# The first five steps to a successful CIS implementation

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Updating your customer information system (CIS) will affect nearly every employee and function within your utility. But a CIS project is more than just a technological change. It requires organizational and individual change to deliver its expected benefits.

### How E Source can help with CIS implementation

Fill out this short form to start a conversation about your needs and how we can help.

Utilities that cut corners during a CIS implementation will likely experience billing issues and poor customer service. Before you start a CIS project, take the time to get the buy-in and resources you need for a successful implementation.

We recommend taking these 10 steps to prepare for your new CIS:

1. Define clear project goals
2. Conduct an organizational readiness assessment (ORA)
3. Get executive support
4. Assign dedicated resources to the project
5. Create a project governance structure and communication plan
6. Define your deployment approach
7. Define system requirements through journey and process mapping
8. Document each step of the process
9. Create a detailed RFP and scope of work
10. Choose a system vendor, system integrator, and other project partners

Below, we dive into the first 5 steps. For guidance on the remaining steps, members of the E Source Customer Service Operations subscription can check out our report How to prepare for your CIS implementation. If you're not a member of this service but would like more information, please contact

us.

## Define clear project goals

Understand the business goals you want to achieve with a new CIS. For example, does your utility want a more advanced customer self-service system that your current system can't support?

Clear and visible goals will help you get buy-in across the organization and show your employees the benefits of a new CIS.

Technology goals. Aging systems need a lot of maintenance and even custom additions to keep up with new business needs. Legacy systems often end up looking like a patchwork of these custom additions.

Updating your CIS is an opportunity to streamline your technology, reduce maintenance costs, and provide a complete omnichannel experience. If your goal is to move your data to cloud services, a new CIS can help you do so.

Business and customer experience goals. Replacing your CIS can improve business operations and the customer experience. Determine whether you can pair your CIS project with related business or customer experience goals. By expanding the project scope, you can get more out of your implementation while still dedicating enough resources to its success.

E Source Solution Services can help streamline the process for better ROI. Learn more on our website.

## Conduct an ORA

ORAs help utilities assess their ability to support a complex CIS project. An ORA will help you:

- Understand if you have the right number of staff with the right skill sets
- Prepare to backfill positions in preparation for the project
- Give the software vendors the information they need to respond to staffing and pricing in your RFP

### Case study: Citizens Energy Group's digital transformation

Citizens partnered with E Source Solution Services, using the E Source NavigateOne™ methodology, to implement a new CIS. With the help of the E Source team, Citizens engaged a software partner and a system implementer to complete the project within scope, under budget, and on time.

Read the case study

## Get executive support

Executive sponsorship is the most important part of a CIS replacement project.

Identify one executive sponsor who's ultimately responsible for the project. And get executive buy-in from both the business and the IT side. Choosing the right executives to sponsor the project and serve

on a steering committee will help you make decisions and remove roadblocks faster.

## Assign dedicated resources to the project

Utility contact centers often experience slowdowns during CIS launches. Knowing this, Citizens onboarded new contact center personnel for extra customer support one year before the first launch of the new CIS. By adding extra contact center agents, Citizens could continue exceeding its service-level goals during the launch.

The executive sponsors assigned 3 FTEs from Citizens and Infosys, the system implementor, for the software launch. These staff monitored three test launches in addition to the official launch. The project team also had 9 FTEs for its hypercare command center. This group worked on identifying and resolving any postlaunch issues and supporting customers.

## Create a project governance structure and communication plan

The governance structure of your CIS project should reflect the project's shared business and technology goals.

- Identify a project governance team and train them on their roles and responsibilities.
- Include staff from the business and technology side to serve on the governance team.
- Create a project charter to empower the project manager to start the project, establish an initial budget, and set a framework for implementing projects.

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