

Exhibit No.:
Issue: Customer Forward
Witness: Forrest Archibald
Type of Exhibit: Surrebuttal Testimony
Sponsoring Party: Evergy Missouri Metro and Evergy
Missouri West
Case No.: ER-2022-0129 / 0130
Date Testimony Prepared: August 16, 2022

MISSOURI PUBLIC SERVICE COMMISSION

CASE NO.: ER-2022-0129 / 0130

SURREBUTTAL TESTIMONY

OF

FORREST ARCHIBALD

ON BEHALF OF

EVERGY MISSOURI METRO and EVERGY MISSOURI WEST

**Kansas City, Missouri
August 2022**

SURREBUTTAL TESTIMONY

OF

FORREST ARCHIBALD

Case No. ER-2022-0129 / 0130

1 **Q: Please state your name and business address.**

2 A: My name is Forrest Archibald. My business address is 1200 Main, Kansas City, Missouri
3 64105.

4 **Q: By whom and in what capacity are you employed?**

5 A: I am employed by Evergy Metro, Inc. and serve as Director – Customer Operations Projects
6 for Evergy Metro, Inc. d/b/a as Evergy Missouri Metro (“Evergy Missouri Metro”), Evergy
7 Missouri West, Inc. d/b/a Evergy Missouri West (“Evergy Missouri West”), Evergy Metro,
8 Inc. d/b/a Evergy Kansas Metro (“Evergy Kansas Metro”), and Evergy Kansas Central,
9 Inc. and Evergy South, Inc., collectively d/b/a as Evergy Kansas Central (“Evergy Kansas
10 Central”) the operating utilities of Evergy, Inc.

11 **Q: On whose behalf are you testifying?**

12 A: I am testifying on behalf of Evergy Missouri Metro and Evergy Missouri West
13 (collectively, the “Company”).

14 **Q: What are your responsibilities as the Director – Customer Operations Projects?**

15 A: I provide Project Management Office (PMO) subject-matter-expertise on strategic
16 initiatives for the Company. In 2015, I was assigned the Project Director role for the One
17 CIS Program. The Project Director role was responsible for delivering One CIS and

1 subsequent Customer Forward Program (CFP) within the confines of the control budget,
2 master schedule and the Project's Guiding Principles as defined by the Project Charters.

3 **Q: Please describe your education, experience and employment history.**

4 A: I earned an Associates and Bachelors of Science degree from Park University, majoring in
5 Management and Finance. I hold three professional certifications from various industry
6 accredited sources; PMI-PMP (Professional Project Management Certification from the
7 Project Management Institute), PMI-SP (Professional Planning and Scheduling
8 Certification from the Project Management Institute) and EVP (Professional Earned Value
9 Management Certification from Association for Advancement of Cost Engineering
10 International – AACEi). I have over 20 years of experience in managing various aspects
11 within a Project's lifecycle; including but not limited to: development and implementation
12 of cost tracking systems; forecasting and estimating project costs; developing and
13 maintaining project schedules; contract negotiations (including administration including
14 interpretation and management); and execution of general project management
15 responsibilities. I began my career in Project Management in the early 1990's with Wichita
16 Steel & Precast Erection Company. In 2004, my focus switched to the utility sector as I
17 began providing services to American Electric Power where I was accountable for Project
18 Controls on projects ranging in size from \$25 million to \$600 million.

19 In 2006, I began my employment at Kansas City Power & Light Company
20 ("KCP&L") in the Construction Management Department. I have held multiple positions
21 during my tenure at KCP&L but all positions have encompassed project management,
22 project controls and/or oversight services on the large capital investment projects managed
23 by KCP&L (e.g., Iatan, Spearville, LaCygne, Transource's Iatan to Nashua and Mid-West

1 Transmission Projects, Corporate Relocation, Wolf Creek, Jeffrey Energy Center, One
2 CIS, Customer Forward, etc.).

3 **Q: Have you previously testified in a proceeding at the Missouri Public Service**
4 **Commission (“MPSC” or “Commission”) or before any other utility regulatory**
5 **agency?**

6 A: Yes, I testified in the 2010 rate cases for KCP&L and KCP&L Greater Missouri Operations
7 Company (“GMO”) (respectively, ER-2010-0355 and ER-2010-0356), 2014 GMO rate
8 case (ER-2014-0370), and 2018 KCP&L and GMO rate cases (respectively, ER-2018-0145
9 and ER-2018-0146).

10 **Q: What is the purpose of your surrebuttal testimony?**

11 A: The purpose of my surrebuttal testimony is to respond to rebuttal testimony of the Office
12 of the Public Counsel (“OPC”) witnesses Marke and Robinette regarding the Company’s
13 Customer Forward Program and One CIS Program.

14 **CUSTOMER FORWARD PROGRAM**

15 **Q: What is a Customer Information System (CIS) and why is it important to a utility?**

16 A: A customer information system or CIS interlinks the customer information to the
17 consumption and metering processes all the way through to payments, collections and other
18 downstream processes that affect a utility’s ability to support state commission
19 requirements and report revenue. Customer information systems can include multiple sub-
20 systems depending on the regulatory and operational requirements but at a minimum are
21 inclusive of the metering and consumption, billing, and collections functions and online

1 portals for customers to perform self-serve functions like bill payment and energy usage
2 awareness, among others.

3 **Q: What was One CIS and subsequent Customer Forward Program (CFP)?**

4 A: The One CIS Program consolidated the two obsolete CIS systems that served Evergy
5 Kansas Metro, Evergy Missouri Metro and Evergy Missouri West into a modern platform
6 while integrating multiple system and subsystems underneath this Solution. The Customer
7 Forward Program or CFP incorporated changes including new functionality to One CIS to
8 allow Evergy Kansas Central to leverage the foundational architecture, applications, and
9 functionality that was deployed in 2018.

10 **Q: Do you agree with OPC witness Marke's description of Westar's Customer Forward
11 Program on p. 40 of his rebuttal testimony?**

12 A: Not in its entirety, no. I think OPC witness Marke's description of Evergy's Customer
13 Forward Program ("CFP") mistakenly infers the scope of the program was simply to
14 migrate or move Evergy Kansas Central (Legacy Westar) customer data into the One CIS
15 deployed by Evergy Kansas Metro, Evergy Missouri Metro and Evergy Missouri West
16 (Legacy KCP&L) in 2018. The conversion of Evergy Kansas Central customers was an
17 extremely small subset of the overall scope, effort, and complexity of CFP. Marke's
18 description doesn't address the standardization and integration of processes and technology
19 within the CFP, including but not limited to: Customer Information Integration and
20 Consolidation, Customer Self Service and Notification Preference, Meter Data
21 Management (MDM), Interfaces, etc. as reflected on slide 9 as presented at the July 2020
22 CFP Update meeting with Missouri Public Service Commission ("MPSC") Staff ("Staff")
23 and OPC. See attached **Schedule FA-1** for the July 2020 presentation. OPC witness

1 Robinette makes a similar error when he describes the CFP as limited to benefiting Westar
2 customers only on p. 2 of his surrebuttal.

3 **Q: What was the scope of the CFP?**

4 A: At a high-level, the scope of CFP was to ensure Evergy Kansas Central customer
5 information was incorporated into the Solution and address the incremental functional
6 and/or technical differences between Evergy’s Kansas Central CIS and Evergy Missouri
7 Metro and Evergy Missouri West’s One CIS. This means addressing each application
8 within the existing One CIS; Customer Care & Billing system (“CCB”), Customer Self
9 Service (“CSS”), MDM, Intelligent Voice Assistance (“IVA/IVR”), Operational & Device
10 Management (“ODM”), Customer Relationship Manager (“CRM”), Knowledge
11 Management tool (“BEN”), not to mention all the third-party interfaces.

12 **Q Do you agree with OPC witness Marke’s contention at p. 40 of his rebuttal testimony**
13 **that Evergy is charging its Missouri customers for the IT conversion of its Kansas**
14 **customers?**

15 A: No, because the cost to perform the actual conversion activities of the Evergy Kansas
16 Central customer data is not included within the ~\$131 million in capital expenditures
17 corresponding to the CFP. Appropriately, however, Missouri customers are being charged
18 their allocated share of the One CIS and the CFP that are in place to serve them. Likewise,
19 Kansas customers are being charged their allocated share of the One CIS and the CFP that
20 are in place to serve them. See the surrebuttal testimony of Ronald Klote for additional
21 discussion of the allocated costs.

1 **Q: Why wasn't the conversion of Kansas customers included within the CFP's capital**
2 **expenditures?**

3 A: According to Evergy's Property Accounting Policy (Accounting for Licensed or Internally
4 Developed Computer Software and Cloud Computing Arrangements) and technical
5 accounting guidance from FERC's Accounting Standards (Codification ("ASC") 350-40 –
6 Internal-Use Software, formerly AICPA Statement of Position ("SOP") 98-1; ASC 720-45
7 – Business and Technology Reengineering, formerly EITF 97-13) the scope of data
8 cleansing and the act of data conversion are not capitalizable expenditures.

9 **Q: Didn't the One CIS Program deployed in 2018 have all the necessary functionality that**
10 **Evergy Kansas Central customers required?**

11 A: No. The One CIS Program was solely focused on Evergy Kansas Metro, Evergy Missouri
12 Metro and Evergy Missouri West tariffs, laws, regulatory, territory, rates, etc. Said another
13 way, Evergy Kansas Metro, Evergy Missouri Metro and Evergy Missouri West did not
14 increase the scope of One CIS to include the functionality required to serve Evergy Kansas
15 Central existing customers.

16 **Q: Were the Staff and OPC aware of this strategy and approach?**

17 A: Yes. It was discussed on multiple occasions, during in-person meetings between Evergy,
18 Staff and OPC as early as 2018. In fact, these discussions continually came up during the
19 One CIS Program status updates, quarterly customer operations updates, and then at the
20 July 2020 CFP Update meeting. Because Evergy Kansas Metro, Evergy Missouri Metro,
21 Evergy Missouri West, and Evergy Kansas Central were not certain that the merger would
22 be approved, One CIS did not include Kansas Central requirements. If Evergy Kansas
23 Metro, Evergy Missouri Metro and Evergy Missouri West included requirements for

1 Evergy Kansas Central into the One CIS Program, it could have arbitrarily inflated the
2 costs and risks to a successful implementation.

3 **Q: Was there any duplicate scope between Evergy Kansas Metro, Evergy Missouri**
4 **Metro, Evergy Missouri West and Evergy Kansas Central?**

5 A: Absolutely. Since we were both investor-owned electric utilities and performed similar
6 functions like billing, meter consumption, and credit & collections, there were redundant
7 or similar scoping requirements identified. And since Evergy Kansas Metro, Evergy
8 Missouri Metro and Evergy Missouri West had already implemented those duplicate
9 features with the deployment of One CIS, Evergy Kansas Central customers would now
10 receive benefit from items like those found on slide 6, such as real-time payments,
11 summary bills, adjustable due dates, budget billing for small commercial customers, etc.,
12 without paying for the initial implementation costs.

13 **Q: Why should Evergy be allowed to allocate the costs of the CFP to its Missouri**
14 **customers?**

15 A: As discussed within OPC data request 8555 in case ER-2022-0129, “Since the functionality
16 within both customer information system implementations (One CIS Program & CFP)
17 cannot be separated and benefits all jurisdictions; this aligns with the way designer created
18 and packaged the industry CIS.” Meaning as functionality is implemented, customers have
19 access and receive the benefit of the functionality. So, the features implemented with CFP
20 provided incremental functionality to Evergy Kansas Metro, Evergy Missouri Metro and
21 Evergy Missouri West, just as the opposite is true (i.e., Evergy Kansas Central benefits

1 from functionality for the original installation of One CIS and is paying its allocated share
2 of those system and implementation costs).

3 A simple example to demonstrate the interrelation of the two projects was Evergy
4 Kansas Central's adoption of the "V" or the industry's new structure between the person,
5 premise, and account. This structure did not exist within Evergy Kansas Central's custom-
6 built Customer CIS and Evergy Kansas Central customer received the benefit.. Similar can
7 be said for Evergy Kansas Metro, Evergy Missouri Metro and Evergy Missouri West
8 customers as they benefited from more self-serve options via the phone including 24x7
9 Spanish speaking availability with the adoption and integration of Evergy Kansas Central's
10 intelligent voice assistance or IVA during CFP.

11 **Q: Why were One CIS & CFP so relatively close in expenditures?**

12 A: The first consideration is how interrelated the two programs were to each other. CFP
13 leveraged the same applications deployed during the One CIS Program but CFP added
14 functionality that benefits all jurisdictions. Second, the same system integrators and third-
15 party vendors that made One CIS successful were used for CFP, where feasible. Third, the
16 timeline for both programs were similar in total duration length; and the fourth and final
17 consideration would be total number of resources engaged and their corresponding costs.
18 One must also take into consideration that the labor costs for One CIS were 2015 versus
19 comparing to Customer Forward starting in 2019. All these factors contribute to the final
20 cost of the two programs being similar; however, CFP would have been much larger, more

1 complex, longer-duration, and ultimately; a higher-risk and more expensive investment if
2 One CIS has not been completed as a predecessor program.

3 **Q: What is your recommendation?**

4 A: Because the benefits and functionality from both the One CIS and CFP ultimately benefited
5 all customers, and the Solution that exists today still serves all jurisdictions, I support the
6 Company's approach for allocation of the combined One CIS and CFP costs to all
7 jurisdictions through the common use billing approach. Company witness Klote addresses
8 concerns from the OPC regarding the allocation of CFP costs. In addition, the adjustment
9 found in OPC witness Marke's rebuttal testimony (p. 41) should be rejected by the
10 Commission as Missouri customers benefited from the CFP and One CIS programs.

11 **Q: Does that conclude your testimony?**

12 A: Yes, it does.

**BEFORE THE PUBLIC SERVICE COMMISSION
OF THE STATE OF MISSOURI**

In the Matter of Evergy Metro, Inc. d/b/a Evergy)
Missouri Metro’s Request for Authority to) Case No. ER-2022-0129
Implement A General Rate Increase for Electric)
Service)

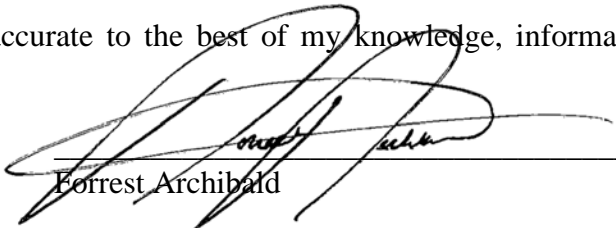
In the Matter of Evergy Missouri West, Inc. d/b/a)
Evergy Missouri West’s Request for Authority to) Case No. ER-2022-0130
Implement A General Rate Increase for Electric)
Service)

AFFIDAVIT OF FORREST ARCHIBALD

STATE OF MISSOURI)
) ss
COUNTY OF JACKSON)

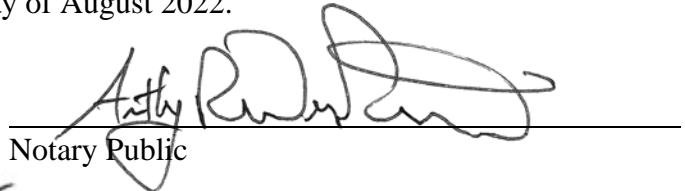
Forrest Archibald, being first duly sworn on his oath, states:

1. My name is Forrest Archibald. I work in Kansas City, Missouri, and I am employed by Evergy Metro, Inc. as Director – Customer Operations Projects.
2. Attached hereto and made a part hereof for all purposes is my Surrebuttal Testimony on behalf of Evergy Missouri Metro and Evergy Missouri West consisting of nine (9) pages, having been prepared in written form for introduction into evidence in the above-captioned docket.
3. I have knowledge of the matters set forth therein. I hereby swear and affirm that my answers contained in the attached testimony to the questions therein propounded, including any attachments thereto, are true and accurate to the best of my knowledge, information and belief.



Forrest Archibald

Subscribed and sworn before me this 16th day of August 2022.



Notary Public

My commission expires: 4/26/2025





Evergy *Customer Forward* Program Update

July 2020





- Safety Moment
- The Journey
- Goals, Objectives, Guiding Principles
- Governance Structure & Logistics
- Program Overview
 - Approach
 - Scope
 - Timeline
 - Financials
- Current Status

Safety Moment – Corona Virus Disease

How to Protect Yourself and Others from COVID-19

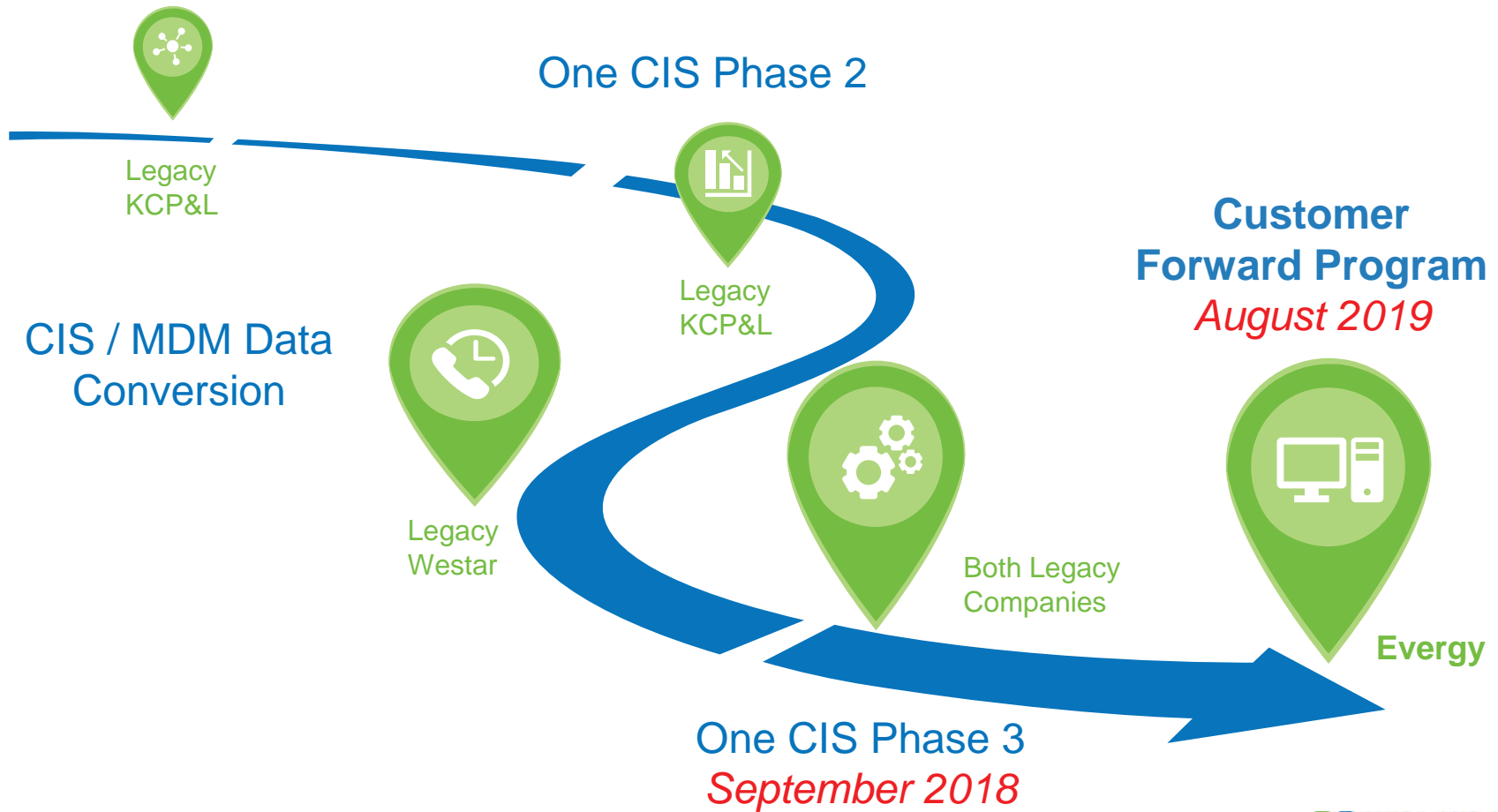
- The best way to prevent illness is to avoid being exposed to the virus.
- The virus is spread mainly from person to person between people who are in close contact with one another (within about 6 feet) through respiratory droplets when an infected person coughs, sneezes, or talks.
- COVID-19 may be spread by people who are not showing symptoms.
- Put distance between yourself and people outside your home. Don't gather in groups.
- Avoid close contact with people who are sick, even inside your home. If possible, maintain 6 feet between the person who is sick and other household members.
- Avoid touching your eyes, nose, and mouth with unwashed hands.
- Wash your hands often with soap and water for at least 20 seconds after you've been in a public place, or after blowing your nose, coughing, or sneezing.
- If soap and water are not available, use a hand sanitizer that contains at least 60% alcohol.
- Remember to cover your mouth and nose with a tissue when you cough or use the inside of your elbow.
- Cover your mouth and nose with a cloth face cover when around others.
- Clean and disinfect frequently touched surfaces daily. Use a detergent or soap and water prior to disinfection. Then use a household disinfectant.

The Journey



The Journey

One CIS Phase 1



One CIS Phase 1 & 2 – Customer Benefits

Customer Benefits

- ✓ Single bill format
- ✓ Budget billing for small commercial customers; and reduced volatility around annual true-up
- ✓ Adjustable due date for bills
- ✓ Summary Billing for customers
- ✓ Customer information is more readily available to Customer Reps to respond to customer requests
- ✓ Platform for offering dynamic pricing programs such as Time of Use (TOU) rates
- ✓ Recurring credit card payment capabilities for Evergy Missouri West customers
- ✓ Real-time payments
- ✓ One time bank account payments can be accepted using savings accounts in addition to checking

One CIS Phase 1 & 2 – Customer Benefits

Customer Self-Service Benefits

- ✓ Enhanced access to customer usage information (monthly, interval, and unbilled usage)
- ✓ Improved billing and payment options for all customers (better integration between channels and real-time payment processing)
- ✓ More notifications and alerts via digital channels with improved preference center for customers to manage preferences

Program Goals, Objectives, Guiding Principles



Program Goals and Objectives

The **Customer Forward Program (CFP)** consists of multiple projects executed simultaneously under one Project Management umbrella to achieve efficiencies, cost effectiveness and an improved customer experience.

The goal of Evergy Customer Forward Program (CFP) is dedicated to integrating customer systems to create a seamless and improved experience for Evergy's customers and our employees.

To achieve this goal the CFP will:



Convert all legacy data to support the new applications installed



Integrate and standardize various business processes and technology at Evergy, including but not limited to:

- Customer Information Integration and Consolidation
- Customer Self Service and Notification Preference
- Meter Data Management (MDM)
- Interfaces



Optimize end to end processes – optimize entire organization rather than individual business silos



Simplify processes – rationalize redundant, divergent processes



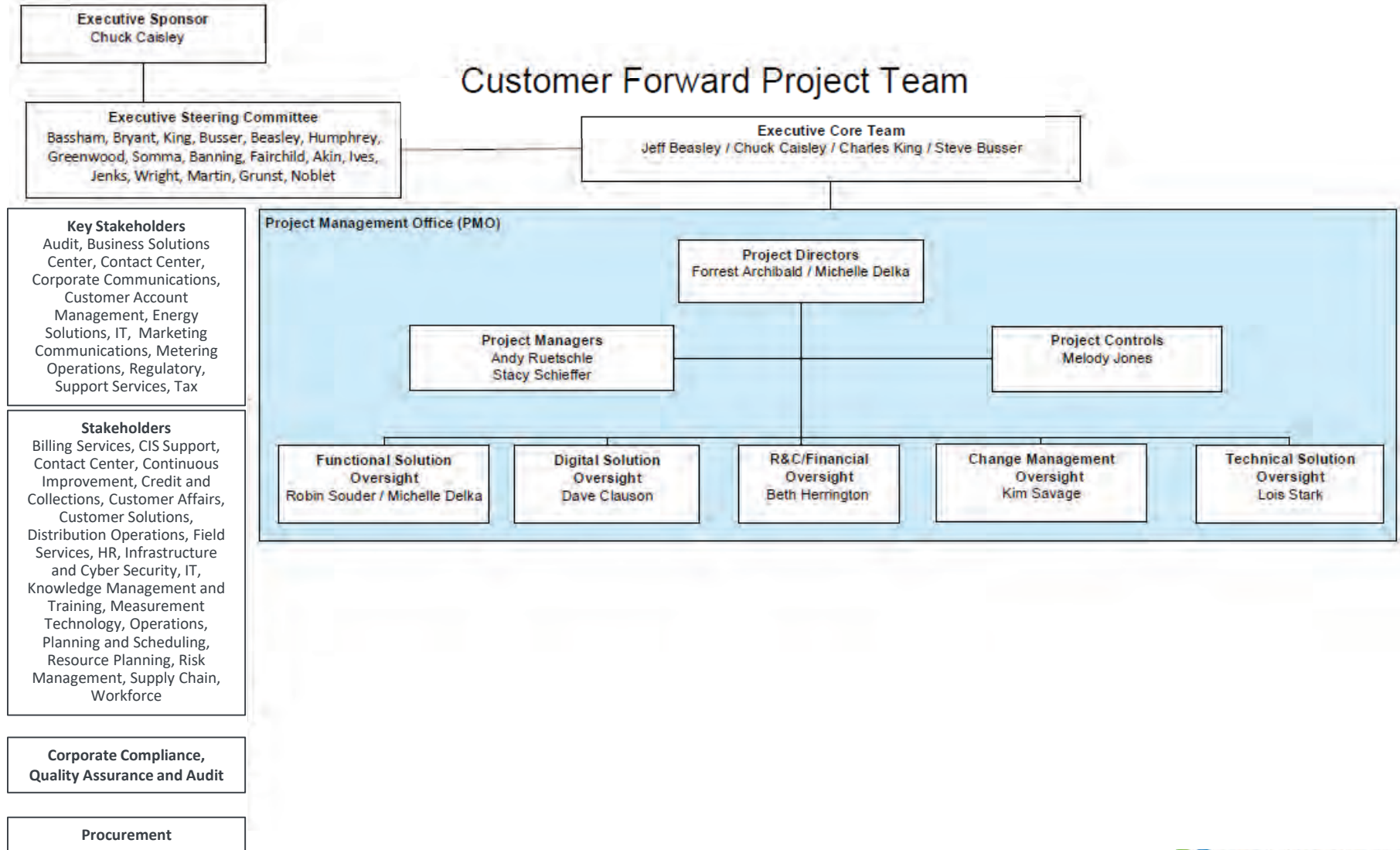
Key Guiding Principles



Governance Structure and Logistics



Governance Structure – Level 1



One Team, One Goal

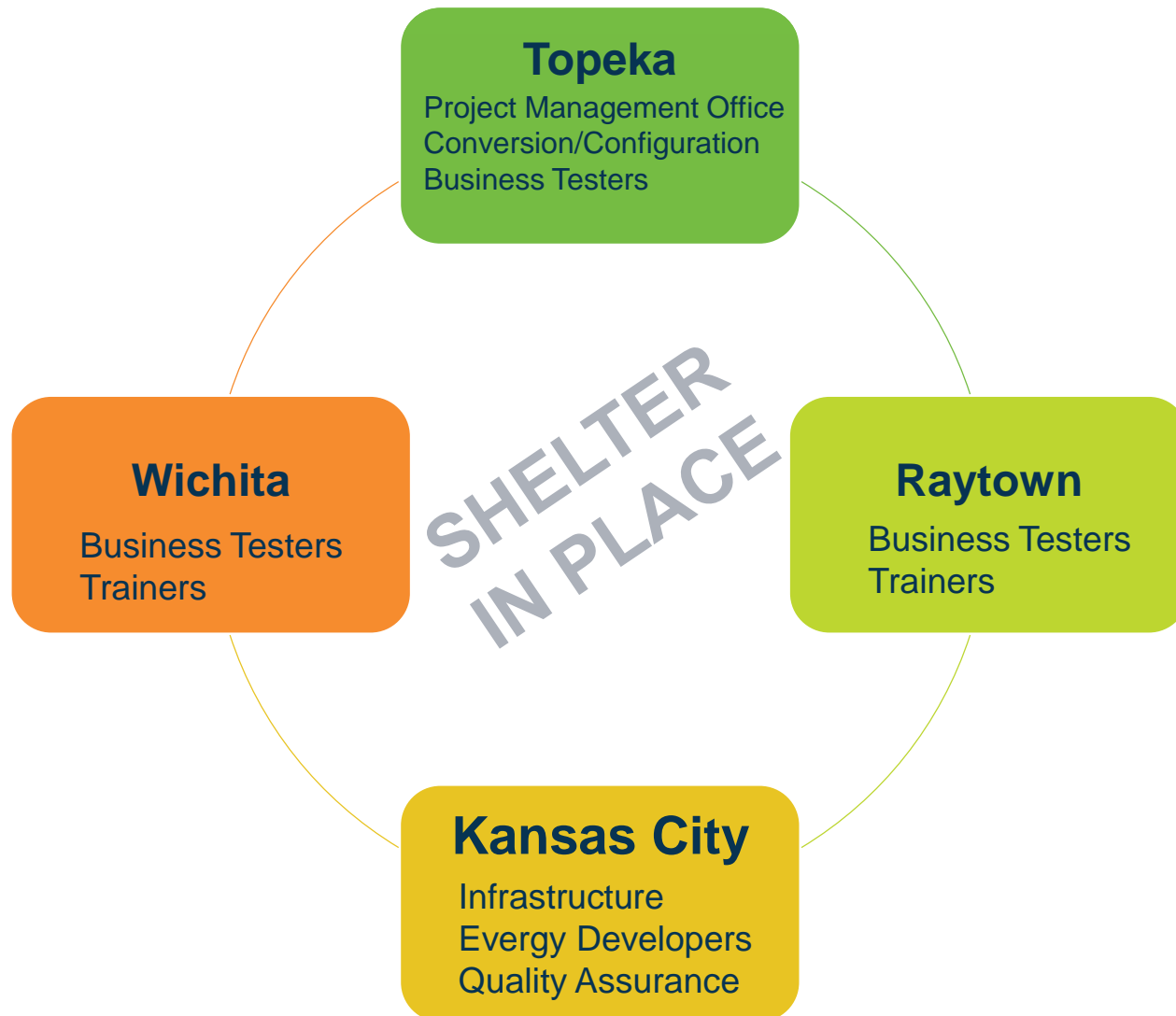
One Team, One Goal will foster efficient handoffs and interactions



ORACLE®



Program Team Locations



Program Approach, Scope, Timeline, & Financials



Program Approach

Speed-to-Value

- When possible, pursue most efficient and expeditious path
- Leverage existing contracts, training, change management, and testing materials
- Manage scope to deliver within budget and schedule

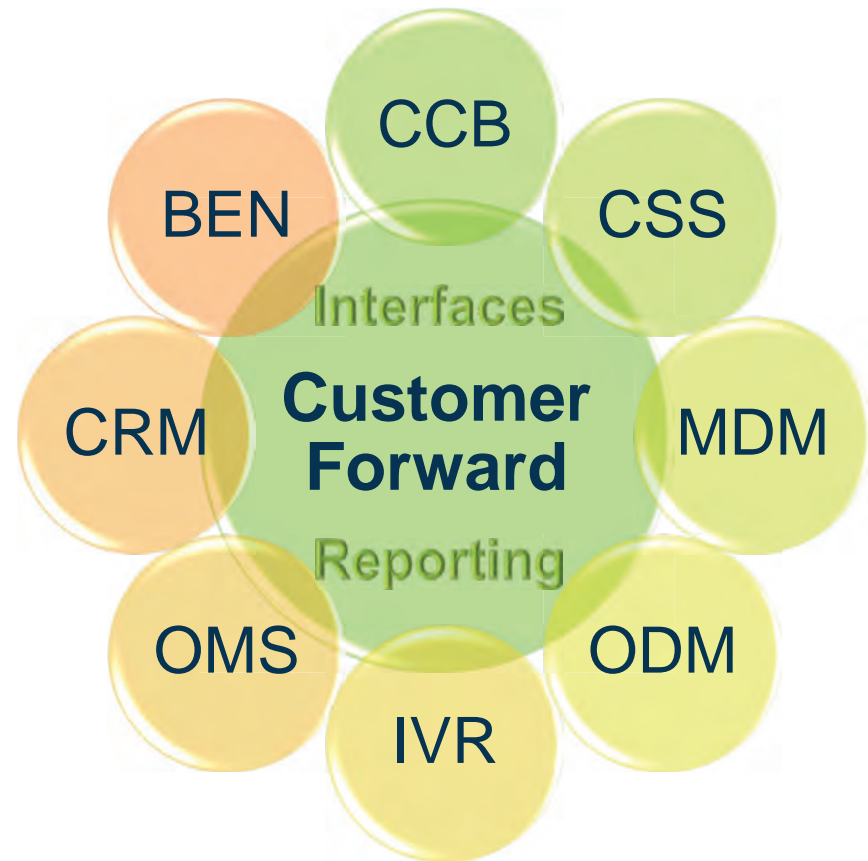
“Four-Pillars”

- Are there any incremental legal requirements for Evergy Kansas Central?
- Will the current Solution comply with regulatory policies and tariffs?
- Will the current Solution positively impact the customer experience?
- Will the current Solution substantially impact the Company’s earnings?

High-Level Program Scope

Scoping Objective:

- Convert Evergy Kansas Central customer information onto the Evergy One CIS solution
- Address the incremental functional and/or technical differences between Evergy's Kansas Central CIS and Evergy's One CIS solution
 - Customer Care and Billing (CCB)
 - Customer Self-Service (CSS)
 - Meter Data Management (MDM)
 - Operational Device Management (ODM)
 - Integrated Voice Response (IVR)
 - Outage Management System (OMS)
 - Customer Relationship Management (CRM)
 - Knowledge Management System (BEN)





Customer Forward Value-Add

Consistent and enhanced levels of customer service

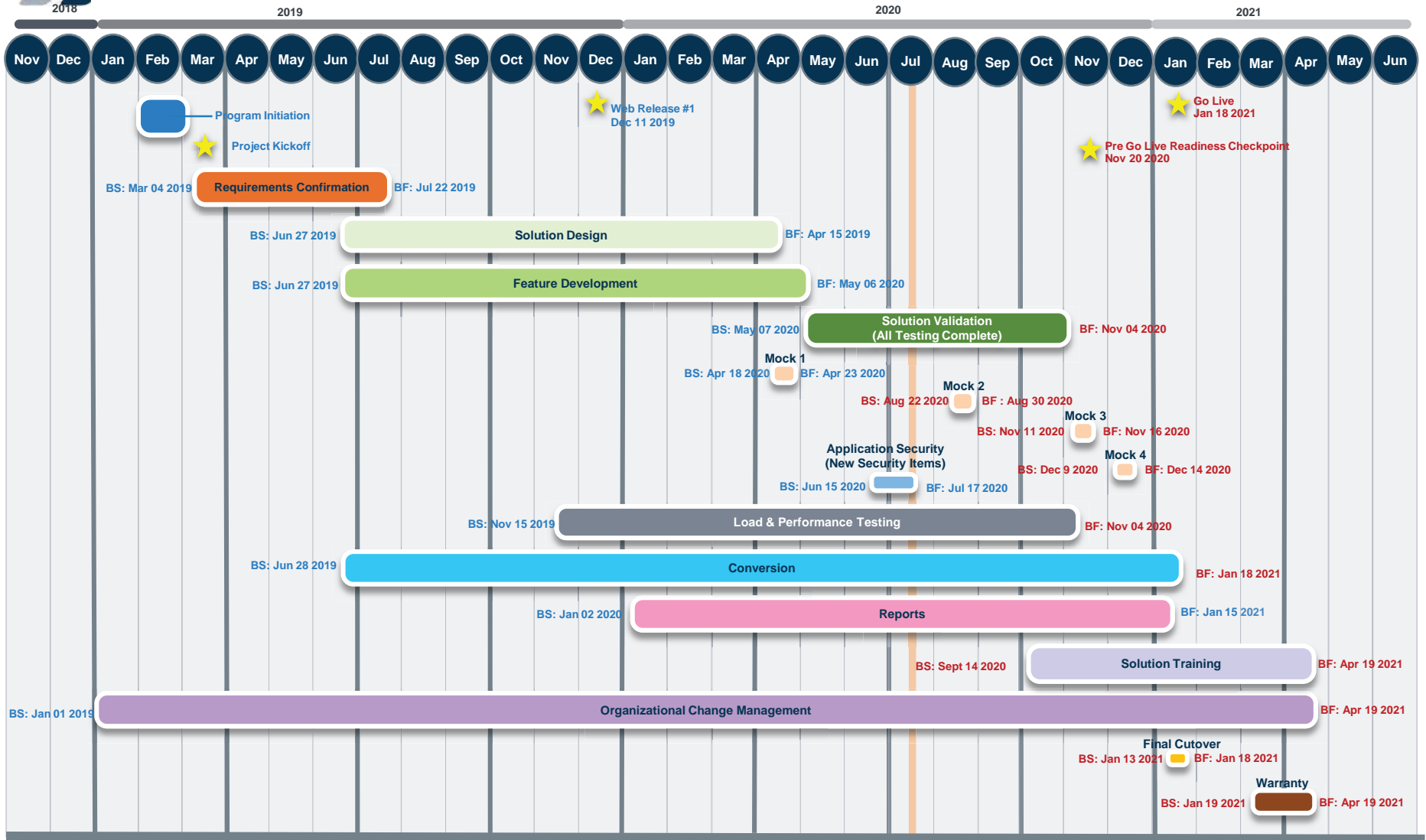
Customer Benefits

- Improvements to the self-service portal features for password reset options and access to 24-months of bill history.
- Enhanced customer alerts and notifications to include new outage notifications, improved messaging for start/stop service.
- Intelligent Voice assistance with more self-serve options via the phone including 24X7 Spanish speaking availability.
- Small commercial customers will have the ability to pay by credit card.

Customer Impacts

- General system and self-serve downtime during go-live implementation (approx. 5 days).
- Details on transactions completed in the IVA will not be available for the contact center representatives if the customer calls on day one.
- Deposits will be auto-assessed and have a consistent distribution for all customers.

Program Timeline



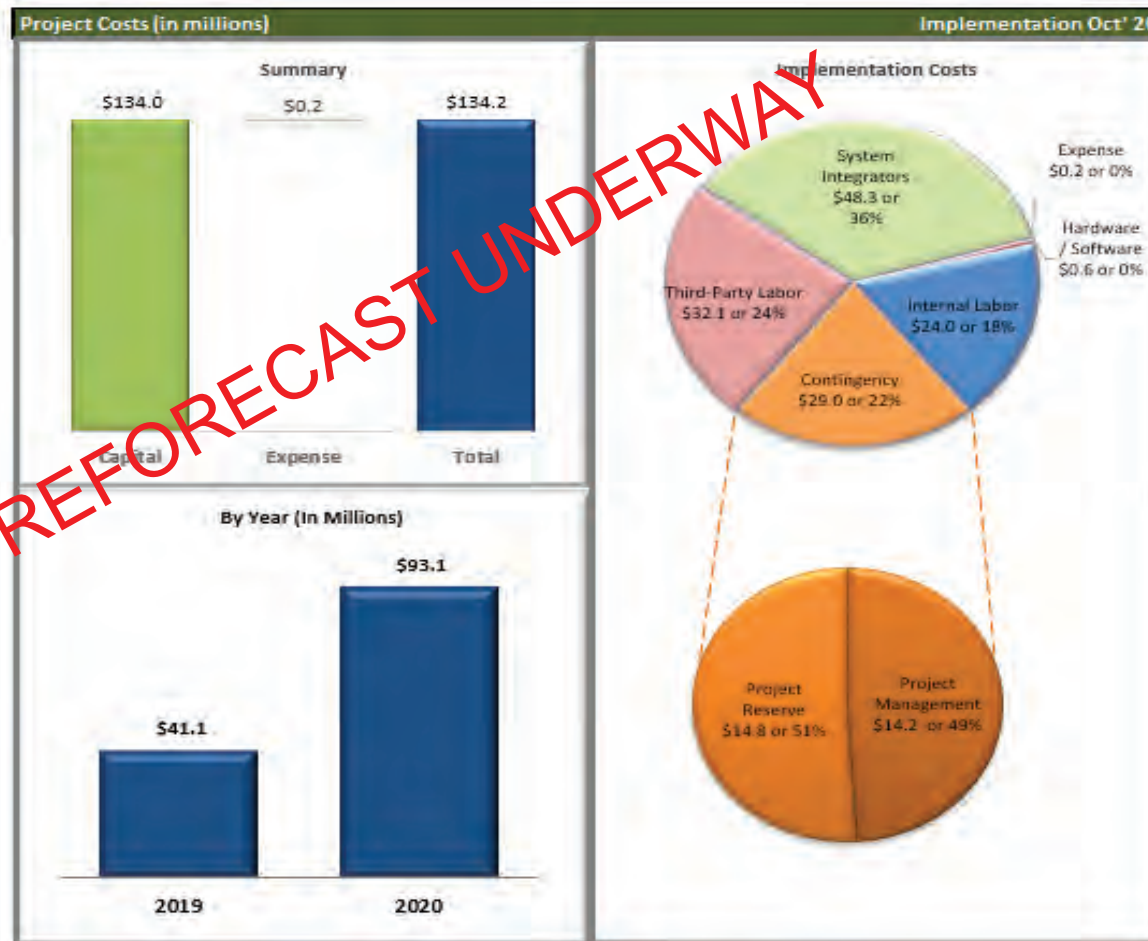
Modified dates are indicated in red





Program Financial Analysis Summary

Total Estimated Project Cost is \$134 Million



Proposed Regulatory Changes

Tariff Change request:

- Change program name from Level Payment Plan to Average Payment Plan in MO West
- Add additional language to the estimation process to clearly state the process (there is NO change to the process, only correcting tariff language) in both MO Metro and MO West
- Accept credit card payments for commercial customers with a transaction fee (2.7% per transaction with each transaction limited to \$5,000) in both MO Metro & MO West
- Allow the collection of all diversion related charges to be collected prior to turn on both inside and outside of CWR in MO Metro & MO West

Process Change notification:

- Change Large Commercial deposits from 2x the Avg to 2x the highest bill

Program's Current Status





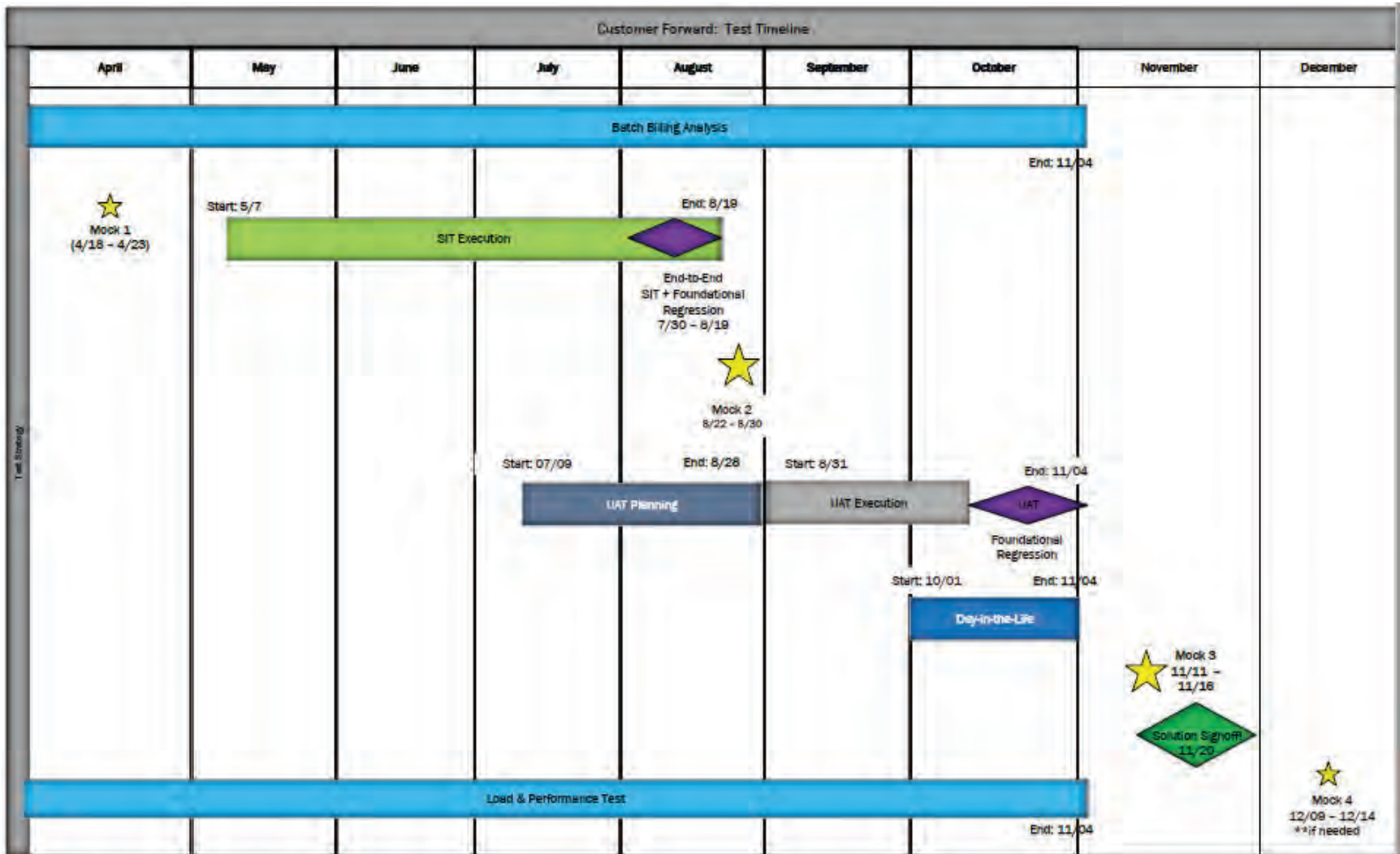
Program Status

Report Date: 07/10/2020
 PM: Ruetschle/Schieffer
 Project Sponsor: C. Caisley

	Overall	Financials	Schedule	Resources	Project Funding	Projection	Spent To Date	Commitment Impl Date	Notes
Status		●	▼	▼	--	--	--	01/18/2021	<ul style="list-style-type: none"> • Reforecast analysis complete; documentation in progress • Issue #23: Resource Contention Impacting Deliverables • Issue #35: External Disrupters Impacting Program Efficiency • Issue #37: COVID-19 • Issue #39: Long/Short Cycle SIT Delay • Issue #40: Vendor Delays to SIT • Issue #41: Broadridge SIT Delivery Release Schedule & Quality • Risk #61: Returning to Business as Usual After COVID-19 • Risk #63: Revert Ph 1 GL Reporting Extension • Risk #64: Kubra Dev Delay/SIT Support – Outage Notifications • Risk #68: OpenText Vendor for EDI - Infosec • Risk #74: EAM Maximo Upgrade

Key Accomplishments – Period To Date		Milestones	Re-Baseline Start	Re-Baseline Finish	Status
1. July 100% data conversion activities in progress in SIT2; environment prep activities began July 8. 2. Migrated SIT2 servers to Synergy Cluster Hardware (CCB, MDM, ODM, and batch servers). 3. Continued SIT Execution and Test Account Sourcing activities. 4. Started UAT planning activities. 5. Risk & Control matrix shared with project leadership for approval. 6. Content Development completed initial review of consolidated Kansas Central Serving Office information in BEN. 7. OCM: Scheduled Change Impact Review with Contact Center; continued updating change impacts. 8. Cutover: Mock 2 Cutover planning in progress with external vendors and Edge application teams; Continued to discuss application outage durations during cutover; plan in place to document for business by application.		Project Initiation	01/02/2019	03/04/2019	Complete
		Requirements Confirmation	03/04/2019	07/22/2019	Complete
		Solution Design	06/27/2019	04/15/2020	Complete
		Feature Development	06/27/2019	05/06/2020	Complete
		Solution Validation	09/18/2019	11/04/2020	In Progress
		Operational Readiness	10/24/2019	04/19/2021	In Progress
		Mock Cutover 01	04/18/2020	04/23/2020	Complete
		Mock Cutover 02	08/22/2020	08/30/2020	Not Started
		Solution Training	09/14/2020	04/19/2021	Not Started
		Mock Cutover 03	11/11/2020	11/18/2020	Not Started
		Final Cutover (Go-Live)	01/13/2021	01/18/2021	Not Started
		In-Service	01/18/2021	01/18/2021	Not Started
Next Week's Key Activities		<i>customer forward</i>			
1. Review of Oracle Black Belt Load & Performance report 2. Continue SIT Execution & UAT Planning 3. Continue Sprint 19 activities 4. Continue to work with 3 rd Party Vendors on revised timelines.		***Note: Red font indicated potential changes as we realign schedule.			

Revised Testing Timeline:





Organization Change Management Summary

- Monthly communication with Key Stakeholders, Stakeholder meetings, and Change Agent Network
- Completed 100+ outreaches with impacted groups
- Monthly internal communication via Customer Forward Forecast, bi-monthly Plugged in Leader, Circuit articles
- Completed two Change Readiness Surveys – showing an increase in readiness between the first and second surveys
- Organizational Impact Assessment, Knowledge Acquisition, Business Readiness and Cutover Planning and warranty support activities
- External customer communication planned
- Training curriculum development, planning and preparation for end users

Questions?

