BEFORE THE
WASHINGTON UTILITIES AND TRANSPORTATION COMMISSION

WASHINGTON UTILITIES AND
TRANSPORTATION COMMISSION,

    Complainant,

  v.

PUGET SOUND ENERGY,

    Respondent.

Docket UE-19____
Docket UG-19____

FIFTH EXHIBIT (NONCONFIDENTIAL) TO THE
PREFILED DIRECT TESTIMONY OF

JOSHUA J. JACOBS

ON BEHALF OF PUGET SOUND ENERGY

JUNE 20, 2019

GTZ PROJECT LIST (Exh. JJJ-6)

PROJECT	IN SERVICE	CATEGORY	COSTS IN SERVICE THROUGH THE TEST YEAR	COSTS EXPECTED TO BE IN SERVICE BETWEEN JANUARY AND JUNE 2019	PROJECT EXPLANATION
Account Balance Clarity & Consistency	2016	BPCC	$21,685.65	N/A	Remove barriers to payment and customer errors in paying their balance, which has resulted in dissatisfaction with the payment experience, excess calls, and UTC complaints when customers have multiple accounts.
Bill Code Enhancements Phase 1	2016	BPCC	$2,682,162.81	N/A	The bill code enhancement project will address the deficiencies in the Miscellaneous Adjustment bill code that are producing misleading and confusing bills, reducing the number of calls to the call center and providing clarity to the customer.
Bill Due Reminder & Fiserv Balance	2016	BPCC	$539,393.25	N/A	Provide a notification to users who have not paid or scheduled a payment within 5 days of their due date that their payment date is approaching, along with a prompt to pay now. Display a real time balance, explanation of type of account (active or closed) and remove closed accounts if they are paid in full through the Bank Withdrawal Pay Page through FISERV
Billing Performance Improvement	2016	BPCC	$3,794,900.60	N/A	This project strives to identify underlying causes of billing exceptions in the meter to cash process and then sets processes and systems in place to improve the efficiency of billing exceptions, reduce the volume of those exceptions and ensure compliance to the UTC requirements.

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Collection Cycle Improvement	2018	BPCC	$3,337,015.13	N/A	The Collection Cycle Improvement project focused on implementing improvements to our back office operational process for dunning and collection procedures.
Credit & Collection Quick Wins	2016	BPCC	$135,365.02	N/A	Addition of six Quick Wins to improve several billing & payment transactions.
No Fee Bank Card	2016	BPCC	$447,091.55	N/A	This project will make the necessary process and system changes to eliminate credit card processing fees for our customers.
Fiserv Next Phase 1	2018	BPCC	$2,121,907.25	N/A	Allows customers that are paying by debit or credit card to see real-time posting of their payment. Also, improved the process for customers to donate to the Warm Home Fund.

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3-Click	2018	BPCC	$2,767,598.99	N/A	Providing a guided experience for CSRs that will reduce the amount of time to process a customer transaction over the phone.
Non-Consumption Billing	2018	BPCC	$3,095,476.68	N/A	Improving the non-consumption billing process to allow for customers to view & pay their bill, establish recurring billing plans and create standards for late payment fees and collections.
Security Deposit & Refunds	2018	BPCC	$2,775,505.27	N/A	Improving the process by which a customer receives their security deposit refund after eligibility requirements are met.
Social Media Core	2017	CI	$768,014.74	N/A	Provides a social media digital channel that is easy for the PSE staff to publish, interact and track customers social activity across multiple social networks.

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CI Cross Channel Design Exp	2016	CI	$1,017,628.79	N/A	The goal of this project is to create the high level design requirements for development of a customer-centric, consistent customer experience across all digital channels and interactions. The product will be used to inform requirements and selection of digital core elements identified in the GTZ roadmap, as well as subsequent implementation of individual customer journeys.
Multichannel Foundation	2018	CI	$1,280,870.82	N/A	PSE enabling the SAP Multi-Channel Foundation software that will allow customers to process transactions via the web, mobile and IVR technologies.
Microservices	2018	CI	$10,708,446.27	N/A	Provides the architecture to streamline the back-end systems with the new customer facing systems.
IVR Enhancements	2017/2018	CI	$8,127,482.85	N/A	Upgrading our IVR system to improve call routing prompts, improve customer authentication, add new self-serve options, auto call categorization, add predictive call routing and adding predictive call identification.

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CI IVR Improvements	2016	CI	$657,981.71	N/A	Improving the menu deisgn options of our IVR channel to create a channel that was clear, concise and engaging that will allow the customer to self-serve without the need of a customer service rep.
Communication Gateway	2018	CI	$20,903,189.90	N/A	Allows all PSE organizations to proactively communicate with customers via their most preferred channel.
CI Start n Stop n Transfer	2016	CI	$14,127.46	N/A	The Start Stop Transfer Quick Wins implemented the SAP Multi-Channel Foundation for Utilities software to provide a new customer self-serve experience. This included a Start service process for new customers and a Start, Stop, Transfer service for existing customers via their myPSE account in an effort to reduce Start/Stop/Transfer calls to the customer care center. The test year cost for this project was $14,127.46; the total cost of this project was $3,378,588.25.
Web Platform	2018	CI	$36,491,922.70	N/A	Planning, design and execution of a new PSE.com web platform to increase the number of customer self-serve transactions.

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Mobile App	2018	CI	$2,884,961.69	N/A	Planning, design and execution of a new mobile app to increase the number of self-serve transactions for our customers.
Data Governance and Quality	2018	Data Management	$180,747.94	N/A	Migrate and expand the existing Amazon Web Services cloud-based data "lake" to a long-term, governed repository to align with our IT Cloud Strategy. Scope included migrating current applications to the new Direct Connect AWS Cloud environment with improved security, governance and access control capabilities.
Data Lake Meter Upgrade Ingestion	2018	Data Management	$569,914.11	N/A	This project improves the storage capacity flexibility for Smart Meter data and establishes a foundation for future insights related to usage data.
g Data Platform & Data Quality Assessmen	2016	Data Management	$1,167,644.78	N/A	This goal of this project was to achieve Quick Wins in assessing/improving the quality of Customer Master Data. Provides an easily accessible, cloud based repository for multiple PSE data sources.

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AMR to OMS	2018	IWM	$3,829,499.59	N/A	Implementation of proactive texts, emails and phone calls to customers notifying them of power outages, status updates and estimated time of restoration (ETR).
GIS CAD Design Manager	2018	IWM	$3,705,451.76	N/A	The GIS CAD project modernizes PSE's design processes for new gas and electric systems by introducing tools and processes that, in addition to producing pictures/schematics, create attribute data associated with the design of new equipment in the field. The test year cost of this project was $3,705,451.76; the total cost of this project was $5,768,232.24.
IWM WORK MANAGEMENT SYSTEM	2018	IWM	$37,103,087.60	N/A	Integrated Work Management improves PSE's field operations work processes and tools that will improve the customer and PSE initiated service requests that total over approximatley 900,000 jobs per year.
PMO Activities	2018	General GTZ	$7,677.85	N/A	Costs associated with configuring the working space for GTZ team members to optimize project interactions through co-location.

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Visual IVR	2019	CI	N/A	$866,000.00	Visual Integrated Voice Response or "VIVR" functionality allows consumers with smartphones to type the call prompts on their phone screens instead of waiting to listen for them in the IVR.
Additional Web/Mobile/IVR enhancements	2019	CI	N/A	$4,809,376.59	This includes improvements to the scalability of the website to handle large outage events, enhanced website security, additional self-service optimization, and high bill analysis tools for customers.
Billing Performance Improvement Phase 3	2019	BPCC	N/A	$683,132.13	Building on the work done in phases 1 & 2, Phase 3 will reduce the number of EMMA cases that require manual processing by back office billing agents. An EMMA case is an exception to the normal billing process or a situation where a billing correction is necessary.
IWM to MNS and Automated Time Entry	2019	IWM	N/A	$11,824,198.43	Delivery of Integrated Work Management for the Meter Network Services (MNS) Group, which performs credit disconnects and electric reconnects, as well as field collections. Delivery of automated time entry functionality for field workers using IWM mobile tools.

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Field Payment Strategy	**2019**	**IWM**	N/A	$823,000.00	Providing PSE Customer Field Reps (CFR) with a mobile, streamlined and secure solution for accepting customer credit/debit card payments in the field that will post in real time to the customer's account.
Data Governance	**2019**	**Data Management**	N/A	$13,039,355.54	Continuation of the Data Governance project which will provide the ability to create and govern data-driven insights that will drive future business decisions and effectiveness in delivering the goals of the GTZ initiative.
GTZ PMO	**2019**	**General GTZ**	N/A	$414,050.10	Hardware and Software costs associated with GTZ PMO.
			$151,136,752.76	$32,459,112.79	