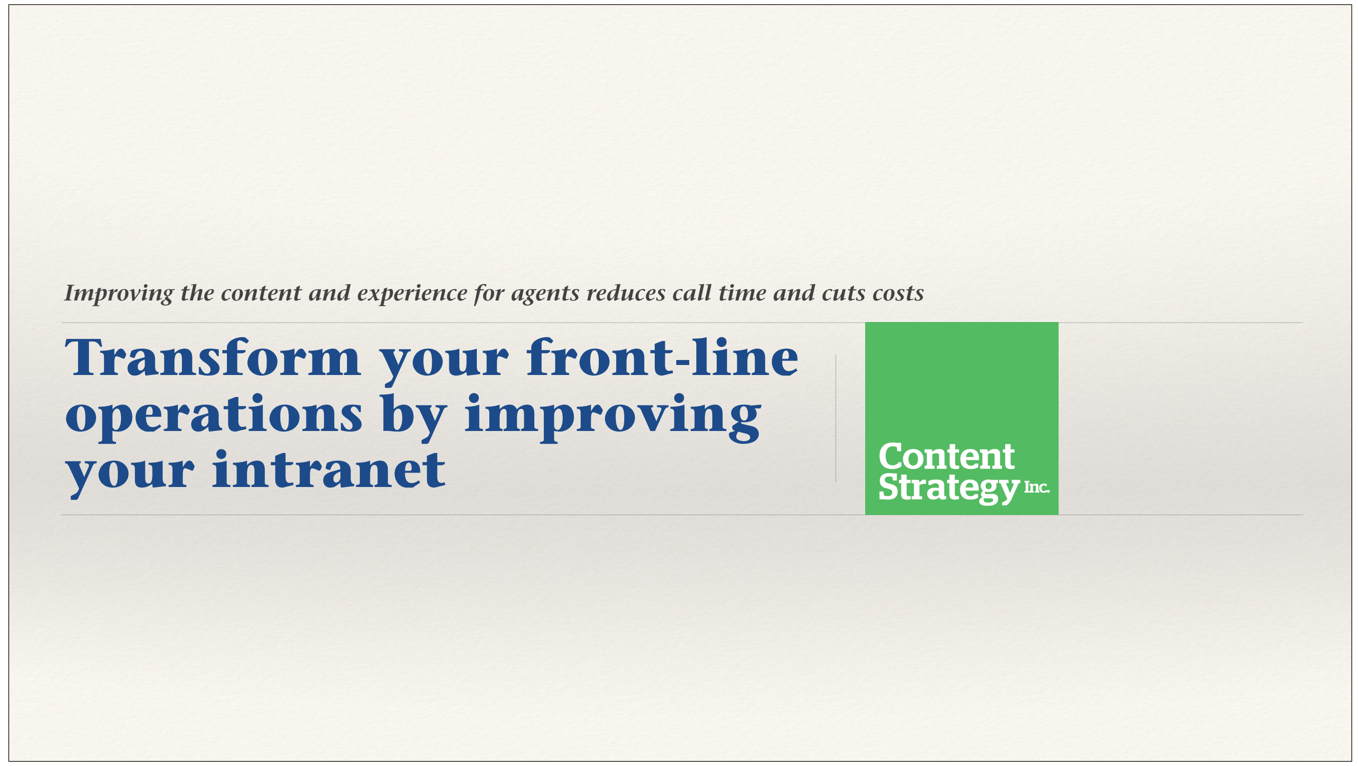
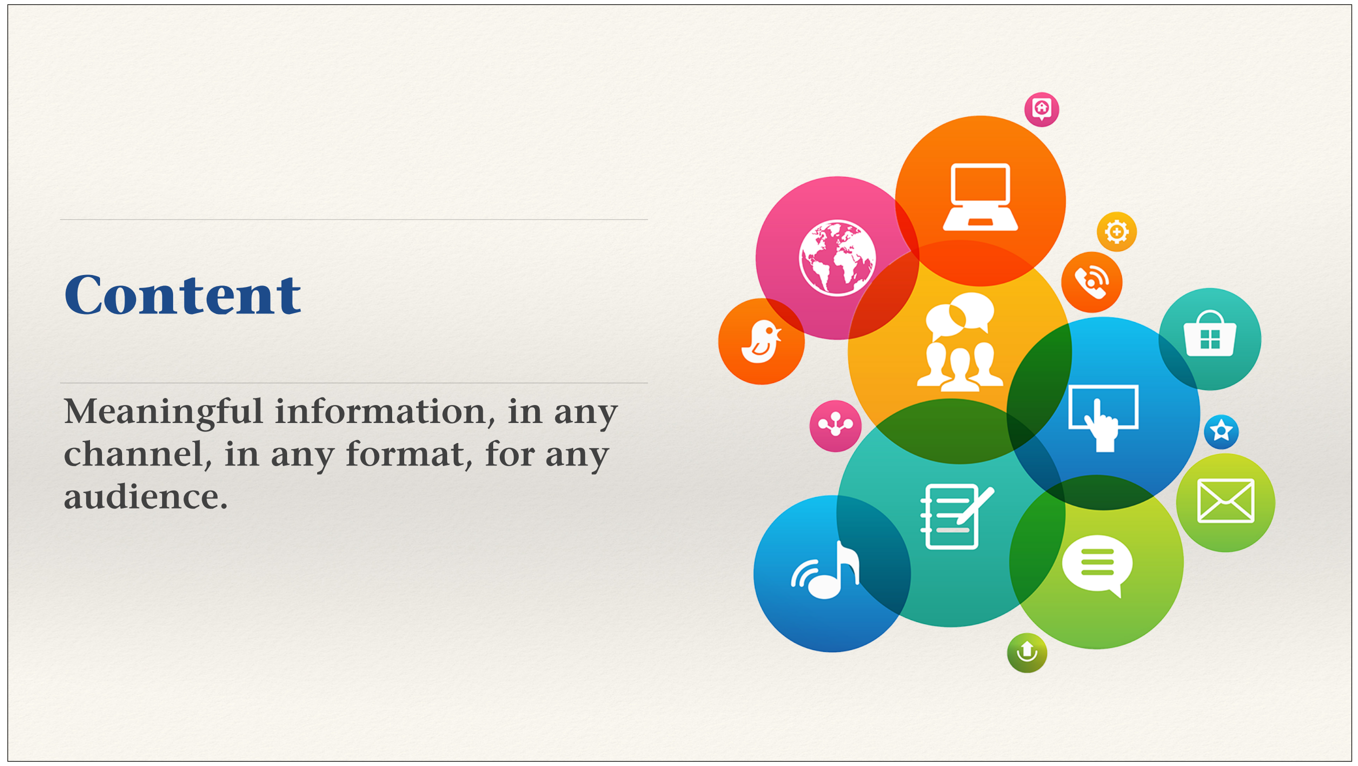


Good afternoon, everyone. It’s nice to see you all here today. I’m a senior strategist with Content Strategy Inc. We are a consultancy that specializes in content strategy.

And I bet that at least some of you are wondering what I mean by “content strategy”. Well, that’s okay. Even those of us who are content strategists find ourselves wondering what it means to do the job. But there’s one thing about content people that’s fairly consistent: we like to define our terms. So I’m going to start there.



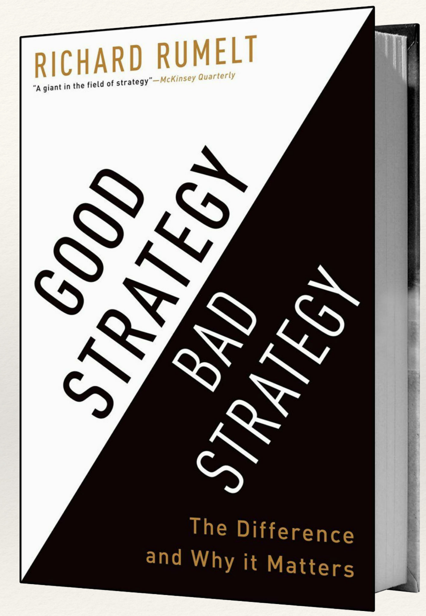
Let’s start with the word “content”. We define content as being, “Meaningful information, in any channel, in any format, for any audience.” It’s a very broad term, but it can be clarified by context.

Content is newsletters and newspapers. It’s Facebook, Twitter, and Instagram posts. It’s videos and articles and images that go with those articles, whether they are in a magazine or on a tablet. Software and apps are full of content. So are websites.

Strategy

"A coherent set of analysis, concepts, policies, and arguments that respond to a high-stakes challenge."

—Richard Rumelt



We like how Richard Rumelt defines strategy as being, "A coherent set of analysis, concepts, policies, and arguments that respond to a high-stakes challenge."

This means that strategy IS NOT best practice. It also means strategy is different from tactics, which are the actions and activities that help achieve a strategy.

Content strategy

Content strategy guides the creation, delivery, and governance of useful, usable content.

–Kristina Halvorson

Now let’s define what content strategy means. This is the popular definition and it comes from Kristina Halvorson, a pioneer in the field.

“Content strategy guides the creation, delivery, and governance of useful, usable content.”

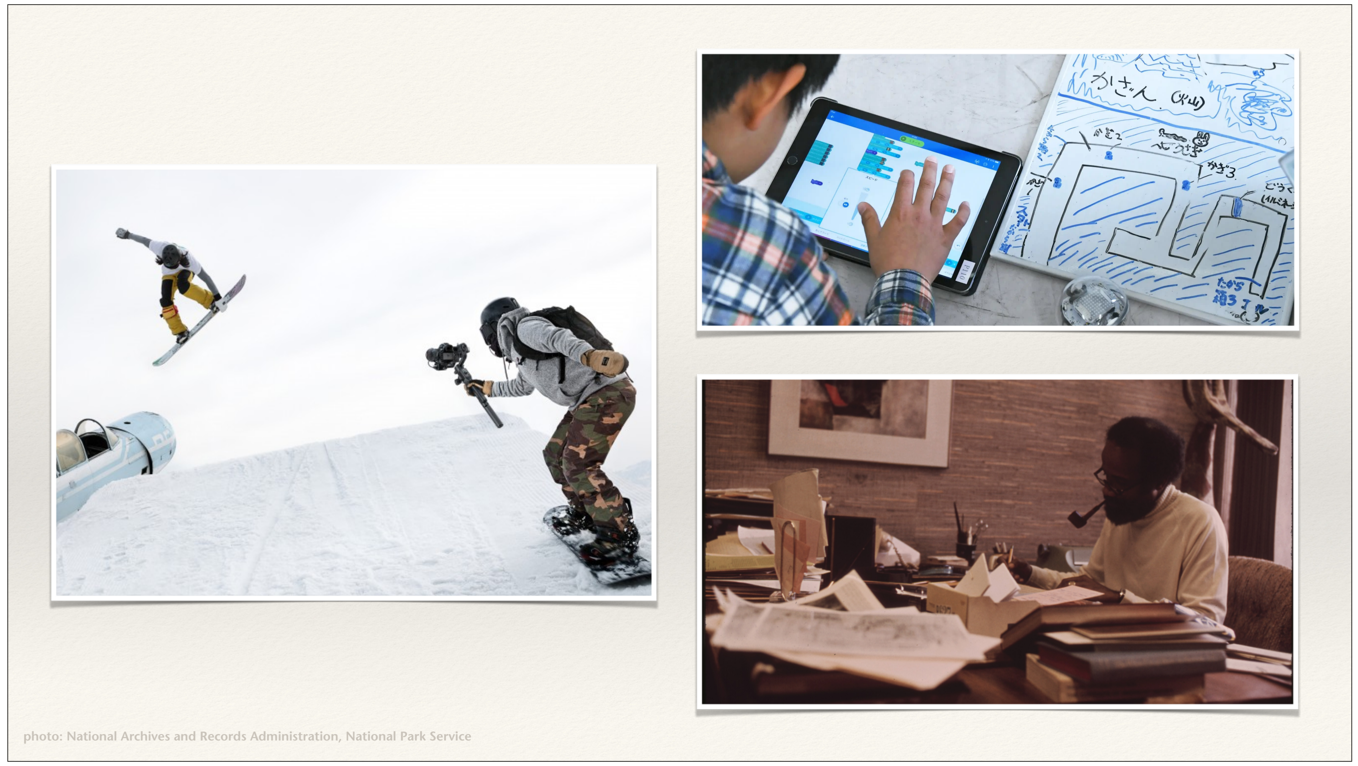
I’ll unpack what we mean by this.

Content strategy

Content strategy guides the creation, delivery, and governance of useful, usable content.

–Kristina Halvorson

CREATION



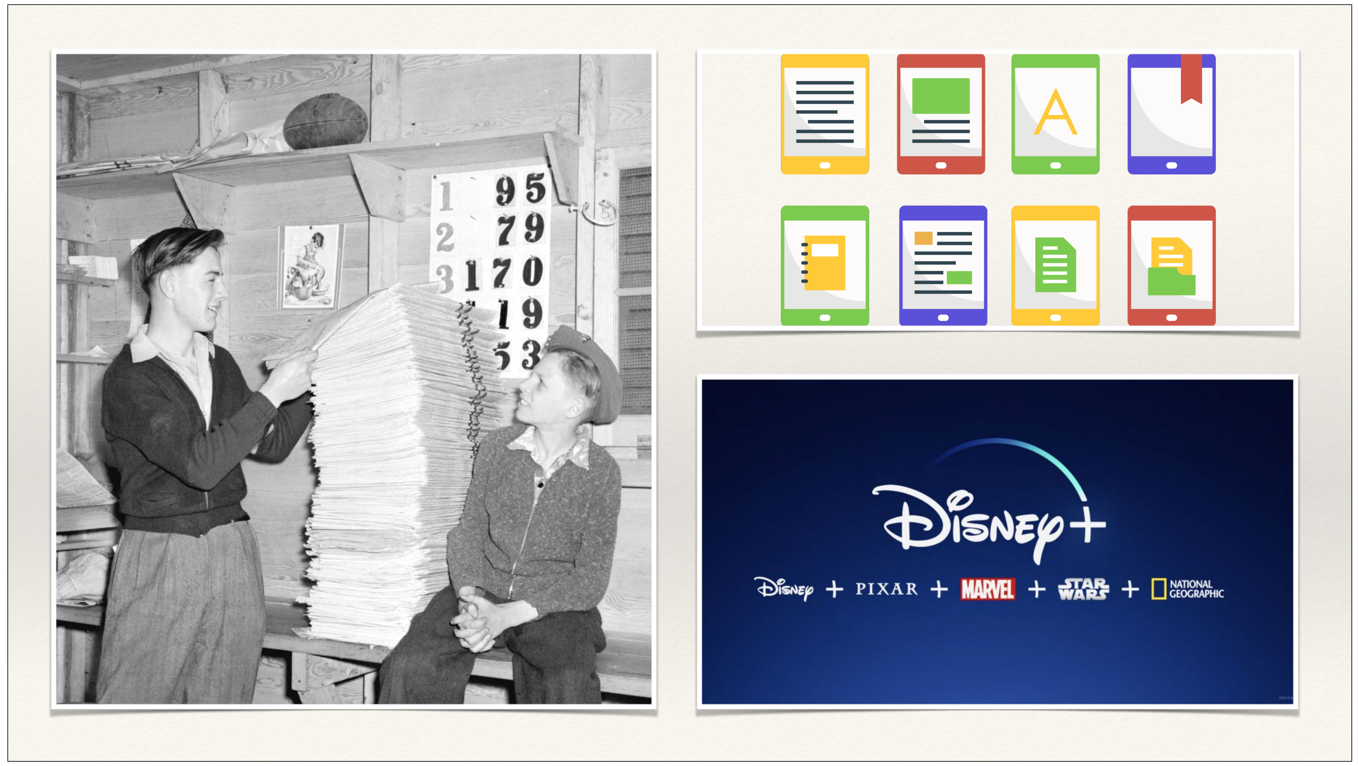
“Creation” is about developing content. That can be a bunch of snowboarders making a gnarly video series, or a writer at their desk with a pen and paper, or a child building nascent applications in coding interfaces.

Content strategy

Content strategy guides the creation, delivery, and governance of useful, usable content.

–Kristina Halvorson

DELIVERY



“Delivery” is about making content available to people who need it. Newspapers coming off a press and delivered daily, or RSS feeds that automatically push content out to smartphones, tablets, and computers, or streaming services that give us on-demand access to our favourite movies.

Content strategy

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–Kristina Halvorson

GOVERNANCE

“Governance” refers to how decisions about content are made and how the people and systems that are involved in content are managed.

Content strategy

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–Kristina Halvorson

USEFUL

We focus on content that is “useful”. It serves a purpose. It helps someone accomplish a task or objective in the same way a lightbulb is useful because it enables us to see in the dark.

Content strategy

Content strategy guides the creation, delivery, and governance of useful, usable content.

–Kristina Halvorson

USABLE

This is also about content that is “usable”: the people for whom it is intended can actually do something with it, easily, simply, and without effort. One rechargeable version of Apple’s Magic Mouse may have been very useful, but it wasn’t very usable, because to recharge the device you had to turn it upside down. So you could never recharge this while you were using it.

In addition, content strategy is about…

Making sure that this all serves the needs of the business, that it's being done efficiently, and that the audience for the content is front of mind.

Audiences can be customers, or members, or even INTERNAL audiences like staff.

CX

“Customer experience”

And here’s another term you may not be familiar with. How many of you in the room have heard the term “customer experience”? It’s often abbreviated as CX. It refers to the experience of being a customer of a business.

When it comes to CX, I think we can agree that being on hold with a customer service representative is a poor customer experience. Every time you're on hold aren't you thinking about everything else you could be doing with that time?

Businesses want to improve customer experience. Every business school and consultant agrees that that improving the customer experience leads to improved business performance. And for many businesses, the customer experience relies on the efforts of a customer service representative.

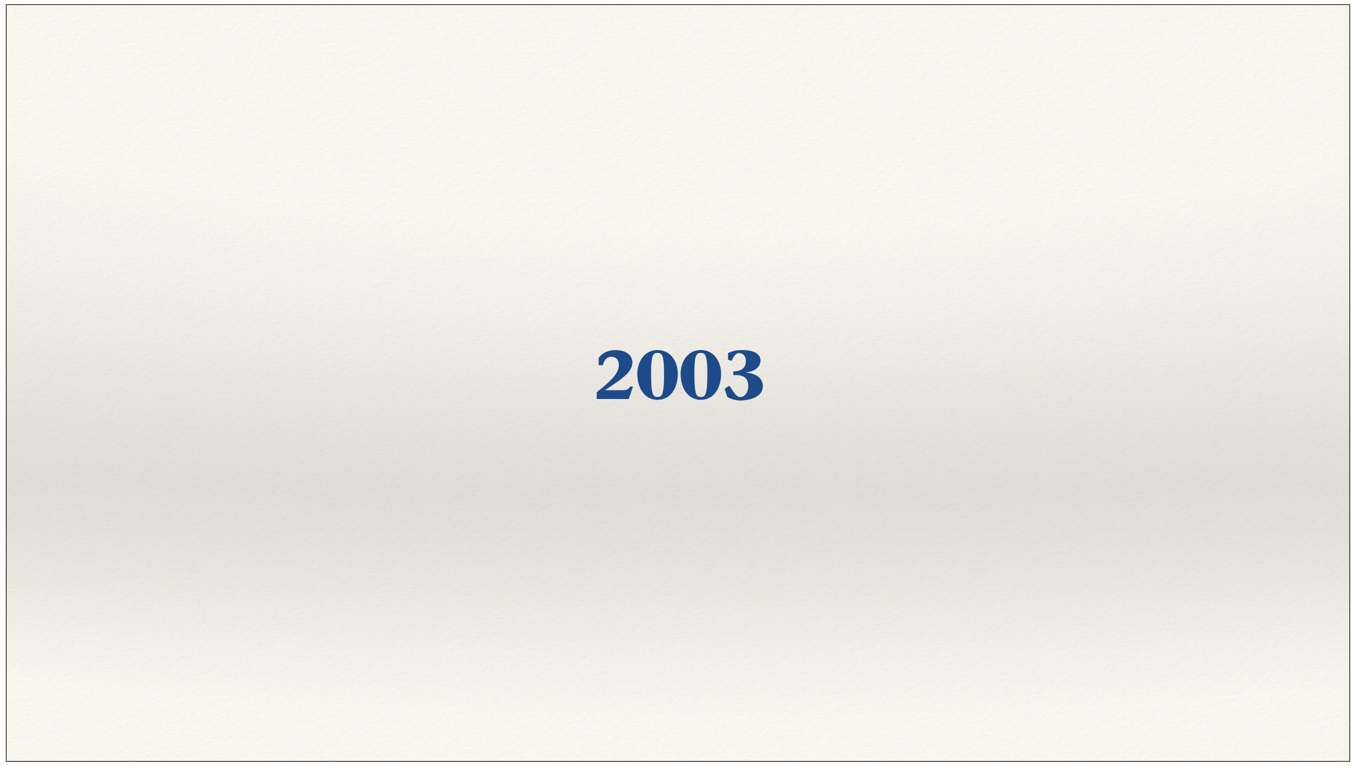
Think about the impact, then, of improving the **work experience** of those front line employees. It seems reasonable to hypothesize that improving the experience of those on the front line will lead to a commensurate improvement in the experience of the customers they are supporting. Right?

In other words, improving the tools that your staff use to do their jobs is good for your business.

Today, I'm going to tell you about a success story that proves this notion.

We’re in the midst of a long project with BC Hydro that demonstrates the tangible business impact of improving the work experience for front line employees.

By using content strategy to improve the content they use to do their job, we’ve helped those call centre agents work more efficiently and be more satisfied in their job. And that leads to an improved business performance that we can measure.

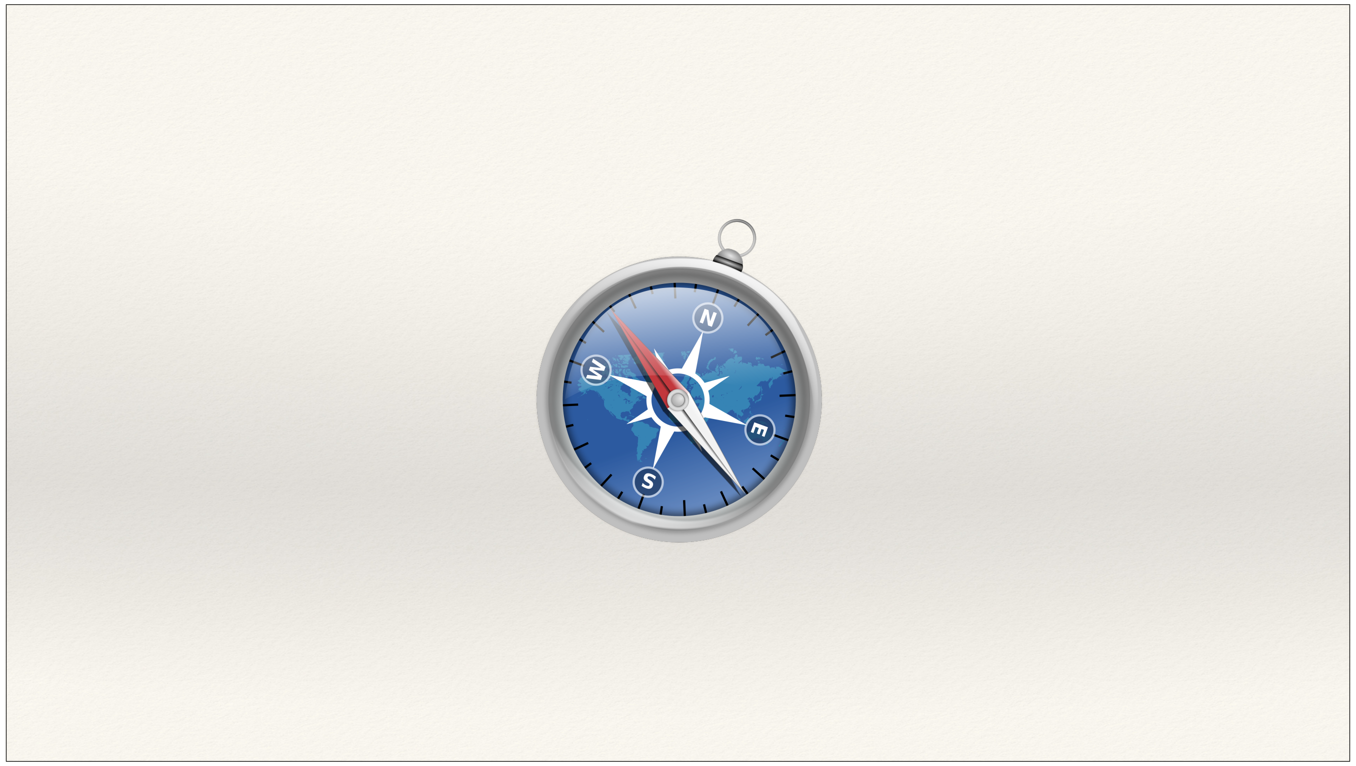


It starts in 2003.

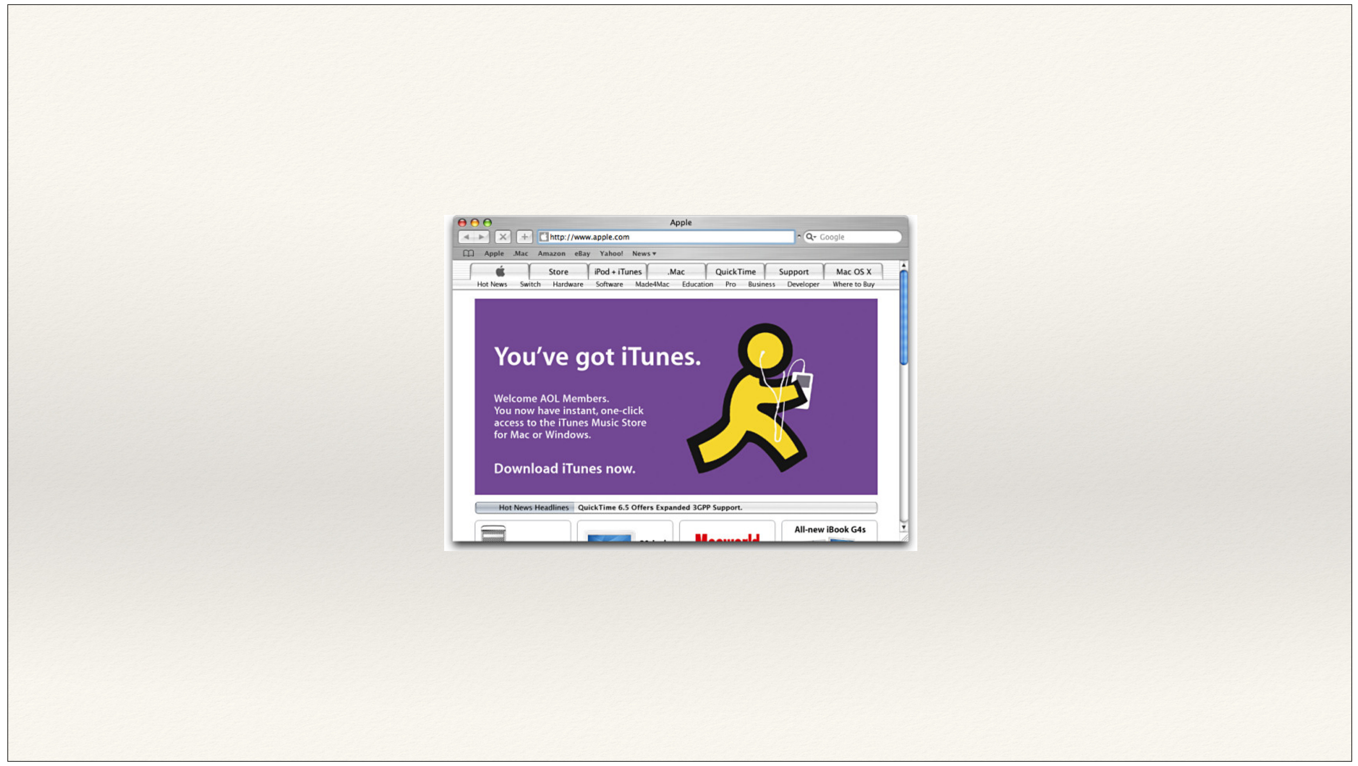
Back then, BC Hydro decided to outsource various frontline customer service functions, including the contact centre. The vendor that was contracted to do this work made the decision to create a repository of information where the call centre agents could look up business rules and procedures.

Once upon a time, that information would have been developed, distributed, and maintained on paper. But this is 2003.

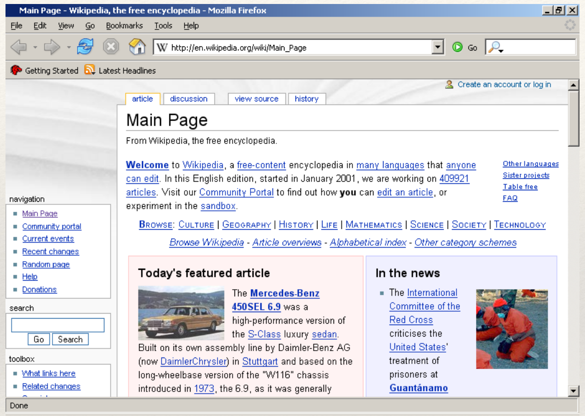
This is the age of the World Wide Web.



In case you don't remember the state of the web in 2003, that was the year Apple released the Safari browser.



Which rendered web pages like this.



The following year, Mozilla would release Firefox. This is what Wikipedia looked like then.

For designers and content creators, the web allowed for an explosion of creativity. Of course, by today's standards, it was tedious. Pages were created in HTML, the coding language of websites. And those pages were often created by people who actually worked using that code. If you were lucky, you could update web pages using software like Dreamweaver, which meant you could do the work without needing to know the code.

By way of example, this is the home page for the Globe and Mail on June 19, 2003.

Just look at those headlines. I had completely forgotten that SARS was a thing.

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</div>
  <div id="contentPannel">
  <table width="770" cellpadding="1" cellspacing="5" border="0" id="contentTable">
    <tr>
     <td width="120" id="leftRail">
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<div class="promo"><a href="/web/20030619110434/http://theglobeandmail.com/services/site/where-to-find.html">Where to find it</a></div>
<div class="spacer"><img src="http://web.archive.org/web/20030619110434im_/http://images.theglobeandmail.com/imagesv3/spacer.gif" width="1" height="5" alt=""/>
</div>

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  </tr>
  <tr>
   <td class="leftGreyText"><a href="http://web.archive.org/web/20030619110434/http://www.theglobeandmail.com/home">Home Page</a><br/>
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    <a href="http://web.archive.org/web/20030619110434/http://www.theglobeandmail.com/national/">National</a><br/>
    <a href="http://web.archive.org/web/20030619110434/http://www.theglobeandmail.com/international/">International</a><br/>
    <a href="http://web.archive.org/web/20030619110434/http://www.theglobeandmail.com/sports/">Sports</a><br/>
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ads="1"/></a><br clear="all"/><img alt="ad" src="http://web.archive.org/web/20030619110434im_/http://adcounter.theglobeandmail.com/servlet/AdletCounter?
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</div>
<div class="brickTable">
 <table width="118" cellpadding="0" cellspacing="0" border="0">
  <tr>
    <td class="leftDarkGrey">Special Reports</td>
  </tr>
  <tr>
   <td class="leftGreyText">
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eight=675,scrollbars=yes');
}
</script>
    <a href="/web/20030619110434/http://theglobeandmail.com/backgrounder/airindia/index.html">Air-India</a><br/>
    <a href="#" onclick="javascript:openWin();">Business Travel</a><br/>
    <a href="/web/20030619110434/http://theglobeandmail.com/series/field/">From the Field</a><br/>
    <a href="/web/20030619110434/http://theglobeandmail.com/series/golf/">Golf Guide</a><br/>
    <a href="/web/20030619110434/http://theglobeandmail.com/generated/realtime/SpecialEvents3.html">New Canada</a><br/>
    <!-- <a href="http://previewv3.theglobeandmail.com/generated/realtime/SpecialEvents.html">Quebec Election</a><br /> -->
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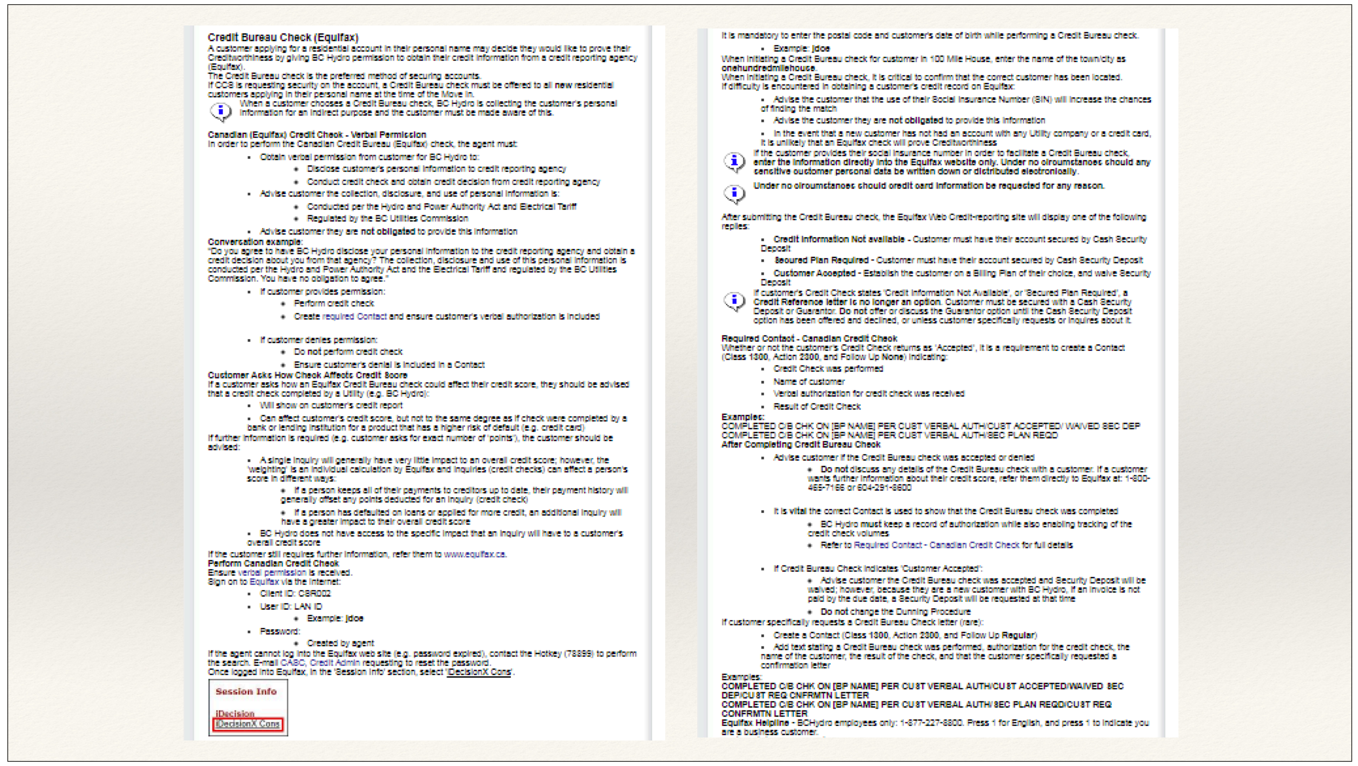
height="10" width="1" ads="1"/></div><a href="http://web.archive.org/web/20030619110434/http://ad.doubleclick.net/clk;5688088;6958408;i?
http://www.theglobeandmail.com/cibc_online" target="_blank"><img
src="http://web.archive.org/web/20030619110434im_/http://ads.globeandmail.com/images/partners/cibc/120x60/cibc5688088.gif" width="120" height="60" border="0"
```

This is the source code from that web page. It’s filled with table code and image maps. These days, sites are built with style sheets and databases that simplify web design and publishing. That sure wasn’t the case back in 2003.

So that’s the environment in which the information repository for BC Hydro call agents was created. They called it ACE.

2018

Fast forward to 2018. BC Hydro decides to repatriate customer service and bring the call centre back in-house.



This means that BC Hydro also takes ownership of the repository. Which has not fundamentally changed since 2003. This is one of the pages from the old system that is still in use today. You can tell that the system hasn't changed. The pages were built as raw HTML pages and have been maintained as HTML pages using Dreamweaver. The structure of the pages and the content design hasn't changed in 15 years.

The content itself is factually accurate. It is maintained regularly. But because of the system, the people doing the content maintenance have been just incorporating new information into the old designs.

This makes it difficult for agents to find the information they need. Imagine trying to quickly find what you are looking for in this sprawling web page. When we asked agents what they needed in a new system, they all begged us to make please not take away "CTRL-F". They had become reliant on finding information on these dense pages by conducting on-page searches.

In early 2018, CSI was asked by BC Hydro to review a number of repositories that had been created by different departments to manage employee knowledge. We looked closely at three, including ACE, the one created fifteen years ago.

This is where the content strategy happens. Because information repositories are filled with content. And I want to make this very clear: Information repositories that are used by call centre staff are intranets. They are filled with content created for employees.

Discovery and research

- Content audit and assessment
- Stakeholder and user interviews
- User survey
- Technical and tool assessment

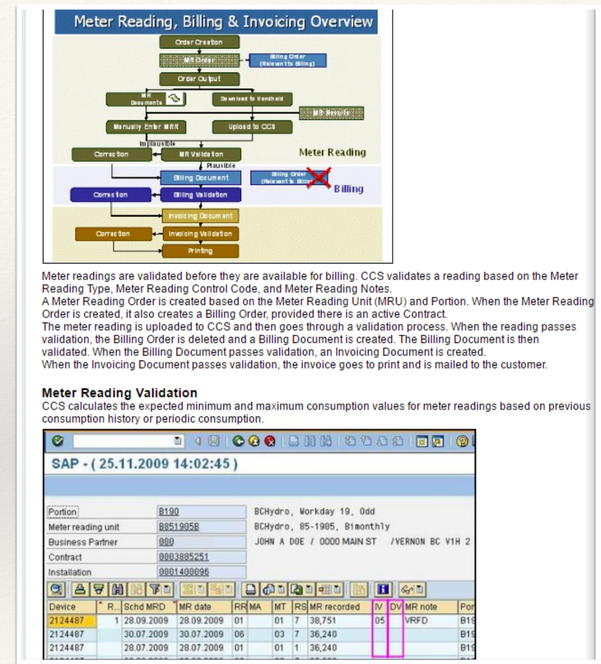
We start projects like this by conducting discovery. It's an attempt to figure out what is there and how effective it is. For us, discovery is also about defining the problem.

Here are the activities we undertook: we audited and assessed the existing content, we conducted interviews, we surveyed the people using the repositories, and we conducted a technical assessment of the systems.

Lorem Ipsum Dolor

Content audit and assessment

- Around 8,000 pages
- Divided by task: General, Collections, etc.
- Organized alphabetically by the title of the page



There a lot to be learned simply by looking closely at the content itself, so that's where we always start. We look to see if there are spelling, grammatical, and punctuation errors. We assess how well the content is structured and presented on the page. We determine the effectiveness of how the content is organized in its entirety.

The major finding was that there was way too much content, it had no coherent organizing principle, and the content quality was inconsistent.

In this example, while there are no spelling errors, capitalization is haphazard, the application of punctuation is irregular, and the sentences themselves are sometimes nothing more than fragments. The writing is also filled with jargon, and while the people using this content are familiar with those terms, research has clearly shown that even if you know what the jargon is, you understand information better when content is jargon-free.

We also insist on talking to people to find out what their experience is. We'll talk to three different groups of people: stakeholders who have influence over the content, authors who create the content, and audiences who use the content.

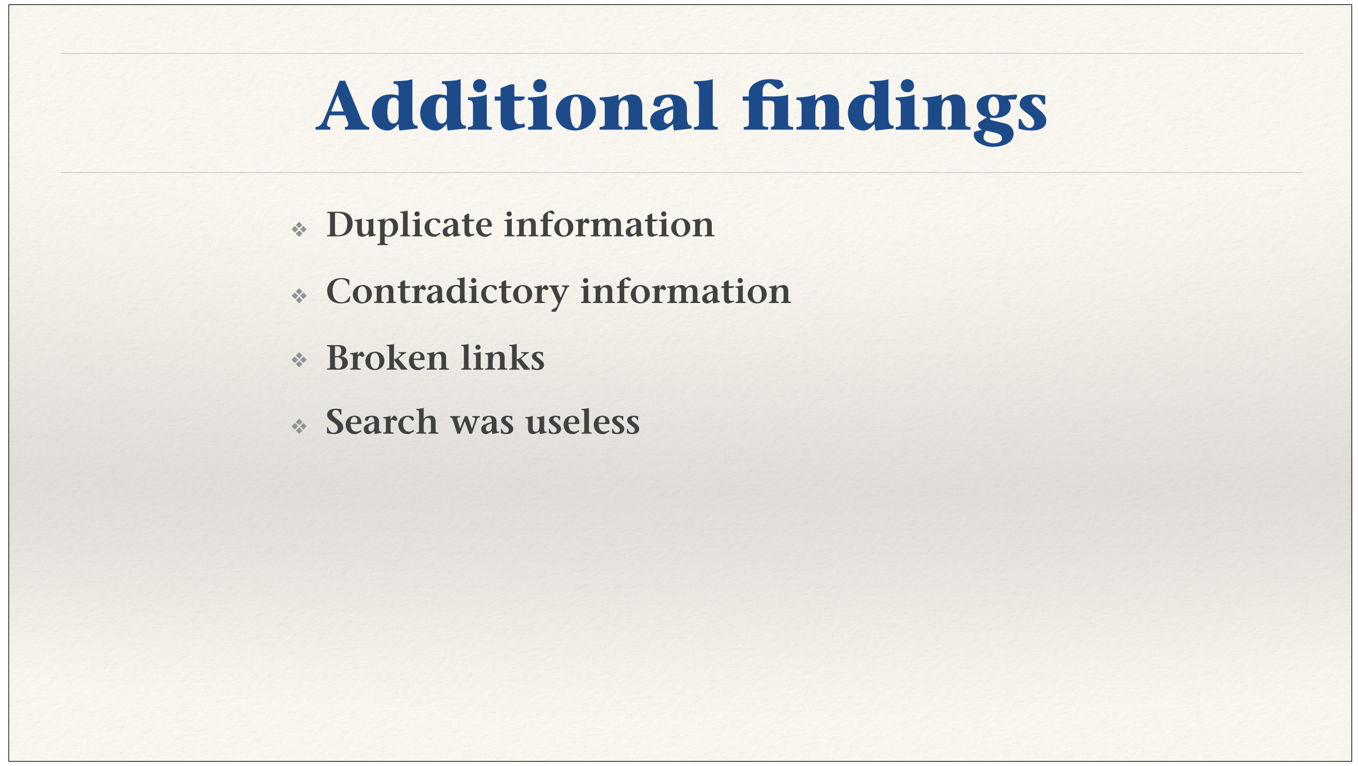
Stakeholders tell us what they expect and what success looks like. Authors tell us about the process of creating content and the tools and systems they use. And audiences tell us what their pain points are when they've been using the content.

What we heard from authors is that the process of creating and maintaining content was slow and tedious. The users, the call centre staff, told us that they had difficulty finding the information they needed. They described the experience of using the existing repositories as having to "wade" through unnecessary content in an attempt to get to what they needed. This is why they had become reliant on CTRL-F.

One way to quantify the things that we hear in interviews is to take insights from conversations and use them to ask questions in a survey. This helps us to validate those insights, and it also helps us to engage with a larger group.

We also assess the tools that are being used in the creation and management of content. This can include technical systems like content management systems and digital asset management tools, and also analogue tools such as style guides, process diagrams, and decision trees.

The biggest challenge for BC Hydro in this respect was that the primary information repository was built on an old, outdated system that was 15 years old.



Here are some other important findings about ACE. The same information could be found in multiple places, and at times information was contradictory. Given the sheer number of pages and the lack of hierarchy, this was not surprising. It also indicates an issue with governance.

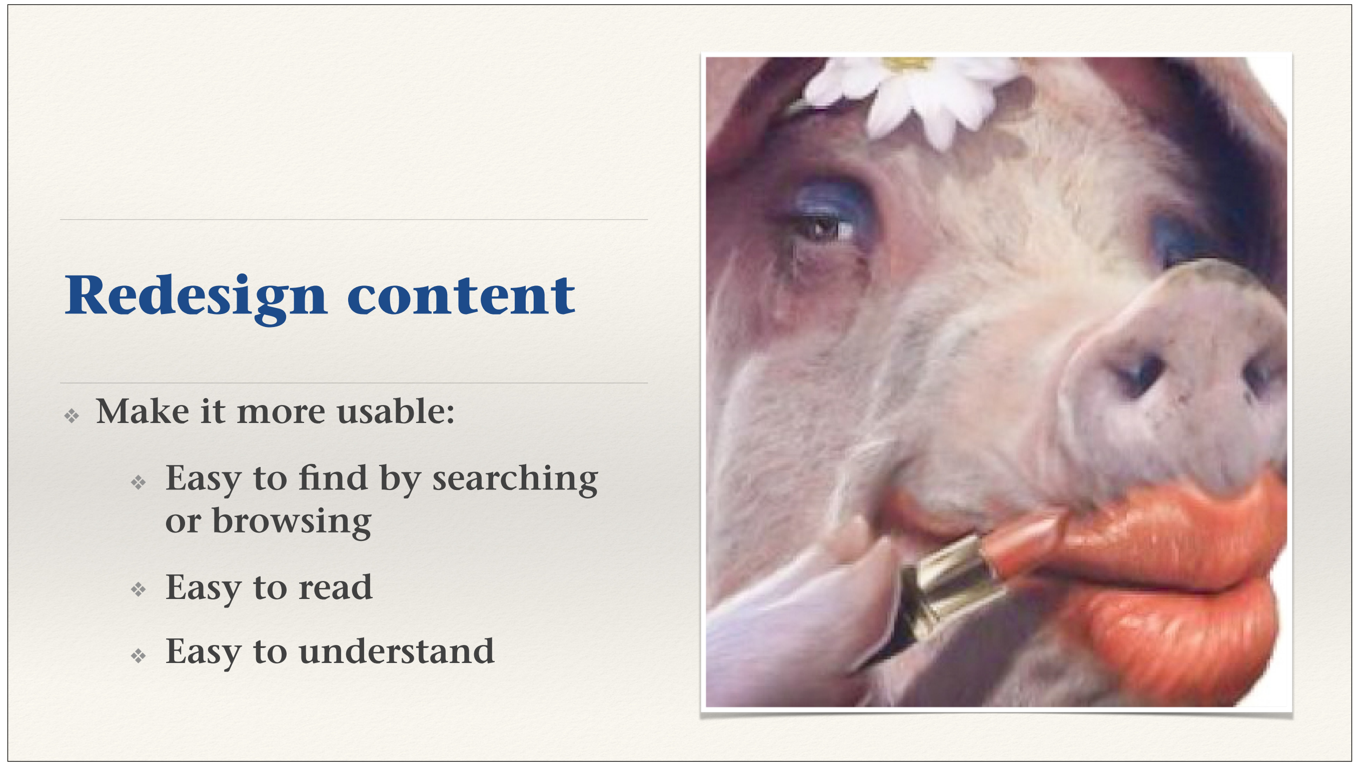
Broken links were common, suggesting issues with maintenance.

Even searching for the right details failed more often than not. And this is a very common complaint of all websites, both extranets and intranets: “Our search sucks.” What you don’t realize is that an effective search engine relies on two things: a good tool and content that is structured and tagged in such a way as to enable search. Even Google struggles trying to search through crappy content.

Recommendations

- Create a single Knowledge Centre
- Build it in a modern content management system (CMS)

Our key recommendation was to merge the repositories into one, and to build it in a modern CMS. Agents had been using up to four different systems when taking calls from customers. In the new world there would be only two: SAP, which is used to run the business, and a central hub, the Knowledge Centre, that would become the complete repository of BC Hydro business rules and procedures.



And all of that would be useless unless it also came with a complete rethink on how the content was designed. Moving the existing content into a new system would be like putting lipstick on a pig.

Instead, content should be rewritten so it would be more useful to the people using it. The content should be easy to find, easy to read, and easy to understand.

When the experience is interacting with content,
***improving content* improves the experience.**

The term UX gets used a lot these days. In case you're not familiar with it, the acronym refers to "user experience" and it contributes to customer experience. There's a good reason that there's so much attention paid to UX. It's because we know that improving the user experience is a good way to improve the performance of your business.

And when the experience requires a user to interact with content, IMPROVING CONTENT improves the experience.

Solutions and design

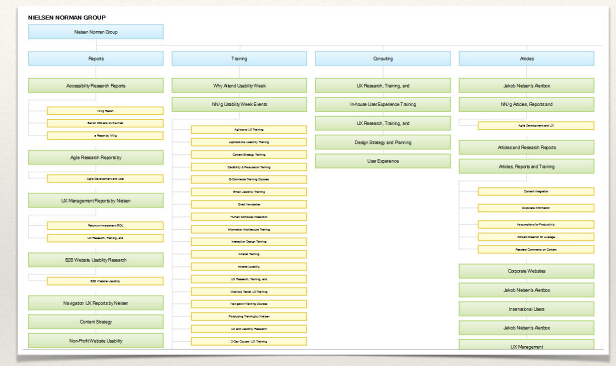
- Designed a new information architecture (IA) and navigation structure
- Created a taxonomy and metadata framework
- Developed content types, models, and templates
- Prepared style guides (including a glossary)
- Author training

So these are the activities we undertook in order to make sure that the content in the Knowledge Centre would provide a good experience for the agents:

- We designed a new information architecture and navigation to make it easier to find information by browsing
- We created an underlying taxonomy and metadata schema to support content findability by searching
- We developed content types and models and prepared templates to establish consistent structure to the content
- We established content standards and trained authors to enable higher quality content through improved skillsets

I'll show you what all of these things look like.

Information architecture and navigation

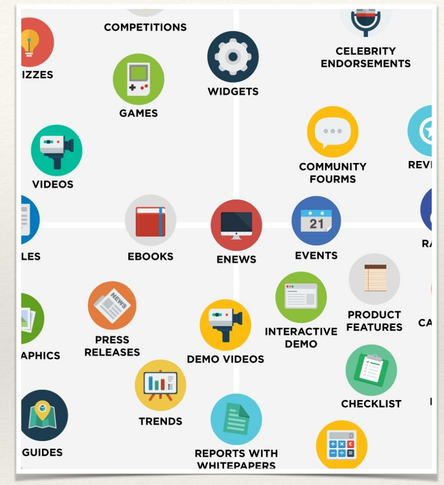


Information architecture refers to how the content is organized within a website. It describes the hierarchy of information and informs what the site navigation will be. Where the previous repositories for BC Hydro organized content by functional area, the Knowledge Centre is organized by topic. Previously, there were multiple pages that had information about supporting customers in setting up new accounts. One for the general agents, one for agents who specialized in collections, another for work leaders and escalation agents. Now regardless of your team, you'll go to the same page to get that information. This is one way we've been able to project a reduction in total page count from over 8,000 to under 3,000.

Metadata and taxonomy

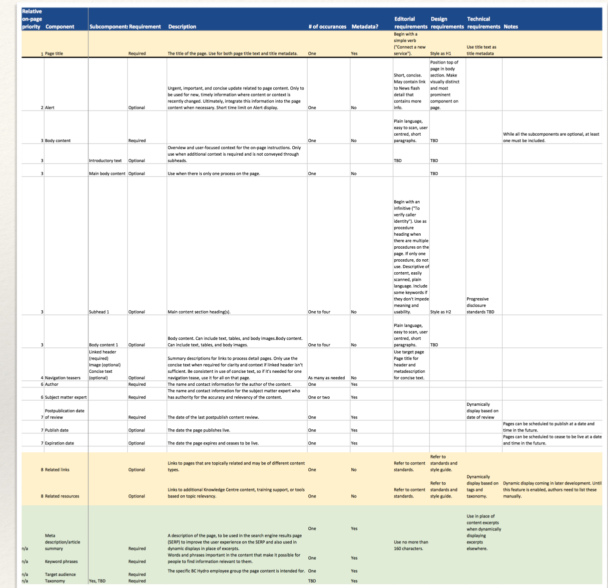
Perhaps the earliest taxonomy you became familiar with is the classification of the natural world, including the animal kingdom, that was initiated by Carl Linnaeus. Taxonomies provide a way of organizing content. Those taxonomic terms are metadata, which is, simply, “data about data”. This could be the date a piece of content was created. Or the name of the person who created it. Or even where the content was sourced from. When we associate metadata with content, we can then connect that content when terms are related, and we can use systems to automatically display content.

Content types



Content types share a common purpose and editorial structure regardless of topic or audience. A press release, for example, is one content type. A white paper is another. In the Knowledge Centre we have things like Process Overviews and Process Details. A Script Overview provides the framework to guide agents through certain kinds of calls so they are sure to collect and share the information needed for that context.

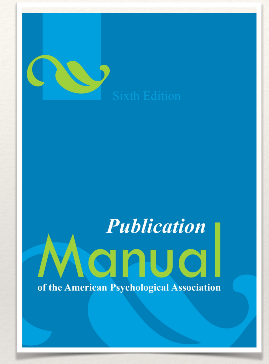
Content models

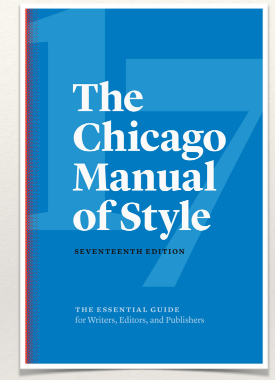


Relative on-page priority	Component	Subcomponent:	Requirement	Description	# of occurances	Metadata?	Editorial requirements	Design requirements	Technical requirements	Notes
1	Page title		Required	The title of the page. Use for both page title text and title metadata.	One	Yes	Begin with a simple verb ("Connect a new service").	Style as H1	Use title text as title metadata	
2	Alert		Optional	Urgent, important, and concise update related to page content. Only to be used for new, timely information where content or context is recently changed. Ultimately, integrate this information into the page content when necessary. Short time limit on Alert display.	One	No	Short, concise. May contain link to News flash detail that contains more info.	Position top of page in body section. Make visually distinct and most prominent component on page.		
3	Body content		Required		One	No	Plain language, easy to scan, user centred, short paragraphs.	TBD		While all the subcomponents are optional, at least one must be included.
3		Introductory text	Optional	Overview and user-focused context for the on-page instructions. Only use when additional context is required and is not conveyed through subheads.			TBD	TBD		
3		Main body content	Optional	Use when there is only one process on the page.	One	No		TBD		
3		Subhead 1	Optional	Main content section heading(s).	One to four	No	Begin with an infinitive ("To verify caller identity"). Use as procedure heading when there are multiple procedures on the page. If only one procedure, do not use. Descriptive of content, easily scanned, plain language. Include some keywords if they don't impede meaning and usability.	Style as H2	Progressive disclosure standards TBD	
3		Body content 1	Optional	Body content. Can include text, tables, and body images.Body content. Can include text, tables, and body images.	One to four	No	Plain language, easy to scan, user centred, short paragraphs.	TBD		
4	Navigation teasers	Linked header (required) Image (optional) Concise text (optional)	Optional	Summary descriptions for links to process detail pages. Only use the concise text when required for clarity and context if linked header isn't sufficient. Be consistent in use of concise text, so if it's needed for one navigation tease, use it for all on that page.	As many as needed	No	Use target page Page title for header and metadescription for concise text.			
6	Author		Required	The name and contact information for the author of the content.	One	Yes				
6	Subject matter expert		Required	The name and contact information for the subject matter expert who has authority for the accuracy and relevancy of the content.	One or two	Yes				
7	Postpublication date of review		Required	The date of the last postpublish content review.	One	Yes			Dynamically display based on date of review	
7	Publish date		Optional	The date the page publishes live.	One	Yes				Pages can be scheduled to publish at a date and time in the future.
7	Expiration date		Optional	The date the page expires and ceases to be live.	One	Yes				Pages can be scheduled to cease to be live at a date and time in the future.
8	Related links		Optional	Links to pages that are topically related and may be of different content types.	One	No	Refer to content standards.	Refer to standards and style guide.		
8	Related resources		Optional	Links to additional Knowledge Centre content, training support, or tools based on topic relevancy.	One	No	Refer to content standards.	Refer to standards and style guide.	Dynamically display based on tags and taxonomy.	Dynamic display coming in later development. Until this feature is enabled, authors need to list these manually.
n/a	Meta description/article summary		Required	A description of the page, to be used in the search engine results page (SERP) to improve the user experience on the SERP and also used in dynamic displays in place of excerpts.	One	Yes	Use no more than 160 characters.		Use in place of content excerpts when dynamically displaying excerpts elsewhere.	
n/a	Keyword phrases		Required	Words and phrases important in the content that make it possible for people to find information relevant to them.	One	Yes				
n/a	Target audience		Required	The specific BC Hydro employee group the page content is intended for.	One	Yes				
n/a	Taxonomy	Yes, TBD	Required		TBD	Yes				

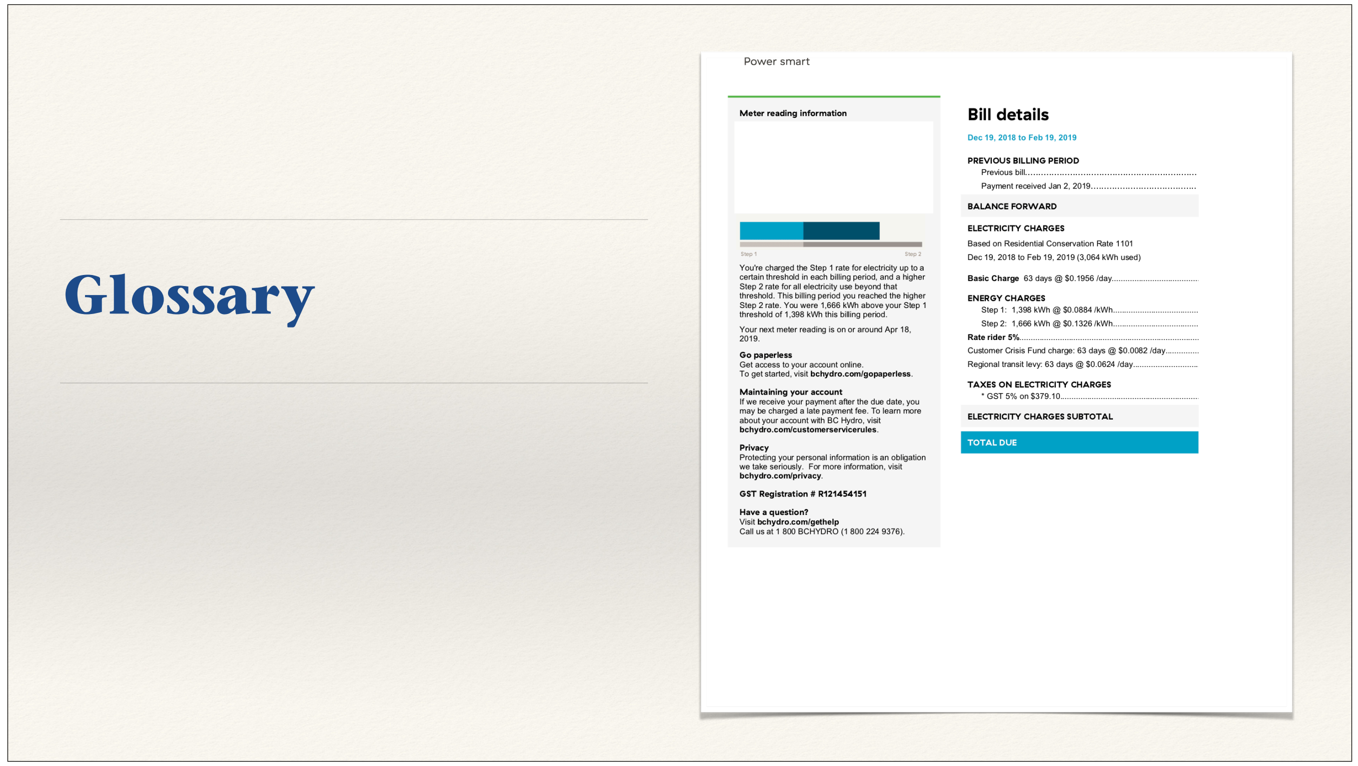
For each content type, we create a model, which is a specific description of the different components or elements that need to be included in that type of content. We're able to provide editorial and technical direction here so that designers can use models to create wireframes, so that developers can use them to create technical templates, and so that writers can use them to create content that is consistent and complete.

Content standards and guidelines





Standards and guidelines you may be familiar with are the Chicago Manual of Style and the APA Publication Manual, depending on what courses you took at college or university. These are essential to make sure that the content being created is consistent, and also to make sure that quality standards are being upheld by everyone in the company. BC Hydro has standards for digital content that were not being used by the team creating the knowledge content. We modified those existing standards to fit the specific context of call-centre agents, and all content is now expected to follow these guidelines.



We’ve also developed a glossary to help BC Hydro start wrangling how it understands terms. Because the same word or phrase is often understood to mean different things throughout the company. What, exactly, does “bill” refer to, for example? Is it a verb, as in “Bill the customer”? Or a noun, as in “Send the customer the bill”? Listing and defining these problematic terms will help everyone.

So these are the solutions and designs we brought in to anchor the development of BC Hydro’s new Knowledge Centre.

User requirements

- Speed
- Accuracy
- Ease of use

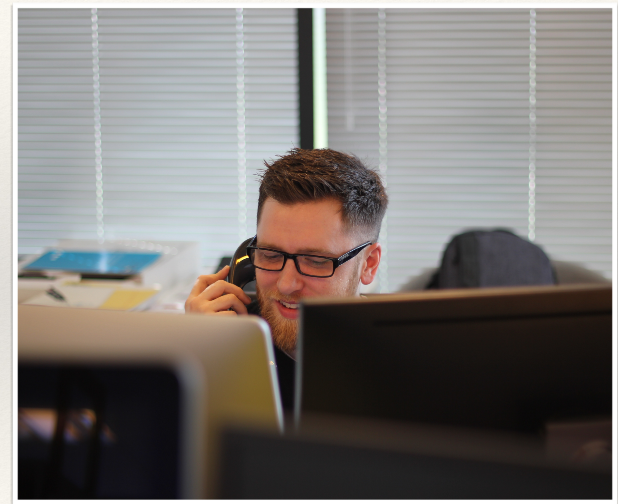


photo: Berkeley Communications

And at the heart of all of this work is the needs of the users.

Front line customer service agents have unique requirements. They need to be able to handle calls efficiently. They need to be accurate. To do those things they need to be able to navigate to and search for procedural information quickly.

When you layer of top of that the high employee turnover rate in customer-facing areas like these, you can begin to understand how important it is to have information systems that are simple, streamlined and uncomplicated to use.

Customer service agents are a key connection point with BC Hydro customers. It’s not good for anyone if the knowledge management system causes delays and results in awkward customer hold time. This is why giving the customer service agents a simple, uncomplicated system is central to a good customer experience.

article | discussion | view source | history

New Connections

NEW CONNECTIONS

Call Flow

a. **Verify the caller** (energy biller or agent ie. electrical contractor, general contractor)
b. If caller is the **energy biller, confirm if they have an existing BP#** in SAP (validate birthdate in SAP). Obtain billing information for the new account including phone#, email address & mailing address and DOB (if required).
c. **Determine service address**. Confirm if there is an existing connection object in SAP.
d. **Determine service details** (amps, voltage, phase ie. 1 phase or 3 phase), specifics of the dwelling /building and what the connection is for.
e. **Verify if connection is permanent or temporary**. If temporary see: New Temporary Construction Service.
f. **Determine type of heating** for building
g. **Determine BCH connection point** (ie.Overhead Pole ID#(Pg21) or Underground stuboff at LPT/PMT#(Pg7)or Service Box(Pg25)) and approx. distance from conn point to service location. If OH and unable to find lot/address in DAD, have caller provide pole ID#).
h. **Inquire about electrical contractor's** name and contact information and populate ONLY if coming in on paper. IF using web portal leave blank and have the electrician input on own.
i. **Advise** on standard charges if determined as EC job
j. **Advise on next steps** (paperwork requirements, possible design involvement, timeline). Provide connection request # and request electrical contractor include on paperwork.
k. **Summarize the caller's request** & give timeline expectations and remind the customer can go online and link request to profile, check status and manage other requests **web enablement**If the caller is not the owner/energy biller, advise that customer authorization is still required.

System Steps

1. Check Gateway to ensure no duplicate orders, SAP for BP# and possible existing connection object# and DAD (for existing plant details ie. pole has existing transformer or secondary) to understand client situation.
2. If new customer, put "NEW BP" in reference tab in Gateway. If BP is company not existing in SAP, confirm whether company is registered in BC by searching BC Online.
3. If overhead, run O/H transformer Report with proposed load. (DAD-Checking Transfomer Load (Pg41))
4. Create or update an order in Gateway-Creating New Orders (Pg26)
5. Fill in Gateway - Information for Creating New Orders (Pg16) (BP#, connection object#, site details, service details including correct service instructions, meter info, load info, electrical contractor info, standard charges etc...)

After the Call:

1. Await paperwork from electrical contractor and authorization from customer if still required.
2. Await Design approval if design referral was sent

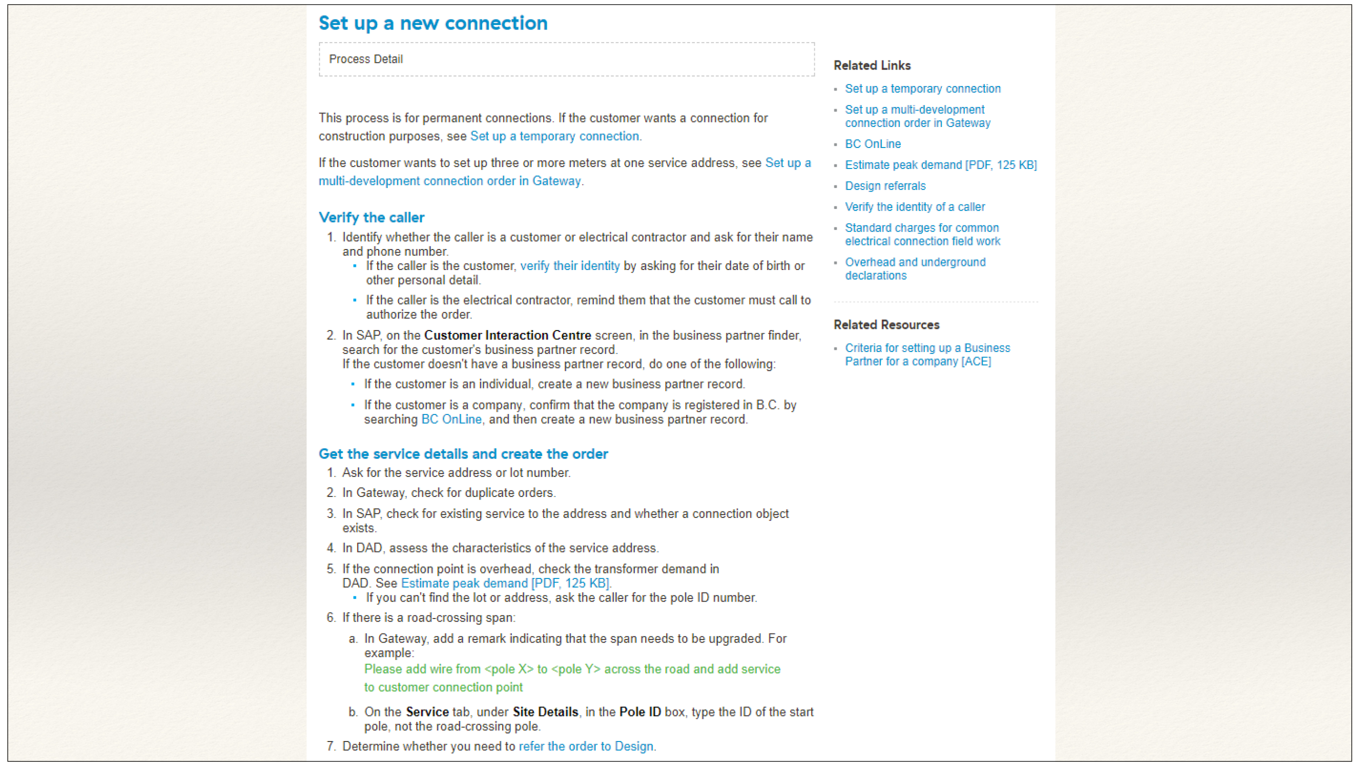
Follow up calls:

1. Upon processing of paperwork,check if all prerequisites have been met. If so, create order in SAP & schedule if required. **Create** DAD job if required

Reminders

- *Refer to Design/Design Connect if: Connection points to pole are longer than 30 meters, 3 phase connection, Existing BCH plant is not adequate, BC Hydro plant not on site, 400 amp or greater request (excluding 2 X 200), Transformer load > 100%, Right of Ways, Aerial Trespasses](p.59) , Midspan*
- *Multi-Development - If the request is for 3 or more meters at the same address, use multi development activity type and confirm unit numbers for the premises and premise type.*
- *In DAD concrete poles are visually marked with an orange circle around the pole. Concrete pole information could determine crew work requirements.*

This is what content used to look like in one of the old repositories. Complex, verbose, and visually unappealing. It's hard to read.



Set up a new connection

Process Detail

This process is for permanent connections. If the customer wants a connection for construction purposes, see Set up a temporary connection.

If the customer wants to set up three or more meters at one service address, see Set up a multi-development connection order in Gateway.

Verify the caller

1. Identify whether the caller is a customer or electrical contractor and ask for their name and phone number.
   - If the caller is the customer, verify their identity by asking for their date of birth or other personal detail.
   - If the caller is the electrical contractor, remind them that the customer must call to authorize the order.
2. In SAP, on the **Customer Interaction Centre** screen, in the business partner finder, search for the customer's business partner record.
   If the customer doesn't have a business partner record, do one of the following:
   - If the customer is an individual, create a new business partner record.
   - If the customer is a company, confirm that the company is registered in B.C. by searching BC OnLine, and then create a new business partner record.

Get the service details and create the order

1. Ask for the service address or lot number.
2. In Gateway, check for duplicate orders.
3. In SAP, check for existing service to the address and whether a connection object exists.
4. In DAD, assess the characteristics of the service address.
5. If the connection point is overhead, check the transformer demand in DAD. See Estimate peak demand [PDF, 125 KB].
   - If you can't find the lot or address, ask the caller for the pole ID number.
6. If there is a road-crossing span:
   a. In Gateway, add a remark indicating that the span needs to be upgraded. For example:
      Please add wire from <pole X> to <pole Y> across the road and add service to customer connection point
   b. On the **Service** tab, under **Site Details**, in the **Pole ID** box, type the ID of the start pole, not the road-crossing pole.
7. Determine whether you need to refer the order to Design.

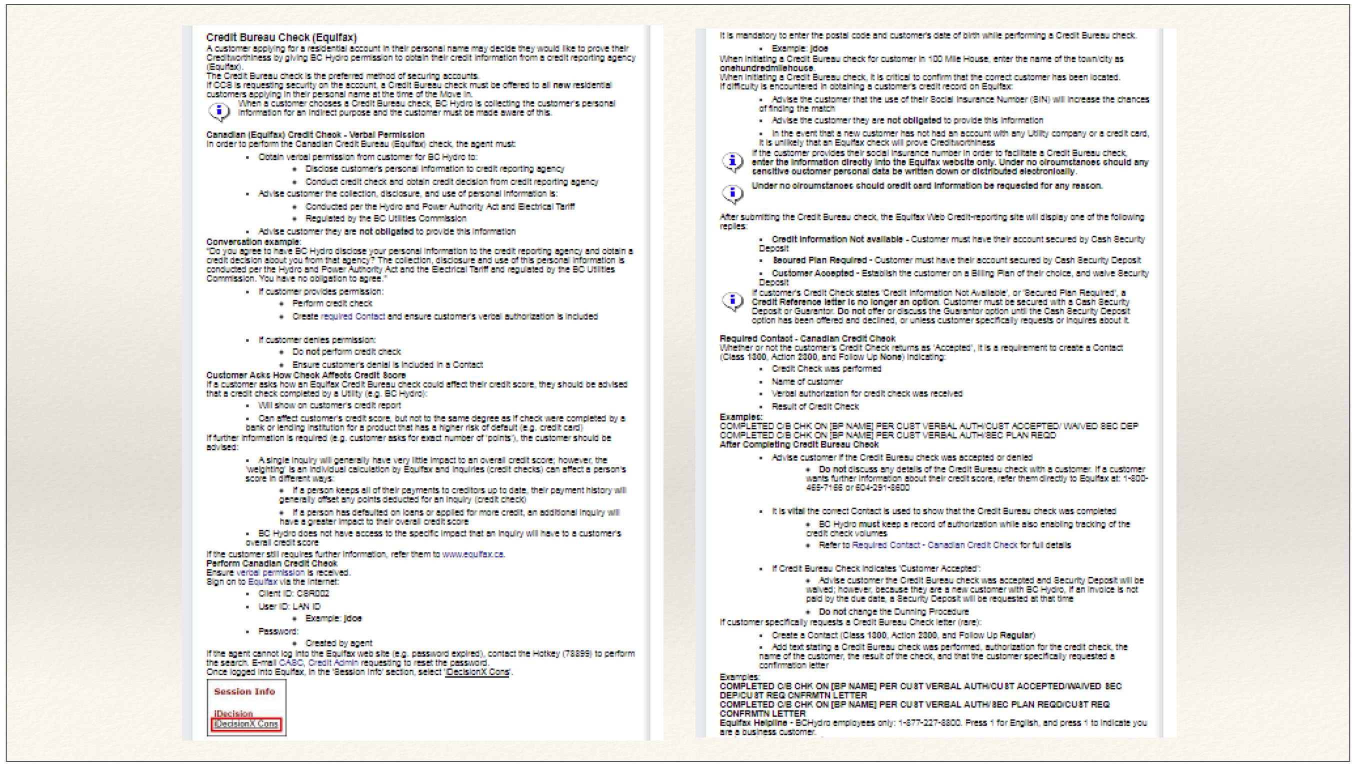
Related Links

- Set up a temporary connection
- Set up a multi-development connection order in Gateway
- BC OnLine
- Estimate peak demand [PDF, 125 KB]
- Design referrals
- Verify the identity of a caller
- Standard charges for common electrical connection field work
- Overhead and underground declarations

Related Resources

- Criteria for setting up a Business Partner for a company [ACE]

After our team of technical writers reworked the content to new standards, this is how it is looks now. You're seeing the result of not just a change in how the content is presented, the look and feel, but also in how the content is written and designed on the page. We've made use of subheads to break up the text and make it easier to scan. We've used plain language to make it easier to follow. Even the page title makes a big difference. Before it was "New connections" but now, "Set up a new connection" makes it explicitly clear to anyone what this page is about.



Credit Bureau Check (Equifax)
A customer applying for a residential account in their personal name may decide they would like to prove their Creditworthiness by giving BC Hydro permission to obtain their credit information from a credit reporting agency (Equifax).
The Credit Bureau check is the preferred method of securing accounts.
If CCS is requesting security on the account, a Credit Bureau check must be offered to all new residential customers applying in their personal name at the time of the Move In.

When a customer chooses a Credit Bureau check, BC Hydro is collecting the customer's personal information for an indirect purpose and the customer must be made aware of this.

Canadian (Equifax) Credit Check - Verbal Permission
In order to perform the Canadian Credit Bureau (Equifax) check, the agent must:

- Obtain verbal permission from customer for BC Hydro to:
  - Disclose customer's personal information to credit reporting agency
  - Conduct credit check and obtain credit decision from credit reporting agency
- Advise customer the collection, disclosure, and use of personal information is:
  - Conducted per the Hydro and Power Authority Act and Electrical Tariff
  - Regulated by the BC Utilities Commission
- Advise customer they are **not obligated** to provide this information

Conversation example:
"Do you agree to have BC Hydro disclose your personal information to the credit reporting agency and obtain a credit decision about you from that agency? The collection, disclosure and use of this personal information is conducted per the Hydro and Power Authority Act and the Electrical Tariff and regulated by the BC Utilities Commission. You have no obligation to agree."

- If customer provides permission:
  - Perform credit check
  - Create required Contact and ensure customer's verbal authorization is included
- If customer denies permission:
  - Do **not** perform credit check
  - Ensure customer's denial is included in a Contact

Customer Asks How Check Affects Credit Score
If a customer asks how an Equifax Credit Bureau check could affect their credit score, they should be advised that a credit check completed by a Utility (e.g. BC Hydro):

- Will show on customer's credit report
- Can affect customer's credit score, but not to the same degree as if check were completed by a bank or lending institution for a product that has a higher risk of default (e.g. credit card)

If further information is required (e.g. customer asks for exact number of 'points'), the customer should be advised:

- A single inquiry will generally have very little impact to an overall credit score; however, the 'weighting' is an individual calculation by Equifax and inquiries (credit checks) can affect a person's score in different ways:
  - If a person keeps all of their payments to creditors up to date, their payment history will generally offset any points deducted for an inquiry (credit check)
  - If a person has defaulted on loans or applied for more credit, an additional inquiry will have a greater impact to their overall credit score
- BC Hydro does not have access to the specific impact that an inquiry will have to a customer's overall credit score

If the customer still requires further information, refer them to www.equifax.ca.

Perform Canadian Credit Check
Ensure verbal permission is received.
Sign on to Equifax via the internet:

- Client ID: CBR002
- User ID: LAN ID
  - Example: jdoe
- Password:
  - Created by agent

If the agent cannot log into the Equifax web site (e.g. password expired), contact the Hotkey (78899) to perform the search. E-mail CABC, Credit Admin requesting to reset the password.
Once logged into Equifax, in the 'Session Info' section, select 'IDecisionX Cons'.

Session Info
IDecision
IDecisionX Cons

It is mandatory to enter the postal code and customer's date of birth while performing a Credit Bureau check.

- Example: jdoe

When initiating a Credit Bureau check for customer in 100 Mile House, enter the name of the town/city as **onehundredmilehouse**.
When initiating a Credit Bureau check, it is critical to confirm that the correct customer has been located.
If difficulty is encountered in obtaining a customer's credit record on Equifax:

- Advise the customer that the use of their Social Insurance Number (SIN) will increase the chances of finding the match
- Advise the customer they are **not obligated** to provide this information
- In the event that a new customer has not had an account with any Utility company or a credit card, it is unlikely that an Equifax check will prove Creditworthiness

If the customer provides their social insurance number in order to facilitate a Credit Bureau check, **enter the information directly into the Equifax website only. Under no circumstances should any sensitive customer personal data be written down or distributed electronically.**

Under no circumstances should credit card information be requested for any reason.

After submitting the Credit Bureau check, the Equifax Web Credit-reporting site will display one of the following replies:

- **Credit Information Not available** - Customer must have their account secured by Cash Security Deposit
- **Secured Plan Required** - Customer must have their account secured by Cash Security Deposit
- **Customer Accepted** - Establish the customer on a Billing Plan of their choice, and waive Security Deposit

If customer's Credit Check states 'Credit Information Not Available', or 'Secured Plan Required', a **Credit Reference letter is no longer an option.** Customer must be secured with a Cash Security Deposit or Guarantor. **Do not** offer or discuss the Guarantor option until the Cash Security Deposit option has been offered and declined, or unless customer specifically requests or inquires about it.

Required Contact - Canadian Credit Check
Whether or not the customer's Credit Check returns as 'Accepted', it is a requirement to create a Contact (Class 1300, Action 2300, and Follow Up **None**) indicating:

- Credit Check was performed
- Name of customer
- Verbal authorization for credit check was received
- Result of Credit Check

Examples:
COMPLETED C/B CHK ON [BP NAME] PER CUST VERBAL AUTH/CUST ACCEPTED/ WAIVED SEC DEP
COMPLETED C/B CHK ON [BP NAME] PER CUST VERBAL AUTH/SEC PLAN REQD

After Completing Credit Bureau Check

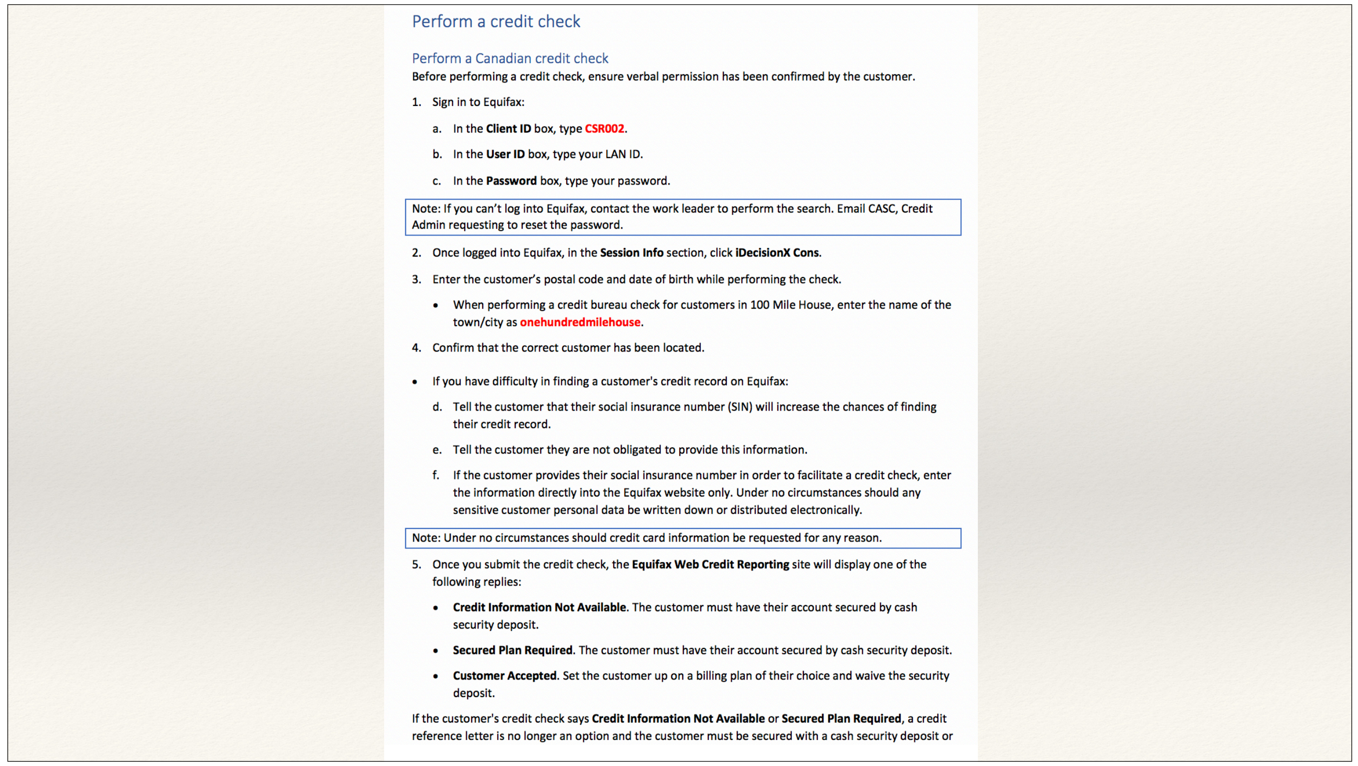
- Advise customer if the Credit Bureau check was accepted or denied
  - **Do not** discuss any details of the Credit Bureau check with a customer. If a customer wants further information about their credit score, refer them directly to Equifax at: 1-800-465-7166 or 604-291-8600
- It is **vital** the correct Contact is used to show that the Credit Bureau check was completed
  - BC Hydro **must** keep a record of authorization while also enabling tracking of the credit check volumes
  - Refer to Required Contact - Canadian Credit Check for full details
- If Credit Bureau Check indicates 'Customer Accepted':
  - Advise customer the Credit Bureau check was accepted and Security Deposit will be waived; however, because they are a new customer with BC Hydro, if an invoice is not paid by the due date, a Security Deposit will be requested at that time
  - **Do not** change the Dunning Procedure

If customer specifically requests a Credit Bureau Check letter (rare):

- Create a Contact (Class 1300, Action 2300, and Follow Up **Regular**)
- Add text stating a Credit Bureau check was performed, authorization for the credit check, the name of the customer, the result of the check, and that the customer specifically requested a confirmation letter

Examples:
COMPLETED C/B CHK ON [BP NAME] PER CUST VERBAL AUTH/CUST ACCEPTED/WAIVED SEC DEP/CUST REQ CNFRMTN LETTER
COMPLETED C/B CHK ON [BP NAME] PER CUST VERBAL AUTH/SEC PLAN REQD/CUST REQ CONFRMTN LETTER
Equifax Helpline - BCHydro employees only: 1-877-227-8800. Press 1 for English, and press 1 to indicate you are a business customer.

Here’s the example from ACE I showed earlier.



Perform a credit check

Perform a Canadian credit check

Before performing a credit check, ensure verbal permission has been confirmed by the customer.

1. Sign in to Equifax:
   a. In the **Client ID** box, type **CSR002**.
   b. In the **User ID** box, type your LAN ID.
   c. In the **Password** box, type your password.

Note: If you can't log into Equifax, contact the work leader to perform the search. Email CASC, Credit Admin requesting to reset the password.

2. Once logged into Equifax, in the **Session Info** section, click **iDecisionX Cons**.
3. Enter the customer's postal code and date of birth while performing the check.
   - When performing a credit bureau check for customers in 100 Mile House, enter the name of the town/city as **onehundredmilehouse**.
4. Confirm that the correct customer has been located.

- If you have difficulty in finding a customer's credit record on Equifax:
   d. Tell the customer that their social insurance number (SIN) will increase the chances of finding their credit record.
   e. Tell the customer they are not obligated to provide this information.
   f. If the customer provides their social insurance number in order to facilitate a credit check, enter the information directly into the Equifax website only. Under no circumstances should any sensitive customer personal data be written down or distributed electronically.

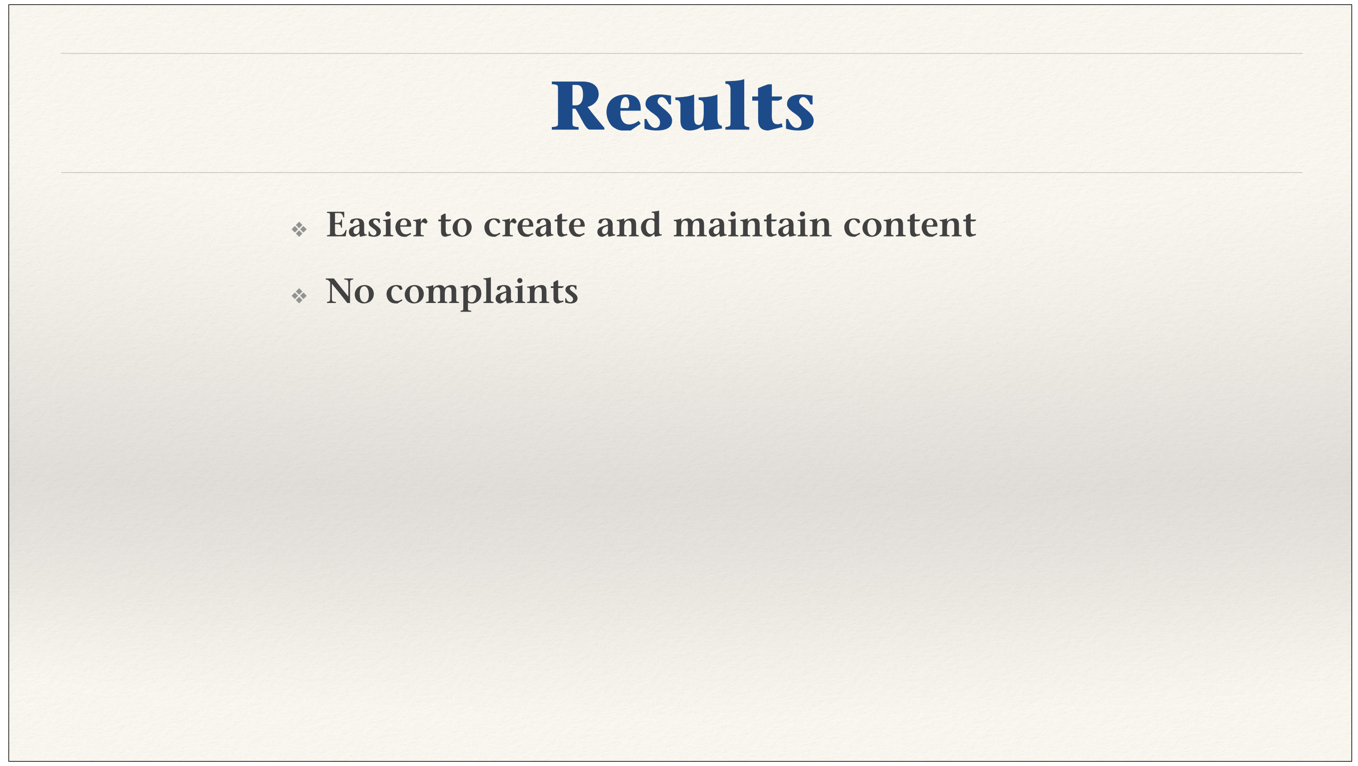
Note: Under no circumstances should credit card information be requested for any reason.

5. Once you submit the credit check, the **Equifax Web Credit Reporting** site will display one of the following replies:
   - **Credit Information Not Available**. The customer must have their account secured by cash security deposit.
   - **Secured Plan Required**. The customer must have their account secured by cash security deposit.
   - **Customer Accepted**. Set the customer up on a billing plan of their choice and waive the security deposit.

If the customer's credit check says **Credit Information Not Available** or **Secured Plan Required**, a credit reference letter is no longer an option and the customer must be secured with a cash security deposit or

This content hasn't been moved into the CMS yet, so this is just how it looks as a Word document. Even displayed small, here, you can see how the writing is easier to follow. Even the headline on this article makes it easier. It used to be "Credit bureau check" and now it's in language that speaks to what the agent is doing: "Perform a credit check".

There is great complexity in this content. But the content can be designed in such a way as to make it seem simple. You can still use "CTRL-F" here, but you don't need to.

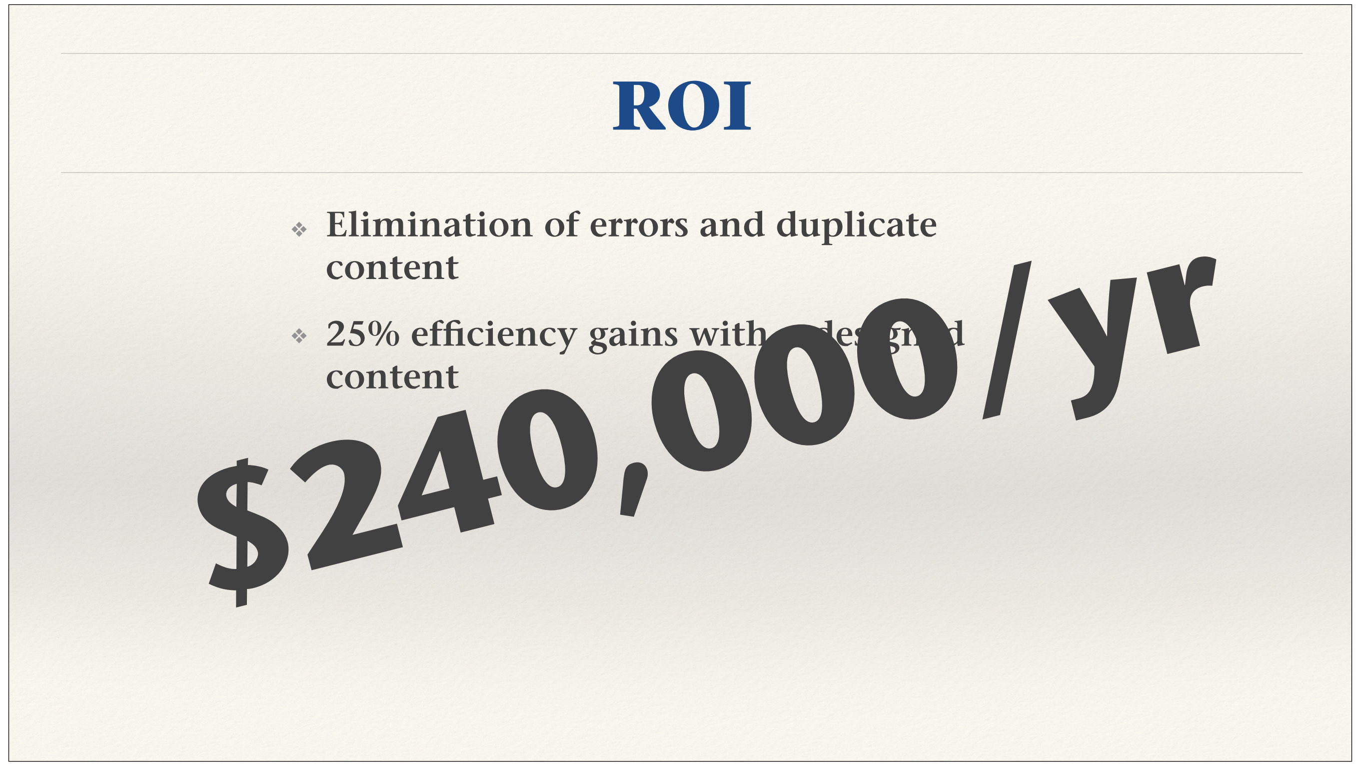


Because the Knowledge Centre is being built in an enterprise content management system, it is easier to maintain existing content. It’s also easier to create new pages and link them to existing related content.

We knew we had succeeded with this work when we realized, months after the new system had been implemented, we hadn’t received a single complaint about the redesigned and rewritten content.

We’re not done. The work to redesign the content experience continues, and we’ve got a team of technical writers in the middle of rewriting thousands of pages of content to new standards. There are months of work left. And making the decision to spend this time and budget on building the Knowledge Centre was not easy for BC Hydro to make.

In the world of content operations and content strategy, we often find it difficult to put a number on content. Exactly how much revenue is generated by various content practices? With this project, we were able to come up with a number.



BC Hydro conducted an analysis of the cost savings that results from agents being able to process calls more quickly and accurately. We can eliminate the time they spend reaching system error messages due to broken links.

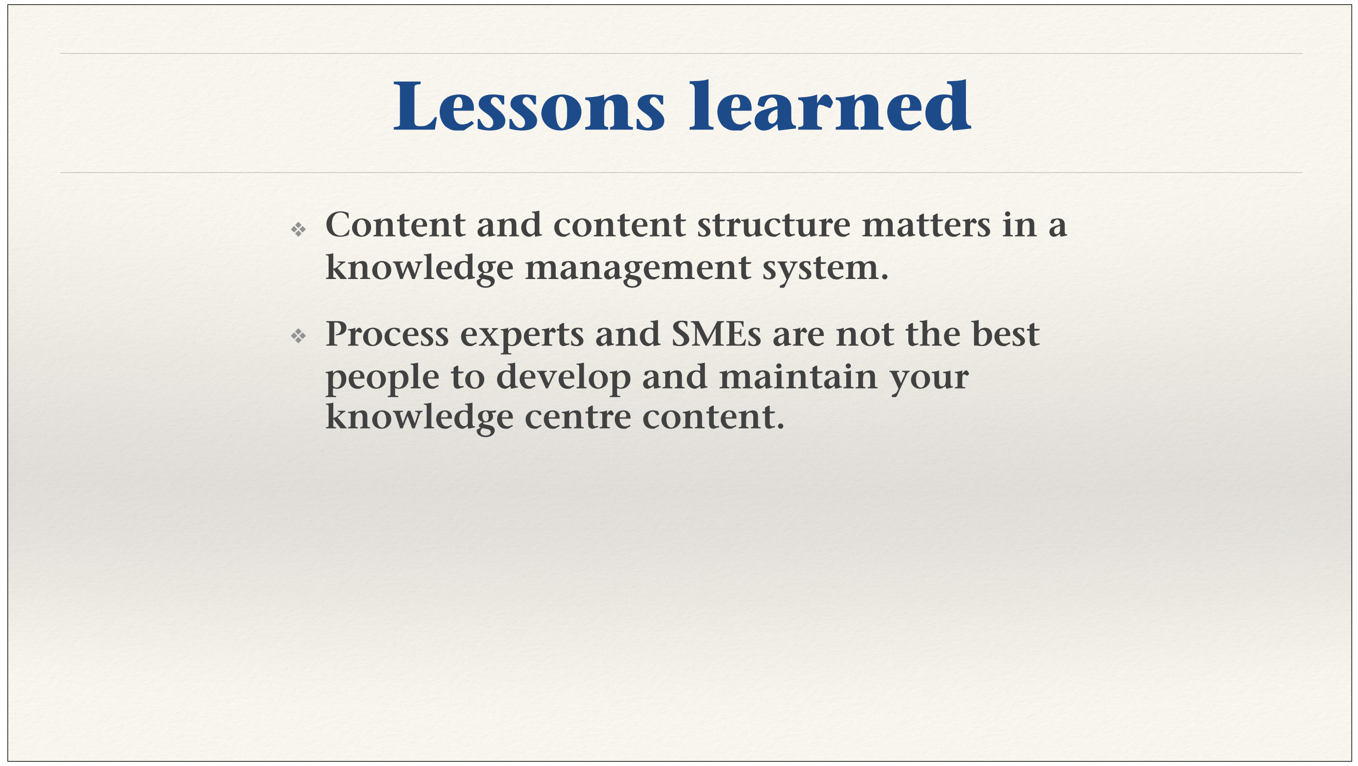
A conservative assumption is that agents will reduce the amount of time they need to spend finding and comprehending the information by about 25%. Based on standard labour rates and average handling time associated with the relevant calls, that translates to about $240,000 a year.

BC Hydro looks to save nearly a quarter of a million dollars annually.

Content debt

- There is a cost to not maintaining content and the processes and systems used to create content.
- The longer a business waits to do this work, the bigger and more expensive the job will be.

Not maintaining the content in your systems is creating debt. And at some point, you'll have to pay that off. Perhaps that will be when the software your intranet is running on is no longer supported. Perhaps it will be when you realize there are 20,000 pages in it. Or it could be when there's litigation of some sort because of factually incorrect information on your site.



We’ve been working with BC Hydro on the Knowledge Centre project for two years now, and both they and us have learned some things.

Systems that lack consistent structures and layouts are fraught with inefficiencies, resulting in slow and frustrating task completion. Repeatable effort is a hallmark of a well structured system, resulting in quick and simple workflow

In the same way that you don’t ask writers to come up with engineering designs for a new bridge, and you don’t ask accountants to develop your software code or come up with pattern libraries, process and subject matter experts are not the people who should be creating and maintaining the content in your knowledge centre. In the same way you get people who have been trained to do a specific skill to perform that job in your company, you need people who have been trained in the mechanics of content to do the work of content. Look to hire or contract editors and technical writers, and provide your staff with opportunities to expand their skills.

The star performers and “go-to” members of your work teams will be most familiar with the old systems, warts and all. Involving them in the development of the new system alongside they any hired guns brought into transition from old to new, will create buy in and build credibility for the shift to the new knowledge management system. You need this change management technique to break from the old and bring in the new.

Workers are happiest when they can find what they are looking for the first time. Organizations like the inherent efficiencies that result in cost savings. Customers like it for the most basic of all reasons: when they call they don’t have to wait, they get to speak with a quick, efficient and happy agent who solves their problem.

Improving your content will improve the user experience. In BC Hydro’s case they are able to improve the customer experience by improving the experience of front-line staff, but if you are using content to interact with your customers directly, you will get business benefits from improving that content.

Content is not a project. It’s not created and done and you do your business a disservice by ignoring your content. Content requires regular maintenance and attention. Better to create a bit of space in your budget now for regular content operations than to leave things for 15 years and have to pay that content debt then.

Thanks for listening.

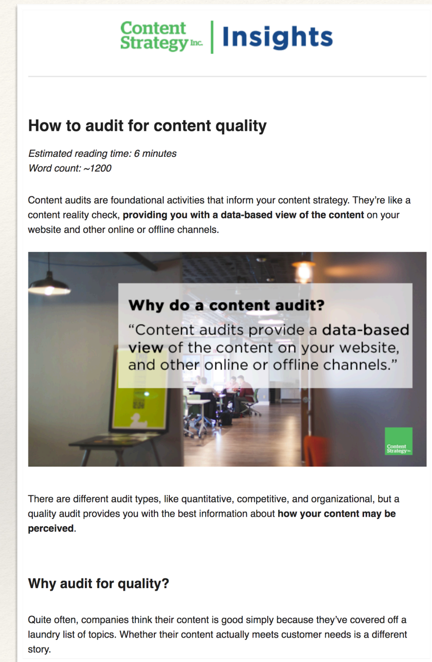
Thank you for listening.

If you’re interested in learning more about how content work is done, I have a podcast you might like.

Lorem Ipsum Dolor

CSI Newsletter

http://eepurl.com/bTo4PH



Content Strategy Inc. | Insights

How to audit for content quality

Estimated reading time: 6 minutes
Word count: ~1200

Content audits are foundational activities that inform your content strategy. They're like a content reality check, **providing you with a data-based view of the content** on your website and other online or offline channels.

There are different audit types, like quantitative, competitive, and organizational, but a quality audit provides you with the best information about **how your content may be perceived**.

Why audit for quality?

Quite often, companies think their content is good simply because they've covered off a laundry list of topics. Whether their content actually meets customer needs is a different story.

And you can subscribe to the Content Strategy Inc newsletter for more information about the practice of content strategy.

Questions?

I’m happy to take any questions.

Content Strategy Inc.

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