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

DR NO.	"CONFIDENTIAL" Material				
101	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 costbenefit 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.

<u>Response:</u>

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:

Technology	Aligned Project	Status
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;

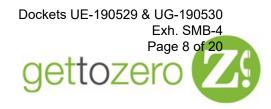
• Attached as Attachment AH to PSE's Response to Public Counsel Data Request No. 101 is the most recent KPI dashboard.

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.

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

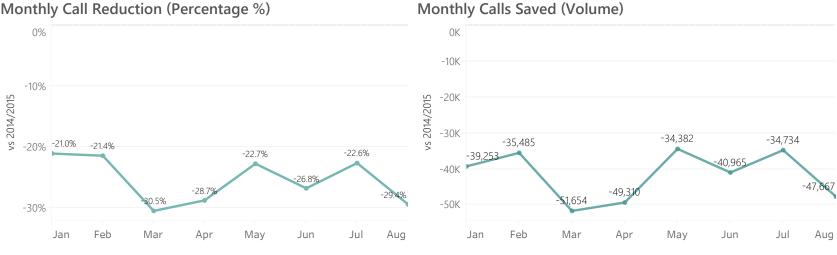
CALL DASHBOARD



August 2019 - OVERALL PERFORMANCE VS BASELINE:



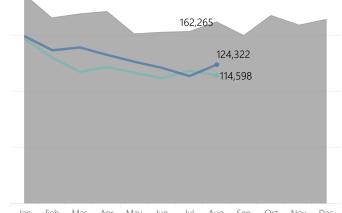
Monthly Call Reduction (Percentage %)



2019 Calls vs. Baseline

Calls per Customer





2018 Calls

2019 Calls

Jan Feb Mar Apr May Jun Jul Aug Sep Oct Nov Dec Baseline = 2014/2015 average for CCC + CBL

August 2019 - SUMMARY

YTD 2019

Dunning

Billing

Payment

Outage

Other

Web

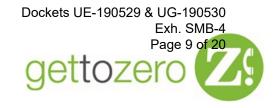
Back Office

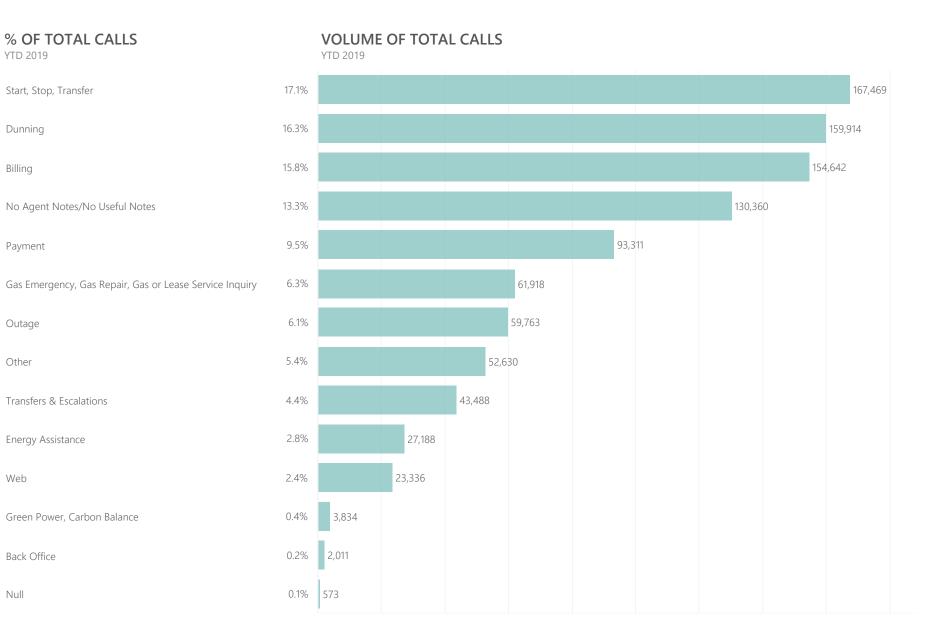
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Transfers & Escalations

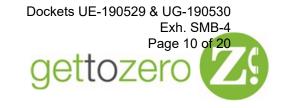
Energy Assistance

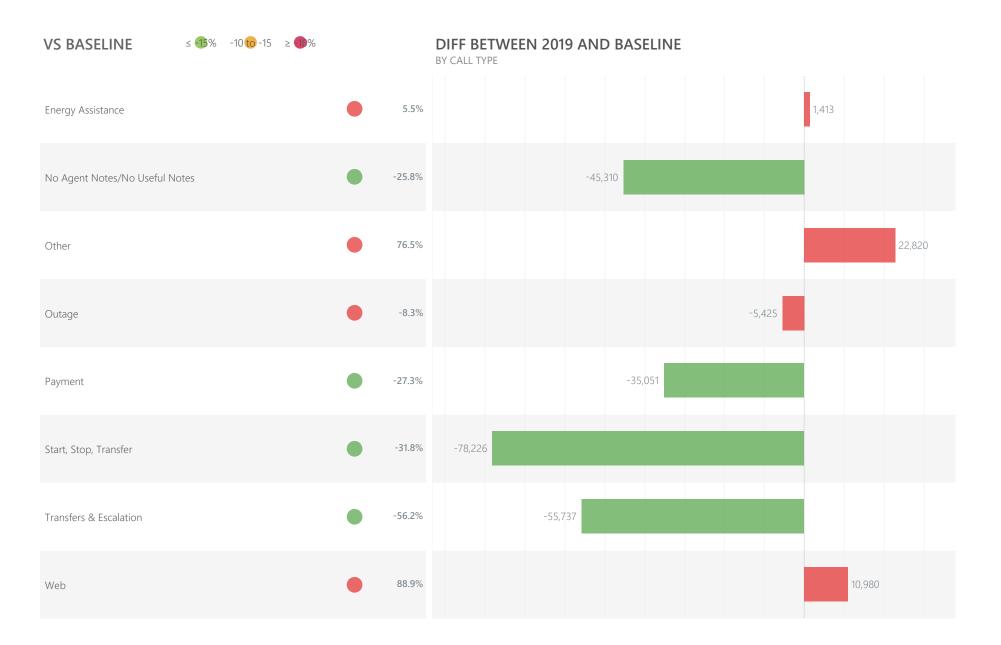
Start, Stop, Transfer



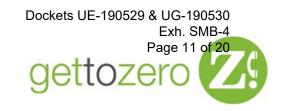


August 2019 - SUMMARY



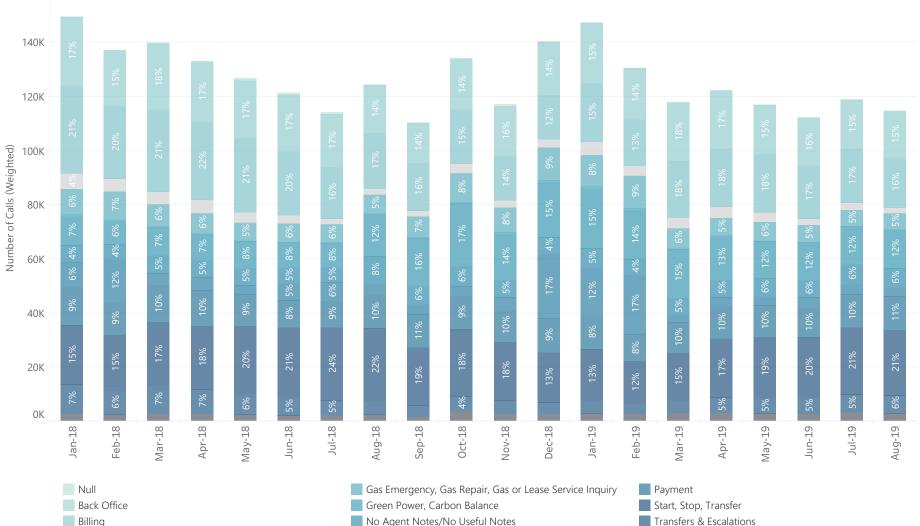


% OF CALLS BY USE CASE



August 2019 - BREAKDOWN BY USE-CASE

BREAKDOWN BY MAPPED CALL GROUP



Dunning

Energy Assistance

- No Agent Notes/No Useful Notes
- Other

Outage

Transfers & Escalations

Web

YTD CALL REASON PERFORMANCE gettozero

August 2019

		2019 vs.	2014/2015	2019	9 vs. 2018
Start, Stop, Transfer	Customer Movements - Other Customer Movements - Property Manager Customer_Movements_Discuss_Request_Deposit_Waiver Customer_Movements_Request_Confirm_Move_Service Customer_Movements_Request_Confirm_Start_Service Customer Movements_Request_Confirm_Stop_Service	-14,402	23,806	-1,939	5,709 19,072
ack Office	Back office - meter issue				
nergy Assistance	Energy_Assistance_Discuss_Request_Energy_Assistance Energy_Assistance_Make_Discuss_Confirm_Energy_Assis. Energy_Assistance_Report_Energy_Assistance_Appoint	-1,424	1,240 1,597	-2,597	
/eb	Web_Username_Query_Password_Reset Web Z Other Website Support		995 9,985		1,616 2,437
ayment	Payment - Z Other Payment Payment_Discuss_Setup_Stop_Automatic_Payments Payment_Make_Payment	-39,415 -10,582	14,946	-2,274	23
ull	Null				
iilling	Back office - revenue protection Billing - Z Other General Bill Question Billing_Check_Account_Balance_Check_Due_Date Billing_Discuss_Setup_Stop_Budget_Billing Billing_Inquire_Request_Refund_Credit Billing_Question_Review_Dispute_High_Bill	-129,319 -1,525	27,979 3,139	-15,265 -3,054 -687	621 251
	Billing_Question_Review_Dispute_High_Bill Billing_Report_No_Bill_Received_Request_Statement Billing_Request_Bill_Correction		1,191	-796	1,065
unning	Collections Escalation Dunning_Related_Dunning_Deposit_Related Dunning_Related_Inquire_about_Collections_Call Dunning_Related_Non_Payment_Disconnected_Service Dunning_Related_NonPayment_Reconnection_Request Dunning_Related_Promise_Payment_Cannot_Pay Dunning_Related_Report_Payment Dunning_Related_Setup_Stop_Discuss_Installment_Plan PRIOR OBLIGATION	-11,458 -10,962 -22,373	4,394	-1,899 -5,649 -12,526	3,105
as Emergency, Gas Repair, Gas or ease Service Inquiry	Service - Z Other Service Service_Lease_Inquiry_Issue_Concern_Transfer Service_Report_Gas_LeakGas_Emergency Service_Request_Gas_Repair	-9,501	4,479 7,014	-6,096	5,278
reen Power, Carbon Balance o Agent Notes/No Useful Notes ther	Programs_Energy_Efficiency_Green_Power_Carbon_Bala Other - Z Other / Indeterminable / No Useful Notes Other_Discuss_Setup_Medical_Hold Other_Request_Account_Information Other_Screen_Pop_Ghost_Call	-659	2,667	-1,924	2.040
)	Other_Update_Account_Information Outage Report Or Status		19,241		2,940
utage ansfers & Escalation	Escalation Other Transfer Customer Construction Services	-61,119	5,382	-20,904	696

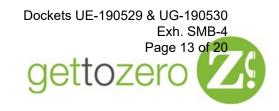
Difference Between 2019 & 2014/2015

Difference Between 2019 & 2018

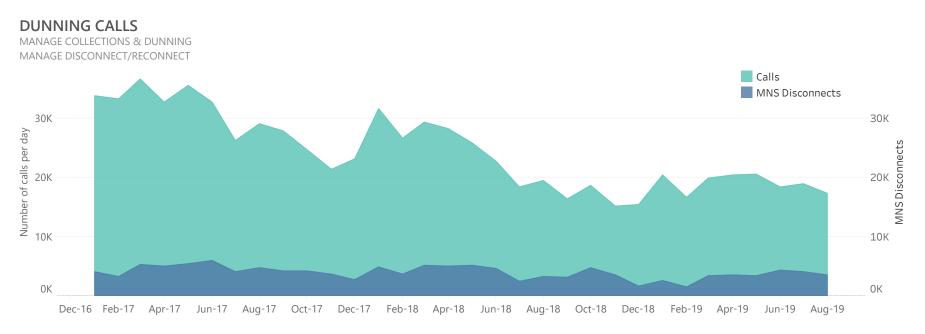
Dockets UE-190529 & UG-190530

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PROJECT PERFORMANCE



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



START, STOP, TRANSFER

START, STOP, TRANSFER

PERCENTAGE OF TRANSACTIONS DONE VIA SELF SERVICE

CALL VOLUMES 2018 2019 Average: 22,469 20K Number of Calls 10K 0K Feb Mar Apr May Jun Jul Aug Sep Oct Nov Dec Jan Feb Mar Apr Лау lun Jul Aug Jan

Data validation in progress for date from October 2018 to present

August 2019 - START, STOP, TRANSFER & BILLING PERFORMANCE

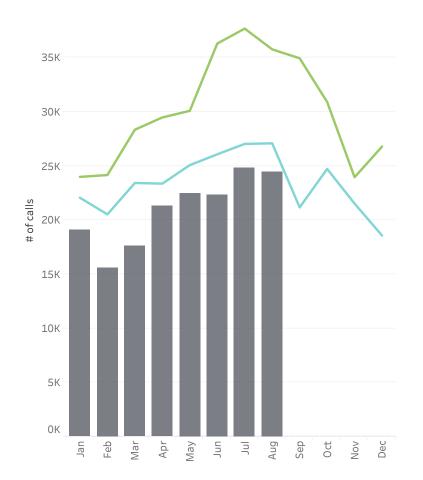
Dockets UE-190529 & UG-190530 Exh. SMB-4 Page 14 of 20 Gettozero

2014/2015 2018

2019

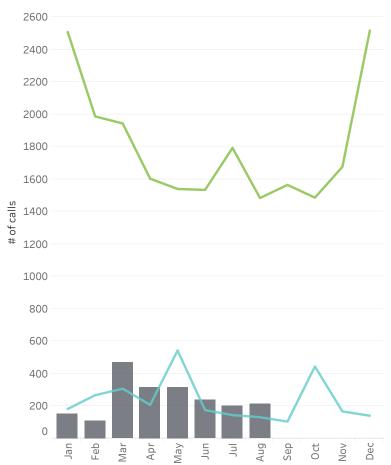
START, STOP, TRANSFER

CALL VOLUMES BY YEAR



BACK OFFICE

CALL VOLUMES BY YEAR



August 2019 - BILLING & DUNNING

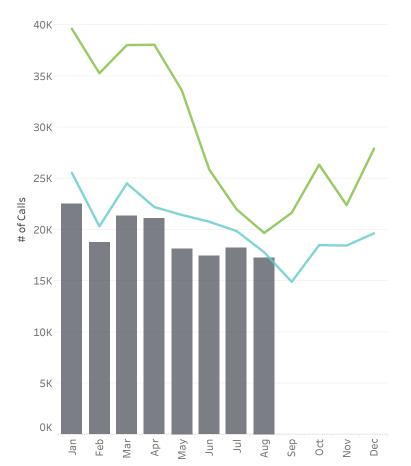


2014/2015 2018

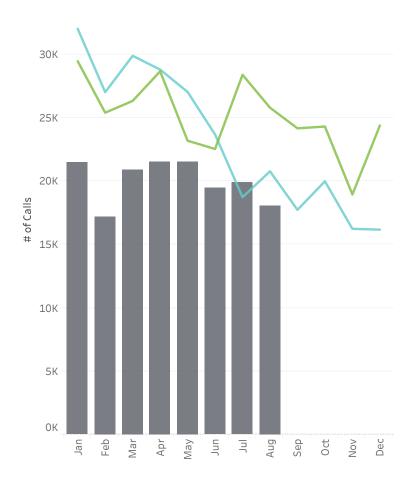
2019

BILLING

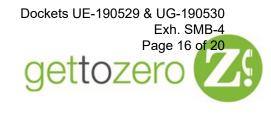
CALL VOLUMES BY YEAR



DUNNING



August 2019 - PAYMENTS, OUTAGES



2019

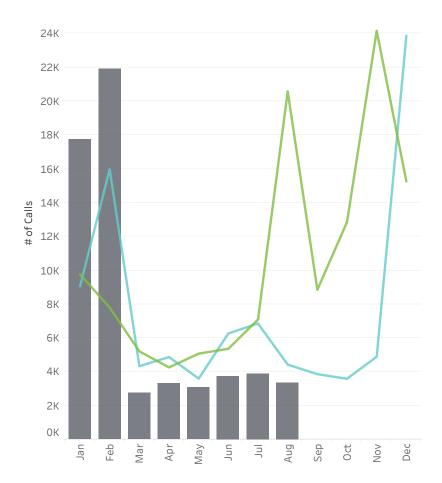
2014/2015 2018

PAYMENT

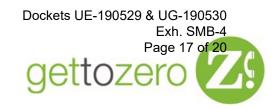
CALL VOLUMES BY YEAR



OUTAGES

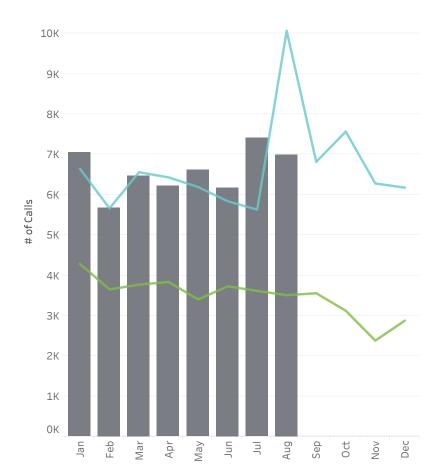


August 2019 - OTHER REASONS, NO AGENT NOTES/NO USEFUL NOTES

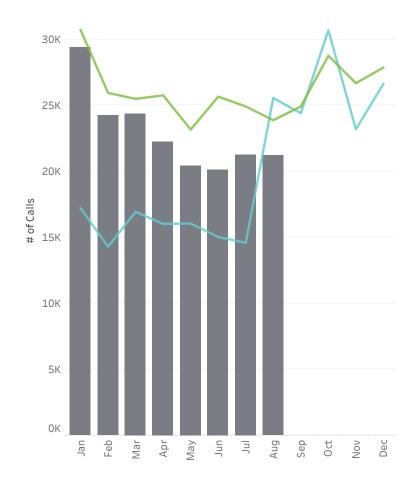


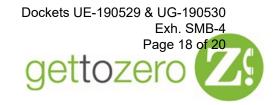
OTHER REASONS

CALL VOLUMES BY YEAR



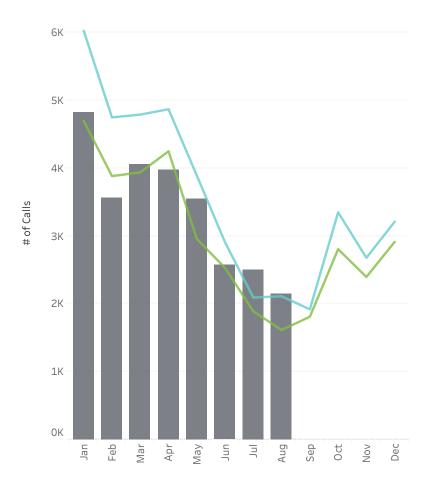
NO AGENT NOTES/NO USEFUL NOTES





August 2019 - ENERGY ASSISTANCE

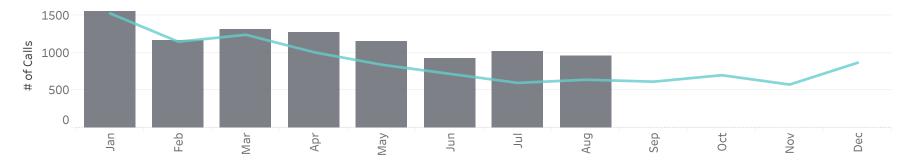
ENERGY ASSISTANCE



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Discuss_Request_EA

CALL VOLUMES BY YEAR

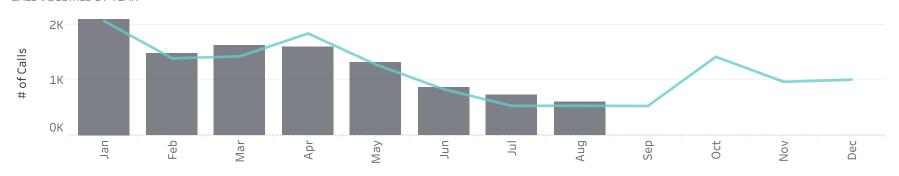








Request_EA_Appointment CALL VOLUMES BY YEAR



Measure Names

2018

2019

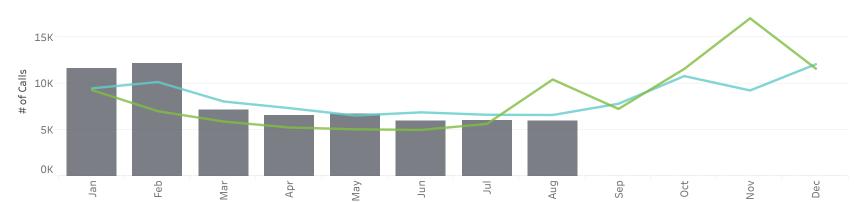


2014/2015 2018

August 2019 - GAS EMERGENCY, WEB, TRANSFERS

GAS EMERGENCY

CALL VOLUMES BY YEAR





CALL VOLUMES BY YEAR



TRANSFERS CALL VOLUMES BY YEAR

