City of Seattle Request for Information # ITD-001-18
Addendum

Dated: 11/05/2018

The following is additional information regarding Request for Information # ITD-001-18, titled "Customer Information Service Workflow Improvements" released on 10/24/2018. The due date and time for responses will remain as 11/8/18 @ 4:00 PM (Pacific). This addendum includes both questions from prospective proposers and the City's answers, and revisions to the RFI. This addendum is hereby made part of the RFI and therefore, the information contained herein shall be taken into consideration when preparing and submitting a response.

Item #	Date Received	Date Answered	Vendor's Question	City's Answer	RFP Revisions
1	10/25/18	10/25/18	Are any vendor contracted systems used alongside CCB in the current environment, or is this all managed in-house?	All of the CCB environment is hosted on-premise. Most of it is managed in-house but we do have a support contract with InfoSys in Bellevue WA to assist in maintaining and enhancing the system.	None.
2	10/25/18	10/25/18	If the City were to decide to move forward with a solicitation after RFI responses, do you have any early estimate or goal for a potential solicitation release?	If we move forward with a purchase it would likely not happen until 1st quarter 2019. It is possible that the purchase will not be through an RFP.	None.
3	10/29/18	10/29/18	What is the estimated cost of the Customer Information Service Workflow Improvements?	We have budgeted approximately $520,000 for the software purchase and implementation services.	None.
4	10/29/18	10/29/18	Has the Department allocated funding for the Customer Information Service Workflow Improvements yet? If so, through which source (budget, CIP, state/federal grant, etc.)? If no funding is secured, which sources will be sought and when? If utilizing a grant, would you be able to specify which one?	Yes, this work is being jointly funded through CIP funds from the City's two utilities, Seattle Public Utilities and Seattle City Light.	None.
5	10/29/18	10/29/18	If a subsequent RFP is released, when does the Department anticipate releasing the solicitation?	If we move forward with a purchase it would likely not happen until 1st quarter 2019. It is possible that the purchase will not be through an RFP.	None.
6	10/29/18	10/29/18	When does the Department want this solution to be implemented by?	Implementation would not begin until 2nd quarter in 2019 at the earliest.	None.

7	10/29/18	10/29/18	What other systems will have to integrate or interface with the Customer Information Service Workflow Improvements, and what vendor provides each system?	There are at least two interfaces. One is the King County Parcel Viewer website (https://gismaps.kingcounty.gov/parcelviewer2/) that is used to confirm property ownership. The second is an in-house developed application that creates the service points for water, solid waste, draining and electrical services for new construction in Seattle.	None.
8	10/29/18	10/29/18	Does the Department need to replace or upgrade any of the integrated systems in the next 5 years? If so, which system and when?	The primary Customer Care and Billing system that the automation tool primarily interfaces with is being upgraded to a later version starting early 2019.	None.
9	10/29/18	10/29/18	Who is the technical contact and/or project manager for the Customer Information Service Workflow Improvements?	Mark Schiller. Mark.schiller@seattle.gov	None.
10	10/29/18	10/29/18	Does the Department anticipate any professional or consulting services may be needed through separate procurements to accomplish this effort? (i.e. project planning/oversight, PM, QA, IV&V, staff augmentation, implementation services etc.)? If so, what services does the Department desire and how do they anticipate to procure?	At this time we do not envision requiring any of those services from outside vendors.	None.
11	10/29/18	10/29/18	Is there any relationship between the New Customer Information Systems (NCIS) Support/Development of a Customer Self Service (CSS) and the Customer Information Service Workflow Improvements? If so, what is it?	No.	None.
12	10/29/18	10/29/18	Will the Customer Information Service Workflow Improvements be	No.	None.

			incorporated in to the new Customer Information Systems that the Seattle City Light (SCL) and Seattle Public Utilities (SPU) are pursuing?		
13	11/1/18	11/5/18	A. Currently how many Utility Account Representatives(UAR)are involved in entering data about solid waste bin garbage requests in CCB ? B. How many UAR are involved in starting a new electrical service ?	Current headcount fluctuates between 90 and 110 due to temporary employees. Normal headcount is 85. There are roughly another 60 users that interface with the CCB system that are not in the call center.	None.
14	11/1/18	11/5/18	A. How many requests do you receive for solid waste bin garbage on monthly basis ? B. How many Start (electrical) service processes your UARs do per month ?	For start new electrical service we processed 116,423 requests year to date, with months ranging from 9,000 to 16,000. For change solid waste bin size we processed 23,721 requests year to date and are consistently 2,000 to 2,500 each month.	None.
15	11/1/18	11/5/18	A. How much time it takes for creating a solid waste bin garbage request data in CCB ? B. Likewise, how much time it takes to complete one cycle of New Start service process data entry in CCB and other necessary applications like MDM ?	Actual time to create a Solid Waste bin change takes approximately 4 minutes. Solid waste transactions for multi-family/unit facilities is typically the same because those facilities still only have one service point (one garbage can, albeit a much bigger one). For new electrical service process time ranges from 5 -6 min. For multi-family facilities like apartments it will take 5-6 minutes per unit. So a 200 unit apartment it could take 5-6 minutes x 200. The steps are the same as there are no features in CCB to complete bulk changes like these. All times reflect actual time it takes to complete task in CCB/MDM from the point the customer's profile/premise is retrieved.	None.

				• For Solid Waste changes the time includes review of the collection information and multi item pages, review for previous or pending Field Activities. • For electrical service starts the time includes, reviewing the premise, reviewing Meter Data Management system, uploading the read and adding the fee. If the customer needs to be verified via Equifax, this will add additional time to the transaction.	
16	11/1/18	11/5/18	A. For both use cases mentioned in RFI, do you require any email notifications to be sent to users or stakeholders when UAR completes each each process? B. Do you require any reports generation while creating automation opportunity for the use cases ?	For start new electrical service – we do not require an email confirmation, but it would be nice to be able to do that. For change solid waste bin size - we do not require an email confirmation, but it would be nice to be able to do that.	None.
17	11/1/18	11/1/18	Can companies from Outside USA can apply for this (like, from India or Canada)?	Yes	None.
18	11/1/18	11/1/18	Will we need to come over there for meetings?	Yes, you will need to be onsite for at least a portion on the project.	None.
19	11/1/18	11/1/18	Can we perform the tasks (related to RFP) outside USA (like, from India or Canada)?	Possibly some portions of the project may be performed offsite (and outside the USA).	None.
20	11/1/18	11/1/18	Can we submit the proposals via email?	Yes, this RFI only accepts email proposals.	None.
21	11/1/18	11/1/18	Are there more than the 2 use cases listed in the RFI?	Yes, about 10 that are candidates for automation.	None.

22	11/1/18	11/1/18	Intention of the RFI to identify the "tool" (software) that will work, or identify the implementer?	Both.	None.
23	11/1/18	11/1/18	Are Proof of Concept's going to be considered?	Possibly.	None.
24	11/1/18	11/1/18	If a vendor wants to propose multiple solutions, can you package all in the same proposal response?	Yes. No need to send separate proposals.	None.
25	11/1/18	11/1/18	How detailed do the responses need to be (detailed architecture, timeline, diagrams)?	High level is fine.	None.
26	11/1/18	11/1/18	Do you have a preference for a cloud provider?	No, there is no preferred cloud provider.	None.
27	11/1/18	11/1/18	Do you plan on using internal resources or external resources for implementation workflows?	A combination of both to implement the workflows.	None.
28	11/1/18	11/1/18	Do you have a list of preferred external partners for implementing workflows?	No.	None.
29	11/1/18	11/1/18	What is the business problem you are trying to solve?	Human error, improving efficiency.	None.
30	11/1/18	11/1/18	Do you have success criteria defined?	Yes. See questions 29 and 38.	None.
31	11/1/18	11/1/18	Do you know what the error rates are?	In most cases, yes.	None.
32	11/1/18	11/1/18	How do you determine which workflows to automate?	We evaluate each workflow based on these criteria: a) complexity; b) time required to complete the workflow; c) frequency of requests; d) other changes we can make to improve the workflow using existing CCB functionality; e) other systems that must be used to complete the workflow; and f) are there clear rules for all steps in the workflow.	None.
33	11/1/18	11/1/18	Do you have specific numbers for employee training?	6-8 weeks to train an employee?	None.

34	11/1/18	11/1/18	Do you prefer on-premise or cloud or hybrid solutions?	Preference is on-premise, but open to all solutions.	None.
35	11/1/18	11/1/18	If on-premise, what kind of environments are you looking for?	There are 4 existing environments, production, test, evaluation, and development. We would like to understand how your licensing/cost model works for non-production environments.	None.
36	11/1/18	11/1/18	Do you have an estimated timeline of when this work would start?	Target RFP release in 2019, work to begin late 2019.	None.
37	11/1/18	11/1/18	How long will it take you to get budget approval for this?	We have approved budget today.	None.
38	11/2/18	11/5/18	Please explain the scope of the problem and the criteria by which success will be measured and the agreed upon deliverables for your sponsor? - Tell us what's driving the City's interest in RPA? - What explicitly do you need from your automation project?	We are measuring success through these objectives below. We expect that improvements in these objectives translate into: a. Less time utility customers need to be on the phone and/or time required to get their problems resolved. b. More consistent results with fewer errors. c. Happier CCB users/staff. **Objective 1:** Reduce the number of keystrokes/clicks CIS users must perform across all steps for each CIS workflow. **Objective 2:** Reduce the total elapsed time from the start of each workflow to the completion of each workflow. **Objective 3:** Reduce the total elapsed time to complete each individual step of a multiple	None.

				step workflow. A step is defined to be the portion of the complete workflow that is performed by a single staff member in a single session/setting. For example, the customer service agent enters the initial request step, a meter reader completes the meter reading step, and back office staff reviews and completes the workflow. **Objective 4:** Reduce workflow error rates. **Objective 5:** Simplify training for each workflow.	
39	11/2/18	11/5/18	What benefit do expect to achieve? - Why is that benefit important? - How would that help your operations and metrics?	See answer to question 38.	None.
40	11/2/18	11/5/18	How are you doing your research in-house or are you working with a 3rd party consultant to determine which workflows to automate?	This work is being performed in-house.	None.
41	11/2/18	11/5/18	Have you completed any process optimization studies, and can you share the results with us?	We haven't finished that work yet.	None.
42	11/2/18	11/5/18	Have you tried RPA for any use cases today?	No.	
43	11/2/18	11/5/18	Do you have an RPA POC in the works today? If so, what stage are you currently?	No. That may be something we pursue after the RFI.	
44	11/2/18	11/5/18	Have you launched any RPA software into production? If so, what benefits have you achieved?	No.	

45	11/2/18	11/5/18	Concerning the 2 use cases in the RFO, could you provide details in terms of the number of people, volume of tasks, hours used currently to complete them in total? Please include seasonal spikes or high-volume situations.	See answers to questions 14 and 15.	
46	11/2/18	11/5/18	For server sizing can you project how many Robots you'll need over the next two years?	For purposes of this RFI, assume we'll have 5 workflows that we will automate, 145 total users, and server installed on-premise (unless that's not an option for your software solution in which case propose an off-premise solution).	
47	11/2/18	11/5/18	Is the CCB application Web based or Thick Client?	Web based.	
48	11/2/18	11/5/18	Do users access the application through a Terminal Server/RDP or from their local machines?	From their local machines.	
49	11/2/18	11/5/18	Do you have a governance structure in place for RPA?	Yes.	
50	11/2/18	11/5/18	Is the CCB system single sign-on enabled?	Yes. Actions taken in CCB are tracked by the user logged on and performing those actions.	
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