

# Nuts and Bolts of CCA Formation

## Data Management, Customer Call Center and Customer Enrollment

March 4, 2016

Drake Welch, VP Customer Care & IT

401 W. A Street, Suite 500  
San Diego, CA 92101  
Wk (619) 684-8039  
Mobile (619) 261-2477  
[DWelch@NobleSolutions.com](mailto:DWelch@NobleSolutions.com)

## Data Management

- ▶ **Electronic Data Interchange (EDI) Services**
  - Complete technical testing and certification for all necessary EDI activity with utility and your bank. Once operational:
    1. Utility sends customer information and usage EDI files to CCA
    2. CCA calculates charges and *timely* sends charge EDI files to utility
    3. Utility invoices customers and receives customers payments
    4. Utility sends monies to CCA's bank and account level remittance data to CCA via EDI
- ▶ **Customer Information System (CIS)**
  - Capture all utility account data
  - Determine and program customer rates
- ▶ **Customer Relationship Management (CRM) System:**
  - Provide visibility to pertinent customer information
    - Program participation
    - Billing information
    - Customer correspondence

# Data Management

- ▶ **Settlement Quality Meter Data Reporting**
  - Register and test access to CAISO system (OMAR)
  - Validate historical usage data and other inputs to your estimation routine
  - Provide ramp-on schedule to CCA Scheduling Coordinator
- ▶ **Qualified Reporting Entity Services**
  - Access to meter data for any renewable energy owned or controlled
- ▶ **Reporting**
  - Determine what reports are needed to manage or provide oversight of program
  - Determine the frequency and distribution of the reports
  - Determine form and format of the reports
  - Program reports



## Customer Call Center

- ▶ Staff and train a call center
  - Create training and reference material for Customer Service Representatives based on CCA program specifics
  - Access to CRM system
- ▶ Interactive Voice Response System (IVR)
  - Design and program IVR functionality
  - Record messages and prompts
  - Integrate IVR to CIS/CRM systems



## Customer Enrollment

- ▶ Determine if positive Enrollments will be accepted
- ▶ Acquire original customer list from utility
- ▶ Identify list of customers in respective phase
- ▶ 1<sup>st</sup> notice mailed 90 days prior to launch
- ▶ 2<sup>nd</sup> notice mailed 60 days prior to launch
- ▶ Process opt-outs and positive Enrollments
- ▶ Send mass opt-out and customer list to enroll to utility 30 days prior to launch
- ▶ Launch
- ▶ Send the two post enrollment opt-out notices after launch

CCA Data Management is all about getting the details right!

