Scaling Water Conservation
Through Workflow Automation

OVERVIEW

Water conservation is the most cost-effective strategy for meeting our future water needs. To meet savings targets, however, conservation approaches must be scalable—in other words, the delivery of these programs cannot be effectively run on inflexible legacy utility software or managed out of a shared Microsoft Excel/Access database. The easiest way to reduce these challenges is through the implementation of software-based platforms that target workflow digitization and automation.

Utilities like Denver Water, San Antonio Water Systems, and the City of Prescott, AZ are using software-based platforms to run different components of their conservation programs. Using this type of solution helped streamline program management, reduce program costs, and enhance transparency into program performance. Utilities can also realize a quantifiable return on investment by comparing the cost of the software with the value of labor-time reallocated to other programs or activities of greater critical need within their organization.

As these examples demonstrate, program management platforms are the 21st Century solution for scaling utility operations, which is paramount to their long-term financial health.

DENVER WATER

CITY OF PRESCOTT

San Antonio Water System

WHY AUTOMATE?

Benefits of Automation

- Reduce administrative workload and reallocate more time/budget to higher-value tasks
- Streamline program implementation, tracking, and reporting
- Enhance customer satisfaction and outreach efforts
- Integrate multiple customer-related programs across one platform
- Access program history and budget all in one central location

Barriers to Adoption

- Utility's decision-making process (e.g., IT requirements, procurement requirements, involvement of multiple departments)
- Budget (i.e., quantifying return on investment)

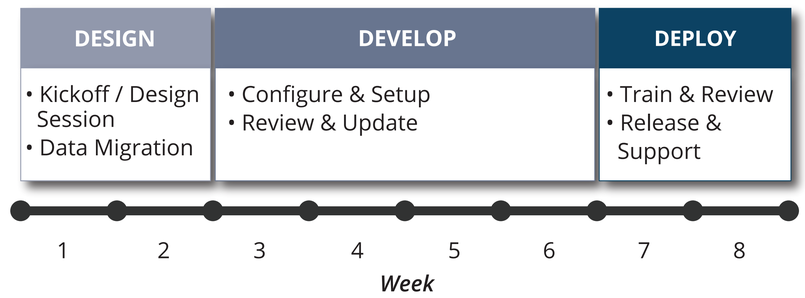
PATH TO AUTOMATION

Drivers – before deciding on a software-based solution, it is important to identify the biggest challenges your department is facing. Challenges driving the need for workflow automation can include:

- **Customer experience** – Are customers frustrated by cumbersome rebate application requirements, lack of transparency in application status, or ineffective communication tools?
- **Size of organization/conservation program** – Is the volume of rebates, audits, water waste citations, etc., becoming too overwhelming for utility staff? Are processing times getting longer?
- **Availability of staff resources** – Are other tasks, such as customer outreach efforts, falling through the cracks because utility staff's time is limited?
- **Workflows** – Is rebate management interrupted by lack of centralized program, project, and customer account data?

Stakeholder Engagement – to ensure all key decision-makers within your organization are on-board and no unanticipated hiccups occur down the road, it is critical to engage with stakeholders organization-wide. This includes utility staff upstream and downstream from the conservation department, such as IT and customer service.

Timeline – project timeline can vary depending on the scope of the project and whether it is created in-house or by a third-party consultant. A standard timeline can look like:



Cost-Effectiveness

CASE STUDIES

Denver Water

In-house platform

In Spring of 2013, Denver Water staff, including conservation, management, IT, and customer service participated in a continuous improvement exercise focusing on ways to improve customer experience. From this week-long discussion emerged the idea for an online platform to manage the utility's rebate program. The project was completed within a year by in-house IT staff, who worked alongside conservation staff to design and develop the platform.

Impact
- Rebate staff dropped from 2 full-time to 1/2 full-time (staff reassigned to other tasks)
- Saved $80,000 annually by reducing the number of checks cut (residential customers with less than $300 in rebates received an account credit)

Lessons learned
- Attempting too much automation can make the system less flexible later on when changes need to be made
- Make sure staff responsibilities are properly prioritized during the development phase

Our program management platform offered a better solution for meeting our customers' expectations. In fact, it exceeded their expectations. By pushing the boundaries of the organization, this solution brought Denver Water into the 21st century.

- Jeannine Shaw, Senior Community Relations Specialist

City of Prescott, AZ

Third-party platform

Since mid-2016, the City of Prescott, AZ has been using AIQUEOUS' cloud-based platform, WaterWays, to run its rebate program. WaterWays is a Salesforce-based platform that can be easily customized to fit the needs of a utility and integrated with other customer-related programs.

Impact
- 50% reduction in time spent on rebate processing
- Avoided program fraud by using the reporting tool to show a customer had submitted duplicate rebate applications

San Antonio Water System

Hybrid platform

San Antonio Water System is currently in the process of creating a custom program management platform for its entire conservation portfolio, including rebates, coupons, water waste violations, irrigation consults, and irrigation check-ups. SAWS partnered with AIQUEOUS and a nonprofit to deliver this project. In addition to providing program management tools, the final product will also offer a reporting tool that combines program-related data with dynamic data, such as meter readings and weather data.

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