



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

## Consulting case study

February 16, 2023

### 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- A West Coast utility wished to move from an outdated customer information system (CIS) to a modern technology platform to improve internal processes, enhance customer engagement, and provide an excellent customer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A small West Coast utility had big dreams of upgrading its outdated CIS.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."

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## **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.