Overarching Recommendations:

Participation in and exposure to outside professional resources for knowledge gain of best practices, process improvement, change management of culture, development of change control process to ensure smooth and thorough implementation of process and system changes. The recommended start is participation in professional and technical user groups but not limited to only this stream of resources.

Continue quarterly reporting to Council, which should include measurements of success and goals with progress made measurements.

Periodically engage the Ad Hoc Citizens Committee to support progress of recommendations, as envisioned.

There is a clear interrelationship of all the recommendations cited in the Raftelis report. The current issues related to the recommendations resulted in a siloed approach; intra-department, inter-department and customer facing. It is crucial to the future success of Utility Billing to recognize and position itself with implementation of best practices in all business facets, strong organizational development and training, formal processes, thorough documentation, and formal implementation of change control and risk analysis.

Recommendation #1 - Foster a culture of engagement and continuous improvement

Beneficial for Utility Billing Leadership, at a minimum, to seek out and participate in professional organizations with the focus to gain deeper knowledge on best practices, lessons learned, practical application of solutions, covering the entire scope of activities related to utility billing, hardware and software applications, system interfaces, and processes, ie. AWWA Customer Service User Group, Badger / Itron User Groups, New World User Groups,

Helpful to have access to professional change management resources to support cultural change efforts; user groups, workshops (online during COVID-19), mentoring, etc.

It would it be immensely helpful to have access to outside change management professionals, training or mentoring.

Lacking - every customer-client interaction is an opportunity for problem solving and the use of strong customer service skills/tools. Outside exposure to other company practices, training, support and process documentation is highly recommended.

Recommendation #2 – Establish formal performance measures to track service delivery

Seek understanding of industry standards and best practices for implementation; call center metrics, AWWA guide to performance benchmarking, New World software resources and user group, Meter resources and user group>

Develop prioritization of KPI development and reporting. Include a continual review process of KPI effectiveness and additional measures to highlight business metrics.

KPIs need to have a focus to support being consumed internally and externally by Utility Billing Customers. Study customer dashboards and communication mechanisms of other major utility providers. (Weekly digest of electric usage – sent via email by Steve Saboe)

Develop report back to Committee and/or Council on development, implementation and reporting success of KPIs

Recommendation #3 – Review and update written standard operating procedures (SOP's) regularly

Develop high level, single page, process flow for reference and serve as the process package with supporting, related SOP documentation

SOPs are an integral part of the change control process. They need to be woven into the process of documenting the review, approval and implementation of changes to processes.

Utility Billing is a dynamic environment, and, with such, attention and importance needs to be placed on formal change control and risk analysis whenever a process change is recommended.

Recommendation #4 – Develop an enhanced training program

Outside resources to gain knowledge and understanding of successful training programs, documentation and incentive programs.

Recommend site visits and interaction with top call centers within utility sector and outside.

Suggested deliverables, not a complete listing, but starting recommendations to include scenario planning, scripting, quick reference guides for handling customer calls, decision tree matrix, etc.

Recommendation #7 – Synchronize meter reading and billing cycles

This is a key action to support closing the gap between reading, billing and reporting needed to further the success of Utility Billing and customer access to near real-time information. As the goal, this effort should be focused to support the read/bill gap reduced to less than one week.

Interrelationship with 32/30 Plan and must be considered closely in the action taken.

Closing the gap will allow issues to be identified quicker with resolution following in a timelier manner.

Greater data transparency.

(Reference to weekly digest of electric usage – shared by Steve Saboe)

Recommendation #13 – Adjust staffing to reflect short-term needs and prepare for AMI implementation

This effort needs to be in a project plan for staffing to demonstrate the need related to the implementation of AMI functionality.

Recommendation #15 – Create an Inclusive AMI Implementation Team

Communication, inward and external facing, is critical.

All stakeholders need to be represented and participating.