

Retail Access System Replacement – Q2 Stakeholder Input Meeting Materials

This meeting was held on June 26, 2024, from 10:00 AM – 11:00 AM EST and provided an overview of the Business Plan approach for the Retail Access System Replacement Project. Please find the presentation materials attached along with a copy of the Business Plan outline.

Planned Upcoming Stakeholder Engagement Activities:

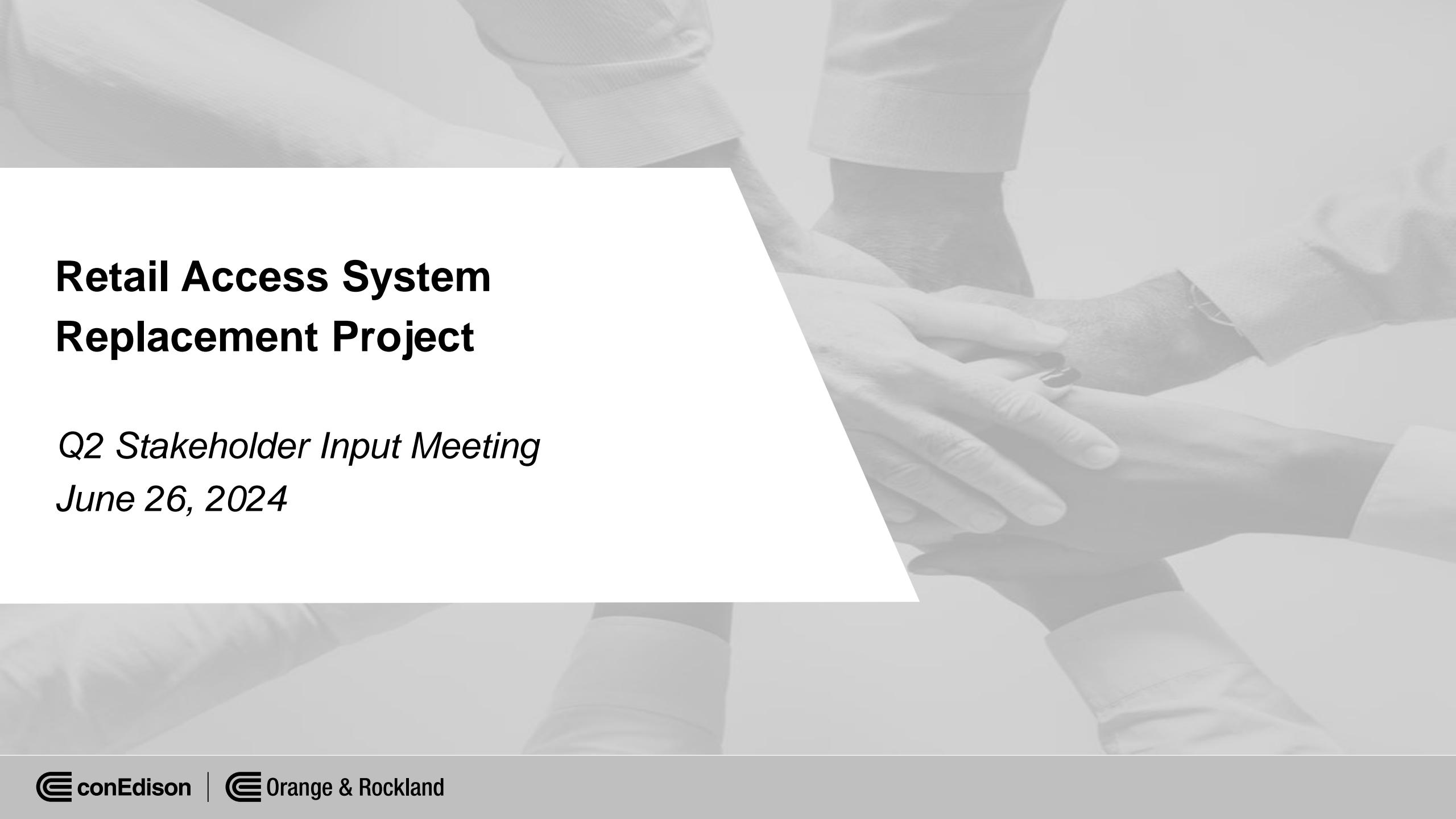
- **July 10:** Deadline to complete the Retail Access System Replacement Business Plan Outline Survey. [CLICK HERE](#) to take the survey.
- You will continue to receive Retail Access System Replacement Project updates through ESCO Newsletters.
 - To access the newsletters, visit www.coned.com/escos.
 - All newsletters related to this project will be tagged as “RAS Replacement”.

Thank you,

Retail Access System Replacement Team
Consolidated Edison Company of New York, Inc.
www.coned.com

Contact Us

If you have any questions or comments, please [visit our ESCO website](#) or email RetailAccess@coned.com.



Retail Access System Replacement Project

Q2 Stakeholder Input Meeting
June 26, 2024

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Retail Access System Replacement Overview

Retail Access System Replacement Overview

- Consolidated Edison Company of New York (CECONY), Orange & Rockland Utilities (ORU) and Rockland Electric (RECO) will conduct a **Retail Access System (RAS) Replacement Project** that will simplify the Company's current complex and outdated Retail Access systems.
- This project's aim is to replace our legacy Retail Access Information System (RAIS) and the retail access components of the Transportation Customer Information System (TCIS).
- This project is currently in the pre-planning phase with the formal RAS Replacement project expected to kick off in January 2025.

What is changing...

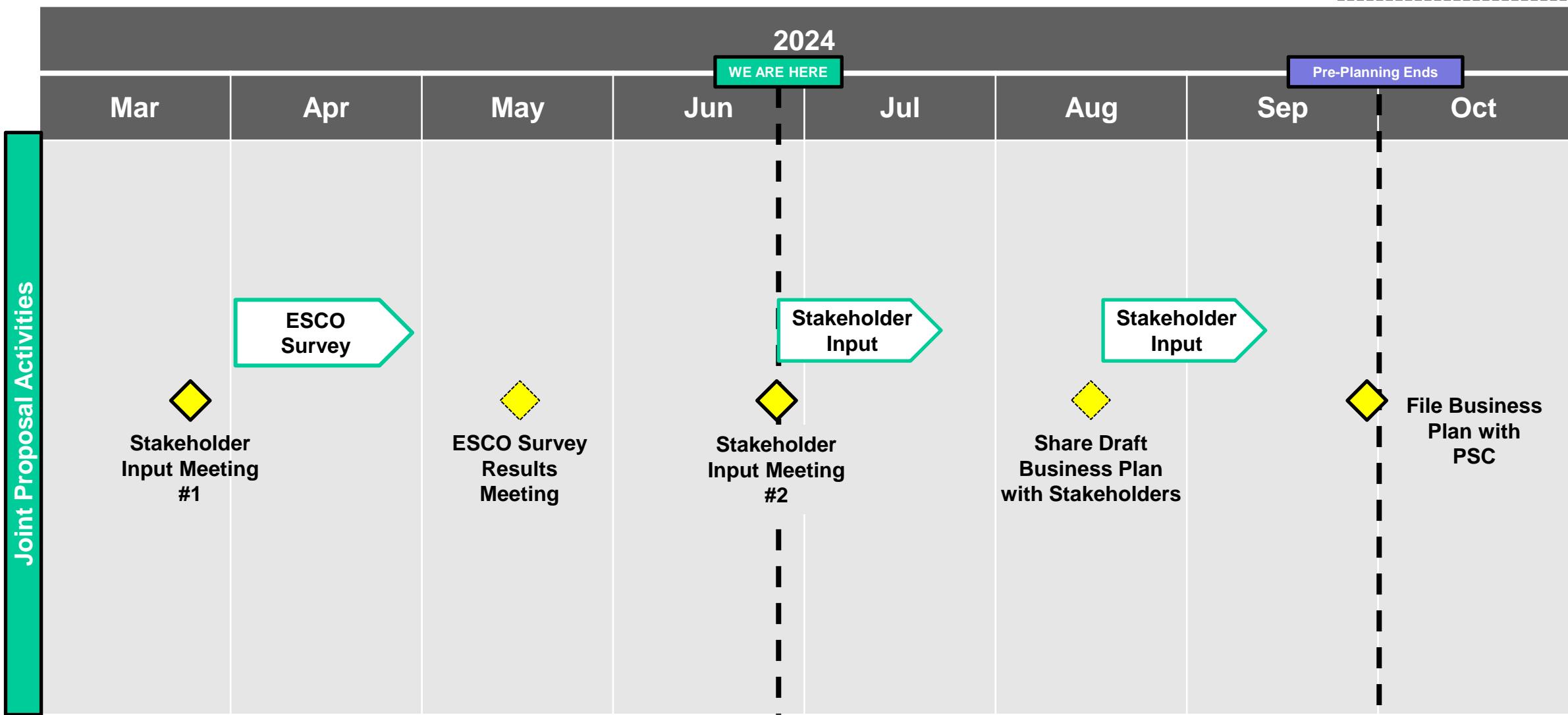
- The Company's internal Retail Access Systems (RAIS and parts of TCIS)
- Back-end infrastructure to support the new Retail Access System solution

What is not expected to change...

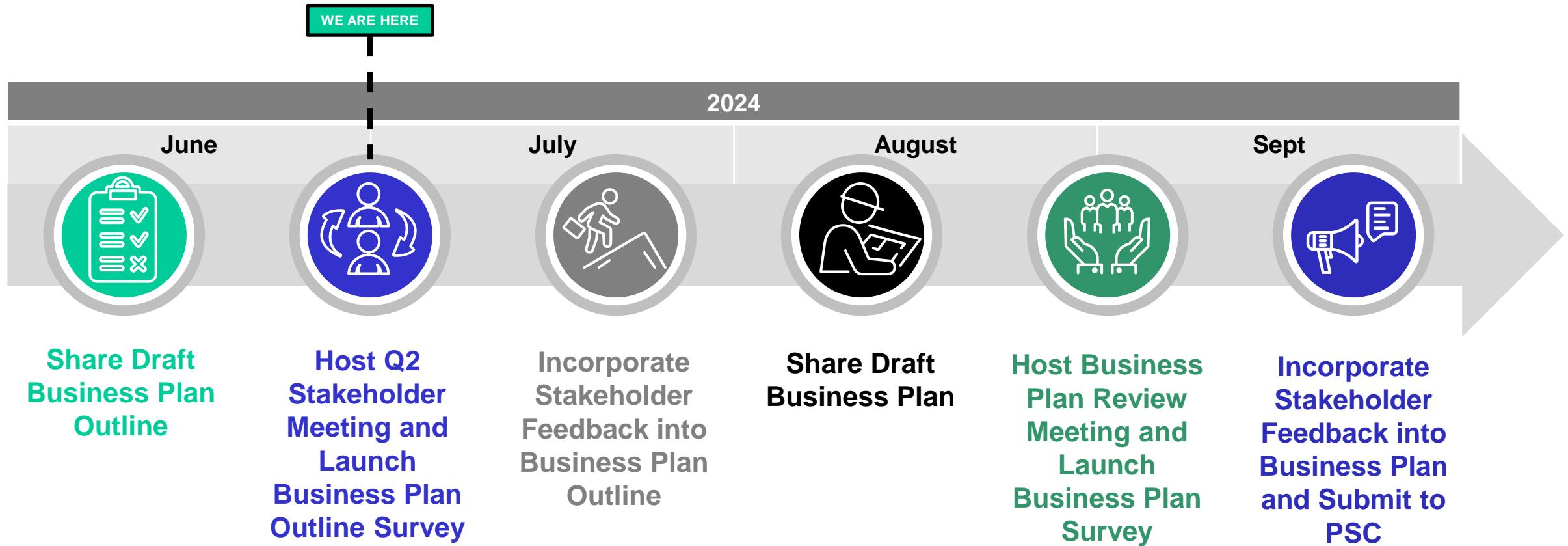
- The Company's customer care and billing system
- EDI framework and protocols
- Processes for communicating with the Company on retail access business matters

2024 Pre-Planning Timeline and Activities

Key:
◆ Per 2023 Joint Proposal



The Company will follow a standard process to gather Stakeholder input into the Business Plan



Business Plan Overview

Business Plan Overview

To prepare for the Retail Access System Replacement Project, the Company will develop a Business Plan to file with the PSC. The Business Plan will include the components detailed below:



Retail Access System Replacement Background

Includes background information about why the Retail Access System Replacement project is taking place, highlighting key industry and Company-specific drivers for change

Project Delivery Process, Implementation Plan, and Proposed Schedule

Provides details related to the project delivery, implementation plan, and proposed timeline



Cost Benefit Summary

Details the cost benefit analysis, including costs to be saved or avoided as a result of the system replacement

Gathering Stakeholder Input

As we continue to develop the Business Plan, we will engage with our Stakeholders to gather input on best practices for engaging with ESCOs throughout testing and the project holistically.

Key Focus Areas for ESCos and EDI Providers

Testing Best Practices

Communications Protocols

Proposed Approach:

Incorporate Lessons Learned – We know that conducting and having Stakeholders participate in extensive testing is critical. It is important for ESCOs and EDI Providers to be actively engaged throughout the testing phase and for the Company to consider the most effective ways to engage our Stakeholders based on your feedback.

Communicate Proactively – To drive success with this project, we will continue to communicate proactively with ESCOs throughout each phase. Planned activities may include ESCO Newsletters, additional ESCO Surveys, and 1:1 Meetings, but we want your input on which methods work best.

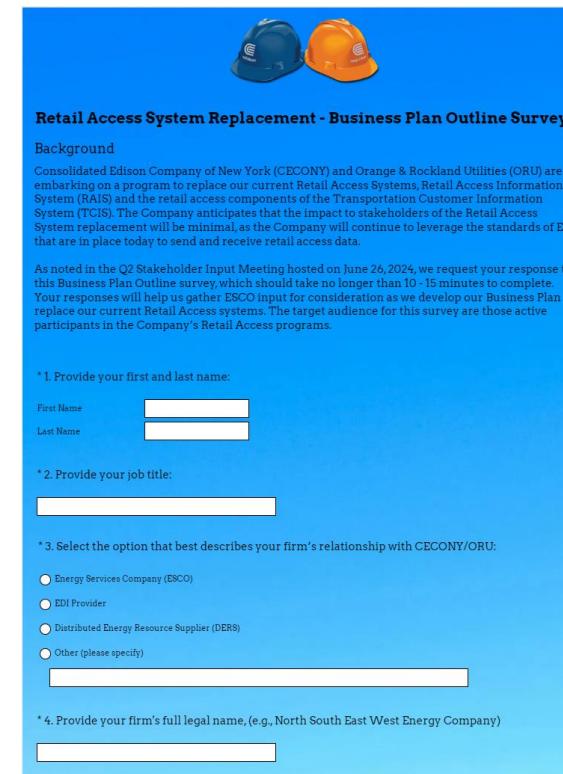
Business Plan Outline Survey

This survey will help the Company understand feedback pertaining to the structure of the Retail Access System Replacement Project Business Plan, equipping the Company with Stakeholder input early in the development process.

The target audience are those active participants in the Company's Retail Access programs.

Business Plan Outline Survey Timeframe

- **June 27:** ESCO Newsletter will be sent with link to Survey (hosted via SurveyMonkey)
- **July 10:** Business Plan Outline Survey closes – all input must be submitted by this date
- **July 10 – August 16:** Company will incorporate feedback into Business Plan Outline and draft Business Plan based on Stakeholder Input



Retail Access System Replacement - Business Plan Outline Survey

Background

Consolidated Edison Company of New York (CECONY) and Orange & Rockland Utilities (ORU) are embarking on a program to replace our current Retail Access Systems, Retail Access Information System (RAIS) and the retail access components of the Transportation Customer Information System (TCIS). The Company anticipates that the impact to stakeholders of the Retail Access System replacement will be minimal, as the Company will continue to leverage the standards of EDI that are in place today to send and receive retail access data.

As noted in the Q2 Stakeholder Input Meeting hosted on June 26, 2024, we request your response to this Business Plan Outline survey, which should take no longer than 10 - 15 minutes to complete. Your responses will help us gather ESCO input for consideration as we develop our Business Plan to replace our current Retail Access systems. The target audience for this survey are those active participants in the Company's Retail Access programs.

* 1. Provide your first and last name:

First Name _____
Last Name _____

* 2. Provide your job title:

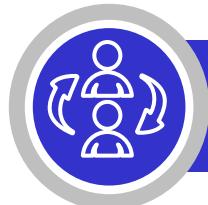
* 3. Select the option that best describes your firm's relationship with CECONY/ORU:

Energy Services Company (ESCO)
 EDI Provider
 Distributed Energy Resource Supplier (DERS)
 Other (please specify)

* 4. Provide your firm's full legal name, (e.g., North South East West Energy Company)

Next Steps

Next Steps



Late-June

Host Q2 Stakeholder Meeting and Launch Business Plan Outline Survey



Mid-July

Incorporate Stakeholder Feedback into Business Plan Outline and Draft Business Plan



Mid-August

Share Draft Business Plan with Stakeholders



Late-August

Host Business Plan Review Meeting and Launch Business Plan Survey



Late-September

Incorporate Stakeholder Feedback into Business Plan and Submit to PSC



RETAIL ACCESS SYSTEM REPLACEMENT

BUSINESS PLAN OUTLINE

CONSOLIDATED EDISON COMPANY OF NEW YORK, INC.

JUNE 2024

Business Plan Outline

1. Executive Summary

- a. Introduction
 - i. Introduce the Retail Access System Replacement (“RASR”) initiative
 - ii. Summarize the significance of the project
 - iii. Highlight key findings, recommendations, and outcomes
 - iv. Summarize alternative solutions considered, with findings
- b. Project Delivery Process, Implementation Plan, and Proposed Schedule Overview
- c. Cost Benefit Summary
 - i. Costs to be saved and to be avoided
 - ii. Company and Stakeholder benefits

2. Retail Access System Replacement Background

- a. New York State (“NYS”) Policy Evolution for Competitive Energy Market Place
 - i. Outline relevant policy changes impacting the Retail Access market
 - ii. Discuss implications and opportunities for RASR
- b. Market and Transaction Growth
 - i. Describe trends in energy market participation
 - ii. Energy market growth and its impact on Retail Access Systems
- c. Current Retail Access System Overview and Challenges
 - i. Detail the current system architecture, strengths, and limitations
 - ii. Highlight business and technical process pain points and opportunities
 - iii. 2023 Rate Order summary
- d. Pre-Implementation Planning Effort
 - i. Discuss key activities that occurred, including Stakeholder engagement, requirements gathering, and risk assessment
 - ii. Highlight regulatory considerations
- e. Energy Service Company (“ESCO”) Stakeholder Outreach and Results
 - i. Summarize interactions with ESCOs (e.g., Stakeholder meetings, ESCO surveys)
 - ii. Share feedback, concerns, and insights from Stakeholder input
- f. Company and Stakeholder Roles and Responsibilities
 - i. Describe the project responsibilities of the Company
 - ii. Specify roles and partnerships with Stakeholders
- g. Future Retail Access System Solution Overview
 - i. Describe technology solutions
 - ii. Provide a high-level vision for the new system

3. Project Delivery Process, Implementation Plan, and Proposed Schedule

- a. Benchmark Summary
 - i. Best practices and lessons learned identified from peer utilities
- b. Overview of Project Delivery Process
 - i. Project Team Structure
 - 1. Introduce key organizational structure
 - 2. Specify Company and Stakeholder roles and responsibilities
 - ii. Governance Model
 - 1. Define the decision-making structure for RASR

2. Specify Company and Stakeholder roles and responsibilities
3. Risk Management Plan

- c. Project Plan Overview
 - i. High-level timeline, including testing phases, training, proposed go-live date, stabilization phase
 - ii. Test Plan, Scope, and proposed timelines
 1. Description of test tracks
 2. Testing and implementation milestones that work for ESCOs and EDI Providers
 3. Stakeholder test plan, timelines, and communication protocols for successful testing processes
 - iii. Organizational Change Management
 1. Stakeholder engagement plan
 2. Process for supporting ESCOs during implementation and stabilization phases

4. **Cost Benefit Summary**
 - a. Cost/Benefit Overview
 - b. Costs and Financial Benefits
 - i. Break down the project costs
 - ii. Identify potential financial benefits
 - c. Non-Financial Benefits
5. **List of Abbreviations**
 - a. Compile a comprehensive list of abbreviations, acronyms, technical terms, etc., used throughout the document