opentext™

Success story

**Snohomish County
Public Utility District**

Industry
• Utilities

Solutions
• OpenText™ Extended ECM for SAP® Solutions
• OpenText™ Document Presentment for SAP® Solutions

Results

Reduced risk and improved efficiency with enhanced enterprise content control
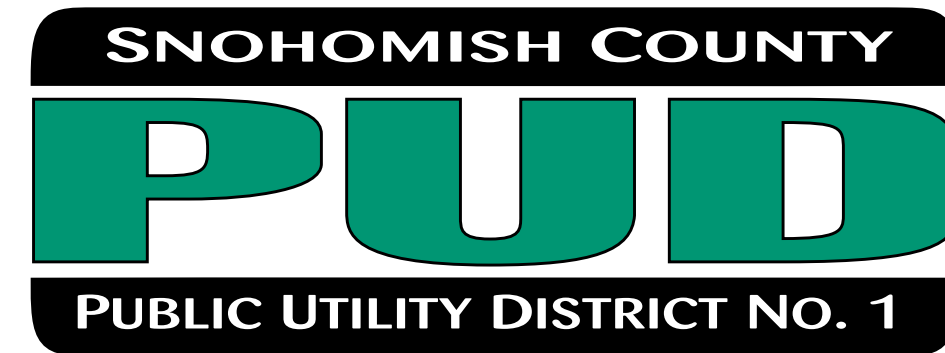
Improved document change turnaround time by months

Connected unstructured and structured content with seamless SAP integration

Improved call center efficiency and reduced customer call times

Ensured enterprise-wide user adoption with effective change-management program

SNOHOMISH COUNTY PUD
PUBLIC UTILITY DISTRICT No. 1

Public utility fuels digital transformation with OpenText

Snohomish County Public Utility District uses OpenText Suite for SAP® to power content generation and management

"Making changes to letters used to be a long process. Now, with OpenText Document Presentment, it is easy and fast. The process is down to two to three weeks instead of three to four months."

Amy Brown
Business Analyst
Snohomish County PUD

Snohomish County Public Utility District (PUD) is the second largest publicly owned utility in Washington, with more than 345,000 electricity customers and 20,000 water customers. Established in 1936, Snohomish County PUD is committed to delivering power and water to its customers in a safe, sustainable and reliable manner.

As a not-for-profit organization, Snohomish County PUD is focused on providing quality service to its customers, prudently managing costs and continually looking for opportunities to improve the safety, efficiency and effectiveness of its business.

In recent years, Snohomish County PUD increasingly struggled to manage its vast information assets and to meet its stakeholders' information needs, which included everything from public records requests to regulatory audits. Mitzi Bulman, sr. manager, District Information Governance at Snohomish County PUD, explained, *"There are so many different regulatory requirements and that is part of the challenge of managing our content. How do we track information so we can instantly find what we need? It is very important to be able to find information if there is an audit."*

The utility's most valued stakeholders are its customers, but their communication needs had also become overwhelming—100,000 service notifications, 3 million invoices, 500,000 letters and 230,000 overdue notices annually. Compounding the issue was that the company's existing system was outdated and could not meet the expectations of today's customer. Communication channels were limited and changes to customer correspondence could take months. Amy Brown, a former business analyst for Snohomish County PUD, noted, *"One of the challenges we face is that customers today have an expectation of instant information and communication. We need to make information available to them immediately and in the way they want to receive it."*

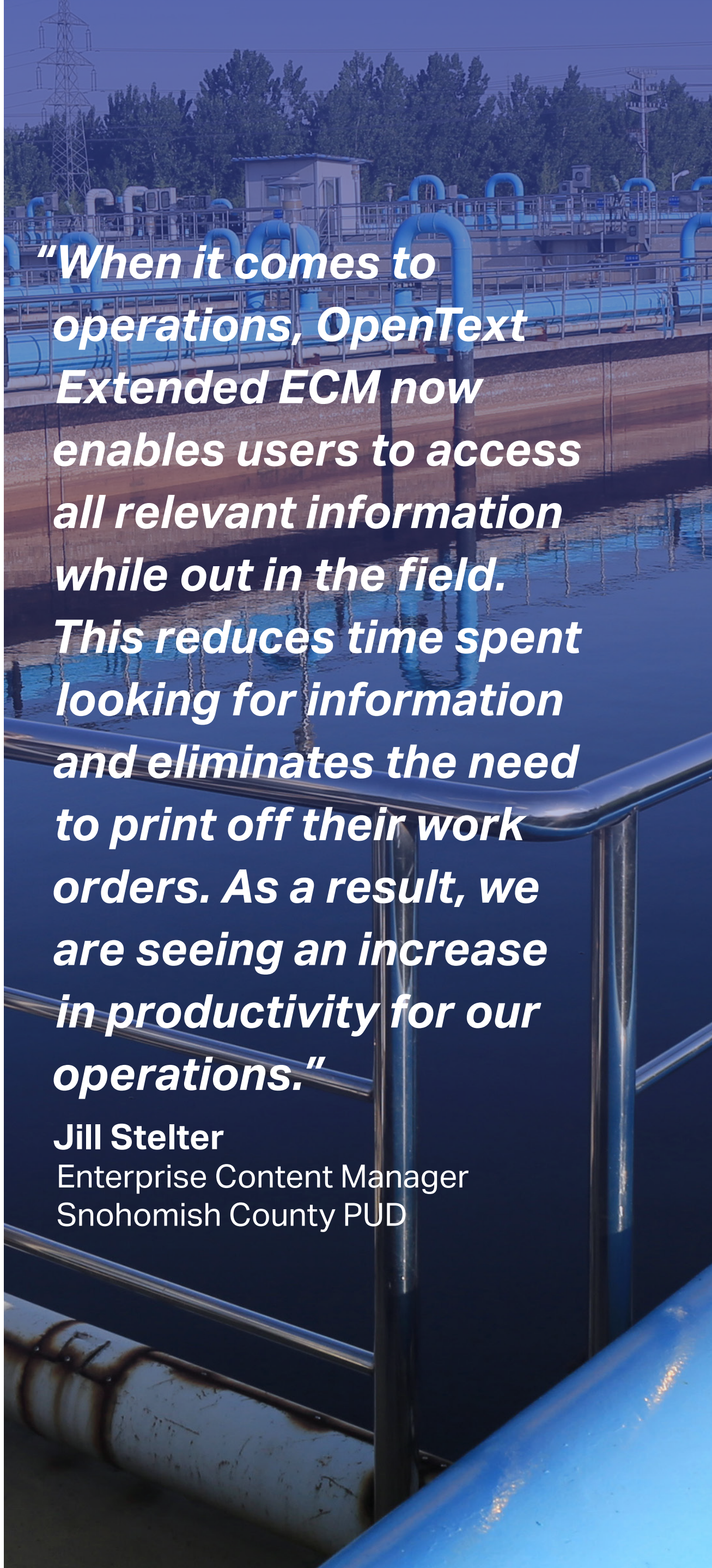## A platform to create, automate and transform

The search for a complete and holistic solution for managing their information led Snohomish County PUD to OpenText. The OpenText Suite for SAP offers a digital content platform that seamlessly integrates with SAP, which was critical given the utility's SAP environment. To manage its enterprise content management (ECM) needs, the company selected OpenText™ Extended ECM for SAP® Solutions. In addition, Snohomish County PUD chose OpenText™ Document Presentment for SAP® Solutions to design, deploy and deliver its customer correspondences via multiple channels.

"One of our considerations was our need to communicate with customers directly and in their preferred channel. That was a big driver for choosing OpenText Document Presentment. It offered a lot of opportunity for us to expand our channels. It was the clear choice and intuitively the direction for us to go," explained Brown.

Achieving enterprise-wide adoption

Migrating an entire organization from paper files and shared drives to Extended ECM for SAP Solutions has been no small task. To guide the effort, Snohomish County PUD established the District Information Governance (DIG) department to oversee the management of informational assets and provide user training and education. The team led company-wide clean-up efforts in preparation for moving information to the OpenText platform, with recognition and rewards for participation.

"We called it, 'Team Up to Clean Up' and we had what we called the Golden Shovel award, which always makes everyone laugh a little bit. Whether it was a big electronic clean-up of files or a physical one, we would publish an article in our newsletter and reward the effort with

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Jill Stelter
Enterprise Content Manager
Snohomish County PUD

a Golden Shovel plaque. It put a positive spin on the project because records management and information governance are not always everyone's favorite thing to do," explained Jill Stelter, enterprise content manager at Snohomish County PUD. The innovative concept to drive their company-wide information governance initiative was wildly successful and went a long way towards ensuring strong user adoption of the enterprise project.

Transforming how enterprise content is consumed and managed

With OpenText, Snohomish County PUD has successfully driven organizational change around information governance. With roughly 300 users across numerous departments, the ultimate goal is to roll out the solution to all 45 departments and more than 1,100 employees throughout the organization.

The solution provides the ability for employees in multiple departments to easily access and share information. *"When it comes to operations, OpenText Extended ECM for SAP Solutions now enables users to access all relevant information while out in the field. Whether it's photos from previous inspections or design documents from engineering, it's all there. This reduces time spent looking for information and eliminates the need to print off their work orders. As a result, we are seeing an increase in productivity for our operations,"* said Stelter.

Mitigating legal and regulatory risks

As both a utility and a public entity, Snohomish County PUD must adhere to strict industry and public record regulations and provide information for audit purposes or public requests, or else face steep fines. With information stored in Extended ECM for SAP Solutions, the organization can now easily respond to any request. *"In the past, we*

might not be able to find all the information because it was stored in someone's files or deep down in their hard drive. For us, being able to capture everything and comply with all our regulatory requirements is a huge benefit," said Stelter. She added, *"If we are not managing information correctly, either not keeping it long enough or keeping it too long, it can impact us. Having Extended ECM for SAP Solutions and being able to automate the records management process was very important. Once we have everything in the system, it will help us sleep at night knowing that OpenText is managing our records instead of having them on shared drives somewhere."*

Seamless SAP integration

In addition, the company has realized the benefits of using the ECM solution to connect its unstructured information with its SAP content. *"It is a great fit. The possibility of having SAP transactions and content together is really valuable,"* said Stelter. The integration has been seamless for users. "We have people saying, 'I found the documents in SAP.' We tell them, 'No, those documents actually live in OpenText.' And OpenText has also made it easier to search and find SAP content. From a user standpoint, I think that has been a big win,"* added Brown.

Efficient customer communication process leads to time savings

With Document Presentment, Snohomish County PUD replaced an outdated, cumbersome system with a flexible, efficient platform that integrates with SAP and easily handles the utility's correspondences, including 500,000 letters per year and up to 20,000 bills per day. *"Users are very happy as OpenText Document Presentment is significantly better than what we had before. It has been such a positive experience for users. They are able to get through the work much faster, with fewer complications and less follow-up,"* said Brown.

More effectively communicating with customers has shaved time off customer service calls. *"We have been able to cut a minute or two off each call that has a correspondence element to it, which has been a huge benefit for the call center,"* said Brown. She added, *"OpenText Document Presentment allows great user interaction. Users can edit their customer letters in real time, which is not something we had before. And it integrates with SAP, so it is a smooth, single interface for the user."*

In addition, long-term changes to correspondence no longer require IT involvement. *"That has been drastically improved. Making changes to letters used to be a long process. Now, with OpenText Document Presentment, it is easy and fast. The process is down to two to three weeks instead of three to four months. It is absolutely a definite improvement,"* said Brown.

The team could not be happier with the reaction to the solution. *"The reception was absolutely wonderful. We had customer service reps who were just thrilled when they first saw it. They were so happy to see what it could do and are excited about its potential,"* said Brown.

Future enhancements and possibilities

Building on its current success, Snohomish County PUD looks forward to continuing its digital transformation by upgrading to OpenText Release 16. In addition, the company foresees continued innovation in customer correspondence. *"We are looking at mail merge and email. We want to leverage the features that we haven't fully explored yet, and we anticipate significant benefits when we get the email channel implemented. It will make such a big difference to our customers for us to provide information how they need it and when they need it,"* concluded Brown.

About OpenText

OpenText, The Information Company™, enables organizations to gain insight through market leading information management solutions, on-premises or in the cloud. For more information about OpenText (NASDAQ: OTEX, TSX: OTEX) visit opentext.com.

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