

Lease Solutions Project

Product Overview

Product Strategic Relevance	Business Opportunity	ISP Contribution
Add new source of regulated earning capital Customer satisfaction Energy efficiency savings	Lease Solutions will provide a one-stop solution for customers to assist them in selecting and financing new energy efficient heating and water heating equipment. It will provide customers with another energy solution, stimulate the installation of energy efficient equipment, and provide broader access to services.	<ul style="list-style-type: none"> Grow New Business Execute Customer Experience Statement

Project Status

Key Accomplishments

- Sept. 18th - Filed Phase 1(a) tariff schedules requesting approval to expand energy equipment lease services
- Oct. 6th - Conducted initial Service partner interviews
- Oct. 9th - Completed and approved SAP Quotation business requirements

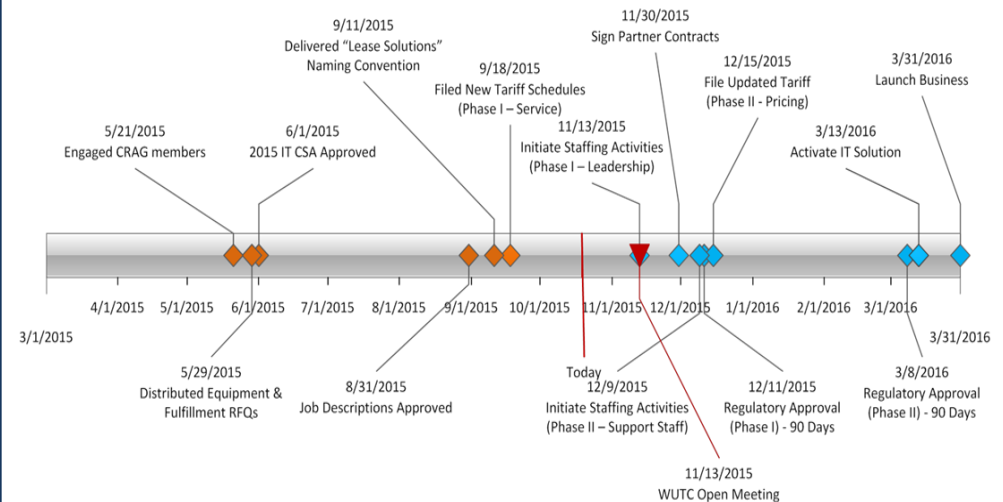
Key Milestones

- Nov. 13th - WUTC Open Meeting where Dockets UE-151871 and UG-151872 will be discussed
- Nov. 30th - Sign Service Partner contracts
- Mar. 13th - Activate IT solutions

Key Decisions

- Determine customer credit eligibility thresholds
- Develop final product specifications and pricing
- Define transition strategy for existing "lease services" customers
- Establish timing to staff core leadership team

Product Development Timeline



Top 3 Dependencies

Mitigation

Discussion

Regulatory authorization	<ul style="list-style-type: none"> Work with Regulatory team to address identified issues Maintain stakeholder engagement 	<ul style="list-style-type: none"> The team continues to engage with WUTC Staff to demonstrate how the Equipment Lease service provides public benefit. Metrics provided to Staff detail energy savings, energy bill savings and deferred customer capital. Additionally the team continues to work with key stakeholders to garner regulatory support. Simultaneous build out of remainder of plan ongoing.
IT development	<ul style="list-style-type: none"> Conduct thorough planning to identify and manage scope and surface system dependencies Establish dedicated resources (people) where feasible 	
Resources	<ul style="list-style-type: none"> Closely manage costs until Regulatory process complete Recruit interim project members and leverage SMEs 	