Smart Electric Power Alliance

Case Study

Streamlining Electrification Processes and Timelines

A Case Study with Orange and Rockland

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The Challenge	The Solution
Timelines and processes for installing EV charging are long and unpredictable. As fleet electrification continues to grow, utility companies will see increases in charging infrastructure applications. Today, the processes to install charging infrastructure are inconsistent across utilities and can involve complex timelines. This creates longer lead times for fleet electrification, higher expenses, and poor customer experiences. To prepare for an increase in fleet electrification, utility companies must explore and implement innovative solutions to improve the overall experience for fleet operators and accelerate the transition to EVs.	**Orange and Rockland (O&R), a utility that provides services in New York and New Jersey, implemented automation software to identify barriers and inefficiencies within their processes.** O&R used the automation software platform to streamline their application, review, and approval processes for EV charging infrastructure projects. As a result, O&R identified several impactful changes, reducing the timeline by 40% and improving communication between customers and the utility.

Approaches to Streamlining Electrification Processes

Through the implementation process, O&R reduced the number of steps in their application, simplified steps, and identified steps that can happen in parallel. A thorough review of past projects and processes exposed opportunities for improvement, and led to the elimination of iterative steps required to process an application. While the automation software played a key role in allowing O&R to improve its processes, other utilities can take steps internally, without new software, to make similar changes. These changes include:

1. Reduce the number of steps to streamline the application process.

- While many utilities may use a combination of email, spreadsheets, and other disconnected systems, all used by different owners, moving towards one system of record prevents external mirroring or record keeping and reduces the total number of steps.
- Identify critical project information requirements and communicate them to customers

Utilizing the software automation platform helped O&R reduce the number of steps in their application process. In addition to reducing the number of steps, they identified steps in the application process that took longer or had a significant variance in time completion, identifying areas that led to longer application timelines. O&R used these insights to optimize the process for the utility and customers.

2. Simplify each step to improve the customer experience.

- Provide transparent milestone tasks with brief descriptions
- Every step should have an owner and expected duration, increasing accountability around the timeline and providing transparency to customers

The software automation platform allowed O&R to track which questions customers spent more time on, allowing the utility to reword questions, input graphics, and make the application process more user-friendly and understandable. These actions led to decreased application timelines and a higher completion rate.

3. Identify when steps can happen in parallel.

By analyzing the application process, O&R identified opportunities where certain steps could occur simultaneously, reducing the overall completion time. This approach allowed O&R to allocate resources more efficiently and expedite application processing. Identifying and implementing parallel processes can help other utilities streamline their operations and improve customer satisfaction.

Utility Benefits	Customer Benefits
Efficiency: Automated workflows and streamlined processes help utilities process applications faster and more accurately, saving time and resources.	**Shorter Timelines:** O&R reduced the timeline for adding charging infrastructure by over 40%.
Enhanced Customer Service: Utilities can improve customer satisfaction and maintain better customer relationships by providing fleet operators with real-time updates through a centralized platform.	**Greater Predictability:** O&R was able to provide real-time updates and improved communication to help fleet operators better plan for the electrification process and manage expectations.
Scalability: Automated processes can be scaled as the demand for fleet electrification increases.	**Easier Application Process:** The platform's user-friendly interface simplifies the application process and reduces the potential for errors, ensuring a smoother experience for fleet operators.
Ease of reiteration: The user-friendly software automation platform allowed O&R staff to reiterate quickly and without back and forth from the provider.	**Better Communication:** By coupling transparency and communication, the system allows the customer to determine the frequency and granularity of desired updates.
On/off-boarding and Coverage Ease: A record containing all communication, field notes, and history makes it easier to cover a project for someone who is out of office, and it is easy to on/off-board folks without material delay or rework required to get the new leads up to speed.	

Additional Benefits: Improved Hosting Capacity Maps and Freeing Up Staff Time

O&R also used the automation software to improve their hosting capacity map, which provides developers with information about available capacity and factors such as travel corridors The improved hosting capacity map has a drawing tool that can determine distance from travel corridors (affecting incentive eligibility for other non-O&R programs), and contains information on currently energized chargers and those under construction. This tool helps developers understand project timelines, capacity availability, and potential utility upgrade requirements. It has reduced siting costs for developers, which was a pain point.

Freeing Up Staff Time: Streamlining the application and approval process allowed O&R staff to allocate more time to other tasks that previously received less attention. The platform's efficiency allowed the team to be more diligent in monitoring and evaluating projects, improving their ability to detect fraudulent applications. This enhanced the overall program integrity and improved resource allocation and project outcomes. As transportation electrification staff become increasingly burdened, tools that free up staff time will be valuable.

Ultimately, implementing automated processes enabled O&R to optimize their fleet electrification procedures, yielding advantages for the utility and their fleet operator customers. This case study demonstrates the value of using tools such as software automation platforms to improve customer experience, free up staff time, and accelerate the adoption of EV charging infrastructure.

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