Safe Harbor Statement

The following is intended to outline our general product direction. It is intended for information purposes only, and may not be incorporated into any contract. It is not a commitment to deliver any material, code, or functionality, and should not be relied upon in making purchasing decisions. The development, release, and timing of any features or functionality described for Oracle’s products remains at the sole discretion of Oracle.
Program Agenda

1. Our Customer and Meter Solution
2. Updates since last year
3. Trends driving our roadmap
4. Future Plans and Roadmap
5. Q & A
Our Customer and Metering Solutions

If you didn’t’ know already
Next Generation | Complete, Modular, Integrated

Core Meter-Customer Solution

Complimentary Solutions

- CC&B
- MDM
- OUA
- CSS + OPOWER
- MWM
- QM
- LPSS

Field & home services
C&I Quoting
Forecasting/Settlements
Lowering Total Cost of Ownership at Every Step

- Deployment options (Cloud, Express)
- Simplified Installation process
- Best practice - out of the box
- Pre-built utility analytics and process based integrations
- Simpler configuration/extensions
- Automated testing tools ★ New!
- Information lifecycle management ★ New!
- Monitoring and patching tools ★ New!
- Hardware optimization options
Making Upgrades Easier

• New Tools
  – Automated testing tools with pre-built scripts
  – Automated translation scripts
  – New benchmarked shows faster performance
  – New browser support options

• Partner Driven Initiatives
  – Enablement webcasts
    • Benefits of upgrading
    • Tools and techniques
  – Joint account planning

• Oracle Consulting Offers
  – Specialized Upgrade service
  – “Back to base” guidance
  – Business case development
  – Lifetime Managed service

• Leveraging the Oracle Cloud
Updates since last year

We’ve been busy!
Meter Solution Cloud Service

Major Capabilities

• Supports traditional and smart meters for various commodities
• Cleanses (VEE) incoming data
• Supports aggregation, usage subscription, investigative orders
• Scales to large volumes
• Automated commands via AMI
  – Includes SSN, Sensus, Echelon, L+G, Itron, MV90
• Service order management
• Integration with Oracle CCB, ODM, MWM
• Pre-built analytics
Oracle Utilities Meter Solution Cloud Service
Enabling Smart Grid Transformation

Remain at the forefront of industry innovation with a consistent, smooth upgrade path.

- Cloud Service gives you immediate access as we roll out new capabilities
- Capture data from the farthest edges of the grid
- As data sources and volumes explode, manage and store it without missing a beat
- Be prepared for data from IoT expansion
- Leverage prebuilt analytics from the latest in Big Data capabilities
## Enhanced Customer Care and Billing Features

- Support for integrating with Customer Experience (CX) solutions
- Customer contact enhancement
- System wide support for person contacts
- Auto Pay enhancement
- Off-Cycle Service Provider Switching
- Miscellaneous enhancements

## Operational Efficiencies

- Support for DOC1 to enable bill and letter online display and printing
- Adoption of Oracle Utilities Application Framework V4.3.0.2
  - Oracle Scheduler (DBMS_SCHEDULER) integration

## Enhanced Integrations

- Additional support for integrating with Oracle DataRaker Cloud Service
  - Service Point Business Flag Support
  - Advanced Analysis / Lead Segmentation Support
- Oracle Utilities Meter Data Management (MDM) integration
- Oracle Utilities Customer Self Service (CSS) integration
- Oracle Process Integration Pack for Oracle Utilities Field Work
## Oracle Utilities Customer Self-Service v2.2.0
### Key Features Overview

<table>
<thead>
<tr>
<th>Account Management</th>
<th>Customer Service</th>
<th>Technology</th>
</tr>
</thead>
<tbody>
<tr>
<td>• Self-Service/CCB User Synchronization</td>
<td>• CCB Owned Notification</td>
<td>• WebCenter 12c</td>
</tr>
<tr>
<td>• User Login Using Email Address</td>
<td>• Notification Preferences Synchronization</td>
<td>– CSS v2.2.0 will be deployed on WebCenter Portal v12.2.1</td>
</tr>
<tr>
<td>• Mailing Address Validation</td>
<td>• Detailed Scalar Usage Graph</td>
<td>• SOA Suite 12c</td>
</tr>
<tr>
<td></td>
<td></td>
<td>– Integrations will run on SOA Suite v12.1.3 or later.</td>
</tr>
</tbody>
</table>

### Account Management
- Schedule / Cancel One-Time Payment
- Bill Charge Projections

### Customer Service
- CCB Owned Notification
- Notification Preferences Synchronization
- Detailed Scalar Usage Graph

### Technology
- WebCenter 12c
- SOA Suite 12c
Combining strengths to define the leading edge innovation

**Oracle + Opower**

**Transactional**
- Send Bills
- Collect Payments
- Resolve Enquiries

**Customer Centric Service**
- Customer Care
- 360 View
- Multi-Channel

**Customer Experience**
- Value Add
- Customer Journey
- Omni-Channel

**Customer Engagement**
- Customer Insight
- Programs
- Next Best Action

**Prosumers/Partners**
- Total Energy View
- Asset Management
- Financial Optimization

Customer Relationship Evolution
## Oracle Utilities: Customer & Metering Solution Highlights

<table>
<thead>
<tr>
<th>Replacing 1st Generation MDMs</th>
<th>Growing Customer Base</th>
<th>Faster Implementations</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>10+</strong> MDM Replacements</td>
<td><strong>12%</strong> CC&amp;B customers growth globally</td>
<td><strong>&lt;7</strong> Months</td>
</tr>
<tr>
<td></td>
<td><strong>30%</strong> MDM customer growth globally</td>
<td><strong>25+</strong> Go Lives/ New Logos</td>
</tr>
<tr>
<td></td>
<td></td>
<td><strong>17</strong> Months Average (CIS)</td>
</tr>
</tbody>
</table>

- Growing Customer Base globally: 15% CC&B customers growth, 30% MDM customer growth, 30% MDM customer growth globally.
Trends Driving Our Roadmap
If you didn’t’ know already
Trends Driving our Roadmap

- Driving Down Costs
- New Business Models
- Digital Customers
Customer Centric Edge of Grid
Leverage our expertise in Customer Care and lifecycle support

Targeted edge technology sales
Segment CC&B/MDM Data
Run campaigns with Program Management
Push offers via Self-Service

Integrated Service and Maintenance of edge devices
Integrated appointment Mgt
Real-time work tracking
Customer updates via CCB/CSS

Advanced commercial offers
Support complex time of use tariffs
Real-time pricing and billing
Forecast generation and demand profiles and settle

Enrol, Execute and reconcile Demand Response events
Segment customer & usage data
Enroll best customers in program
Execute campaigns with DERMS/IOT or 3rd Party
Analyze event & settle finances

Customer Centric Edge of Grid
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Future Plans and Roadmap
Oracle Utilities Customer Roadmap

**CCB V2.5 Service Pack 2 (July 2016)**
- CX (Social Cloud and RightNow Knowledge Cloud Service) integrations
- DataRaker integrations
- Enhanced Oracle Utilities Customer Self Service integration
- Notification preferences management enhancements
- Oracle Scheduler integration
- TCO enhancements

**Released**

**Next 12-24 Months**

**CCB V2.6**
- Multi-Jurisdiction filtering and processing improvements
- More CX integration
- Integration-free CCB-MDM
- Accessibility

**CCB V2.6 Service Pack 1**
- Next generation credit and collections
- Competitive retail enhancements
- Business process flow improvements
- Cloud enablement
- Enhanced exception management (To Do)
- TCO enhancements

**Customer Care V2.6.x**
- Released 2015
## CCB V2.6 Enhancement Candidates

**Adding Depth to Existing Functionality and Lowering Total Cost of Ownership**

<table>
<thead>
<tr>
<th>Delivering Value Faster</th>
<th>Enabling a Digital Utility</th>
<th>Reducing TCO</th>
</tr>
</thead>
<tbody>
<tr>
<td>• Retail Enhancements (product and contract management)</td>
<td>• Integrated digital marketing</td>
<td>• Exception Management (To Do) Enhancements</td>
</tr>
<tr>
<td>• Embedded customer behavior and usage insights</td>
<td>• Digital channel management merged with CIS including:</td>
<td>• Business Process Flow Enhancements</td>
</tr>
<tr>
<td>• Next generation Credit and Collections management</td>
<td>- Chat, Email, Social, Web, SMS, and IVR</td>
<td>• Configurable Letter Extract</td>
</tr>
<tr>
<td>• New simplified CIS user interfaces</td>
<td>• Centralized customer preferences and contact history</td>
<td>• New SaaS Offerings</td>
</tr>
<tr>
<td>• New management dashboards</td>
<td>• Refreshed self-service user experience</td>
<td>• Integration free Meter to Cash (CC&amp;B with MDM)</td>
</tr>
</tbody>
</table>

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Next Generation | **CX and Utilities Integrations**

**Oracle Utilities Customer Solution**

- Customer Data & Preference
- Contact History
- Rating & Billing
- Accounts Receivable
- Usage Management
- Products & Orders
- Field Work
Digital Utility Campaign Management
Targeted, localized and dynamic engagement to drive adoption

- Example Campaigns:
  - Acquisition
  - Retention (loss intervention)
  - Event promotion
  - Promote budget billing
  - Drive smart pre-pay adoption
  - Promote energy efficiency
  - Demand response program enrolment
  - Cross-sell related services
  - On boarding welcome
Full Channel Management & Utility CIS
Oracle Utilities CC&B + Service Cloud

Pop-up chat assistance allows customers to access additional help when necessary without leaving the web portal.

Utility Customer CIS: Customer, Account, Contact History, Usage, Payments etc.

CSR Is Alerted and the customer account pops up when CSR accepts the chat.

Call Centre Tools: Chat, Email, IVR Co-Browse Bill Advisor
Delivering Value Faster
Retail Enhancements

• **Product Offers**
  – Define products
    • Cater for single and multiple commodities, services, and goods
    • Support multiple product components
    • Define options / features for pricing / non-pricing related information
    • Eligibility criteria for product / option suitability
  – Enable browsing of products and product comparisons

• **Contract Process Flow**
  – Process flow to manage customer enrollment from initial contact through to fulfillment
    • Support multiple non-active contracts per customer to cater for various proposals
Accelerating Value
Next Generation Credit and Collections

• **Overdue Processing**
  – Out-of-the-box capability to **support balanced-forward accounts**

• **Volume Management**
  – **Graphical view** of pending collection activities by type (e.g. Overdue events, Cut Process events, etc.)
  – Providing “what if” **volume analysis** using the graphical tool
  – **Bring forward or delay the execution** of one, groups of pending events

• **Enabling Dynamic Strategies**
  – Support **capturing customer profile data**
  – **Score cards**: Derive scores based on customer profile data
  – **Dynamic collection path processing**
    • Supports strategic approach to encourage customer payment
    • Select and change tracks based on new information
  – Ability to **branch out to custom processes** (e.g. Court action)

---

**Volume That Matches Capacity**
(Call Center, Field, Operations, etc.)
Business Operations Efficiency Management Dashboards

• **Batch Performance Dashboard**
  – Use *embedded analytics* to present the *duration* of processes in a simple and easy to understand format
  – Define and track batch process *service level agreements (SLA)*

• **Exceptions Dashboard**
  – Use embedded analytics to help managers and supervisors understand what *issues are trending*, the *average turnaround time* for exceptions resolution
  – Define and track SLAs per To Do Type
Reducing Total Cost of Ownership
Planned Highlights

• **To Do Management Enhancements**
  – New To Do Portal and Zones
    • Enable efficient processing
    • Easily extendable by implementations

• **Business Process Flow Enhancements**
  – Architecture to enable implementations to easily configure their own UIs to support their business processes
  – Start / Stop process flow improvements

• **Informational Lifecycle Management**
  – Financial Transactions

• **Expanded Use of Configurable Extracts**
  – Letters

• **Enhanced Integrations**
  – Oracle Utilities Customer Self Service
    • Landlord Portal
    • Enhanced Financial History Table
  – Fieldwork Process Integration Pack
  – Integration free Meter to Cash
    • (CC&B with MDM built in)
Custom Integration

- Custom built during project
- Performance and data integrity depends on delivery team and legacy system architecture
- Ongoing maintenance costs
- Future enhancements require interface updates

Oracle Pre-Built Integration

- Avoids complex and costly interfaces
- Optimized for performance
- Ensure data integrity
- Reduces data replication
- Inherit product enhancements

Integration Free

- Same rich MDM and CC&B capability
- Modular Licensing
- Lower implementation and maintenance costs
- New screens
- Unlocks future innovation
- Migration support

Two deployment options
Customer Solution Cloud Service

Key services on offer

- Customer, premise & meter data management
  - Notification preferences, customer contacts, case management. full MDM capability available as option
- Rating service, Billing service
- Payments processing and debt collection
- Integrated with Oracle Utilities solutions, Financial Systems (EBS, JDE, PSFT). Social, Marketing and Service Cloud integration
- Supports integration with external systems:
  - IVR, metering payments, credit checks, address validation, etc.
- Pre-built, pre-integrated analytics
- Subscription & module based licensing
Oracle Utilities Metering Roadmap

**Meter Data Management (MDM) V2.2**
- Management Dashboard
- Enhanced Outage Processing
- Measurement Correction Processes
- New Usage Rule & Processes
- Subtractive Interval Data

**Smart Grid Gateway (SGG) V2.2**
- AMI Adapter Certifications
- L+G New Asset Commands
- Usage and Event Prioritization
- Device Event and UOM Filtering

**Settlements V2.x**
- Replatformed settlements solution (OUAF)

**MDM V2.2 Service Pack 1**
- Weather Data Enhancements
- Streaming Interval Data Improvements
- More Subtractive Interval Data

**Meter Solution V2.2**
- (Jun 2016)

**Released**

**Next 12-24 Months**
### MDM V2.2 Enhancement Themes

**Building on the Oracle Utilities Metering Solution**

<table>
<thead>
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<th>Meter to Bill</th>
<th>Integration</th>
<th>Total Cost of Ownership</th>
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<tbody>
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<td>• Enhanced Outage Processing</td>
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<tr>
<td>• New Validation Rules</td>
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<tr>
<td>• Improving Billing</td>
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<tr>
<td>• DataRaker Integration</td>
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<tr>
<td>• AMI Certifications</td>
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<td>• SGG Data Prioritization and Filtering</td>
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<tr>
<td>• Data Access</td>
<td></td>
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<tr>
<td>• Improved User Interface</td>
<td></td>
<td></td>
</tr>
<tr>
<td>• MDM and SGG Cloud Technical Enhancements</td>
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Oracle Utilities Customer Self Service Roadmap

**CSS V2.1 Service Pack 2**
(July 2015)
- Self-Service User Synchronization
- CCB Owned Notifications
- Scheduled One-Time Payments
- Detailed Scalar Usage Graphs

**CSS V2.2.0 Service Pack 1**
(July 2015)
- Usability Fixes
- Customer Requested Enhancements
- Accessibility Testing

**CSS V2.2.0 Service Pack 2**
(Aug 2016)
- Bill Charges Projection
- User Login using Email Address
- Mailing Address Verification
- WebCenter Portal 12c Upgrade

**Digital Self Service**
- SaaS Platform
- Modern UI redesign
- Account management
- Integration to UGBU CC&B & MDM
- Simplified user journeys
- Embedded insights

**Released**

**Next 12-24 months**
Oracle Utilities Customer Self Service Roadmap

OUCSS and Opower

**Customer Self Service (CSS)**

- On-Premise
- Focused on transactional, account management tasks
- Huge range of pre-built Oracle Utilities source system web services
- Open standards supporting the utility’s enterprise portal strategy
- Continued support

**Digital Self Service (DSS)**

- SaaS / Cloud
- Same account features as CSS
- New UI, modern look and feel
- Includes Opower insights, next best actions and engagement techniques to exploit "Moments that Matter"
- Supporting non-Oracle Utilities back-end systems
- CSS can embed DSS widgets to support transition

Two Self Service Options
Digital Self Service

- Billing and payments
- Start/stop service
- Proactive Alerts
- Outage
- Energy management
- Preference management