

CUSTOMER PROFILE

MEMPHIS LIGHT, GAS AND WATER IMPLEMENTS WORKFLOWS AND ELECTRONIC FORMS WITH BP LOGIX PROCESS DIRECTOR



Memphis Light, Gas and Water Division (MLGW) is the largest three-service municipal utility in the U.S. with more than 420,000 customers. Owned by the City of Memphis, MLGW has provided electricity, natural gas, and water service for residents of Memphis and Shelby County since 1939.



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The Tennessee Valley Authority (TVA), a federal agency that sells electricity on a nonprofit basis to its distributors, supplies electricity to MLGW. Memphis Light, Gas and Water is TVA's largest customer, representing 11 percent of TVA's total load. Natural gas, however, is the more common means of residential heating in the area. MLGW provides natural gas to more than 313,000 customers in Shelby County through a distribution network that measures more than 4,650 miles.

While some utilities obtain drinking water from surface lakes or rivers, MLGW supplies water from the Memphis aquifer, which contains more than 100 trillion gallons of water that are more than 2000 years old. MLGW operates one of the largest artesian well systems in the world with 10 water pumping stations and more than 175 wells that deliver water to more than 254,000 customers.



Cynthia Jones

Supervisor of Data Analytics and Software Integration

THE NEED TO AUTOMATE

Cynthia Jones, Supervisor of Data Analytics and Software Integration at Memphis Light, Gas and Water, is responsible for the Utility's data warehousing, business intelligence, third party software support and its eBusiness team, which includes outward-facing applications and iHub, the Utility's intranet. With a staff of 12, Jones supports the 2500 employees that access iHub for information ranging from forms, policies and "how to's" about each department as well as the corporate calendar, volunteer activities and enterprise web applications. Beyond her current set of responsibilities Jones' strategic roadmap involves embracing web technologies as well as mobile applications.

After launching its intranet and recognizing how well it had been received, the IT group decided to automate the workflows and forms it used to manage MLGW's business. Initially the group's idea was to eliminate the sheer volume of paper documents that the company used – and to put an end to the delays caused by routing forms to multiple approvers across multiple locations.

According to Jones, "An average form that MLGW uses has three signatures – and could have a maximum of eight. We typically wait a minimum of one day for documents to transfer between locations. As a result, one form could take two weeks to get all the signatures from the approximately 20 locations – and, at any point in time, we could be routing 100 different forms. The need to find a more effective and efficient solution was obvious."

When the Utility's former IT Vice President stepped in to serve as President for two weeks, she quickly recognized that there were far too many forms that needed to be routed and signed – and that the system was inefficient. As a result of that experience, identifying an automated solution became a priority for Jones and her team. "We have over 1000 forms that we use at any point in time. Every executive had a green initiative as part of his or her performance objectives. We needed to go paperless. We needed to find a forms-routing solution that would grow as we grew and could change to meet our needs," Jones recalled.



THE CRITERIA AND THE RFP

The IT team began by determining the scope of their effort and identifying the features they needed in a product. They began with web searches, Googled form-routing products and contacted twelve companies to request demos. With the elimination of hosted solutions, that list of twelve was narrowed to four and a Request for Proposal sent to the short list.

Pivotal to the selection of any product was the requirement that the software be browser-based, support both internal and external users and facilitate the company-wide initiative

to become a 'greener' organization. The key criteria for the new product included that it would: 1) Integrate seamlessly within MLGW's existing environment, 2) Provide electronic routing and approval at multiple levels, 3) Use LDAP

authentication, 4) Facilitate electronic signatures, 5) Be web-based with no client install, 6) Allow electronic templates to be easily converted, 7) Send out notifications via GroupWise, 8) Provide a publication process, 9) Reside on MLGW's hardware and 10) Be competitively priced.

While the IT team were champions of this initiative, the Environmental Engineering department became a key contributor from the business side. Looking at only the top 25 forms that the department routed (and that required

more than one signature), the department manager worked closely with Jones' team to develop a cost justification for the workflow and forms-routing solution they wanted to acquire.

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IMPLEMENTING A PHASED APPROACH

The competing products were evaluated based on the feature list and criteria the IT team had established. BP Logix Process Director was subsequently selected

to meet all the Utility's needs. "Most of the forms we use require multiple signatures – so the ability to authenticate users and provide electronic signatures was a critical aspect of our decision. Equally important was the ability to delegate approval, encrypt data and send email notifications to approvers," observed Jones.

The team decided on a phased approach to automating its forms and workflows. In Phase I they would convert 25 key forms. Phase II would address more complex, complicated and/or multi-page forms. "When we did the RFP we developed a strategy regarding which forms we would automate first—and in what order. Because we could tell which forms received the most hits on our intranet, those forms became part of Phase I," Jones remarked. Among those initial forms were forms dealing with network and systems security, requests for security access cards, employee separation notification, project cost justification, equipment request, electronic form request (used to request the development of an electronic form), publishing a web site, reserving a (conference) room and an HR Employee Movement form.

A QUICK RAMP UP

Within 90 days of training, Jones' team implemented the 'big bang approach,' rolling out a number of forms and workflows simultaneously. "One of the benefits we are aware of already is that it will be easier to survive audits! With our forms automated, there will be a lot less effort for both the auditors and us – and, of course, there are even more government regulations to address," Jones commented.

The team is now taking requests from departments across MLGW, with Finance currently its biggest internal customer. Already the Utility has 22 forms in production and being utilized – and everything it can handle for the remainder of



2012. In addition, there are eight processes in the queue for 2013. "Process Director has caught on and we haven't really promoted it yet. I get more and more requests every day – so I know that it is a product that our employees find easy to use," Jones remarked.

The team has also come to appreciate the workflows—and is teaching users that automation of a process will quickly highlight any flaws that exist in the current process.

"Taking a new form and making it electronic out the gate can cause problems. We recommend that our users work with a paper form for three months to truly learn what they need to know about their workflow – then we can automate and implement a successful process," reports Jones.

ACHIEVING MORE THAN ANTICIPATED

The MLGW team has found that they can do a lot more than initially anticipated. According to Jones, the flexibility of Process Director is one of its strengths, in addition to phenomenal support for the product.

"We are satisfied with the performance of Process Director especially as people are moving to smart devices. Being able to approve documents on-the-go without a physical piece of paper is invaluable. I think moving towards mobile devices is the way companies will remain competitive – and we are a service-oriented company," she concluded.

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