

Exhibit to Agenda Item #3

Board Policy Committee and Special SMUD Board of Directors Meeting
Wednesday, November 14, 2018, scheduled to begin at 5:30 p.m.
Customer Service Center, Rubicon Room

Workforce Optimization Initiative

- What is Workforce Optimization?
- Current Challenges
- Expected Benefits
- Goals & Objectives
- Today / Future
- Scope
- Work Groups
- Workflow / Impacts
- ClickSoftware
- Next Steps

What is Workforce Optimization?

Workforce Optimization (WFO) is an integrated, enterprise solution for scheduling and mobile work management for our field forces.

It includes:

- Better utilization of SAP as our work management system
- A new scheduling and field mobile work management tool
 - Bundle work and optimize resources
 - Spatial planning capability
 - Dispatching
 - Creating, updating and closing work in the field

Current Challenges

- Lack of visibility of work in-progress, completed, or scheduled
- No centralized scheduling tool for sharing resources or coordinating work
- Numerous, disparate work management processes, many paper-based
- Field forces lacking mobile tools for obtaining work assignments, gathering field data, reporting time
- Lack of real-time reporting for labor and materials variances per job
- Lack of detailed unit cost reporting by work type

Expected Benefits

- Prioritize work by:
 - Providing accurate visibility of workload demand and capacity
 - Maximize resource utilization and effectiveness
 - Enable accurate measurements of crew utilization
- Centralize workforce scheduling and dispatching
 - Provide real-time workforce scheduling to achieve optimal demand
- Improve operational efficiencies & customer experience and reduce operating costs
 - Enable standardization of processes, reporting and technology
- Improve service control and visibility
- Improve compliance through better document management and enhanced reporting capability




Goals and Objectives

Workforce Optimization will enable:

- Maximize resource management and operational performance, SD-2, 5, 6 & 8
- Streamline processes, SD-2, 5 & 8
- Improve customer service, SD-5
- Reduce costs SD-2, 5

Today / Future – Workforce Optimization

Today



No enterprise scheduling or dispatching tool for planned work

- No scheduled work
- Highly manual/ paper dispatching process
- No visibility to assignments or status
- Limited data available to field

Future

ClickSoftware
Scheduling
and Mobile



- Visibility to scheduled work and assignments across enterprise
- Enhanced mobile experience for field
- Real-time work status / updates from the field
- One system of record for work completion - SAP



Asset and Work Management

Geographical Information System (GIS)

Enterprise Document Management (EDM)

Workforce Optimization - Scope

Workforce Optimization is comprised of 5 projects:

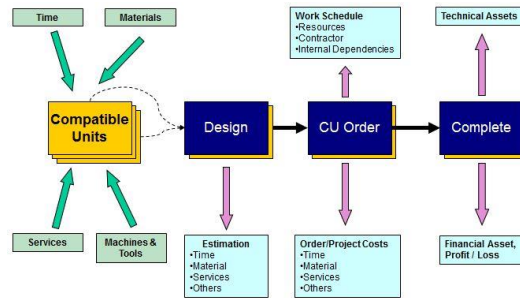
- Project 1 – Work Management (SAP)
- Project 2 – Workforce Scheduling
- Project 3 – Mobile Work Management
- Project 4 – Annual Line Patrol – *COMPLETE*
- Project 5 – Distribution Inspection Mobility

ClickSoftware

Foundational / Companion Projects:



SAP Enterprise Asset Management (EAM)



SAP Compatible Units (CU)



Data Analytics

Work Groups in scope (26 total)

Customer

- Revenue Protection

Line Assets

- Cable Injection & Replacement
- Cable Locators
- Inspectors – Miscellaneous
- Inspectors – Project Readiness (pre-fielding)
- Inspectors – Utility Compliance
- Maintenance Crews
- New Business
- Pole Replacement
- Service Crews
- Transmission & Large Construction
- Troubleshooters
- Underground Cable Faults
- Vegetation Management

Power Generation

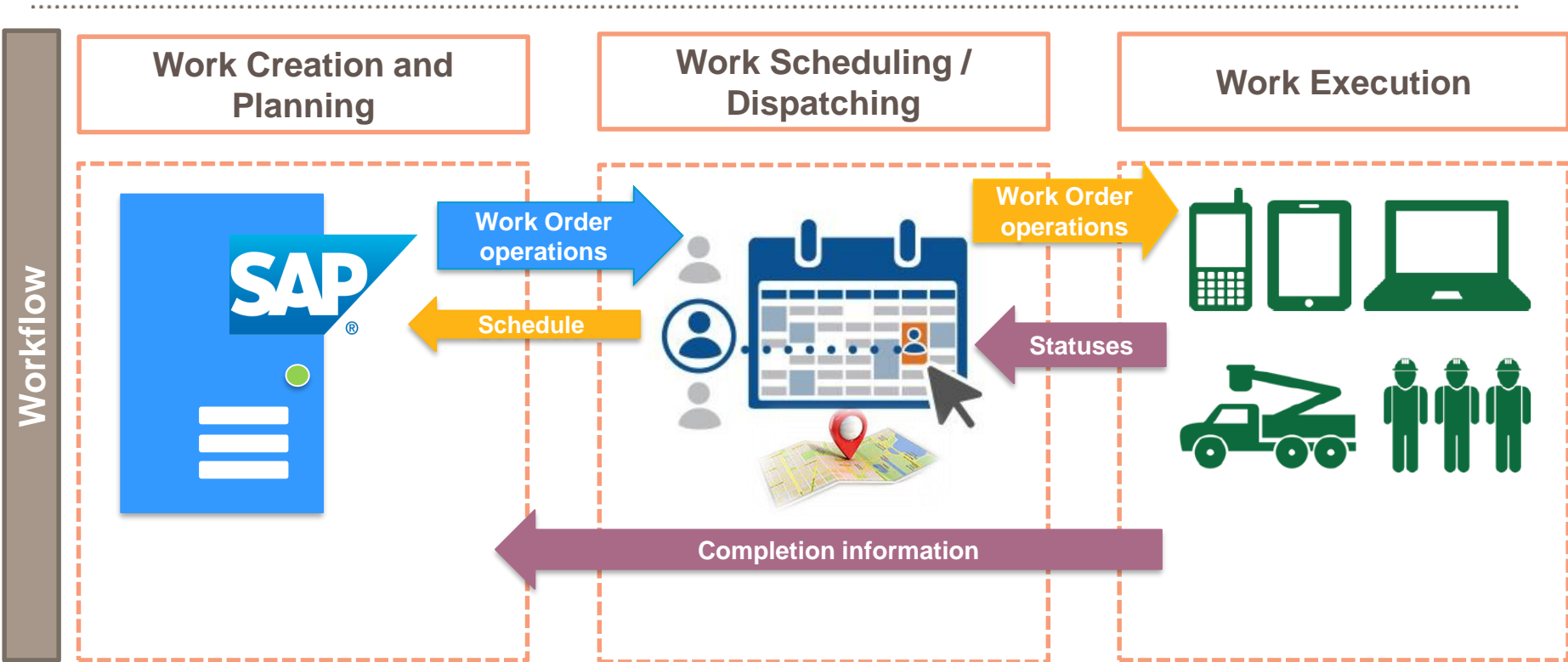
- Gas Pipeline Operations
- Hydro Maintenance and Operations

Substation, Telecom & Metering

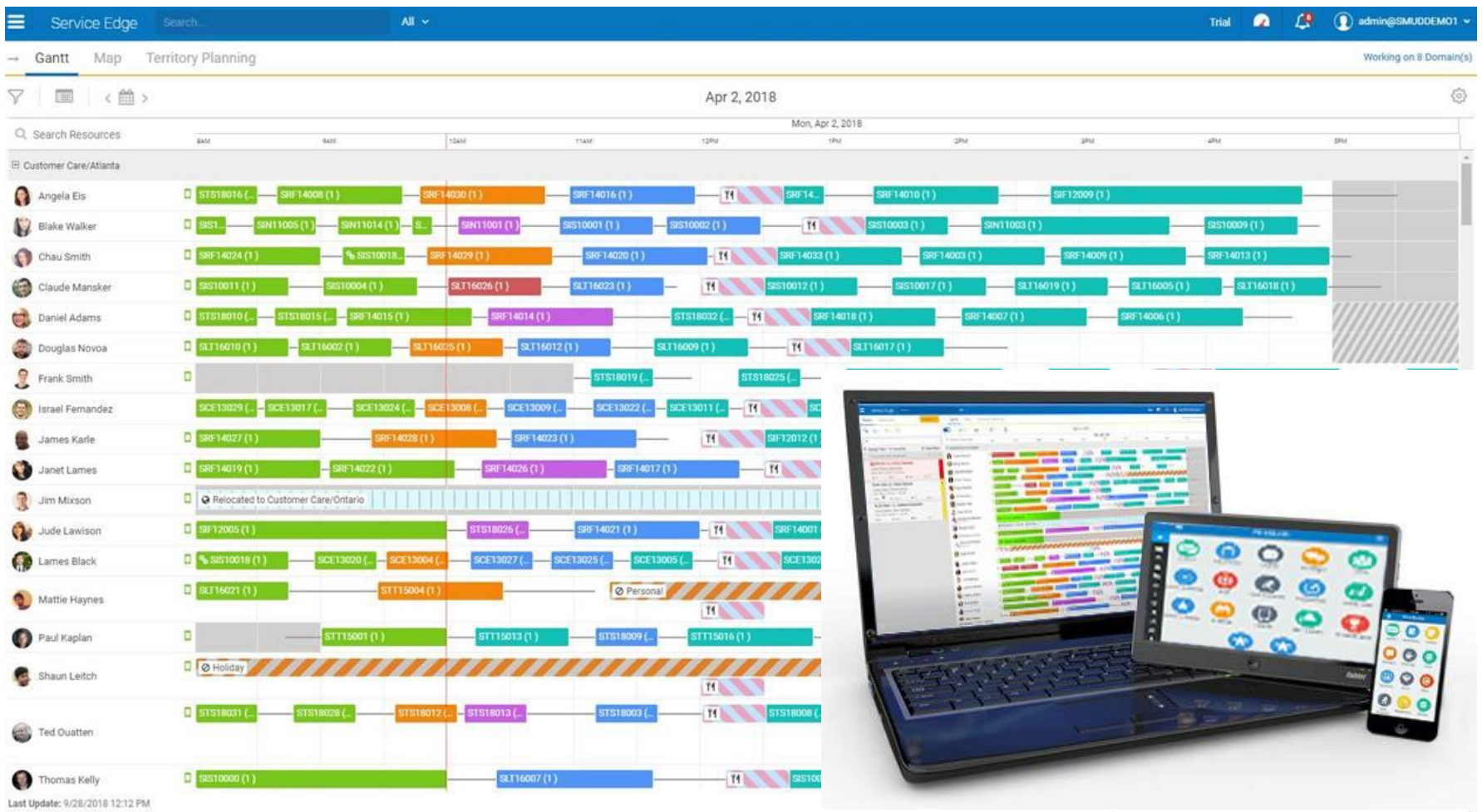
- Construction Management Inspectors (CMI)
- Electrical Techs
- Field Metering – Customer Service Field Representatives
- Field Metering – Meter Techs
- Hazmat
- Maintenance
- Network
- Small Survey
- Station Recorders
- Telecom

Approximately 450 field and 100 office staff impacted

WFO – Future State Workflow



ClickSoftware – Scheduling & Mobile



Next Steps

Achieved Milestones

- Purchased ClickSoft – scheduling and mobility
- Pre-work / Process Mapping
- SAP Work Management Proof of Concept (POC)
- Annual Line Patrols (ALP)

Planned Milestones

- | | |
|---|--------------------|
| • Distribution Inspection Mobility | Q4 2018 – Q2 2019 |
| • SAP Work Management / Process Readiness | Q4 2017 – On-Going |
| • Integrate ClickSoft (first 5 work groups) | Q3 2019 – Q2 2020 |
| • Integrate remaining 21 work groups | Q2 2020 – Q4 2021 |