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EBCE Call Center & Data Management Services RFP

EBCE Executive Committee

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Context for the RFP for CCDMS Services

What is the Function of a CCDMS Provider?

- Manage data transfers between EBCE and PG&E.
- Manage customer enrollment forms / processes / statuses.
- Calculate, submit and ensure accurate billing of customer usage.
- Operate a call center to address customer requests / questions.
- Provide EBCE staff with access to a Customer Information System.
- Submit Settlement Quality Meter Data to the California ISO.

Current State of CCDMS at EBCE

SMUD has been EBCE's CCDMS provider since inception

- Initial contract was for 2018-2020, subsequently extended Fall 2020.
- Current contract is for 2 additional years, with an early exit clause after 1 year (no sooner than 1/1/2022).
- Current CCDMS Services are approximately \$500K - \$750K per month.
- Currently, the Call Center function is fully outsourced to SMUD.
- EBCE is satisfied with the services it receives from its current provider. This RFP seeks to obtain more information on our options.

The EBCE CCDMS RFP

- RFP was issued on 3/12, with responses due 4/9, and selection expected by 5/7.
- If a new contract is drawn, staff is expecting to bring it for approval to the July 2021 Board Meeting.
- The RFP seeks pricing of all respondents for 3 years, and optionally for a maximum of 5 years.
- The RFP requests that respondents address EBCE's technology and call center roadmap, in particular:
 - Providing EBCE with separate Call Center pricing and options;
 - Addressing integration with EBCE's Customer Relationship Management (CRM) system.

Why Issue an RFP at This Time?

Pricing and Options:

- EBCE seeks to determine whether **better pricing** can be obtained.
- EBCE seeks to **break down pricing** by CCDMS function (separate CC).

Roadmap Fit:

- EBCE has developed its own **technology roadmap**, which calls for bringing the CRM Function in-house, and wants to accelerate the integration of CCDMS Services into this roadmap.
- EBCE also seeks options for different **call center models**, including integrating Call Center Service into EBCE.

Call Center Considerations

Separate Pricing:

- Some CCDMS providers can separate the Call Center function from other functions.
- RFP calls for separate pricing to help EBCE understand the potential cost of contracting for these services separately.

Call Center Options:

- **Brick and Mortar:** Operate a call center within EBCE service territory fully staffed by vendor agents;
- **Working From Territory:** Place remote vendor agents within EBCE service territory;
- **Staff:** Support a limited number of EBCE-employed agents that supplement a call center.

CRM Considerations & Roadmap

All CCDMS providers currently **implement their own CRM** systems to support their operations. This is less than ideal for CCAs:

- They have **limited control** over the CRM systems their providers use;
- CCA data is either **siloed or duplicated** across systems.

EBCE's **technology roadmap** seeks to change this:

- EBCE has licensed, configured and deployed its **own Salesforce CRM**.
- **Through the RFP**, EBCE is setting in motion the process for integrating all data and processes into its own CRM.
- Roadmap extends to **2023 and beyond**.