

Customer Engagement Portal Vendor Contract

Public Utility Board

Reports of the Director

October 28, 2020

Agenda

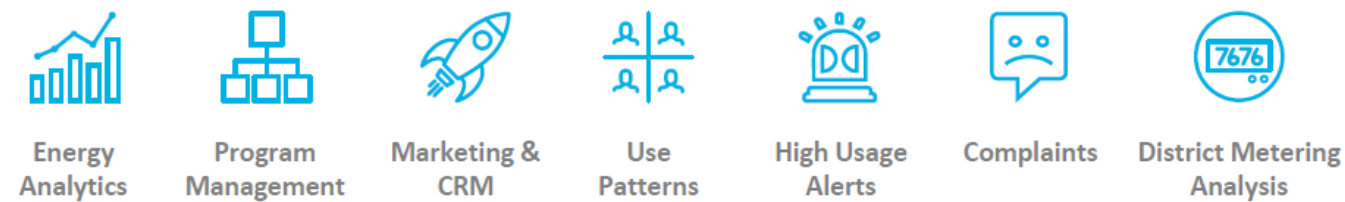
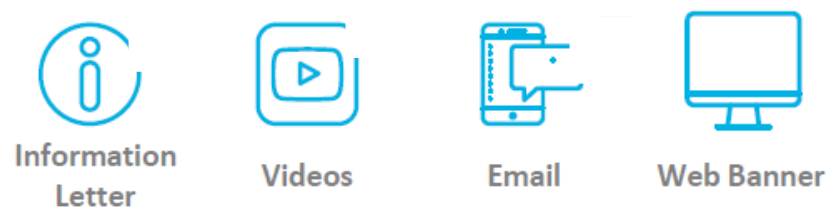
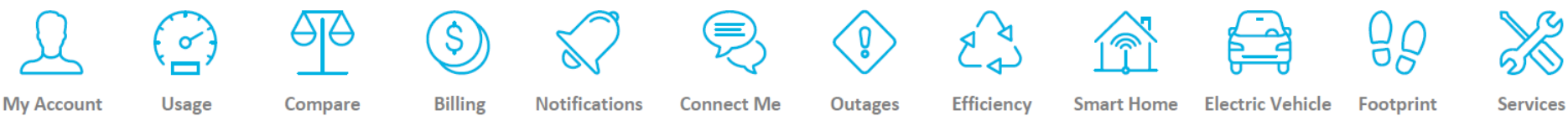
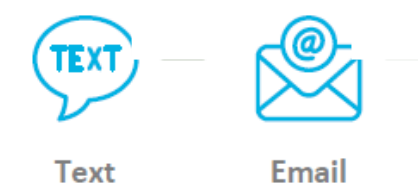


1. Customer Engagement Portal Background
2. Selection Process & Scope
3. Recommended Contract Mechanism & Amount

Customer Engagement Portal Background

Tacoma Public Utilities

A modern customer portal providing features our customers expect...



Customer benefits

- Enables greater customer convenience & control
- Meet rising customer expectations in a digital world
- Become our customer's trusted utility advisor
- Share new products, services, and rebates with customers
- All device types supported (smartphone, web, and tablet)
- Empower customers to set communication preferences, including language



Utility benefits



- Automate/streamline common utility customer processes
- Lessen environmental impact through paperless enrollment
- Communicate products/services to customers most likely to need and use them – 1:1 targeting
- Improve customer data quality
- Flexibility to add new customer programs, products, & services



Selection Process & Scope

Tacoma Public Utilities

Competitive Solicitation

- More than six days of business and technical requirements gathering from across TPU and GG
- Competitive RFP process
 - Six firms submitted and four interviewed
 - Bids were evaluated and scored by a selection advisory committee, comprised of representatives across TPU and GG

Average Vendor Scores (With Price Option #1) - TCO 5 Year				
	HCL - 10.0	SEW	Milestone	VertexOne
SAC01	73.88	67.98	82.06	48.03
SAC02	65.93	67.73	78.03	40.96
SAC03	71.50	66.01	84.30	49.90
SAC04	69.40	67.31	77.90	57.20
SAC05	71.40	67.91	80.40	61.00
SAC06	79.98	76.88	88.56	63.43
SAC07	73.80	67.21	76.40	41.40
SAC08	79.88	73.78	90.86	64.33
SAC09	73.63	76.38	83.16	79.93
Total	73.27	70.13	82.41	56.24

Customer Engagement Portal (CEP) Vendor



- Selected Milestone Utility Services, Inc.
- Status: preparing contract for PUB approval
- Primary Scope is to provide the Milestone Utility Services ePortal platform including the following key features



Billing & Payments

Increase utility payment completions with customer-centric design and real-time information.



Outage & Leak Alerts

Proactively flag changes in usage and notify customers and utilities of potential defects.



Usage Comparisons

Enable customers to take more control of their usage with regional and historical comparison data.



Self-Service Requests

Customers are able to schedule start, stop and transfer services in a convenient, mobile-first manner.



Efficiency & Conservation Programs

Digital customer engagement can increase program participation of rebates, programs, and more.



Usage History

Display interval data and allow customers to drill into history as well as utility reps to gain insight.

Detailed Statement of Work Provisions



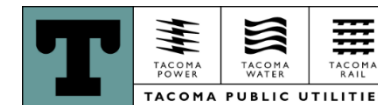
- Provisions include
 - Provide hosted environment (in Amazon Web Services)
 - Provide perpetual license for ePortal software
 - Requirements analysis and design
 - Implementation of the ePortal and Co-Browse solutions configured to TPU requirements
 - Integration with TPU systems (SAP, OMS, GIS, MDMS) and 3rd party systems (Trust Commerce, DataLake)
 - Testing
 - Training
 - Post Go-Live support



Recommended Contract Mechanism & Amount

Tacoma Public Utilities

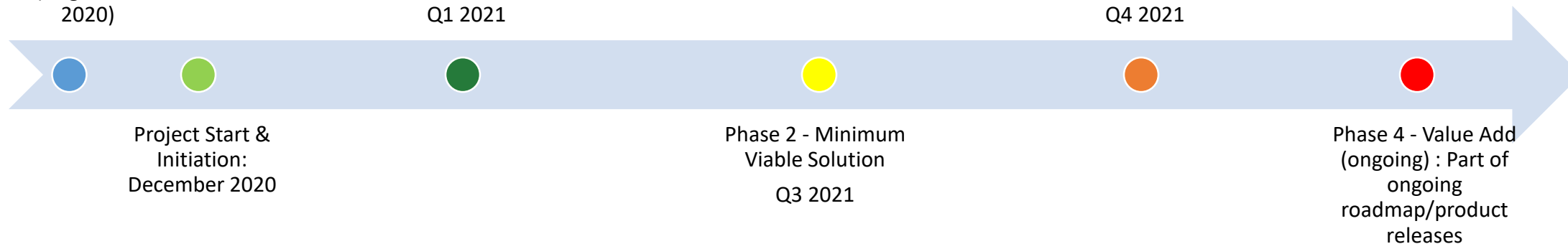
Upcoming Target Dates



Request PUB
Approval
(target Nov
2020)

Phase 1 - AMI Data
Display
Q1 2021

Phase 3 - Additional
Enhancements
Q4 2021



Project Start &
Initiation:
December 2020

Phase 2 - Minimum
Viable Solution
Q3 2021

Phase 4 - Value Add
(ongoing) : Part of
ongoing
roadmap/product
releases

Project Initiation	Phase 1	Phase 2	Phase 3	Phase 4
<ul style="list-style-type: none"> Onboarding Governance Product Backlog Definition Project Plan Source Systems and services analysis Release scope confirmation Dev platform install 	<ul style="list-style-type: none"> AMI Data Display Integrated/launched from current HCL MyAccount 	<ul style="list-style-type: none"> Like-for-like replacement of MyAccount portal + key enhancements MyAccount Billing and Payments Notifications & Alerts Contact Us Service Integrate SEW Outage Admin, Analytics, Reporting Pre-pay Notifications from Usage Comparison (to self) 	<ul style="list-style-type: none"> Additional enhancement release requirements Customer selected due date Donations Service (full automation) Outage (Water) Comparison to other like households 	<ul style="list-style-type: none"> Two planned releases every year Deferred scope from phases 2/3 Value-add requirements

Recommended Contract Mechanism & Amount



City Master Business & Services Agreement (Terms and Conditions)

Agreements and Statements of Work (SOW)	Amount	Term
License Agreement	\$500,000	One Time Fee
Implementation SOW	-	-
Implementation	\$2,333,757	One Time Fee
Reimbursement of travel and expenditures (not to exceed)	\$335,000	One Time Fee
ePortal-SAP Integration Support Services	\$90,450	One Time Fee
Support and Hosting SOW	\$1,462,000	5 Year Term
Notification Management SOW	\$210,623	5 Year Term
Preliminary Total	\$4,931,830	5 Year Term (plus applicable taxes)
Pre-Bid Estimate	\$5,270,000	5 Year Term (plus applicable taxes)

Questions?

MyTPU.org/AdvancedMeters

