DSM  Data Tracking Systems
Utility insights on selection & implementation

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Midwest Energy Solutions Conference
Chicago, IL
Who we are
A research and consulting firm focused exclusively on utilities and their customers

Clients
We work with over 300 utilities and their partners

Founded
Founded in 1986, we’ve been in the industry for over 30 years

Headquartered
Boulder, CO
Presentation outline

The journey of DSM tracking systems

Tracking system platforms

How to succeed with system selection & implementation
- Know (exactly) what you want
- Secure organizational buy-in
- Collaborate with IT
- Consider ICs and TAs
The journey of DSM tracking systems

- Started with internal solutions driven by necessity
- Growth in number and types of DSM programs
- Evolving regulatory and data complexity
- Additional layering of IT Systems
The status quo
DSM tracking system platforms
The ideal outcomes

- Easily-configurable program management & tracking
- Ad-hoc reporting and analysis
- Improved customer relationship management
- Back-end integration with other IT systems
- Mobile applications for in-field data collection
How to succeed with selection & implementation

1. Know (exactly) what you want
2. Secure organizational buy-in
3. Collaborate with IT
4. Consider ICs and TAs
1. Know (exactly) what you want

“The best advice I have is to know exactly what you’re looking for before it gets built… Have a concise vision of what you’re looking for it to do.”
1. Know what you want (cont’d)

**Business Requirements**

**Functional Requirements**
- Administrative functions
- Authentication
- Financial auditing/tracking
- Reporting requirements
- Historical data
- Legal or regulatory requirements

**Non-functional Requirements**
- Scalability
- Usability
- Accessibility
- Interoperability
- Extensibility
- Security/privacy

**Technical Requirements**
1. Know what you want (cont’d)

Business Requirements

- Functional Requirements
  - Administrative functions
  - Authentication
  - Financial auditing/tracking
  - Reporting requirements
  - Historical data
  - Legal or regulatory requirements

- Technical Requirements
  - Scalability
  - Usability
  - Accessibility
  - Interoperability
  - Extensibility
  - Security/privacy

- Non-functional Requirements

Avg. cost overrun on projects with poor requirements analysis

60%

Source: Business Analysis Benchmark 2009, IAG Consulting
1. Know what you want (cont’d)

1. Helps vendors define scope and estimate costs
2. Lays foundation for determining project success
3. Reduces system implementation costs
4. Builds cohesive implementation strategy
5. Reduces re-work and minimizes maintenance
6. Manages expectations & reduces fallout
7. Faster rollouts & stronger performance
2. Secure organizational buy-in

“You need constant communication with staff who are running programs and the management group. And if your executive team is not bought into doing it, it’s not going to happen.”
2. Secure organizational buy-in (cont’d)

- Transformational change
- Executive buy-in with good communication
- Resistance(s) to change at utilities
- End goals elusive but important
3. Collaborate with IT

“We’re limited in our ability to integrate a new system with existing ones and it’s primarily because of concerns from our IT department…”

…”It’s really a utility problem more than a developer problem. Our system’s developers could do it, but at this point our IT department just won’t let us.”
3. Collaborate with IT (cont’d)

- DSM origins with IT necessities
- Internal constraints & expectations
- Well-placed privacy/security concerns
- Robust vetting of potential vendors
- IT support beyond system selection
4. Consider implementers & contractors

“We’ve seen it take months as opposed to days or weeks. We have to deal with data configuration & validation, making sure that mapping files are correct, that project statuses are accurate, and that rounding of data records is consistent.”
4. Consider implementers & contractors

- Prevalence of implementers & contractors in DSM
- Third-party data security, compatibility, and validation
- Digital & human systems
- Months vs. weeks vs. days
The journey continues...

- Know (exactly) what you want
- Secure organizational buy-in
- Collaborate with IT
- Consider ICs and TAs
- Digital transformation(s)
- New data streams
- Adaptive program management
- Improved customer relationships
Thank you! Questions?

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