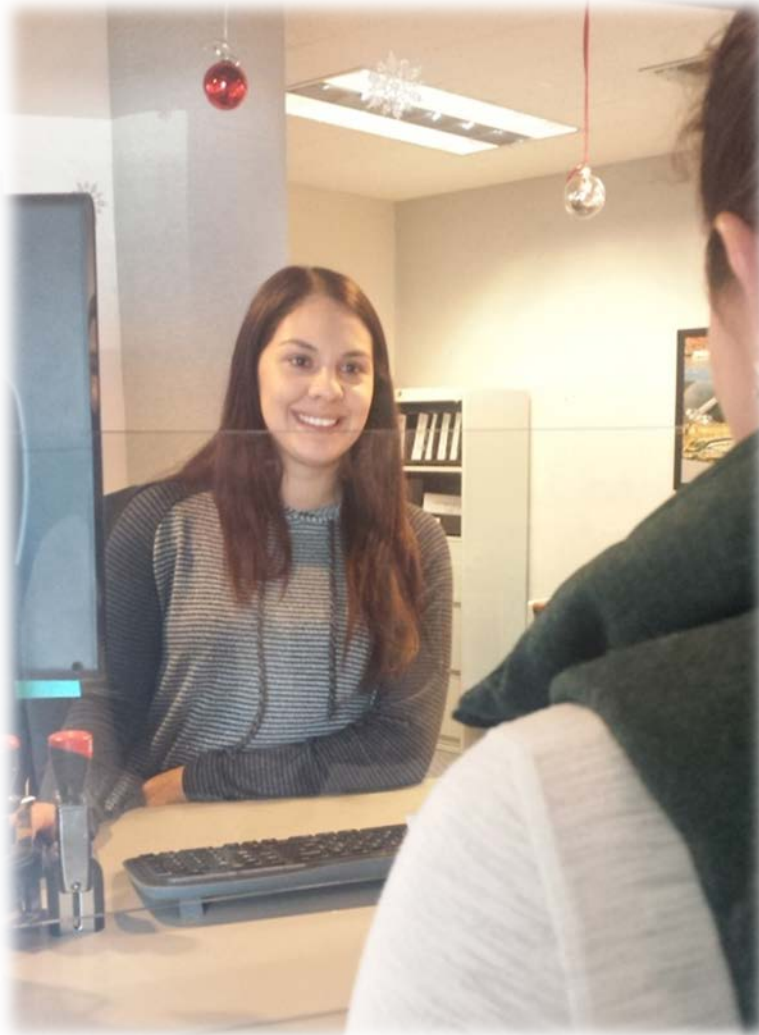# Customer Information System(CIS) Replacement Project Update

Presented by
John Stoll & Kerri Wendell
July 18, 2016

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Today's update

- Background

- Project team

- What have we done?

- Areas of focus
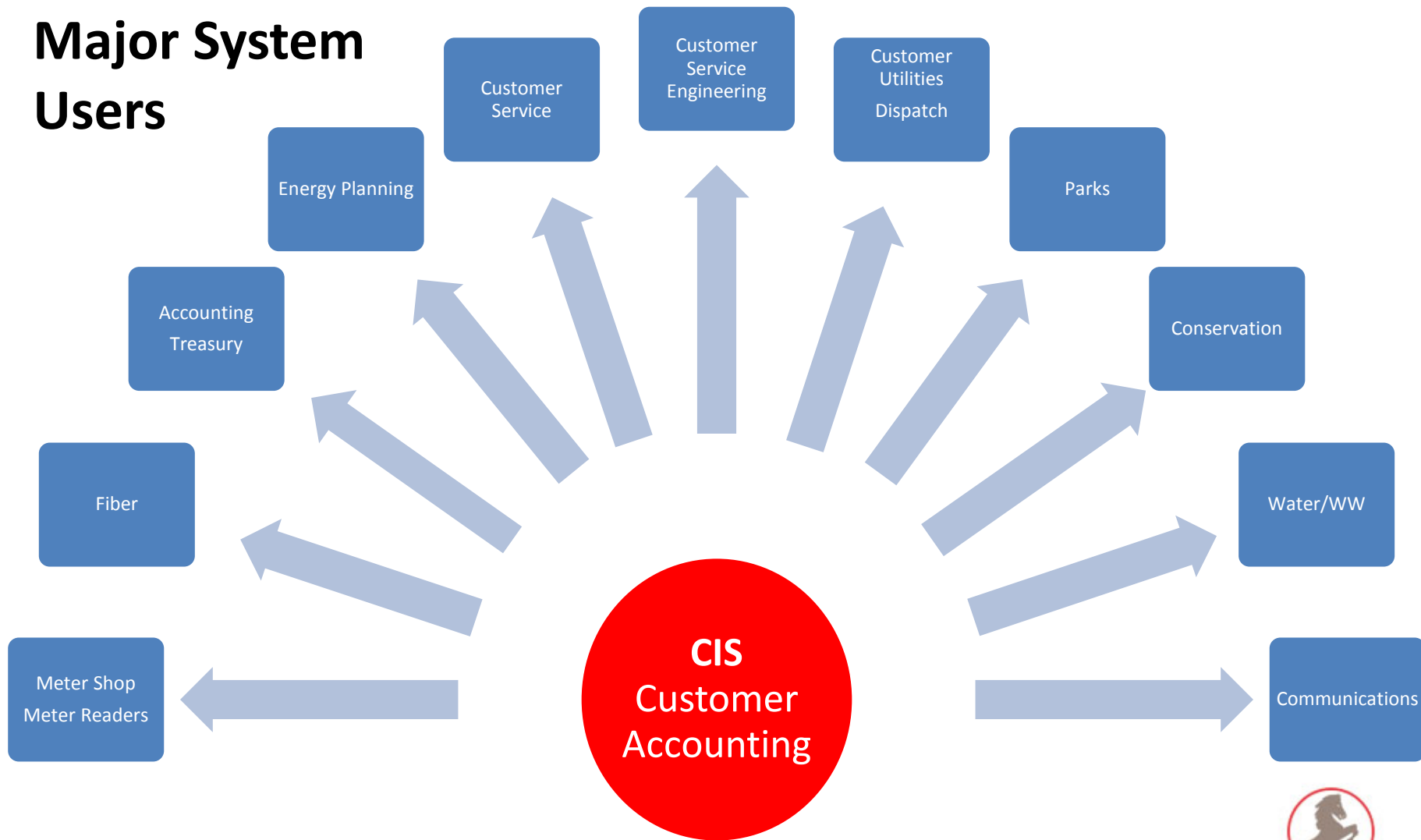
- Schedule

- Next Steps

Background

- December 21, 2015 introduced the need to upgrade
  - Current PeopleSoft CIS implemented in 2004
  - Technical support ended in June 2009
  - Current platform does not support future strategies
  - **End of life - Time to upgrade to continue to meet customer expectations**
- March 21, 2016 resolution approved to hire consultant to guide us through process

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Project Team/Core Team

- Project Sponsors – John Stoll/Kelly Boyd
- Sam Dilly – Project Manager
- Greg Larsen – IT Director
- Kerri Wendell – Customer Accounting Manager
- Andy Wendell – Customer Service Director
- Chad Rissman – Asset Management Director
- Ken Smith – ERP/CIS Management & Support
- Jill Stephens – PeopleSoft Developer
- Duane Marker – PeopleSoft Developer
- Megan McCarty – System Support Administrator
- Amy English – Customer Accounts Specialist
- Scott Stanford – Energy Efficiency Advisor
- Alexandria Smith – Contract Specialist
- Karen Wiggum – Legal
- Suzanne Hartman - Communications

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Major System Users

Customer Service

Customer Service Engineering

Customer Utilities Dispatch

Energy Planning

Parks

Accounting Treasury

Conservation

Fiber

Water/WW

Meter Shop Meter Readers

Communications

CIS Customer Accounting

P.U.D.
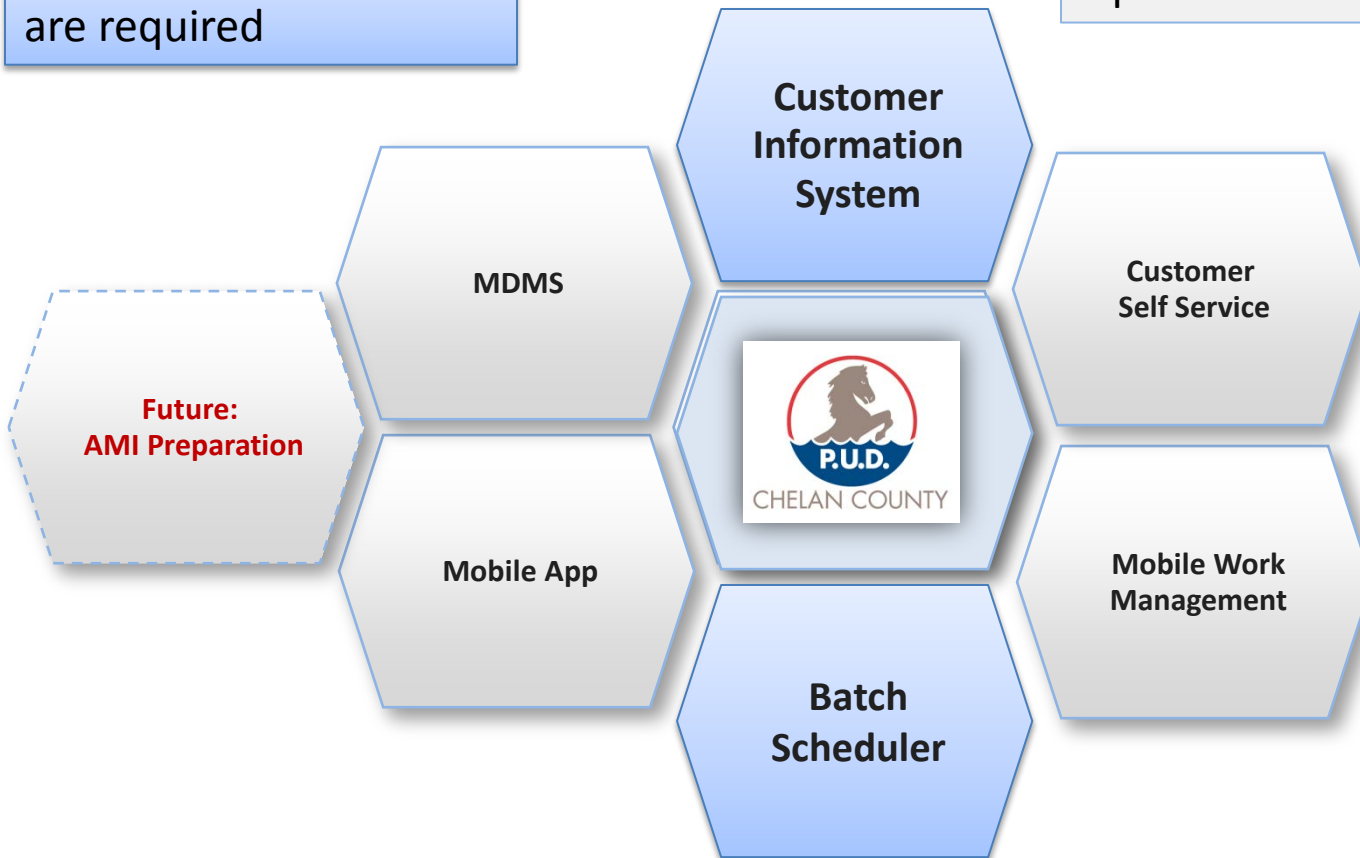CHELAN COUNTY
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What have we done?

- Working with AAC Utility Partners since April

- Completed
    - Project Charter
    - CIS & Meter Data Management System (MDMS) Educational Workshops
    - Data Gathering for RFP
    - Over 3,800 requirements
    - Needs Assessment

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Areas of focus

CIS & Batch Scheduler are required

Options for evaluation in RFP

Customer Information System

MDMS

Future: AMI Preparation

Customer Self Service

Mobile App

Mobile Work Management

Batch Scheduler

Schedule & Next Steps

- RFP Development in progress

- Complete Staffing Plan late July

- Complete Risk Register late July

- Per Delegation Resolution (08-13325), seek Commission authorization for CIS/MDMS Request for Proposal (RFP) August/September 2016

Questions?

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