opentext™

SUCCESS STORY

Puget Sound Energy

Industry
- Energy

Solutions
- OpenText™ Document Presentment for SAP® Solutions
- OpenText™ Data Archiving for SAP® Solutions
- OpenText™ Extended ECM for SAP® Solutions

Results

Optimized document production process for enhanced customer engagement

Rapid data archiving and retrieval

Integrated content management on a single platform

Customer correspondences updated four to five days faster

PSE | PUGET SOUND ENERGY

Washington State utility energizes customer experience with OpenText

Puget Sound Energy optimizes enterprise content with OpenText Suite for SAP® Solutions

"One of the greatest features about OpenText Document Presentment Live is that graph. We did such a successful job that we have other utility customers calling us and asking, 'Hey, how did you do that?' And we say, 'Well, we used OpenText Document Presentment Live'."

Anu Iyer
IT adviser
Puget Sound Energy

Puget Sound Energy is Washington State's oldest energy company and the largest utility in the Pacific Northwest, providing electric and natural gas service to roughly 1.5 million customers over 6,000 square miles. As the first utility to own and operate wind energy facilities in the Northwest and the second largest utility owner of wind power, Puget Sound Energy is a leading producer of renewable energy in the Pacific Northwest.

A history of dedicated service

Puget Sound Energy (PSE) has a 150-year history of leadership, innovation and dedicated service to its customers. While the utility has experienced dramatic change over the years, PSE's focus on safe, dependable and efficient energy service has not wavered. Driven by this commitment, the company recently transformed its customer communications, accelerated access to data and streamlined its enterprise content platform with OpenText Suite for SAP Solutions, featuring OpenText™ Document Presentment for SAP® Solutions, OpenText™ Data Archiving for SAP® Solutions and OpenText™ Extended ECM for SAP® Solutions.

Boosting customer experience

The utility industry currently faces a wide range of challenges, including rising consumer demand for renewable energy sources and new digital technologies. Determined to keep pace with these demands, PSE has been investing in renewable energy, such as wind and solar, to provide cleaner energy choices for its customers. The utility is also working to provide consumers with more choice when it comes to communication with the company. *"Most people simply receive an electricity bill, look at it and then pay it.*

For a lot of customers, this is their sole communication with us. We want to improve their experience by providing mobile, Internet and other avenues of access to us. We would like to provide as happy an experience as possible. Our focus is always on customer engagement, customer experience and doing what the customer wants," explained Anu Iyer, IT adviser for Puget Sound Energy.

However, meeting these new demands proved challenging with PSE's existing systems and solutions. *"We had a legacy system that had served us well when we produced only electricity and gas for traditional means and we continued to do what we had always been doing,"* noted Iyer. Thus, in 2013, PSE laid the groundwork for the future by deploying an SAP Customer Information System. The team then turned its attention to its document management, document production and archiving solutions. PSE was using third-parties for these functions, which resulted in slow and inefficient processes.

A new digital content platform leveraging industry leading solutions

The company required a new solution that could integrate with its SAP system. Similar to its selection of SAP, PSE sought an industry-leading solution. After considering various options, the company decided on OpenText Suite for SAP Solutions, including Document Presentment for SAP Solutions, Data Archiving for SAP Solutions and Extended ECM for SAP Solutions.

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"We chose OpenText because it had a tight integration with SAP—and SAP and OpenText were the industry leaders. We recognized that OpenText was a company that really knew how to manage large amounts of documents and data. Although we looked at others, we never seriously considered any document management solution other than OpenText. It was a no-brainer," explained Iyer.

Optimizing customer communication processes speeds change requests

Today, Document Presentment for SAP Solutions provides PSE with a platform for design, deployment and multichannel delivery of documents and correspondence. The solution enables PSE to generate individualized customer communications and to make ad-hoc changes on the fly. In the past, a simple change on customer correspondence, such as a fax number on a bill, might take days as data from SAP was sent to a third-party vendor who created the document, stored it, printed it and mailed it out. Now, PSE can make the change and produce it the same day. And with the Document Presentment Live add-on, last-minute changes can be made quickly.

"The beauty of it is that it goes out in that night's billing run. If you make the change at say 8:00 in the morning, it can reach the customer's hand by noon or 1:00 p.m. the next day. That is how fast the turnaround time is. We are extremely happy," said Iyer. *"The business can also easily make ad-hoc changes to correspondences. What used to take four to five days can be done in less than a day. That is an incredible improvement."*

## Innovating for millennials with omnichannel delivery and modernized bills

The new solution has also allowed PSE to expand its range of bill formats and delivery methods. *"We can provide our customers with choices they didn't have before. We can provide them separate bills for renewable energy and for traditional energy. They can see their bills in new ways—mobile options and internet options. SAP and OpenText enabled us to do that,"* said Iyer. *"You can convert the SAP data to AFP, EDI, mobile, HTML, email, etc. We use it to generate AFP documents, to generate PDFs, EDI, text messaging. That is the true power of OpenText Document Presentment. I don't know of any other document creation solution that is able to provide that wide a variety of formats."*

Since the utility bill is such a critical point of contact with customers, PSE also used Document Presentment to make the bill easier for customers to understand. Using customer feedback, the bill was transformed from a single black-and-white page to a two-page statement in color, complete with graphs for ease of understanding. *"One of the greatest features about OpenText Document Presentment Live is that graph. We did such a successful job that we have other utility customers calling us and asking, 'Hey, how did you do that?' And we say, 'Well, we used OpenText Document Presentment Live,'"* explained Iyer. *"Plus, our customers are very, very, very happy with the color bill. It's nice to know that we have the customer's back. And in turn, OpenText has our back. So, we're very happy with that."*

"When we archived the SAP data using OpenText, system performance improved dramatically. We went from about two or three minutes for data retrieval to under a few seconds."

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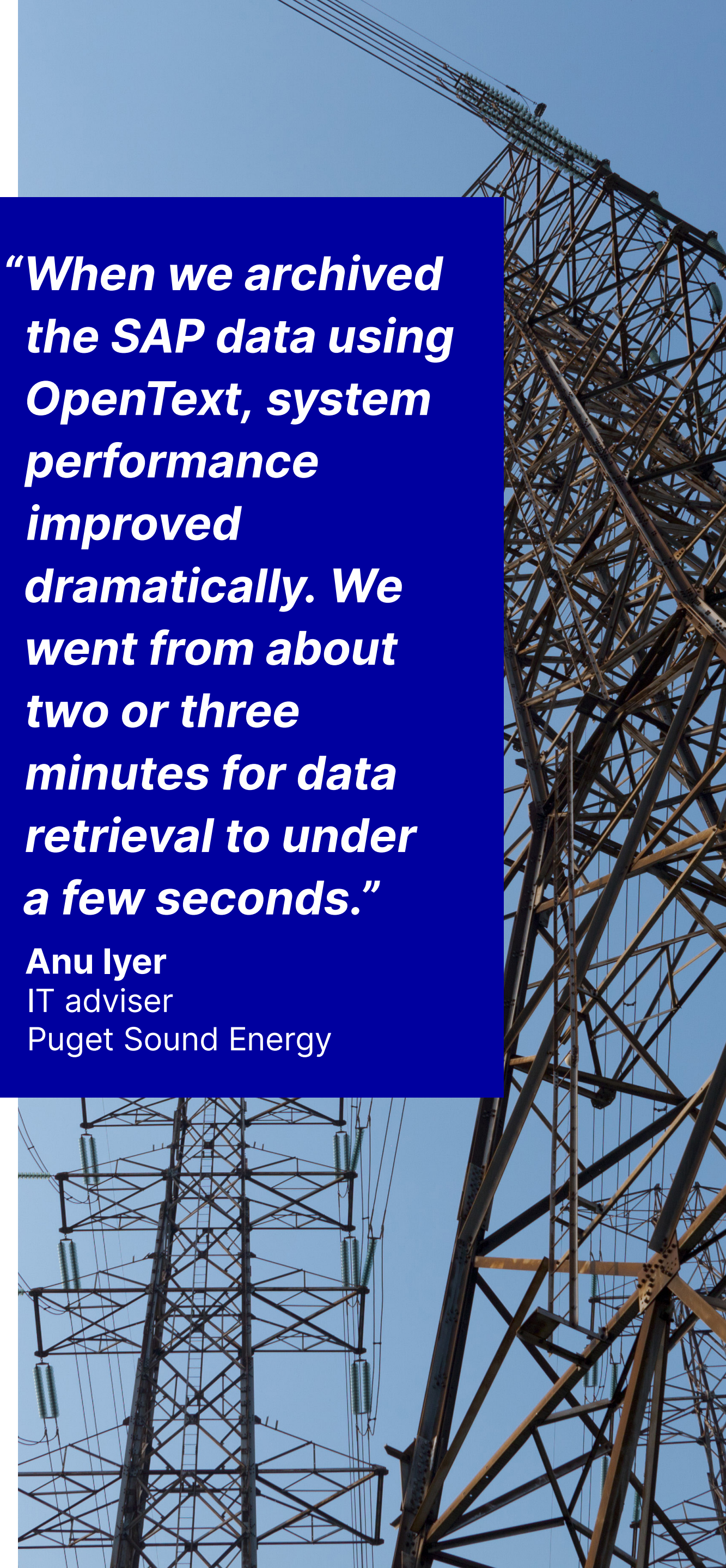
With more and more millennials entering the workforce, buying homes and signing up for electricity and gas, Iyer noted that increased communication channels are critical: *"We want to be able to engage the customers in the manner in which they want, whether it's Facebook, Twitter, mobile, etc. OpenText Document Presentment provides that kind of omnichannel foundation. That's one of the things that I really like about Document Presentment—it's keeping up with all the new ways that we provide our customers with the data that they seek."* As an additional benefit, OpenText's tight integration with SAP means that PSE can leverage the analytics features of its recent deployment of SAP HANA to determine how customers want to engage with the company.

From minutes to seconds: SAP Archiving improves speed and agility

Using Data Archiving for SAP Solutions, PSE can now securely store older data but ensure that it is instantly available when users need it. The large amount of data in the SAP system had been affecting the speed of retrieval, which resulted in longer customer wait times via the call center and the web portal. *"When we archived the SAP data using OpenText, system performance improved dramatically. We went from about two or three minutes for data retrieval to under a few seconds. Overnight, our document archival rates increased to 1,200 documents per minute. The system practically inhaled them. We produce about 80,000 bills and items of correspondence every single night, so that is a huge amount,"* said Iyer. *"That speed translates to a better customer experience, which translates to keeping the business happy. This, in turn, makes management happy. It is a win-win situation all around."*

Single enterprise-wide solution eliminates siloes; provides foundation for 'Get to Zero' initiative

In addition, Extended ECM for SAP Solutions replaced PSE's multiple departmental information silos with a single, central repository for enterprise-wide data that serves multiple departments within the company. *"We needed a common platform that would eliminate these silos while still providing the users what they wanted. We needed it to be scalable, tightly integrated with SAP and with the ability to enforce document retention and disposition rules. We needed to have all of this in one product. OpenText Extended ECM came through for us—it is the answer to all our prayers,"* said Iyer.

Extended ECM now plays a critical role in another important PSE customer initiative: The GTZ (Get to Zero) initiative aims to reduce the number of customer calls to zero. *"We needed a solution that would enable us to predict what the customer wants and be able to provide it to them even before they knew they wanted it. The GTZ initiative has heavily leveraged SAP and OpenText to provide that. And OpenText Extended ECM is a huge part of being able to do that,"* stated Iyer.

Looking to the future, PSE envisions continued change and innovation to meet the energy needs of its customers and it sees OpenText and SAP as partners in that future. *"It's a perfect partnership. SAP understands the business. OpenText understands the data and documents. And business is driven by data and documents. This is a very strong, very strategic partnership,"* concluded Iyer.

About OpenText

OpenText, The Information Company, enables organizations to gain insight through market leading information management solutions, on-premises or in the cloud. For more information about OpenText (NASDAQ: OTEX, TSX: OTEX) visit opentext.com.

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