Retail Access System Replacement – Business Plan Meeting Materials

This meeting was held on August 28, 2024, from 10:00 AM – 11:00 AM EST and provided an overview of the Business Plan for the Retail Access System Replacement Project. Please find the presentation materials attached along with a copy of the drafted Business Plan.

Planned Upcoming Stakeholder Engagement Activities:

- **September 11:** Deadline to complete the Retail Access System Replacement Business Plan Survey. Please note, this survey seeks input specifically on the drafted business plan, in contrast to the previous survey sent in late June, which focused on gathering feedback about the business plan outline. **CLICK HERE**
- 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

Q3 Stakeholder Input Meeting

August 28, 2024

Meeting Logistics

Your microphone will remain disabled until we reach the Q&A portion of the presentation. Please keep your microphone on mute when not speaking

Your camera has been disabled for the duration of the meeting

During the Q&A portion, raise your hand if you would like to ask a question. You can also participate by typing a question or comment into the chat

This meeting is solely for the Retail Access System Replacement project. Current business matters and production issues continue to be managed through your existing support resources (e.g., RetailAccess@coned.com for CECONY or RetailChoice@coned.com for ORU, etc.)

Agenda

Topics
Retail Access System Replacement Overview
Business Plan Overview
Focus on Testing
Business Plan Feedback
Next Steps
Q&A

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will conduct a **Retail Access System (RAS) Replacement Project** that will simplify the Company's current complex and outdated Retail Access systems.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 2025.
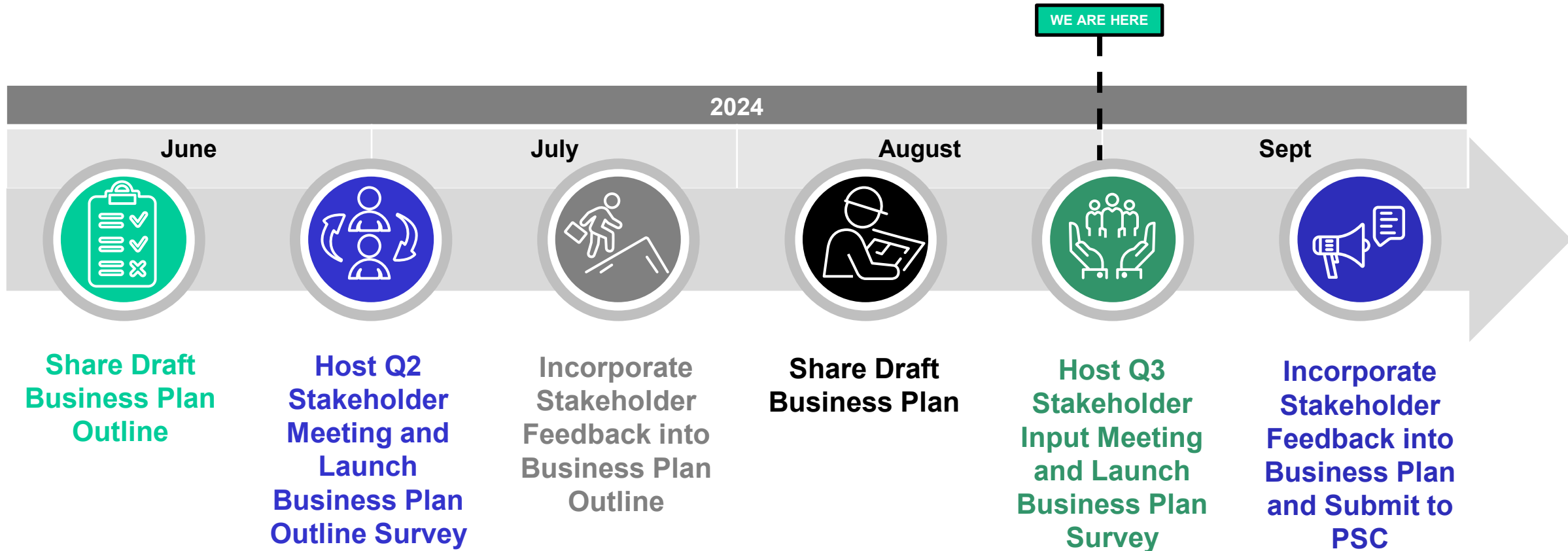
What is changing…	What is not expected to change…
- The Company's internal Retail Access Systems (RAIS and parts of TCIS) - Back-end infrastructure to support the new Retail Access System solution	- The Company's customer care and billing system - EDI framework and protocols - Processes for communicating with the Company on retail access business matters

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

WE ARE HERE

2024

June	July	August	Sept

Share Draft Business Plan Outline

Host Q2 Stakeholder Meeting and Launch Business Plan Outline Survey

Incorporate Stakeholder Feedback into Business Plan Outline

Share Draft Business Plan

Host Q3 Stakeholder Input Meeting and Launch Business Plan Survey

Incorporate Stakeholder Feedback into Business Plan and Submit to PSC

Business Plan Overview

Business Plan Overview

To prepare for the Retail Access System Replacement Project, the Company is developing a Business Plan to file with the PSC. The Business Plan includes the sections detailed below:

Executive Summary

– Implementation Plan and Proposed Schedule

– Cost Benefit Summary

Retail Access System Replacement Background

– NYS Policy Evolution for the Competitive Energy Marketplace

– Market and Transaction Growth

– Current Retail Access System Overview and Challenges

– Pre-Implementation Planning Effort

– Stakeholder Outreach Sessions and Results

– Company and Stakeholder Roles and Responsibilities

– Future Retail Access System Solution Overview

Project Delivery Process, Implementation Plan, and Proposed Schedule

– Benchmark Summary

– Overview of Delivery Process and Implementation Plan

– Test Plan and Scope

– Organizational Change Management

Cost Benefit Summary

– Cost Benefit Overview

– Financial Benefits

– Non-Financial Benefits

– Cost Model Assumptions and Limitations

Focus on Testing

Stakeholder Testing Expectations

Stakeholder Testing is an essential aspect contributing to the success the Retail Access System Replacement Project, which has been thoughtfully considered throughout the RASR Business Plan.

1 **What is Stakeholder Testing?**
- Allows external entities such as ESCOs, EDI Providers, EDI Billers and DERs to validate the end-to-end functionality of the new Retail Access system.
- The Company will work with external stakeholders to initiate, process, and respond to various EDI transactions.

2 **How will Stakeholder Testing work?**
- A phased approach will be implemented with a selected group of ESCOs, EDI Providers, Marketers, and Distributed Energy Resource Providers ("DERs") to manage the impact on ESCOs and EDI providers.

3 **What can Stakeholders expect?**
- Stakeholders will be provided with ample notice to set expectations, align on schedules, and understand participation required for successful stakeholder testing efforts.

Testing Leading Practices and Communications Protocols

Lessons learned around testing and implementation milestones, as well as test plan and communication protocols that work well for ESCOs and Electronic Data Interchange ("EDI") providers will be incorporated to provide a successful testing experience.

Testing and Implementation Milestones

- Phased Testing Approach:
  - An initial, select small set of ESCOs, EDI Providers, Marketers, and DERs will be engaged in the first round of Stakeholder Testing to extensively validate the various transactions.
  - A second round of stakeholder testing will be conducted to cover a broader range of external entities to further substantiate the stakeholder engagement and end-to-end validation.
- All testing will be performed in a non-production environment, initiated by an end-to-end connectivity test prior to any functional validation

Test Plan and Communication Protocols

- Set early and ongoing expectations and communications
- The test plan(s) will be reviewed with the stakeholders to account for the various business scenarios and edge cases
- Testing timeline will be closely coordinated with all participating external entities to accommodate schedules
- During the stakeholder testing phases, a cadence of communication will be set up to keep everyone informed and to continuously collect feedback for improvement

Business Plan Feedback

The Company has incorporated Stakeholder Feedback into the Business Plan

Stakeholders provided input into the Company's Business Plan Outline …

… and the Company incorporated this feedback into the drafted Business Plan

"We are requesting no loss of current reporting or functionality"

"There is no current functionality description or system use case defined [in the business plan outline]"

"How will the changes improve our [Stakeholder] experience?"

"On the timeline will we get more on the expected end or implementation date?"

- The **Future Retail Access System Solution Overview** section addresses that the future solution will maintain current functionality necessary to facilitate EDI Provider and ESCO processes.

- The functionality description and system use case defined are incorporated within the **Current Retail Access Overview and Challenges** section of the Business Plan.

- The changes to improve the ESCO experience are outlined in the **Non-Financial Benefits** section of the Business Plan.

- The timeline is included in the **Project Delivery Approach** section of the Business Plan.
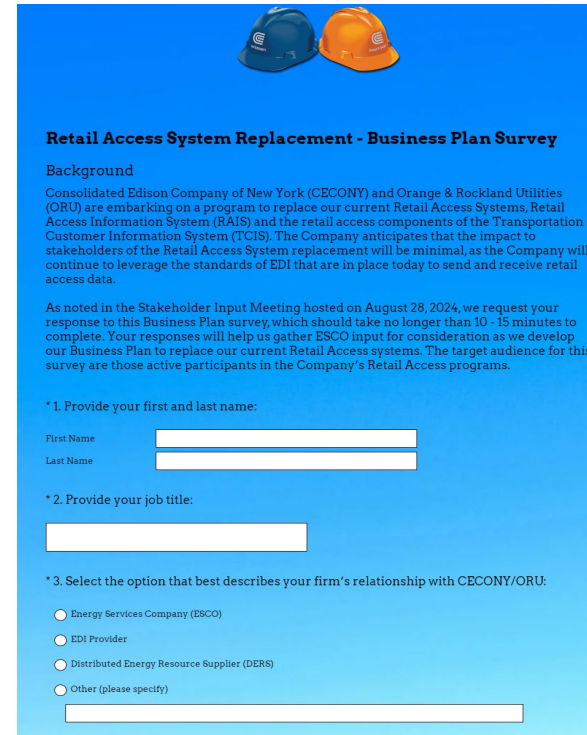
Business Plan Survey

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 throughout the Business Plan development process.

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

Business Plan Survey Timeframe

- **August 28:** ESCO Newsletter will be sent with link to Survey (hosted via SurveyMonkey)

- **September 11:** Business Plan Survey closes – all input must be submitted by this date

- **September 11 – September 30 :** Company will incorporate stakeholder feedback into Business Plan and submit to the PSC

Retail Access System Replacement - Business Plan 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 Stakeholder Input Meeting hosted on August 28, 2024, we request your response to this Business Plan 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.
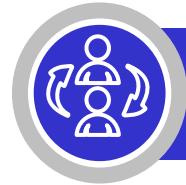
* 1. Provide your first and last name:

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)

Next Steps

Next Steps

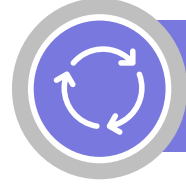|		
Late-June	Host Q2 Stakeholder Meeting and Launch Business Plan Outline Survey	✅
Mid-July	Incorporate Stakeholder Feedback into Business Plan Outline and Draft Business Plan	✅
Mid-August	Share Draft Business Plan with Stakeholders	✅
Late-August	Host Q3 Stakeholder Input Meeting and Launch Business Plan Survey	✅
Late-August – Mid-September	Solicit feedback from Stakeholders	
Late-September	Incorporate Stakeholder Feedback into Business Plan and Submit to PSC	

Questions & Answers