



- Founded in 1889.
- Headquartered in Spokane, Wash., with more than 1,700 employees.
- Provides electric service to 375,000 customers and natural gas service to 335,000 customers in eastern Washington, northern Idaho and parts of southern and eastern Oregon.

#### RESULTS SNAPSHOT:

- Average customer service call volume decreased.
- Overall customer satisfaction score during the implementation month rose two points to 97 percent.
- Zero commission complaints filed in any of the three states based on slow-downs, billing or system impacts that would affect customers.
- New bills went out on schedule with no customer complaints.
- Received “Expanding Excellence Award” for Best CIS Implementation, Level I, at CS Week 2016.

## Avista Recognizes TMG Consulting as Valuable Partner in Success of Award-Winning CIS Implementation

In an effort to increase operating efficiencies while building on the excellent service its customers have historically come to expect, Avista Utilities recently underwent the journey of transitioning from decades-old, homegrown customer information system (CIS) and work management system to modernized CIS and enterprise asset management (EAM) systems. Simultaneously, the utility redesigned its monthly energy statement geared toward its 375,000 electricity customers, and 335,000 natural gas customers in a service territory covering 30,000 square miles in three western states.

Avista embarked on a four-year initiative, known as Project Compass, that resulted in the successful implementations of Oracle’s Customer Care & Billing (CC&B) by Ep2M (now EY) and IBM’s Asset Management (Maximo) by IBM. The success did not go unnoticed in the industry. Lauded for successfully implementing multiple IT solutions simultaneously, Avista received the “Expanding Excellence Award” for Best CIS Implementation, Level I, at CS Week 2016.

Avista recognized TMG Consulting for its guidance on the award-winning project, particularly with the upfront application

planning and the leadership of the Request for Proposals (RFP) procedure, delivery and follow-through. “We hired TMG Consulting to assist us in some of the important planning and lead us through the solution procurement process,” said Avista’s Chief Data Strategist Pat Dever, a co-executive sponsor for Project Compass. “Using TMG’s proprietary tools and methodology, the RFP process was streamlined and the tasks related to the RFP process properly managed—including facilitating the RFP among the most viable potential systems integrators (SIs), fielding questions from potential SIs, determining the proper evaluation criteria, reviewing proposals and helping to finalize the short-list—and even the SI finalist—for the project.”

Gary Weseloh, TMG’s senior vice president, who led the solution procurement process for Avista, added: “TMG applies our tools and methodologies to facilitate the solution procurement process—a major undertaking for replacement projects of any size—because our consultants understand utilities and we have perfected our tools throughout the course of several decades in similar project settings. It’s not something most utilities have the capability to do because they simply aren’t faced with such a major multifaceted task on a regular basis.”

## THE PROJECT COMPASS PROCESS

Avista methodically entered into the enterprise IT replacement process knowing that a steady pace and a firm foundation were critical to ensuring a successful end result for Project Compass.

As an early partner, TMG was key in:

- Assessing Avista's business needs
- Creating a business case
- Building an application plan
- Providing strategic advisory services related to project structure and governance
- Developing an assessment that gave the utility the information it needed to select the best-fit systems and system integrator
- Offering quality assurance oversight
- Serving as an active executive steering committee member for the project during the procurement phase

"TMG was an integral part of our early progress which paved the path to continued success," said Avista Director of Strategic Projects Vicki Weber, co-executive sponsor, now retired. "We couldn't have done it without their expertise, advice and oversight. TMG has a depth of knowledge and experience about system and implementer options at their fingertips; we would have struggled had we tried to achieve the same outcome without their assistance."

## PROACTIVE STEPS IN PLANNING PHASE

In addition to the positioning TMG provided to select proper systems, Avista made other proactive steps in the planning phase that were instrumental in approaching the project confidently, including:

- Benchmarking industry projects for what did and did not work well for others
- Establishing a project organizational structure that included Avista officers on the executive steering committee as well as co-executives embedded within the project team
- Ensuring organizational change management (OCM) was incorporated into every phase of the project
- Adding an external overall project manager from the onset
- Fostering company-wide awareness of the project and creating a visual identity early on

"It is important to have astute planning and oversight on such large-scale projects, particularly in the case where multiple systems are being implemented at the same time," said Weseloh. "When there are so many moving parts, paying particular attention to the details from the outset and properly scoping the project is critical in avoiding unseen challenges and unnecessary, unplanned expenditures added on later."

## RESULTS

In its first full month of transitioning to the new platforms, the average customer service call volume decreased and calls were answered within the original metrics established prior to the project implementation, exceeding Avista's expectations. There were no commission complaints filed in any of the three states based on slow-downs, billing or system impacts that would affect customers.

Avista measured its success on day one by being able to smoothly continue to deliver exceptional customer service with fully-integrated systems—considering the project had more than 100 integration points between CC&B and Maximo and other critical business systems. The customer service representatives, as well as all company employees, were well trained prior to the project's go-live. Avista's overall customer satisfaction score for the month during implementation rose two points to 97 percent. New bills went out on schedule and Avista received no bill complaints based on the educational video tutorial and correspondence sent to their customers early on—an excellent example of OCM at its best.

"Key to the success was selecting vendors who understood how to identify and manage issues and risks to the project which included quality audits," said Dever. "We are proud of our employees and partners at Oracle, IBM, EY, Mosaic, Black and Veatch and TMG Consulting who all contributed to Avista's success in reaching our implementation goal with minimal impacts to the customers or our business."

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**– Avista's Former Director of Strategic Projects & Project Co-Executive Sponsor Vicki Weber**

