

**BEFORE THE WASHINGTON  
UTILITIES & TRANSPORTATION COMMISSION**

WASHINGTON UTILITIES AND TRANSPORTATION COMMISSION,

Complainant,

v.

PUGET SOUND ENERGY

Respondent.

---

DOCKET NOS. UE-190529 and UG-190530 (*Consolidated*)

**SUSAN M. BALDWIN ON BEHALF OF PUBLIC COUNSEL UNIT**

**EXHIBIT SMB-4**

Puget Sound Energy Response to Public Counsel Data Request No. 101

November 22, 2019

**BEFORE THE WASHINGTON UTILITIES AND TRANSPORTATION COMMISSION**

**Dockets UE-190529 & UG-190530  
Puget Sound Energy  
2019 General Rate Case**

**PUBLIC COUNSEL DATA REQUEST NO. 101**

**“CONFIDENTIAL” Table of Contents**

<b>DR NO.</b>	<b>“CONFIDENTIAL” Material</b>
<b>101</b>	Shaded information designated as CONFIDENTIAL per Protective Order in WUTC Dockets UE-190529 and UG-190530 as marked in Attachment A to Puget Sound Energy’s Response to Public Counsel Data Request No. 101.

**BEFORE THE WASHINGTON UTILITIES AND TRANSPORTATION COMMISSION**

**Dockets UE-190529 & UG-190530  
Puget Sound Energy  
2019 General Rate Case**

**PUBLIC COUNSEL DATA REQUEST NO. 101:**

**Cost-Benefit of “Get to Zero”; Direct Testimony of Joshua J. Jacobs, Exh. JJJ-1T at 1:20-21.**

Please reference the testimony of Joshua J. Jacobs, Director, Business Integration for Puget Sound Energy, stating with reference to Get to Zero (GTZ): “The initiative focuses on replacing and updating aging technologies that impact PSE’s customer service.”

- a) Please list each GTZ-related technology that will be replaced.
- b) Please list each GTZ-related technology that will be updated.
- c) Please provide any and all cost-benefit analyses prepared by or on behalf of the Company regarding its Get to Zero (GTZ) Program.
  - i) Please identify the author(s) of the analyses and the date such cost-benefit analyses were prepared.
  - ii) Does the Company have any plans to revise or update the cost-benefit analyses? If so, when? Please provide updates as they become available.
  - iii) Does the Company intend to measure the benefits it actually achieves? If so, please describe fully the way in which the Company will measure each identified benefit, the intended frequency of such measurement, and provide all such measurements to date. If not, how will the Company assess whether the projected benefits are actually achieved.

**Response:**

- a) Puget Sound Energy (“PSE”) interprets this question as asking for technology that will be replaced as part of the Get to Zero (“GTZ”) project. With that understanding, technology replaced was through the Website Platform Redesign, Mobile App, and Microservices projects. For the Website Platform Redesign project, the previous platform was built on Microsoft SharePoint 2010 and this was replaced by the Sitecore Experience Platform. For the Mobile App, PSE replaced the previously built native app with one that was developed on Xamarin technology. For the Microservices project, the previous legacy API architecture

was replaced with a Microservices solution. GTZ also plans on replacing the PragmaCAD or PCAD technology that is used to perform electronic dispatch work with SAP Work Manager and Click Schedule through the Integrated Work Management project.

- b) The following table provides a list of all new and updated GTZ-related technologies that are included in this filing:

<b>Technology</b>	<b>Aligned Project</b>	<b>Status</b>
AutoDesk AutoCAD Utility Design (AUD)	GIS CAD Design Manager	New
Cisco	IVR Enhancements	Updated
Click Software	Integrated Work Management	New
Fiserv Bill Matrix Next	Fiserv Next Phase I	Updated
Jacada	Visual IVR	New
Message Broadcast	Communication Gateway	New
Neustar	IVR Enhancements	New
Nexidia	IVR Enhancements	New
SAP	Various	Updated
SAP Work Manager	Integrated Work Management	New
Sprinklr	Social Media Core	New

As described in the Prefiled Direct Testimony of Margaret F. Hopkins, Exh. MFH-1T, technology solutions generally have a short life expectancy and require ongoing investments to stay current. As a result, it is expected the above technologies and those technologies listed in subpart a) above will be updated on an ongoing basis.

- c) The initial cost-benefit analysis is embedded within the GTZ roadmap and is attached as Attachment A to PSE's Response to Public Counsel Data Request No. 101.

- i) PSE objects to Public Counsel Data Request No. 101(c)(i) as it requests the names of PSE employees who are not witnesses in this case as irrelevant and not reasonably calculated to lead to the discovery of admissible evidence. Without waiving this objection and subject thereto, PSE will provide the names of Officer and Director level employees and employees who are witnesses in this case. PSE will provide titles only for all other employees. Any contact with PSE employees should be coordinated through PSE's counsel.

The analysis was prepared in August 2016 which leveraged expertise from consultants and subject matter experts and was led by the following:

- Director Business Integration, Joshua J. Jacobs

- Business Delivery Lead
  - Performance Consultant
  - Chief Architect
- ii) PSE updates the expected costs and benefits on a regular basis. Project updates regarding costs and benefits are done through the Corporate Spending Authorization (“CSA”) process. The most recent CSAs can be found in the following attachments (note the project names listed match the Third Exhibit to the Prefiled Direct Testimony of Joshua J. Jacobs, Exh. JJJ-4, but may be slightly different in the CSA provided):
- Attached as Attachment B to PSE’s Response to Public Counsel Data Request No. 101 is the Account Balance Clarity & Consistency CSA;
  - Attached as Attachment C to PSE’s Response to Public Counsel Data Request No. 101 is the Bill Code Enhancements Phase 1 CSA;
  - Attached as Attachment D to PSE’s Response to Public Counsel Data Request No. 101 is the Bill Code Enhancements Phase 2 CSA;
  - Attached as Attachment E to PSE’s Response to Public Counsel Data Request No. 101 is the Bill Due Reminder & Fiserv Balance CSA;
  - Attached as Attachment F to PSE’s Response to Public Counsel Data Request No. 101 is the Billing Performance Phase 1 CSA;
  - Attached as Attachment G to PSE’s Response to Public Counsel Data Request No. 101 is the Billing Performance Phase 2 CSA;
  - Attached as Attachment H to PSE’s Response to Public Counsel Data Request No. 101 is the Billing Performance Phase 3 CSA;
  - Attached as Attachment I to PSE’s Response to Public Counsel Data Request No. 101 is the Collection Cycle Improvement CSA;
  - Attached as Attachment J to PSE’s Response to Public Counsel Data Request No. 101 is the Credit & Collection Quick Wins CSA;
  - Attached as Attachment K to PSE’s Response to Public Counsel Data Request No. 101 is the No Fee Bank Card CSA
  - Attached as Attachment L to PSE’s Response to Public Counsel Data Request No. 101 is the Fiserv Next Phase 1 CSA;
  - Attached as Attachment M to PSE’s Response to Public Counsel Data Request No. 101 is the 3-Click CSA;
  - Attached as Attachment N to PSE’s Response to Public Counsel Data Request No. 101 is the Non-Consumption Billing CSA;
  - Attached as Attachment O to PSE’s Response to Public Counsel Data Request No. 101 is the Security Deposits & Refunds CSA;
  - Attached as Attachment P to PSE’s Response to Public Counsel Data Request No. 101 is the Social Media Core CSA;

- Attached as Attachment Q to PSE's Response to Public Counsel Data Request No. 101 is the CI Cross Channel Design Exp CSA;
  - Attached as Attachment R to PSE's Response to Public Counsel Data Request No. 101 is the Multichannel Foundation CSA;
  - Attached as Attachment S to PSE's Response to Public Counsel Data Request No. 101 is the Microservices CSA;
  - Attached as Attachment T to PSE's Response to Public Counsel Data Request No. 101 is the IVR Enhancements CSA;
  - Attached as Attachment U to PSE's Response to Public Counsel Data Request No. 101 is the CI IVR Improvements CSA;
  - Attached as Attachment V to PSE's Response to Public Counsel Data Request No. 101 is the Communication Gateway CSA;
  - Attached as Attachment W to PSE's Response to Public Counsel Data Request No. 101 is the CI Start n Stop N Transfer CSA;
  - Attached as Attachment X to PSE's Response to Public Counsel Data Request No. 101 is the Web Platform CSA;
  - Attached as Attachment Y to PSE's Response to Public Counsel Data Request No. 101 is the Mobile App CSA;
  - Attached as Attachment Z to PSE's Response to Public Counsel Data Request No. 101 is the Data Governance and Quality and Data Governance CSA;
  - Attached as Attachment AA to PSE's Response to Public Counsel Data Request No. 101 is the Data Lake Meter Upgrade Ingestion CSA;
  - Attached as Attachment AB to PSE's Response to Public Counsel Data Request No. 101 is the Big Data Platform & Data Quality Assessment CSA;
  - Attached as Attachment AC to PSE's Response to Public Counsel Data Request No. 101 is the AMR to OMS CSA;
  - Attached as Attachment AD to PSE's Response to Public Counsel Data Request No. 101 is the GIS CAD Design Manager CSA;
  - Attached as Attachment AE to PSE's Response to Public Counsel Data Request No. 101 is the IWM Work Management System and IWM to MNS and Automated Time Entry CSA.
- iii) Yes, PSE intends to measure the benefits it achieves. PSE provides monthly dashboards around call volume and other Key Performance Indicators (KPIs). The most recent reports can be found in the following Attachments:
- Attached as Attachment AF to PSE's Response to Public Counsel Data Request No. 101 is the most recent call dashboard for August 2019;
  - Attached as Attachment AG to PSE's Response to Public Counsel Data Request No. 101 is the most recent SPP financial dashboard for July 2019;

- Attached as Attachment AH to PSE's Response to Public Counsel Data Request No. 101 is the most recent KPI dashboard.

Shaded information designated as CONFIDENTIAL per Protective Order in WUTC Dockets UE-190529 and UG-190530 as marked in Attachment A to PSE's Response to Public Counsel Data Request No. 101.

**ATTACHMENTS A-AH to PSE's  
Response to  
PUBLIC COUNSEL Data Request No. 101**





# CALL DASHBOARD

August 2019 - OVERALL PERFORMANCE VS BASELINE:

YTD Call Reduction (EOY Target: -35%)	YTD Calls Saved (EOY Target: -685K)	YTD Calls/Customer (14/15 Baseline: 0.109)
---------------------------------------	-------------------------------------	--

-25.4%



-333,450

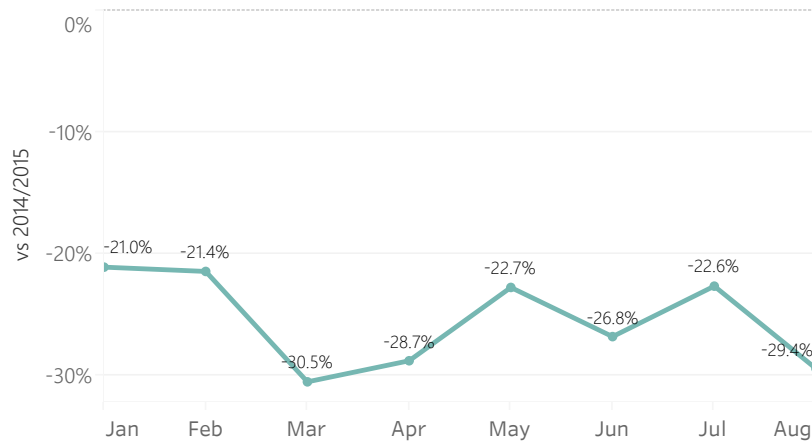


0.077

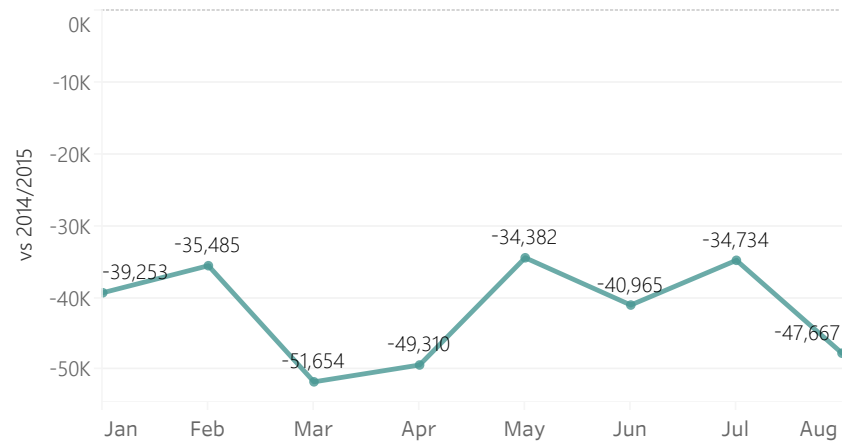


-29.1%

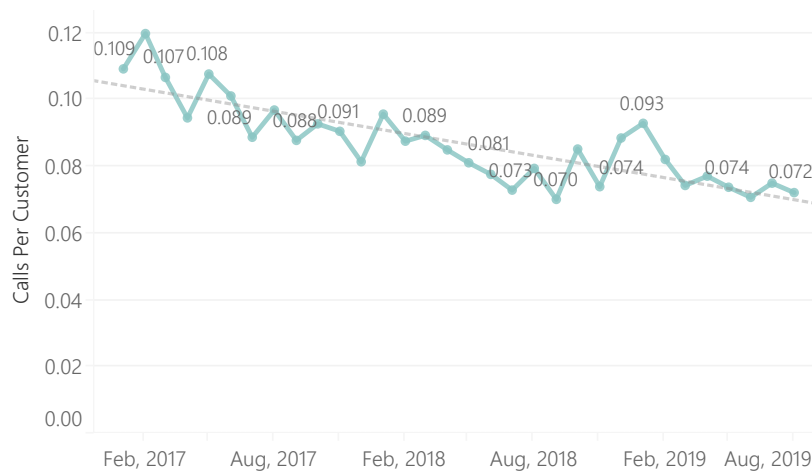
Monthly Call Reduction (Percentage %)



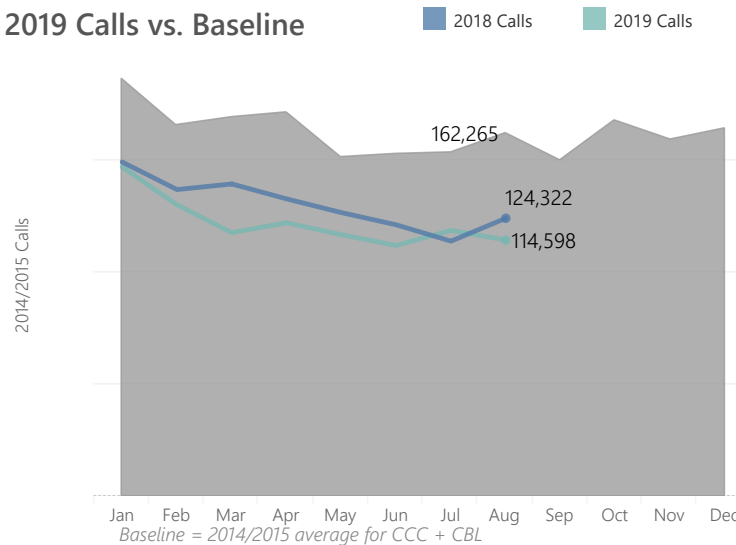
Monthly Calls Saved (Volume)



Calls per Customer



2019 Calls vs. Baseline





# USE CASE DETAIL

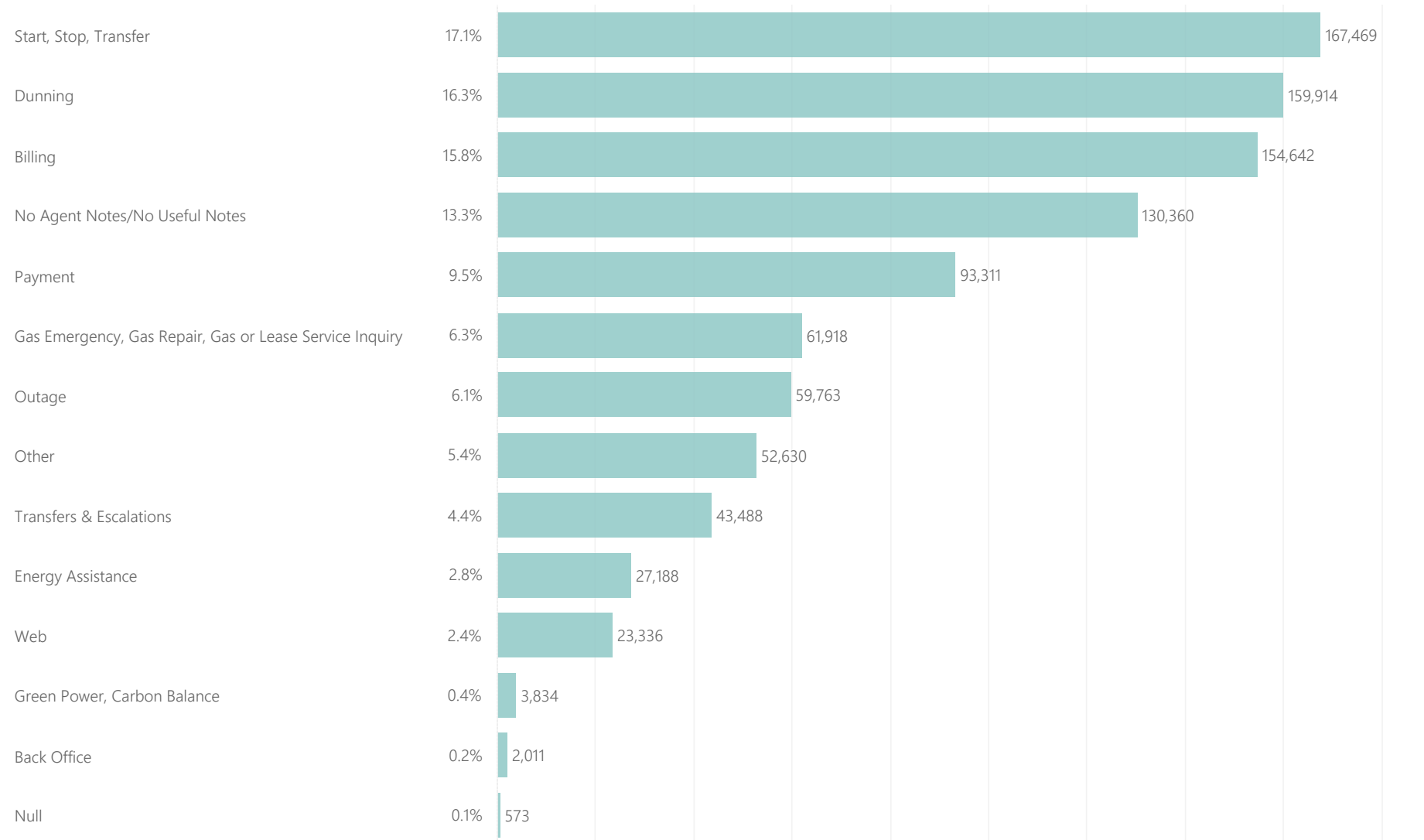
August 2019 - SUMMARY

## % OF TOTAL CALLS

YTD 2019

## VOLUME OF TOTAL CALLS

YTD 2019





# USE CASE DETAIL

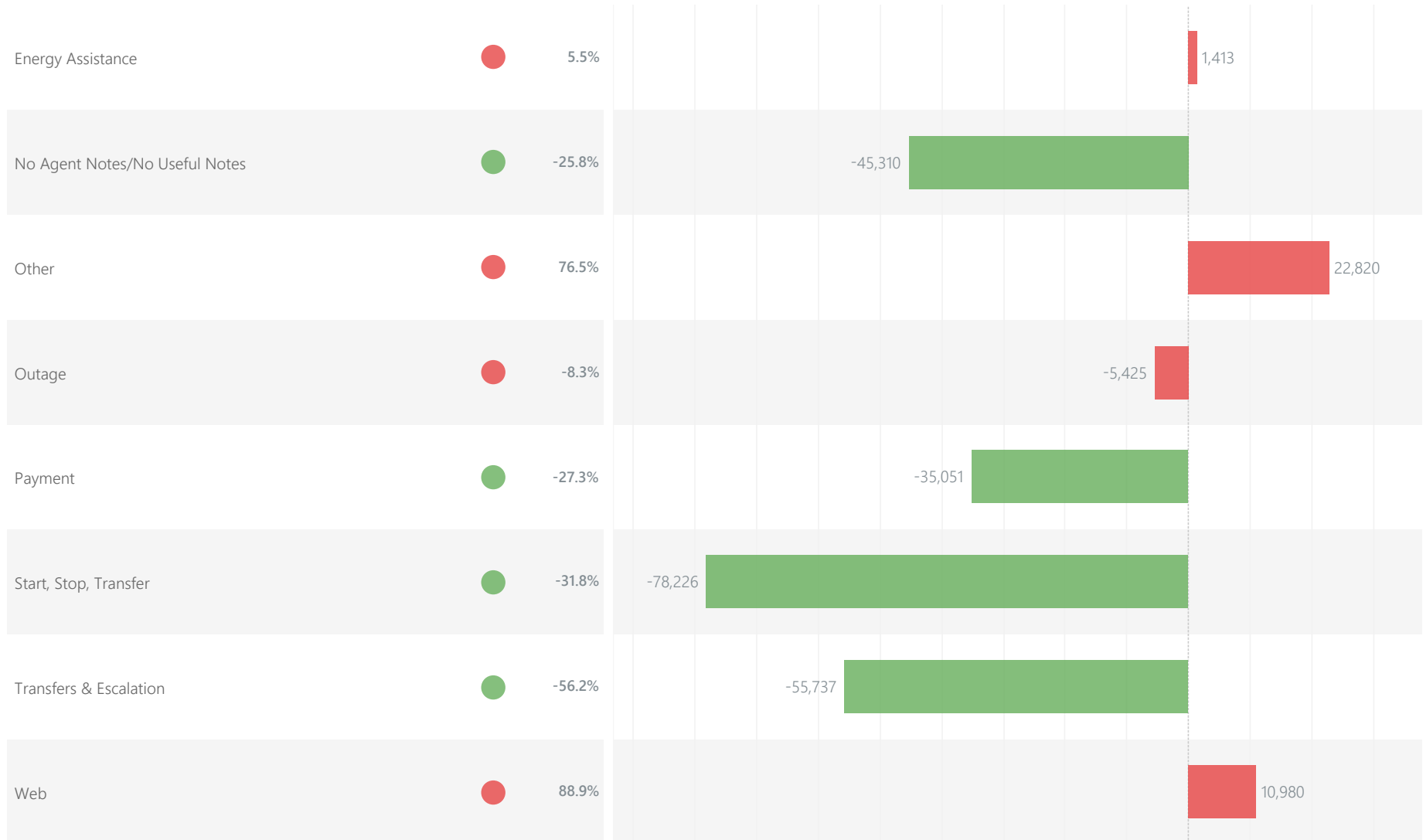
August 2019 - SUMMARY

## VS BASELINE

≤ -15%   -10 to -15   ≥ -10%

## DIFF BETWEEN 2019 AND BASELINE

BY CALL TYPE

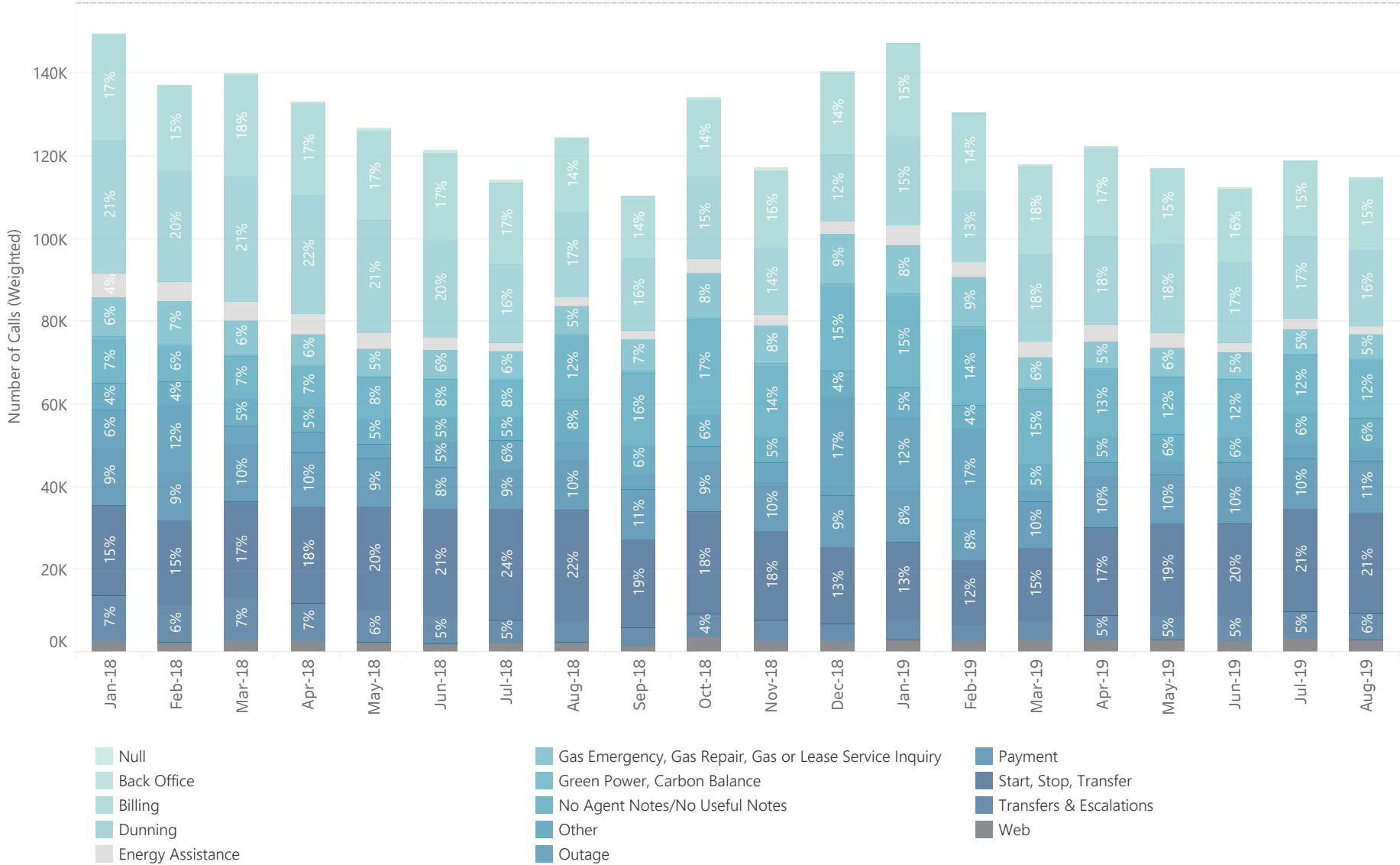




# % OF CALLS BY USE CASE

August 2019 - BREAKDOWN BY USE-CASE

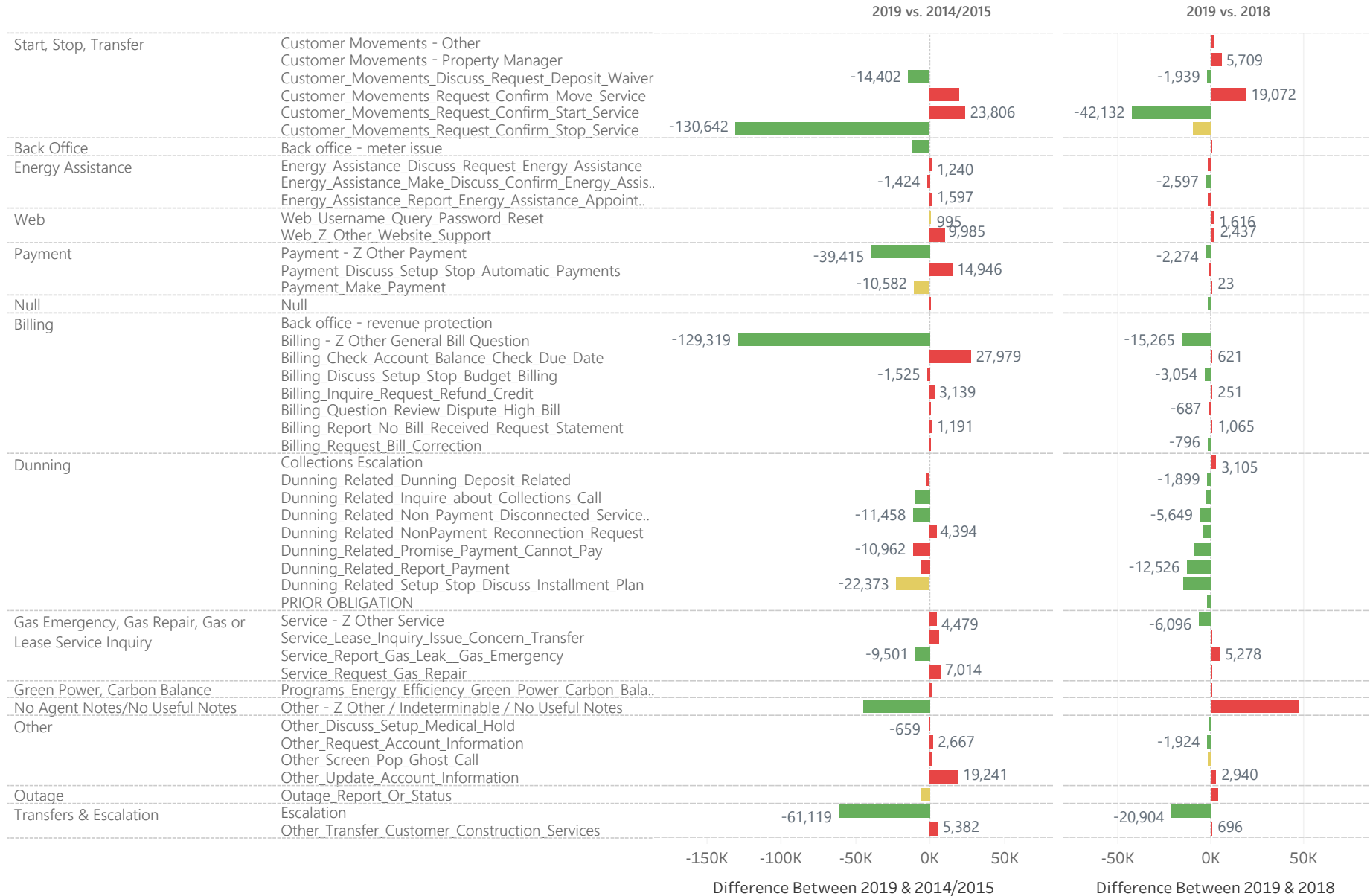
## BREAKDOWN BY MAPPED CALL GROUP





# YTD CALL REASON PERFORMANCE

August 2019



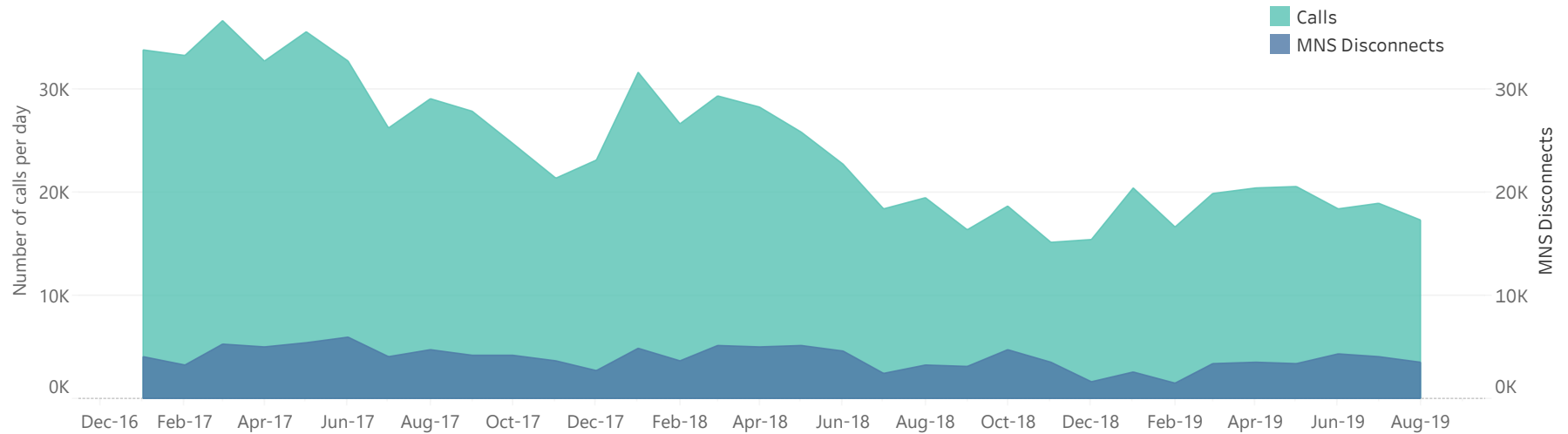


# PROJECT PERFORMANCE

August 2019 - DUNNING CALLS, & START, STOP, TRANSFER

## DUNNING CALLS

MANAGE COLLECTIONS & DUNNING  
MANAGE DISCONNECT/RECONNECT

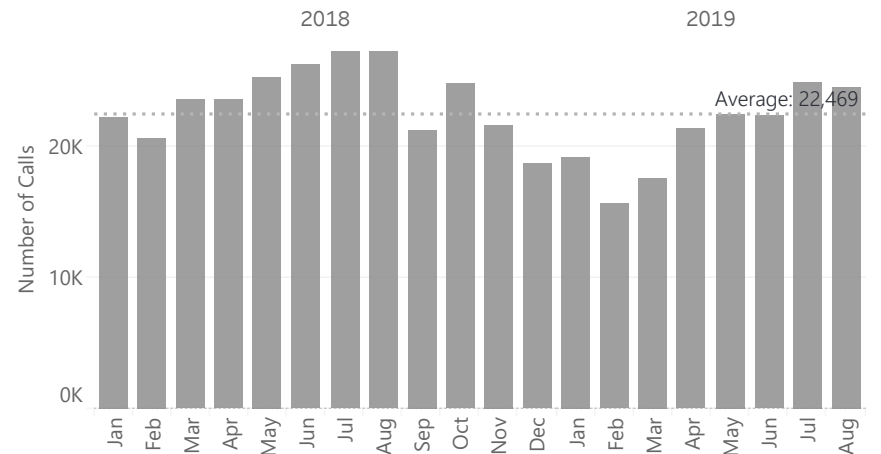


## START, STOP, TRANSFER

PERCENTAGE OF TRANSACTIONS DONE VIA SELF SERVICE

## START, STOP, TRANSFER

CALL VOLUMES



Data validation in progress for date from October 2018 to present



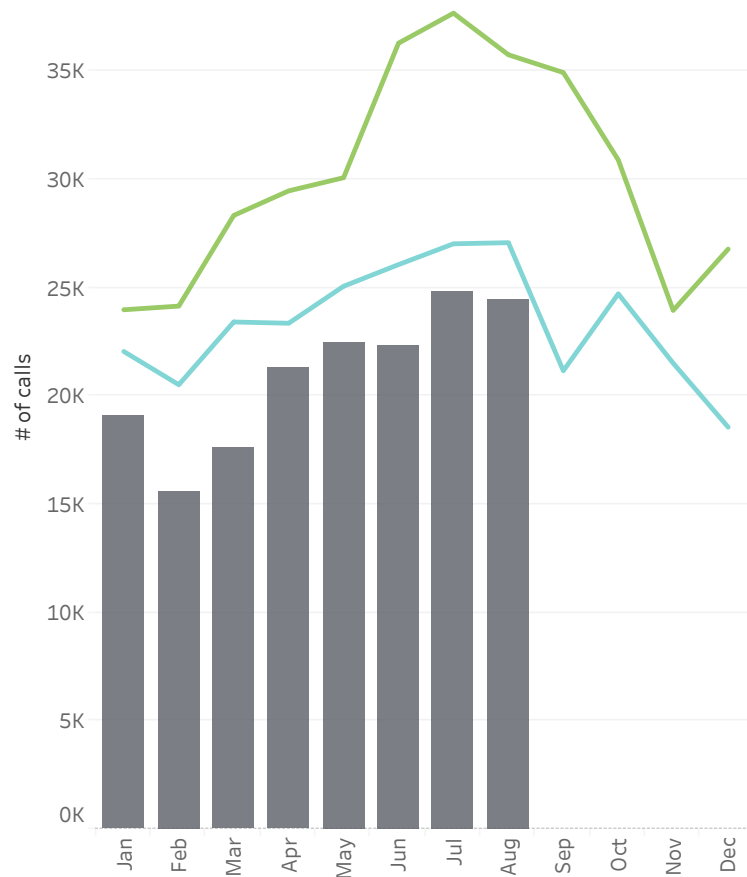
# USE CASE DETAIL

August 2019 - START, STOP, TRANSFER & BILLING PERFORMANCE

2014/2015 2018 2019

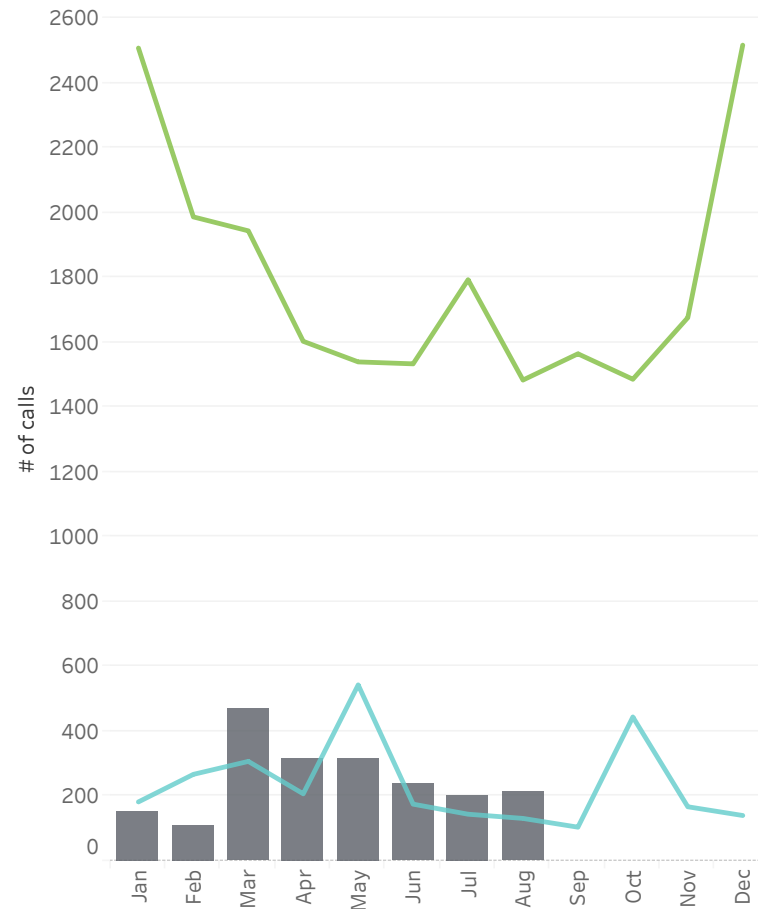
## START, STOP, TRANSFER

CALL VOLUMES BY YEAR



## BACK OFFICE

CALL VOLUMES BY YEAR





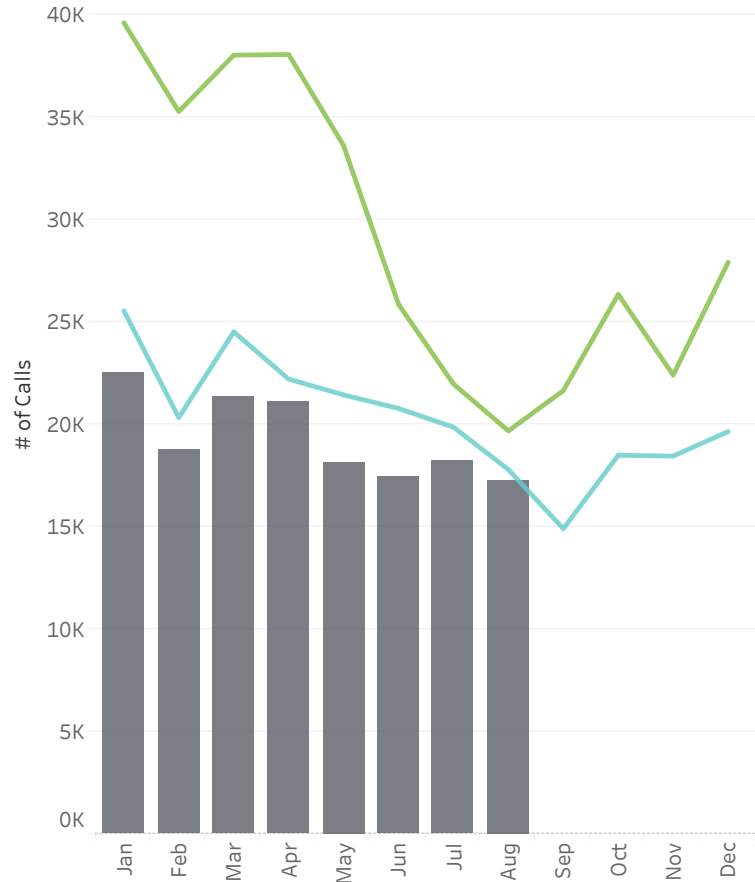
# USE CASE DETAIL

August 2019 - BILLING & DUNNING

2014/2015 2018 2019

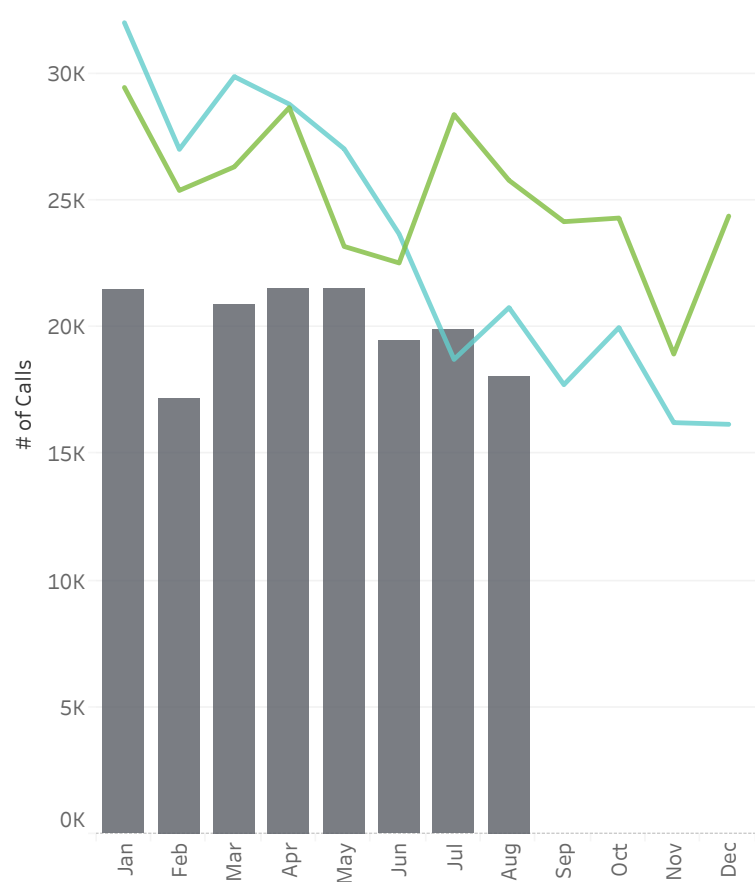
## BILLING

CALL VOLUMES BY YEAR



## DUNNING

CALL VOLUMES BY YEAR







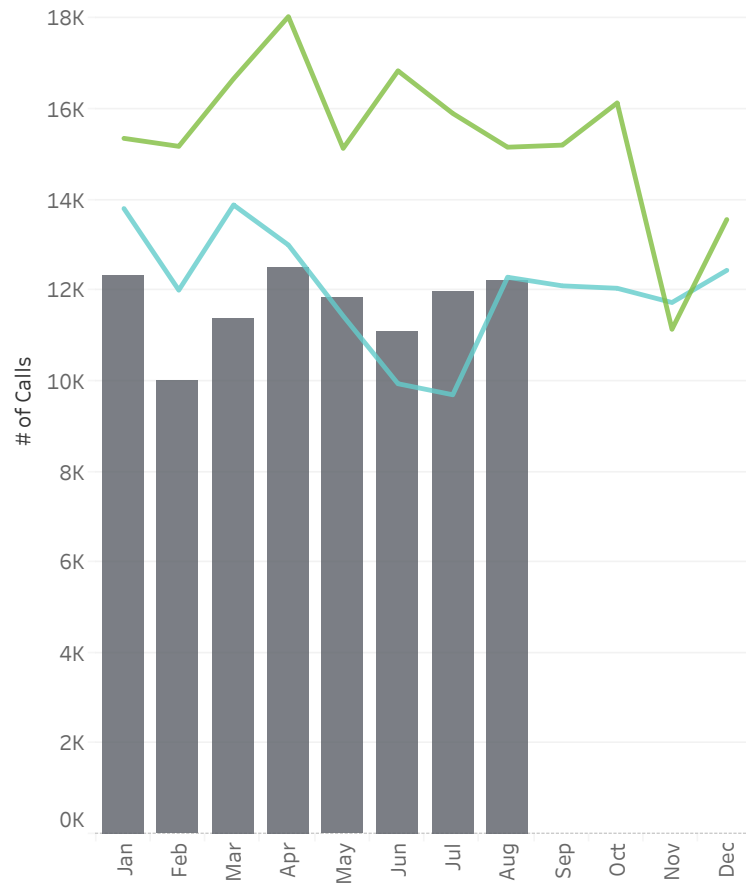
# USE CASE DETAIL

August 2019 - PAYMENTS, OUTAGES

2014/2015 2018 2019

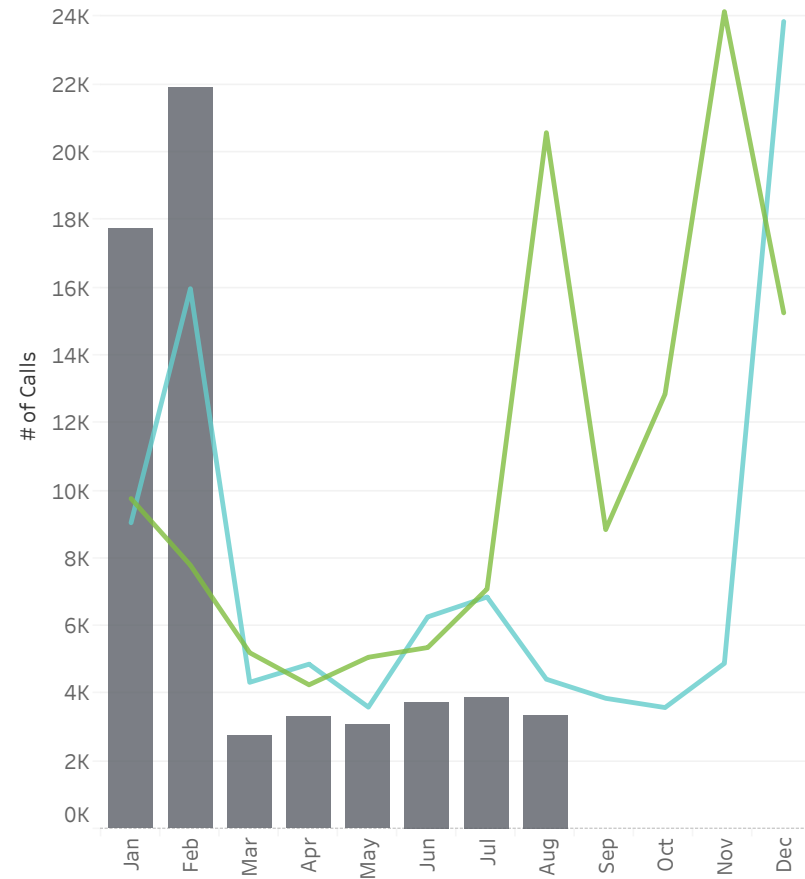
## PAYMENT

CALL VOLUMES BY YEAR



## OUTAGES

CALL VOLUMES BY YEAR



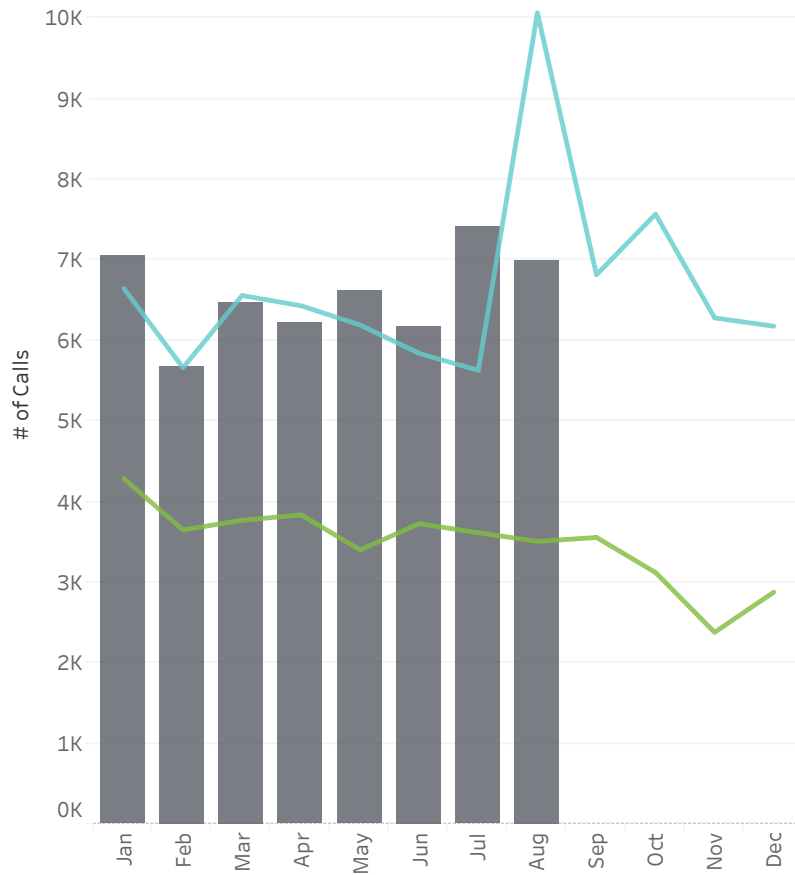


# USE CASE DETAIL

August 2019 - OTHER REASONS, NO AGENT NOTES/NO USEFUL NOTES

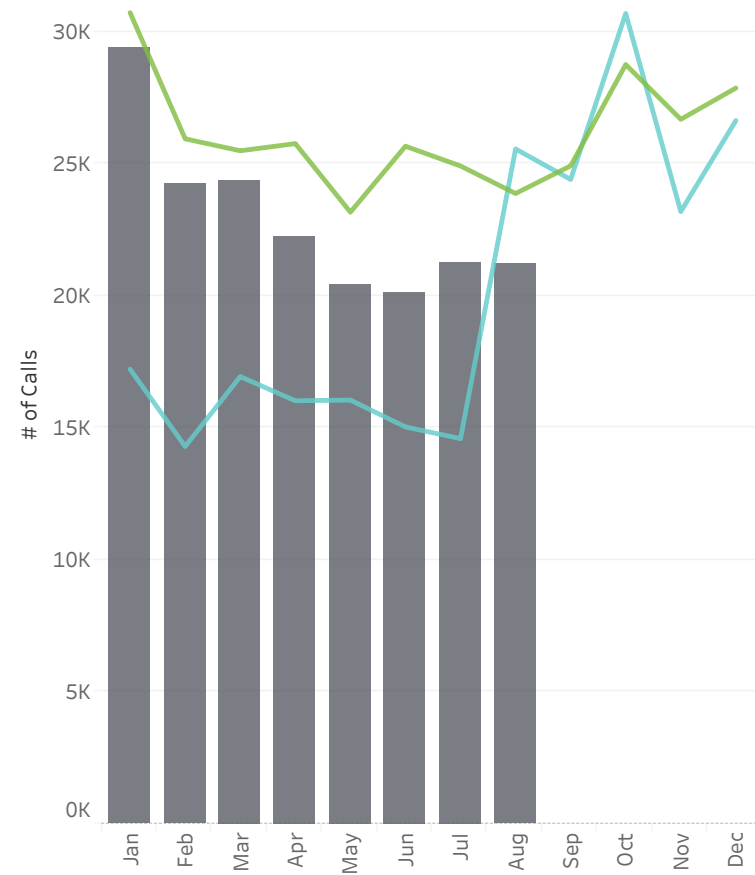
## OTHER REASONS

CALL VOLUMES BY YEAR



## NO AGENT NOTES/NO USEFUL NOTES

CALL VOLUMES BY YEAR



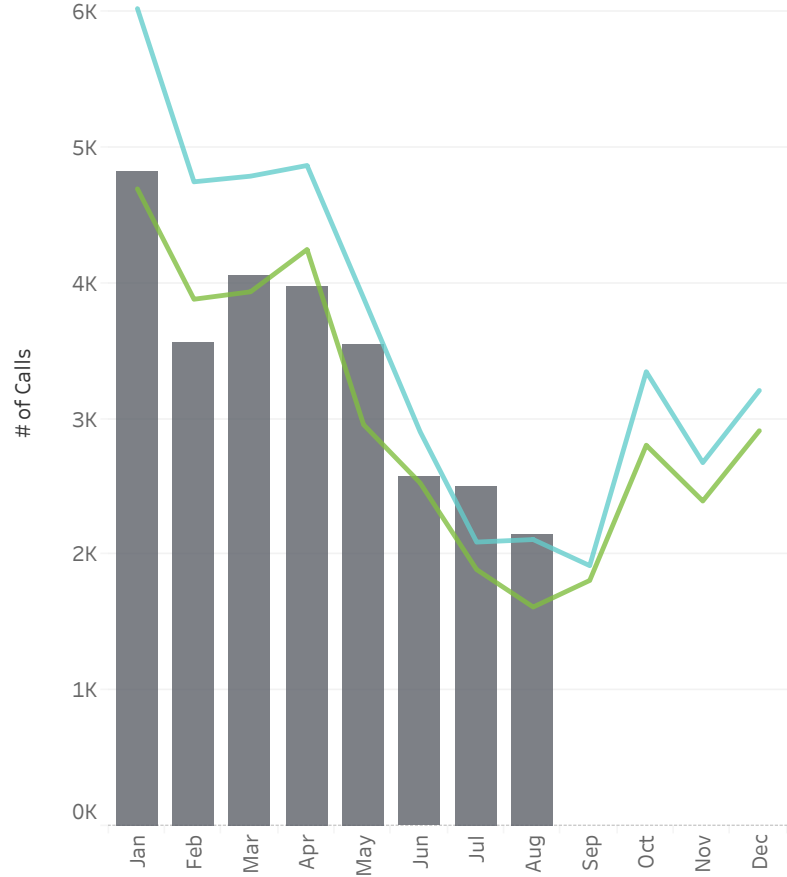


# USE CASE DETAIL

August 2019 - ENERGY ASSISTANCE

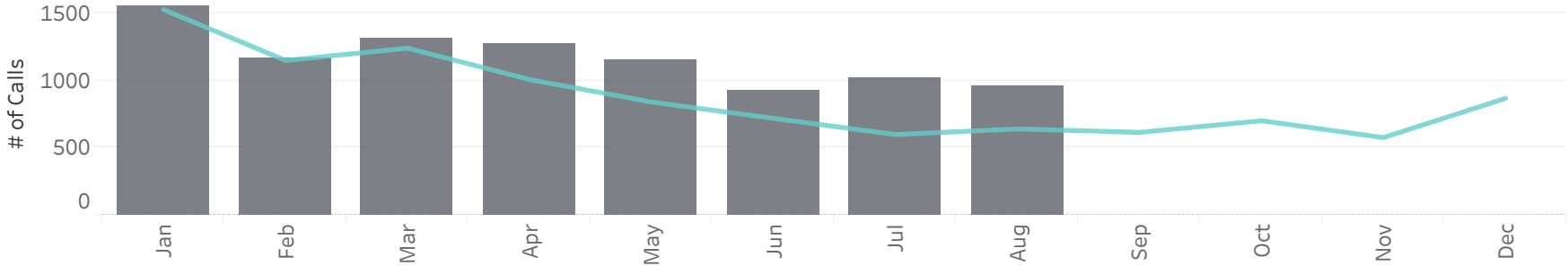
## ENERGY ASSISTANCE

CALL VOLUMES BY YEAR



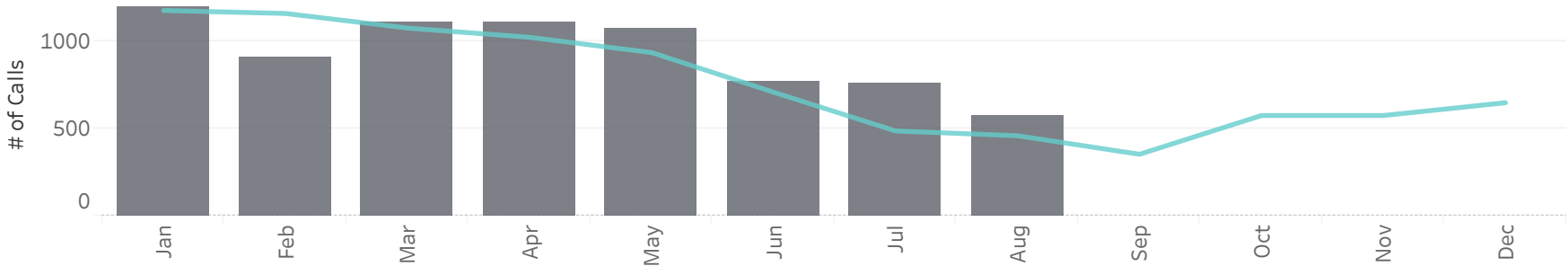
### Discuss\_Request\_EA

CALL VOLUMES BY YEAR



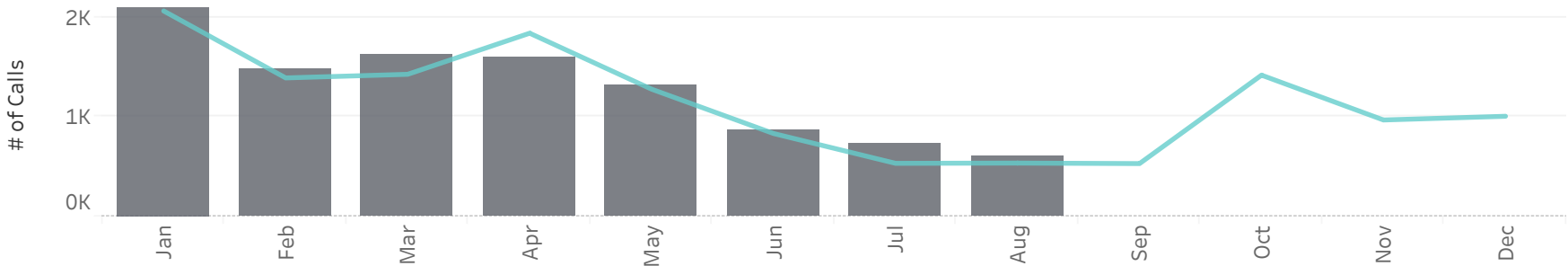
### Confirm\_EA\_Pledge

CALL VOLUMES BY YEAR



### Request\_EA\_Appointment

CALL VOLUMES BY YEAR



Measure Names

- 2018
- 2019



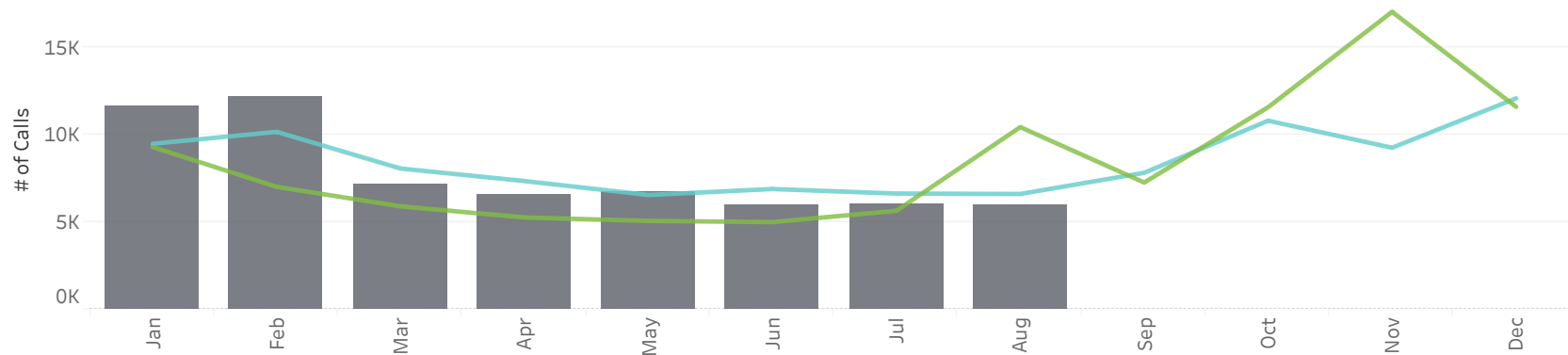
# USE CASE DETAIL

August 2019 - GAS EMERGENCY, WEB, TRANSFERS

## GAS EMERGENCY

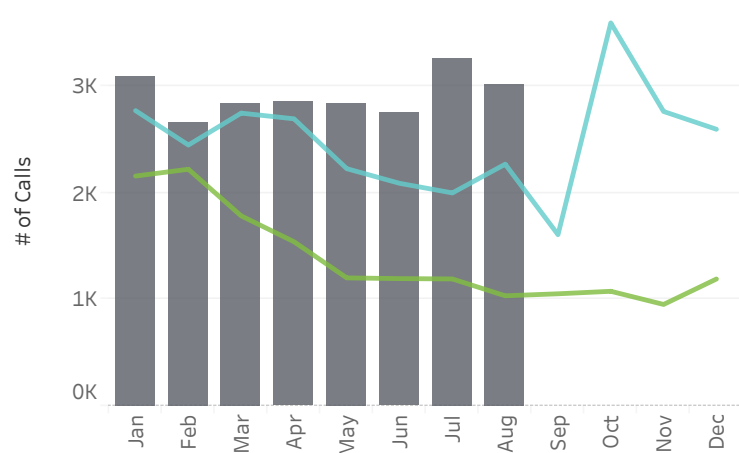
CALL VOLUMES BY YEAR

2014/2015 2018 2019



## WEB

CALL VOLUMES BY YEAR



## TRANSFERS

CALL VOLUMES BY YEAR

