Modernizing the CIS to facilitate a small utility’s big dream to improve the customer experience

Consulting case study
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Key takeaways

- A West Coast utility wished to move from an outdated customer information system (CIS) to a modern technology platform to improve internal processes, enhance customer engagement, and provide an excellent customer experience.
- E Source provided thorough project management and leadership services using its NavigateOne™ methodology, helping the utility evaluate vendors, procure a software-as-a-service (SaaS) solution, and implement it.
- With its new CIS and meter data management (MDM) solution in place, the utility launched a fully integrated customer portal, giving customers more ways to access their accounts and self-serve.

The challenge

A small West Coast utility had big dreams of upgrading its outdated CIS. A modern technology platform would improve internal processes, boost customer engagement, and improve the customer experience. As part of this digital transformation, the utility also needed to find a MDM solution to support its advanced metering infrastructure deployment.

Knowing how challenging a project like this would be, the utility decided to partner with a consulting firm to assess its original billing system, choose the right software, and help with the implementation.

According to the utility’s division manager, “We looked into a variety of separate options but ultimately decided what we needed was a connected platform—a SaaS solution that could adapt with us as we explore and grow as a utility. We all knew we wanted to enhance our customer services and give customers a way to monitor their usage better—simpler, easier. We also knew we wanted a system in place to help us restore outages more quickly.”

Do you need help implementing an upgraded CIS or other mission critical system?

Contact our team to learn more about our expertise and how we can help.

The solution

The utility turned to E Source to lead the project and choose the right software for the transformation. E Source used its proven NavigateOne methodology to:

- Analyze the utility's business needs and technology requirements
- Develop an RFP and manage the bidding process
- Assess and select a vendor
- Negotiate the statement of work

E Source provided thorough project management and leadership services, helping the utility through every step of the digital transformation—from gathering requirements to implementing the solution.

The results

E Source ensured that the utility's new CIS and MDM solutions were implemented on time and within budget. With this modern software in place, the utility launched a fully integrated customer portal, allowing customers to self-serve and improving the customer experience.

The digital transformation will also be beneficial as the utility prepares to adopt increasingly more sophisticated grid and metering technology.

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