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ASUG

CASE STUDY

TriSummit Utilities and VertexOne Harmonize To Achieve Customer Service Success

SAP S/4HANA-Based System Unites Three Canadian Utilities

The Background: TriSummit Utilities

TriSummit Utilities (TSU) is a Canadian company with natural gas distribution utilities and renewable power generation assets. TSU serves approximately 133,000 customers across Canada, delivering low carbon energy, safely and reliably. The company supplies energy to more than 130,000 customers in three separate provinces through its operating subsidiaries:

- Apex Utilities Inc. (AUI): Serves approximately 81,900 customers in more than 90 communities and surrounding rural areas across the province of Alberta.
- Heritage Gas Limited (HGL): Serves approximately 8,500 customers in the Halifax Regional Municipality and rural areas in the province of Nova Scotia.
- Pacific Northern Gas Ltd. (PNG): Serves approximately 42,300 customers in more than 16 communities across the western and northeastern areas of the province of British Columbia.

TSU has approximately 475 employees across its companies and regions. It continues to serve its customers' energy demands—a customer base that includes manufacturers, educational and healthcare institutions, services sectors, and residential consumers. In recent years, TSU has invested in technology upgrades and integrations to achieve improved internal operations and processes. It has also streamlined and enhanced customer services and experiences.

The Situation: Legacy System and Regulatory Challenges

It can be challenging to support customer and business operating needs and services across a three-utility company structure and operate in three separate provinces and time zones. In 2019, changing Customer Information System (CIS) technology requirements and regulatory compliance issues further complicated TSU's situation. On the technology front, IT teams had been managing disparate, outdated systems originally installed in the 1990s. Numerous customizations and work-around manual processes allowed the team to circumvent system limitations and keep the business running. However useful, these stopgap measures sacrificed efficiency and effective functionality.

On the compliance front, at year-end 2021, AUJ was facing the expiration of a regulatory exemption to cover system limitations preventing it from fully complying with industry rule requirements. AUJ operates in a deregulated, competitive gas supply environment unlike its sister utility companies and it would face regulatory enforcement issues if it did not address its technology limitations.

The Initiative: Goals and Success Criteria

IT and business leaders contemplated the need for a new approach and CIS technology while they defined key goals and measures for success. TSU wanted to meet base requirements to support the business and comply with industry rules. It also looked to:

- Unify and streamline CIS processes and best practices across its three utilities.
- Leverage the functionality and flexibility of contemporary CIS platforms to enhance and improve work processes and capabilities.
- Significantly enhance customer experience, including the prospect of adding flexible, adaptable, and responsive self-service options.

The measures of success and the list of performance indicators included setting baselines and gauging results on the following elements:

- Compliance monitoring and reporting
- Billing cycle timeliness and completeness
- Market transactions in compliance with regulatory rules
- Exception management volumes and durations
- Customer feedback, including satisfaction and complaints
- Call center operation statistics

The Solution: Project Partnership, Technology Choice

TSU selected VertexOne as its strategic CIS partner after following a rigorous process to define business requirements and issue an RFP. According to Mike Stock, AUI Vice President, Financial Services & Regulatory Affairs, “VertexOne/SAP ranked high as a functional match,” given the complexities of the project and integration overall, across the three utilities operating in different environments and locations. VertexOne ranked ahead of other options based on functional match, cost, and overall business reputation. Stock also noted that the solution would be a VertexOne hosted system that featured high-availability and disaster recovery service-level agreements, among other elements.

Specifically, TSU moved ahead with a trio of VertexOne SaaS solutions to help optimize meter-to-cash operations. At the core is VertexOne VXenterprise™, a CIS application built on the SAP S/4HANA system and the SAP HANA in-memory database to improve operational efficiency and customer experience. The system offers seamless integration with enterprise SAP solutions and VertexOne’s Digital suite of solutions. VertexOne Digital suite includes customer self-service portal (VXengage), multi-channel outbound communications and preference center (VXcommunicate), and online document management repository (VXrepository). The VXenterprise solution also includes VertexOne Insight, an innovative solution by VertexOne offering 360-degree view of customer, premise and service through quick reference panels, enabling faster issue resolution and more personalized service for AUI’s end customers.

The Results: Implementation Adjustments and Benefits

With a solid plan in hand, the project kicked off in early 2020. However, the week the project was to start on site, new COVID-19 international and local travel restrictions caused the project teams to immediately reset and pivot to virtual management and delivery. The result? An initial three-week project delay. As AUI’s Mike Stock said, “You do your planning at the start, and then you realize this isn’t going to work, so there was certainly some flux that we had to contend with.”

TSU is already seeing benefits with the project moving from implementation to stabilization, including:

- System flexibility to accommodate future regulatory rules and reporting changes
- Automated processes that reduce errors
- Improved data analytics to enable timely decision-making
- Improved tracking of performance and reporting that, in turn, supports ongoing training and process improvements

On the customer side, TSU rolled out the initial self-service features of VertexOne Digital, which allows the utilities’ end customers self-manage their notification preferences. In addition, customers are seeing new bill formats and improvements to budget billing programs. Utility staff now have the ability to deliver targeted messaging and communications—versus the previous one-size-fits-all functionality.

The Lessons Learned

TSU and VertexOne have recognized lessons learned and shared wisdom from the CIS project trenches:

- Have comprehensive and detailed planning, then communicate it, deep and wide across the teams
- Set realistic expectations and include adequate expertise for data conversion issues and clean-up activities
- Set and communicate realistic roles and responsibilities for everyone involved in the project
- Develop and prepare clear and detailed training documentation well in advance of going live
- Develop and act early on a transition plan to stabilize after going live
- Don't pick resources that are available; pick the right people, experience, expertise, and dedication for the project team.



About VertexOne

VertexOne is the recognized leader in SaaS platforms for critical business processes of utilities across North America. It helps more efficiently deliver a compelling customer experience through a wide range of innovative services and solutions—including the VertexOne Complete™ SaaS Solution for Utilities comprised of the Customer Information System (CIS), Mobile Workforce Management (MWM), Meter Data Management (MDM), Digital Customer Engagement, and now the addition of Smart Digital Engagement solutions and services.

VertexOne helps utilities reduce the cost to serve customers, increase operational efficiency, improve customer satisfaction, and drive business agility. VertexOne takes on the heavy lifting of keeping current with the rapid pace of technology changes through our VertexOne Complete™ SaaS offering, so utilities don't have to - leaving our utility clients more time to focus on core utility business while leaving the technology to us.

VertexOne offerings also include:

- VXenterprise (formerly known as CIS Enterprise™) is a CIS built on the SAP platform offering best practice utility business processes and easy integration to SAP application ecosystem.

- VXengage (formerly Customer Advantage™) is a web/mobile customer self-service portal offering customers 24x7 access to personalized account/service information and offering utility staff a portal to manage the self-service functionality via the utility admin console.
- VXcommunicate (formerly known as Communication Advantage™) is a multi-channel messaging solution that allows proactive outbound communication via emails, SMS, voice, letter, online broadcast alerts and promotional campaigns.
- VXrepository (formerly known as Document Advantage™) is an electronic file repository allowing utility staff and customers online access to documents and media linked to a customer's account.
- VXsmart (formerly known as WaterSmart™) provides actionable insights from AML consumption data, home utility reports, conservation features and cost saving recommendations.

For more information on the TSU story, VertexOne partnership, and other offerings, contact info@vertexone.net or visit www.vertexone.net



About ASUG

ASUG is the world's largest SAP user group originally founded by a group of visionary SAP customers in 1991. Its mission is to help people and organizations get the most value from their investment in SAP technology. ASUG currently serves thousands of businesses via companywide memberships, connecting more than 130,000 professionals with networking and educational resources to help them master new challenges. ASUG helps SAP customers make more possible through in-person and virtual events, on-demand digital resources, and ongoing advocacy for its membership.

ASUG develops and publishes Case Studies regularly in partnership with its members and customers. For more information on ASUG Case Study content, contact editorial@asug.com