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## Removing Barriers To Customer Centric Service With SAP Service Cloud

Dan Linder, CIS Replacement Technology Mgr, San Diego Gas & Electric  
Tina Kuo, SAP Product Management - Service Cloud

Session ID 82475

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For all recent and planned innovations, potential data protection and privacy features include simplified deletion of personal data, reporting of personal data to an identified data subject, restricted access to personal data, masking of personal data, read access logging to special categories of personal data, change logging of personal data, and consent management mechanisms.

# About the Speakers

## **Dan Linder**

- CIS Replacement  
Technology Mgr, San Diego  
Gas and Electric
- Leading the technology,  
digital, reporting and  
analytic workstreams

## **Tina Kuo**

- Product Manager for  
Service Cloud

# Key Outcomes/Objectives

1. SDG&E CIS transformation
2. Model for how to innovate with SAP
3. How SAP Service Cloud can fit in your organization

# Agenda

- Decision to replace SDG&E's Customer Information System
- Co-innovation with SAP
- SDG&E project scope and architecture
- SAP Service roadmap and demo

# San Diego Gas and Electric - a Sempra company

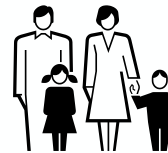


**4,100**  
square-mile  
service area



**2** counties  
& **25**  
communities

**3.6 million**



people

**1.57 million**  
accounts



**1.4 million**  
electric meters



**873,000**  
natural gas meters

# Decision to Replace Customer Information System



## Increasing Customer Demand

- Customers expect an experience comparable to top retailers
- On-demand service through digital channel of their choice
- Personalized communications and offers



## Technology Obsolescence

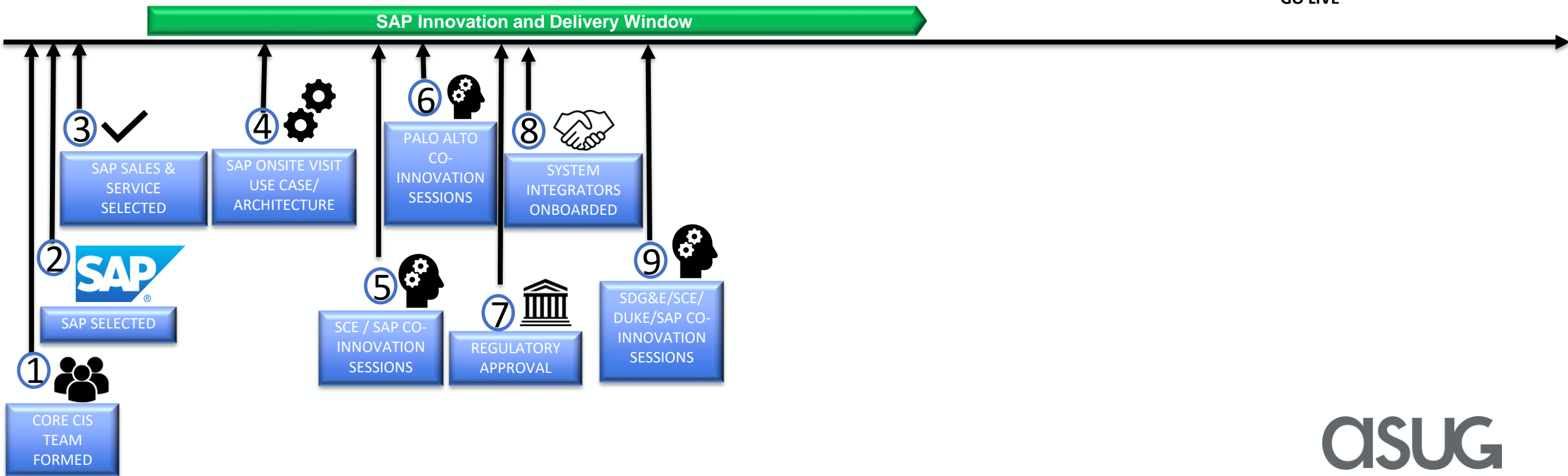
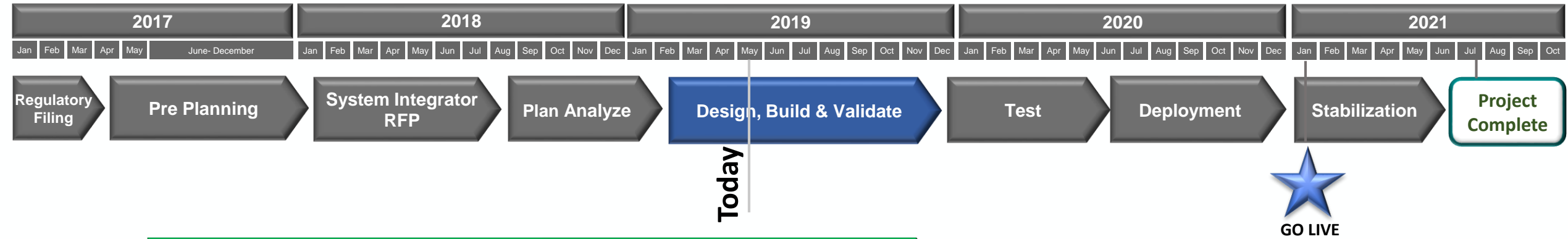
- High operating costs
- System instability and increased risk of failure
- Exponential increase in data volume



## Industry & Regulatory Changes

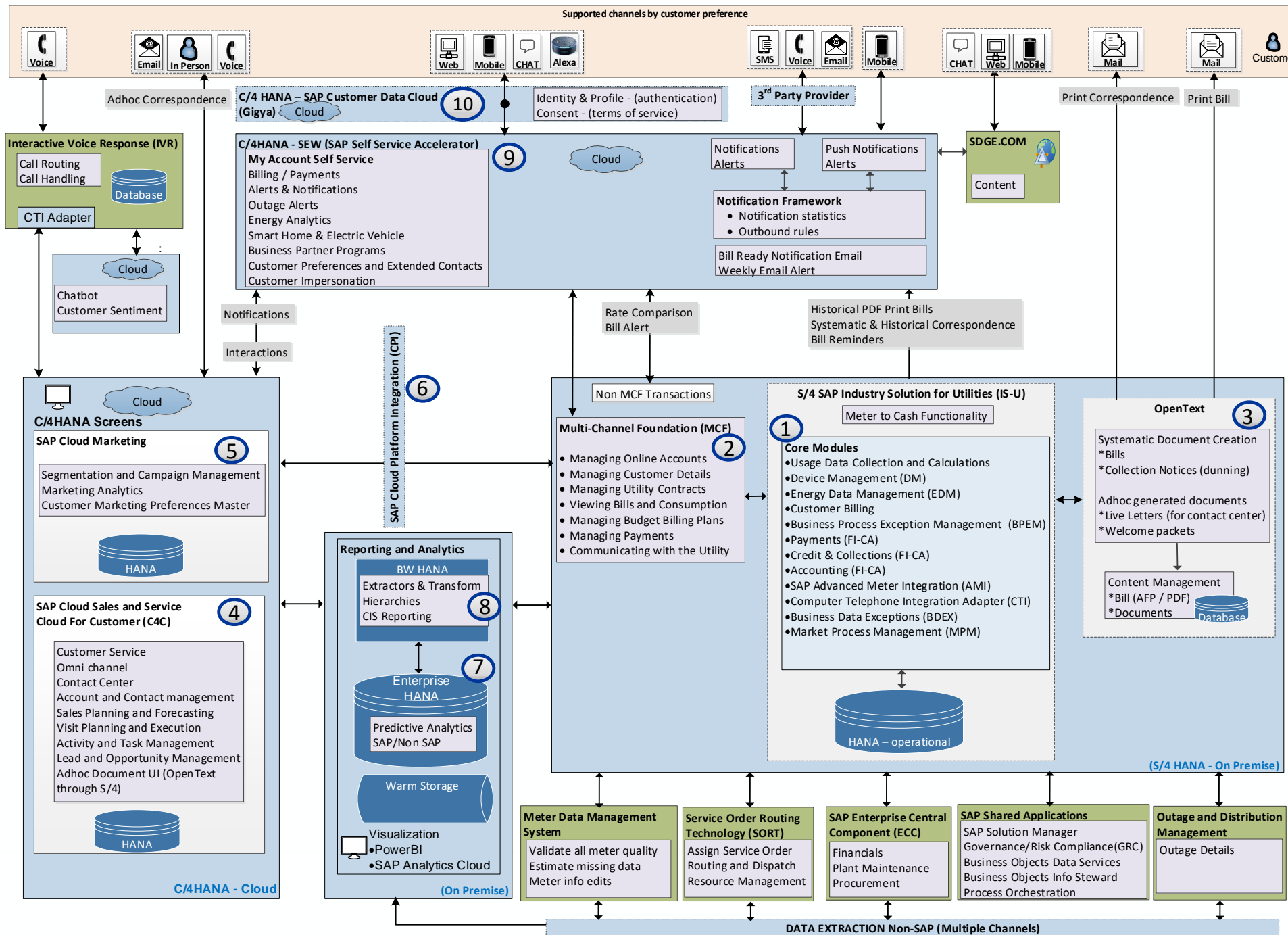
- Expanding customer choice and options
- Rapid introduction of complex rates and programs

# Co-Innovation with SAP





# Proposed Architecture



**Legend**

- New Capability
- Existing System Interface data

- Terminology:**
- SAP S/4HANA Industry Solution for Utilities (IS-U)**  
Central engine for meter to cash functionality
  - SAP Multi-Channel Foundation (MCF)**  
Enables external systems access to data in the core IS-U system through standard services
  - OpenText**  
Document creation and storage for system generated documents such as bills and letters
  - SAP Sales and Service Cloud**  
Cloud for Customer; agent portal for customer-facing transactions
  - SAP Marketing Cloud**  
Campaign development and marketing for customer products and programs
  - SAP Cloud Platform Integration (CPI)**  
Integration for SAP cloud applications
  - SAP Enterprise HANA**  
Predictive and real-time analytics engine for SAP and non SAP data
  - SAP BW/4 HANA**  
Reporting solution for S/4HANA
  - SAP Self Service Accelerator**  
Digital customer platform, centralized notification platform, replacement of current MyAccount and mobile platforms
  - SAP Customer Data Cloud (Gigya)**  
Authentication and terms of service functionality for customers

# Service Cloud for Utilities

1802	1805	1808	1811
<p><b>Service Ticket to Create Exception (BPEM) Case</b></p> <ul style="list-style-type: none"> <li>- Ability to create BPEM case from service ticket</li> </ul> <p><b>Tariff Change</b></p> <ul style="list-style-type: none"> <li>- Ability to change rate category</li> </ul> <p><b>Service Notification</b></p> <ul style="list-style-type: none"> <li>- Service notification in premise in customer and premise objects</li> </ul> <p><b>Financials</b></p> <ul style="list-style-type: none"> <li>- Meter reading validation enhancements create invoice and bill correction processes</li> <li>- Filter/search capabilities in contracts</li> <li>- Enhance billing/invoice simulation in create invoice process</li> </ul> <p><b>Guided Transfer</b></p> <ul style="list-style-type: none"> <li>- Move in using master data template</li> </ul> <p><b>Sales Point of Delivery (POD)</b></p> <ul style="list-style-type: none"> <li>- Sales POD validity dates in the quote process</li> </ul> <p><b>Extensibility for fetch scenarios</b></p>	<p><b>IS-U Contacts in C4C</b></p> <ul style="list-style-type: none"> <li>- Ability to view IS-U contacts in C4C</li> </ul> <p><b>Rate Simulation</b></p> <ul style="list-style-type: none"> <li>- Ability to perform rate simulation in rate change</li> </ul> <p><b>Rate Change</b></p> <ul style="list-style-type: none"> <li>- Ability to use master data template (MDT) to perform rate change</li> <li>- Enable extensibility for the rate change process</li> </ul> <p><b>Extensibility for the Move In Process</b></p> <ul style="list-style-type: none"> <li>- Enable extensibility for the move in process by exposing move in document ID</li> </ul> <p><b>Extensibility for Switch Document Creation</b></p> <ul style="list-style-type: none"> <li>- Support extension fields for switch document</li> </ul> <p><b>Performance</b></p> <ul style="list-style-type: none"> <li>- Enhance performance</li> </ul> <p><b>Extensibility for Action Scenarios</b></p> <p><b>GDPR Compliance</b></p>	<p><b>Advanced Metering Infrastructure (AMI) Phase 1</b></p> <ul style="list-style-type: none"> <li>- Support AMI views and functionalities in the premise view and customer overview</li> </ul> <p><b>View of (BPEM) Exceptions</b></p> <ul style="list-style-type: none"> <li>- Ability to view exceptions from the customer and premise objects</li> </ul> <p><b>Miscellaneous Posting (Credit Memo)</b></p> <ul style="list-style-type: none"> <li>- Ability to post credit memos</li> </ul> <p><b>Promise to Pay (S4 only)</b></p> <p><b>Service Order / Service Notification to Support Long Text</b></p> <p><b>Performance Optimization for Utilities Processes</b></p>	<p><b>Advanced Metering Infrastructure (AMI) Phase 2</b> <span style="border: 1px solid black; padding: 2px;">Innovation</span></p> <ul style="list-style-type: none"> <li>- Support AMI views and functionalities in the move in / out / transfer processes</li> <li>- Support ping functionality</li> </ul> <p><b>Alerts Framework – Phase 1</b> <span style="border: 1px solid black; padding: 2px;">Innovation</span></p> <ul style="list-style-type: none"> <li>- Support the ability to display alerts</li> </ul> <p><b>One time Payment</b> <span style="border: 1px solid black; padding: 2px;">Innovation</span></p> <ul style="list-style-type: none"> <li>- Ability to support one time payment for the customer</li> </ul> <p><b>Collections Fact Sheet</b> <span style="border: 1px solid black; padding: 2px;">Innovation</span></p> <ul style="list-style-type: none"> <li>- View of dunning information for the customer</li> <li>- View of security deposit total</li> <li>- View of customer credit rating</li> </ul> <p><b>Security Deposit for Move In</b></p> <ul style="list-style-type: none"> <li>- Support security deposit at the contract level for the move in process</li> </ul> <p><b>Payment Method – Phase 1</b> <span style="border: 1px solid black; padding: 2px;">Innovation</span></p> <ul style="list-style-type: none"> <li>- Assign payment method for the customer</li> </ul>

# Service Cloud for Utilities

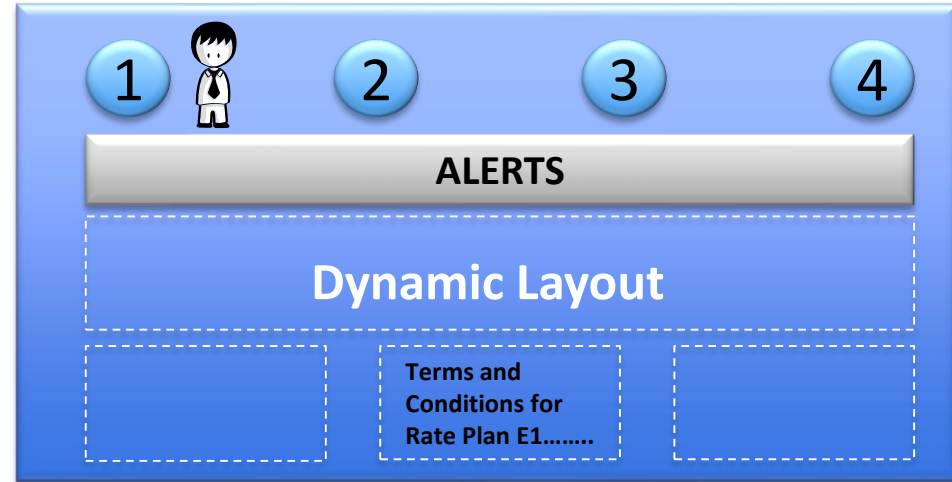
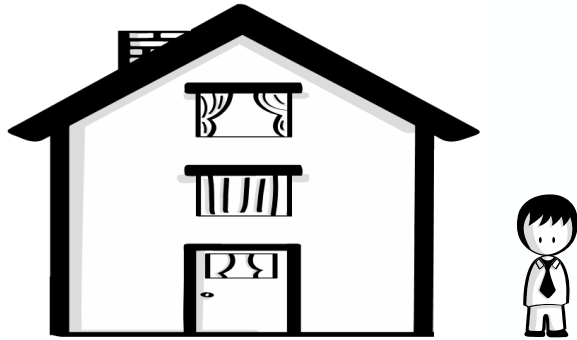
Subject to Change

1902	1905	Future 1908 Top 3-5 Investments	1911 and Beyond Top 3-5 Investments
<p><b>AMI - Phase 3</b> <span style="border: 1px solid blue; border-radius: 5px; padding: 2px;">Innovation</span></p> <ul style="list-style-type: none"> <li>- Support reconnect and safety message</li> </ul> <p><b>Alerts Framework – Phase 2</b> <span style="border: 1px solid blue; border-radius: 5px; padding: 2px;">Innovation</span></p> <ul style="list-style-type: none"> <li>- Display alerts in move processes</li> </ul> <p><b>Payment Method – Phase 2</b> <span style="border: 1px solid blue; border-radius: 5px; padding: 2px;">Innovation</span></p> <ul style="list-style-type: none"> <li>- Support Contract Account assignments</li> </ul> <p><b>Payment Enhancements</b> <span style="border: 1px solid blue; border-radius: 5px; padding: 2px;">Innovation</span></p> <ul style="list-style-type: none"> <li>- View reversed, posted, and scheduled payments</li> <li>- Ability to cancel scheduled payments</li> </ul> <p><b>Collections Fact Sheet</b> <span style="border: 1px solid blue; border-radius: 5px; padding: 2px;">Innovation</span></p> <ul style="list-style-type: none"> <li>- View of correspondence, account history, returns, and write offs</li> </ul> <p><b>Security Deposit</b> <span style="border: 1px solid blue; border-radius: 5px; padding: 2px;">Innovation</span></p> <ul style="list-style-type: none"> <li>- Ability to view and reverse / release</li> </ul> <p><b>Credit Worthiness Overview</b> <span style="border: 1px solid blue; border-radius: 5px; padding: 2px;">Innovation</span></p> <p><b>Service Order and Service Notification Enhancements with Order Code</b> <span style="border: 1px solid blue; border-radius: 5px; padding: 2px;">Innovation</span></p> <p><b>Exceptions (BPEM) Close to Automatically Close Referenced Service Ticket</b> <span style="border: 1px solid blue; border-radius: 5px; padding: 2px;">Innovation</span></p>	<p><b>Configurable Hierarchy in Utilities360</b> <span style="border: 1px solid blue; border-radius: 5px; padding: 2px;">Innovation</span></p> <p><b>Payment Deferral</b></p> <p><b>Move In to include Rate Category Proposal</b></p> <p><b>Collective Contract Account</b></p> <ul style="list-style-type: none"> <li>- Support viewing of all child accounts across multiple business partners for the collective contract account</li> </ul> <p><b>Premise Object Enhancements</b> <span style="border: 1px solid blue; border-radius: 5px; padding: 2px;">Innovation</span></p> <ul style="list-style-type: none"> <li>- Support supplement fields</li> </ul> <p><b>Security Deposit</b> <span style="border: 1px solid blue; border-radius: 5px; padding: 2px;">Innovation</span></p> <ul style="list-style-type: none"> <li>- Ability to perform partial release</li> </ul> <p><b>Advanced Invoice History Filter</b></p> <p><b>Payment Method Selection in Utilities Payment Data</b></p> <p><b>Blog for Analytics on the Backend Data</b></p>	<p><b>Landlord/Tenant View POC</b></p> <p><b>Account Executive Dashboard POC</b> <span style="border: 1px solid blue; border-radius: 5px; padding: 2px;">Innovation</span></p> <p><b>Move In Process to Provide Messaging for Rate Selection (Phase 1)</b> <span style="border: 1px solid blue; border-radius: 5px; padding: 2px;">Innovation</span></p> <p><b>Budget Billing (Phase 1)</b></p> <p><b>Exceptions in Service Ticket</b> <span style="border: 1px solid blue; border-radius: 5px; padding: 2px;">Innovation</span></p> <ul style="list-style-type: none"> <li>- Configurable Hierarchy for Object Selection</li> <li>- Enable Exception Creation With the Objects</li> </ul> <p><b>Simulate Dunning in Collections</b> <span style="border: 1px solid blue; border-radius: 5px; padding: 2px;">Innovation</span></p> <p><b>Enable Separate Master Data Template for processes</b> <span style="border: 1px solid blue; border-radius: 5px; padding: 2px;">Innovation</span></p> <p><b>Contract Account Enhancement – Incoming and Outgoing Payment Method</b></p>	<p><b>Unified Service Desktop With Digital Channels</b></p> <p><b>Enhanced Engagement Contact Records</b></p> <p><b>Collections Enhancement – Dunning Simulations</b></p> <p><b>Budget Billing</b></p> <p><b>Landlord/Tenant Views and Processes</b></p> <p><b>Integration to SAP Self Service Accelerator by SEW</b></p>



# Move In Process Demo

Move In Process



Services (Elec, Gas, Water)

Meter & Meter Reading

Service Order

- ★ Guided Process
- ★ Dynamic Layout
- ★ Create Customer
- ★ Scripting
- ★ Alerts Framework

# Account Executive Dashboard Demo

2017

September

December

2018

Prototype In Progress

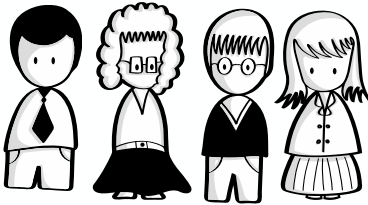
January

2019

April

August

## Meet the team!



*Large/complex accounts with overview and work center (co-innovation topic)*

- Account Executive's view – ability to categorize accounts and pull up working dashboard for the list. Accumulate all the service order, open items.....

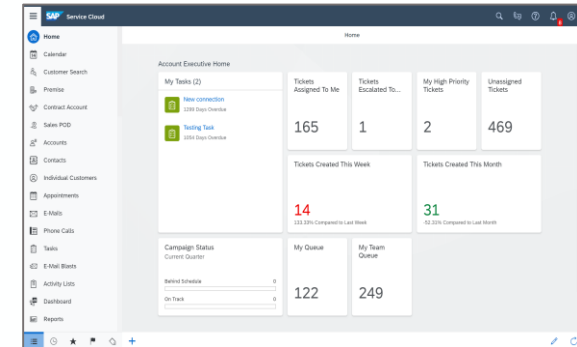
Contract Account	Revenue	Contract
16	12	60

Contract Account	Contract Account Description	Phone ID	Phone Description	Phone Type	Contract ID	Contract Description	Validated ID	Contract Description
100001	Phone 1	100001	Phone 1	1000	100001	Phone 1	1000	Phone 1
100002	Phone 2	100002	Phone 2	1000	100002	Phone 2	1000	Phone 2
100003	Phone 3	100003	Phone 3	1000	100003	Phone 3	1000	Phone 3
100004	Phone 4	100004	Phone 4	1000	100004	Phone 4	1000	Phone 4
100005	Phone 5	100005	Phone 5	1000	100005	Phone 5	1000	Phone 5
100006	Phone 6	100006	Phone 6	1000	100006	Phone 6	1000	Phone 6
100007	Phone 7	100007	Phone 7	1000	100007	Phone 7	1000	Phone 7
100008	Phone 8	100008	Phone 8	1000	100008	Phone 8	1000	Phone 8
100009	Phone 9	100009	Phone 9	1000	100009	Phone 9	1000	Phone 9
100010	Phone 10	100010	Phone 10	1000	100010	Phone 10	1000	Phone 10

## Gather Req. & Create Specifications

- Service Orders – New and open orders only
- Reconnect / Disconnect – New or In process only
- BPEM – New or In process only
- Accounts Past Due for open items



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# Presentation Materials

Access the slides from 2019 ASUG Annual Conference here:

<http://info.asug.com/2019-ac-slides>

# Q&A

For questions after this session, contact us at [dlinder@semprautilities.com](mailto:dlinder@semprautilities.com) and [tina.kuo@sap.com](mailto:tina.kuo@sap.com).



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