

ARTICLE



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8 Steps for Evaluating Customer Portal Solutions for Water Utilities

A municipal water utility providing services to 5,500 endpoints had just finished upgrading meters and installing a wireless meter reading network. The choice to implement a fixed base meter reading system--commonly referred to as an AMI or Advanced Metering Infrastructure system--would virtually eliminate drive-by and manual reads, and allow the utility to collect daily usage data, remotely.

At nearly \$1.4 million, the price tag had been a tough sell to the city council. But council members had agreed to the project knowing the utility would reap improvements in operational efficiency, and create long-term cost savings. They were also sold on the leak detection capabilities of the new system.

THE PROMISE OF CUSTOMER ACCESS

There was only one problem...and it was a big one. Part of the justification for purchasing the fixed base system was that customers would have access to their own consumption information. In addition, customers would be able to see how much they're spending during the billing cycle, be notified of suspected leaks, and see when they're over-irrigating.

The meter data management system used to operate the wireless reading system, did not offer these capabilities. It was as if cable service had been installed throughout a community right up to the end of each customer's driveway...but no connections made to the homes. The "last mile" would prove to be a show-stopper.

Customer portal solutions improve the customer experience, encourage client self-service, and reduce wasted water.

CUSTOMER PORTAL SOFTWARE

The missing link is a new class of application called customer portal, consumer engagement, or Web presentment software. The basic function of a customer engagement solution is to provide a secure website where utility customers can login and get access to their usage data, billing information, and much more.

Because fixed base systems collect daily or hourly reads, this data can be integrated into the portal so customers can:

- Receive notification of possible leak conditions and prevent property damage
- See how much water they're using
- See how their usage compares to similar households/properties
- Learn about the kind of water savings they might reasonably achieve.

The customer portal benefits water providers by:

- Improving the customer experience
- Encouraging customer self-service and lowering call center traffic
- Reducing wasted water
- Generating positive public relations value.

MAKING AN EFFECTIVE SOFTWARE SELECTION

If your utility has installed a fixed base meter reading system or is considering implementing one, you're probably evaluating customer portal solutions too. Solutions vary dramatically in price and capability so it's worthwhile to define the elements that are important to your organization.

The following list of questions may help. Time spent planning your project will pay for itself many times over, and help you pick a system and a vendor you'll be satisfied with well into the future.

1. WATER UTILITY QUESTIONS

1. What results do we want from a customer portal solution?
2. How will we measure our results?
3. What information do our customers want and need?
4. What do customers need in terms of functionality? *Suggested list of features to evaluate and prioritize:*
 - a. Online usage comparisons
 - b. Leak detection
 - c. Customer notification options (text, e-mail, phone, etc.)
 - d. Estimated and threshold billing
 - e. Water efficiency tools
 - f. Task management
 - g. Access via a mobile device
 - h. Integrated weather data
 - i. Ability to view data from multiple accounts
 - j. Reporting
 - k. Other?
5. If water conservation is one of our goals, what improvements are we expecting?
6. In what format do our customers want information, i.e. Web, mobile browser, e-mail, text, etc.?
7. What staff resources will be involved in this project?
8. How much time are we willing to invest?
9. What's the budget?
10. When do we want the system operational?

2. QUESTIONS FOR THE CUSTOMER PORTAL SOLUTION PROVIDER

1. What results have you delivered for existing clients?
2. What are some of the challenges associated with implementing this type of solution?
3. How will your system help our utility?
4. How will the solution meet our functional requirements?
5. What options are configurable on the portal?
6. Is the solution intuitive and easy-to-use?
7. How do customers access their accounts online?
8. How are leaks detected?
9. How are customers notified of leaks?
10. What water conservation management tools are available?

3. DATA INTEGRATION

1. How is data exchanged between the portal and other applications/systems currently in use such as billing, meter data management, customer service, etc.?



4. SECURITY, BACKUPS, AND PERFORMANCE

1. How are data secured and protected?
2. How are backups handled?
3. How reliable is the system?
4. How is system performance measured?
5. What happens to our data if you go out of business?

5. PROJECT MANAGEMENT

1. What is required to implement the system?
 - a. Staff resources
 - b. Time
2. What project management services do you offer?
3. How long does it take for the system to be operational?

6. TRAINING AND SUPPORT

1. How are customers and staff members trained on the system?
2. How is ongoing support provided?
3. When we call, what can we expect as far as response time?

7. LICENSING & PRICING

1. How is the solution licensed? Self-hosted or hosted (cloud-based)?
2. How is the solution priced?
3. What are the setup and ongoing fees?
4. What does training, implementation, and project management cost?
5. What are the costs associated with integrating data from different systems?
6. What are the cancellation policies? (hosted)
7. What software maintenance is available? (self-hosted)

8. FUTURE CUSTOMIZATIONS

1. How are software customizations handled and priced?

LIVE PRODUCT DEMONSTRATION

Make sure to see a live product demonstration. If the solution provider can show you another utility's portal, that would be best. If the provider offers a "sandbox site," get in there and play around.

INTERVIEWING REFERENCES

Calling the solution provider's references is a must. Be sure to ask questions such as:

1. What surprises, good or bad, did you experience?
2. Are your customers using the system?
3. What has the customer feedback been like?
4. What capabilities do you wish you had in this system?



THE BENEFITS ABOUND

Customer portal solutions offer a variety of long-term benefits. Not only do they help customers manage their water expenses and save money, your utility can proactively encourage water efficiency. Reducing the amount of time between when a customer suffers a leak and when he/she learns about it, is extremely beneficial for the provider and the customer.

By delivering a means for customers to answer their own questions, you can reduce call center traffic, lower internal costs, and provide better customer service. Customer engagement solutions will continue to evolve and deliver expanded capabilities. Ultimately, however, they can have a tremendous impact in boosting client satisfaction and enhancing the customer experience.

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ABOUT AMERICAN CONSERVATION & BILLING SOLUTIONS, INC.

AmCoBi develops **AquaHawk Alerting™**, a customer portal solution for municipal water utilities that use Automatic Meter Reading (AMR) or Advanced Metering Infrastructure (AMI) systems. AquaHawk transforms the way utilities educate, engage, and communicate with their customers. AquaHawk presents high value information, in an intuitive Web portal, encouraging customer self-service and increasing client satisfaction.

