Briefing Paper
Integrated Solutions Project Update

March 7, 2012

Summary

The Integrated Solutions Project (ISP) has successfully transitioned to the two-phased implementation approach discussed with the board last November. This paper describes the major components of phase 1 and phase 2 and summarizes progress made.

Background

- In November, staff reported that a thorough analysis and assessment of the ISP had been completed, and planned to shift to a more detailed, two-phased implementation plan.
- Phase 1 would be completed using the same budget previously approved by the board. Phase 2 business objectives would be included in the proposed 2013 budget and slated for completion in 2013.
- The highest-priority business objectives, including a customer relationship management system (CRM) and a budgeting and forecasting model, were proposed for phase 1 completion by the end of Q3 2012.

Discussion

Phase 1 of the project has five priority workstreams now underway:

- **Process analysis and design** – Identify and document the organization's business processes within an overall process architecture. This documentation will identify opportunities for stronger systems integrations, process improvements, and efficiency gains and will be the basis for the other project workstreams
- **Data modeling** – Create a single Energy Trust data model. The data model will be created through iterative rounds of discovery with staff and will be foundational to the other project workstreams.
- **CRM solution –** Address the major inefficiencies and limitations of the current Energy Trust customer relationship management (CRM) solution.
- **Budgeting and forecasting solution** – Bring in outside expertise to educate Energy Trust on best practices and tools and put new, more consistent budgeting and forecasting processes into place throughout the organization.
- **Great Plains upgrade** – Upgrade Microsoft Dynamics Great Plains software to the latest version.

Phase 2 of the project will implement process and systems improvements in the following areas:

- **Program management and delivery**
- **Procurement and contract management**

Progress since November 2011

- Defined workstreams to be completed in each project phase and allocated corresponding resources
- Compiled phase 1 staffing model and baseline budget
- Communicated project scope for each phase throughout the organization
- Implemented creation and distribution of weekly status report
- Initiated bi-weekly steering committee meetings
- Completed kickoff session for each phase 1 workstream
- Documented and approved phase 1 workstream charters including high-level timelines with milestones
- Developed and released RFQ for additional external consulting resources to assist budgeting and CRM workstream efforts
- Planned and executed budgeting and forecasting workshop
- Planned CRM workshop scheduled for early March
- Conducted initial data modeling sessions
- Completed high level process architecture
- Deployed Great Plains upgrade to test environment

Budget

- Through November 2011, the project had expended approximately $1.6 million of the authorized budget of $3.7 million.
- As noted at the November 2011 board meeting update, the project is re-allocating the remaining $2.1 million of the board approved budget authorization to complete phase 1. This $2.1 million is the new baseline budget for phase 1. Through January, the project has expended $107k and is within budget.
- Following a competitive review process, Hitachi Consulting has been selected to provide support for the CRM solution and the process analysis and design workstreams. This engagement, together with existing contracts with Hitachi, is likely to result in authorized Hitachi expenditures in the aggregate in excess of $500,000. This level of contracting triggers our commitment to provide notice to the board.