INTEGRATED BUSINESS TRANSFORMATION SOLUTION(IBTS)

EDx RETAIL END-USER SCOPE AND TARGET END STATE

ONE EDx RETAIL

One Customer | One Journey | One Platform | One Source of Truth

Purpose of this document

To define, from the business end-user perspective, the complete capabilities and future experience required from IBTS. The scope describes what EDx RETAIL customers, employees, managers and partners must ultimately be able to do and experience.

VISION

A modern, agile, intelligent and integrated energy retailer that anticipates customer needs, resolves them at speed, empowers employees, protects and grows revenue, and competes successfully as the retailer of choice.

The scope of work entails but not limited to the following:

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End-user design principle
A customer should not need to understand Retail structures, systems or internal hand-offs to receive a service. The business must organise itself around the customer journey, with clear ownership from need identification through fulfilment, billing and ongoing relationship management.

1. Executive Scope Statement

IBTS will establish a fully integrated retail operating environment for Distribution Retail. It will connect customer engagement, sales, solutions, product management, contracting, connection, metering (Including field work), billing, payment, credit and debt management, service, retention, distributed energy participation and revenue performance into a coherent end-to-end capability.

The transformation must remove the fragmentation experienced by customers and employees. It must provide a one-stop shop where customers receive relevant services at speed, employees have a complete view of the customer and the status of every journey, and management can see customer, operational and commercial performance in real time or near real time.

Scope intent
The required outcome is not a collection of separate applications or systems. It is an integrated business capability in which processes, data, people, channels, decision-making and technology work together around a single customer and a single retail value chain.

2. Transformation Outcomes

- Deliver one seamless customer experience across residential, commercial, agricultural, mining, industrial, smelter, municipality, IPP, prosumer and emerging-energy segments.
- Create a single, governed and trusted customer view accessible to authorised employees and channels.
- Provide end-to-end visibility from customer acquisition and connection through metering, billing, service, retention and growth.

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- Enable a one-stop service model with clear ownership and fewer transfers, hand-offs and repeated customer explanations.
- Automate repetitive processes (Such as information requests, bill queries, meter re - submissions, application submissions) and manage only genuine exceptions through human intervention.
- Embed AI to anticipate needs, recommend relevant products, guide employees and identify service, revenue and retention risks.
- Integrate the IBRO revenue model into daily work so Retail can measure new revenue, growth, revenue protected and revenue recovered or optimised.
- Enable rapid design and launch of sector-specific products, flexible tariffs (packaging of tariffs to suit a customer's requirements within the Eskom Scope) and emerging-energy propositions.
- Enable aggregation and compensation of customer rooftop PV, batteries, EVs and flexible loads.
- Provide real-time or near-real-time operational and commercial dashboards for teams and management.
- Improve revenue collection from prepaid customers (integrated solution in terms of prompting and collecting debt against a purchase value) and reduce cost to serve through increased visibility.
- Improve billing confidence, revenue assurance, customer trust and reduce cost to serve.
- Position Retail to retain and grow its customer base and compete as an energy retailer of choice.
- Enable a control framework that would ensure and verify the accuracy, completeness, and validity of financial statement amounts and disclosures.

Current experience	Required end-user experience
Disconnected processes and multiple hand-offs	One orchestrated journey with a named owner, visible status and automated workflow.
Multiple customer records	One customer identity linking accounts, sites, contracts, meters, products, interactions and energy assets. For example - An Entity / or a premise Vodacom linked to about 3500 accounts (Towers, offices, Data Hubs)
Reactive service	Predictive alerts, proactive contact and intervention before customer impact escalates.
Generic products	Relevant offers based on sector, load profile, value, needs, assets and behaviour. Product offering to enable generic solutions – PV for Residential, Commercial – Microgrids for Agricultural,

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	Government Entities – Green Certification for Industrial, Commercial, Mining sectors.
Manual tracking of opportunities	Digital pipeline from Expression of Interest through connection, billing and realised revenue.
Limited DER visibility	Aggregated view of generation, storage, EVs and flexible loads with measurement and compensation.
Retrospective reporting	Live dashboards, alerts, forecasts and drill-down to the underlying customer journey.

3. Business Problem and Transformation Imperative

3.1 Core Business Problem

Distribution Retal currently serves customers through fragmented processes, systems, data sources, channels and organisational structures. Customer journeys frequently cross several functions, with each function managing only part of the process and often relying on separate systems, spreadsheets, emails, documents and records.

The fundamental business problem is not only ageing or disconnected technology. Retail does not yet operate through one integrated, customer-led and end-to-end retail model. As a result, customers may experience separate functions and varying service levels (depending on the province they receive the Service from) rather than one coordinated retailer; employees may lack the complete context and workflow visibility needed to own a journey; and management may not be able to trace customer need, service delivery, commercial activity and revenue outcome through one integrated view.

3.2 Problem Statement

Distribution RetailE's fragmented processes, systems, data and accountability constrain the business from delivering seamless customer experience, responding at speed, empowering employees and managing customer and revenue performance end to end. Governance (DOA) and Business Rules will also adapt to the new way of doing business. The end-to-end customer Value Chain required integration with GRID, Finance and DET.

3.3 Problems to Be Solved

Problem area	Current business impact
Customer fragmentation	Customers navigate different functions and channels, repeat information and follow up for progress.

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Problem area	Current business impact
Process fragmentation and intergration	Activities are transferred across teams without one integrated workflow, complete case, common milestones or persistent end-to-end ownership.
Information fragmentation	Customer, account, contract, project, meter, billing, sales, service and energy-asset information is distributed across records and systems.
Commercial fragmentation	Leads, opportunities, quotations, connection milestones, retention actions, billing and realised revenue are not consistently connected.
Reactive operations	Service failures, billing anomalies, churn and revenue risk may be identified only after customer or financial impact occurs.
Limited product agility	Product, tariff and sector propositions can be slow to design, approve, implement and measure across fragmented processes.
Employee effort	Employees search, recapture, email, reconcile and manually follow up across functions to understand and progress customer needs.
Limited energy-market capability	Retail requires integrated capability for DER, EVs, flexibility, dynamic propositions, device orchestration, measurement and customer compensation.
Limited management visibility	Operational, customer and commercial performance is often retrospective and not connected to the underlying end-to-end journey.
Automation	Critical customer information/records are transcribed on manual documentation and then transferred to systems as customer master data.

3.4 Transformation Objective

IBTS must establish One Retail: one coordinated retail operating environment in which customers, employees, processes, data, channels and intelligence are connected around a single customer and a complete retail value chain. Customers should not have to coordinate Retail's internal functions. Retail must orchestrate specialist work behind one transparent journey, with clear accountability, consistent information and measurable customer and revenue outcomes.

4. As-Is Process Landscape and Failure Points

The as-is assessment documents on how work is currently initiated, transferred, approved, completed and measured. The assessment identifies the systems, spreadsheets, emails, documents, manual controls and organisational hand-offs used in each priority process.

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4.1 Required As-Is Process Documentation

- Trigger and customer need that starts the process – OCI / Manage Customer Base / Marketing PCMs.
- Customer and employee channels used to initiate and follow up.
- Process steps, responsible functions and current process owner – PCMs, Works Instructions, Procedures
- Systems, spreadsheets, documents and data used at each step – CC&I, ACNAC, CC&B, MATS, PCS Spreadsheets, OpenText. Automation feedback is built into certain activities to trigger messaging to customers Webpages, application Tools for various products.
- Approvals, decisions, service commitments and business rules. Driven by DOA and other environments' rules. Finance – Pricing Committee, Audit Committee, Revenue Management – Asset Creation – allocation of Asset build budget, management of Contractors, timelines, material procurement, etc
- Transfers between teams, waiting points, duplication and rework loops.
- Customer communications and information requested more than once.
- Exceptions, escalations, workarounds and known failure points – This may not be fully eliminated but can be minimised
- End event, current output and how completion is confirmed.
- Available measures for volume, elapsed time, service performance, error, rework, customer impact / effort and revenue impact.

4.2 Priority As-Is Process Inventory

Process family	As-is processes to be mapped
Acquire and connect	Enquiry and lead capture; Expression of Interest; qualification; cost-estimate fee; quotation fee, cost estimate; Cost Estimate Letter; Budget Quotation; agreement; connection; metering; activation; first bill.
Serve and resolve	General enquiry; technical request; billing query; claims; complaint; escalation; appointment; field service; communication; confirmation and closure.
Meter to cash	Meter data; validation; token related, billing; exception; bill correction; payment; allocation; credit; arrangements; collection; reconciliation; meter estimation algorithms, revenue assurance.
Field Work	Work required on asset(s) related to customer requirements or requests
Revenue assurance	Revenue leakage from non-technical losses, metering failures, billing errors, tariff errors and collection breakdowns.
Retain and grow	Account planning; customer health; renewal; churn risk; retention intervention; cross-sell; upsell; product enrolment; revenue attribution.
Product to market	Need identification; design; pricing; simulation; approval; configuration; testing; launch; enrolment; billing; performance review.

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Process family	As-is processes to be mapped
DER and flexibility	Asset registration; eligibility; consent; enrolment; aggregation; event; measurement; settlement; compensation; dispute.
IPP and grid access	Application; document validation; studies; approvals; estimates; quotations; contract; connection; commissioning; metering; operational onboarding.
Reporting	Inventory of all critical report(s) and data used to ensure all International Financial Reporting Standards (IFRS) requirements as well as all Income Tax and Value Added Tax (VAT) requirements and National Energy Regulator of South Africa (NERSA)

4.3 Indicative As-Is Multiple Hand-Off Pattern

Customer need captured → information sent to another function → information or documents requested again → work tracked in a separate tool → status requested through email or telephone → another specialist is engaged → the customer follows up through the original contact → issue is escalated because ownership or status is unclear.

The involvement of specialist teams is not itself a problem. The failure occurs when ownership, information, workflow, customer communication and performance visibility are transferred or lost at each organisational boundary. Training and discipline are also lacking.

5. To-Be Process Landscape and Design Requirements

The to-be process design must define how each priority journey will operate through IBTS. Future processes must be simplified before automation and must retain one customer context, one visible journey and one accountable owner while specialist tasks are orchestrated behind the scenes.

5.1 Required To-Be Process Elements

- Customer or employee trigger and preferred entry channel.
- Information captured once and reused through the journey.
- Creation or update of the Customer 360 record.
- Automated validation, classification and eligibility checks.
- Named end-to-end owner and clear responsibility for each specialist task.
- Workflow orchestration, dependencies, milestones and service commitments.
- Decision points, business rules, approvals and human oversight.
- AI recommendations, automation and exception handling.
- Required system integrations and data updates.
- Proactive customer notifications and self-service status.
- Escalation, recovery and alternative paths.
- Completion criteria, customer confirmation and closure.

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- Revenue recognition, IBRO attribution and benefit measurement where applicable.
- Operational measures and control-tower visibility.
- Establish a governed revenue assurance capability across the revenue lifecycle
- Proactive risk analysis and management of customer credit and debt

5.2 As-Is to To-Be Process Transformation

As-is pattern	Required to-be design
Information recaptured by each function	Capture once; validate; reuse across authorised tasks and channels.
Customer transferred between departments	Keep one customer-facing owner; route specialist work internally.
Separate trackers and email follow-up	One digital journey with milestones, dependencies, alerts and audit trail.
Status is requested manually	Real-time or near-real-time status for employees and customers.
Documents repeatedly submitted or forwarded	One governed document record linked to the customer and journey.
Service reacts after failure	Predict risk; prevent failure; trigger proactive intervention.
Opportunity tracking ends before billing	Trace lead, agreement, connection, billing, collection and IBRO outcome.
Generic service and products	Apply segment, sector, value, load and asset insight to tailor the response.
Management receives retrospective reports	Provide live control-tower views, alerts, forecasts and drill-down.

5.3 Illustrative To-Be Acquisition Flow

Enquiry captured once → prospect or customer identified → opportunity and journey opened → needs and required information validated → Customer provided with indicative costing → Account created once payment received to proceed → technical, pricing, finance, project, metering and billing tasks orchestrated within one workflow → specialists complete assigned tasks using a shared customer and journey context → relationship manager retains end-to-end visibility and accountability → customer receives milestone updates → connection and account activation completed → first bill validated → pipeline value converts to connected, billed and collected revenue.

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6. Priority End-to-End Business Use Cases

The following use cases define practical end-user scenarios that IBTS must enable. Each detailed use case must be documented with the business problem, actors, trigger, preconditions, main flow, decisions, exceptions, data, automation, controls, result and success measures.

Use case	Primary actor	Required future experience	Business outcome
UC01 New industrial customer acquisition	Relationship Manager / Customer	Manage one journey from EOI through estimate, Account Initiation, Budget Quotation, document gathering, agreement, payment confirmation, connection (managing project steps – providing feedback, escalating delays), first bill and realised revenue.	Reduced lead-to-revenue time; complete milestone and revenue visibility.
UC02 Major project connection	Relationship Manager / Project Teams	Coordinate technical, commercial, project, metering and customer dependencies from one shared journey.	Fewer manual trackers; clear commitments, ownership and status.
UC03 Customer Resolution Representative billing resolution	Customer / Customer Resolution Representative	Resolve a billing issue using complete customer, meter, token related, new connection, tariff and billing context, while coordinating specialist tasks without transferring the customer.	Reduced hand-offs, repeat contacts and resolution time.
UC04 Proactive billing anomaly prevention	Billing / Revenue Team/Retail	Identify unusual readings, tariff applications or bill movements and trigger corrective action before or immediately after billing.	Improved billing accuracy and fewer customer disputes.
UC05 Customer churn and revenue retention	Relationship Manager	Identify customer and revenue risk; initiate retention action; manage approvals; track commitments and revenue protected. High turnaround – not necessary loss of customer but change of customer – MIMO. Sale is retained but behaviour may vary.	Reduced churn and measurable retained revenue.
UC06 Sector-specific next-best offer	Customer / Sales / Product	Recommend a relevant proposition using sector, load profile, assets, value and customer need, with explainable reasoning and human review – based on base products	Improved relevance, uptake and share of wallet.

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Use case	Primary actor	Required future experience	Business outcome
		and pricing. Combining solutions for best results	
UC07 IBRO opportunity-to-revenue	Sales / Management	Trace new, grown, retained and recovered or optimised value from intervention through connection, billing and collection. Chamber of Business, Investment forums, Source opportunities to be cultivated through memberships, conferences, value-add appearances.	Trusted pipeline and realised revenue reporting.
UC08 Rooftop PV and battery aggregation	Prosumer / Energy Operations	Register assets, capture consent, aggregate participation, measure response, settle and compensate transparently. Provide customer with views to show savings, opportunities to improve usage and savings, available new products.	Scalable DER participation and trusted compensation.
UC09 Flexible EV charging	EV Customer / Energy Operations	Capture charging preferences and consent; schedule charging in favourable energy periods; show participation and benefit. If available offer customer a built in at home charging solution.	Load flexibility and improved customer value.
UC10 IPP grid-access journey	IPP / Relationship Manager	Submit once and track studies, estimates, quotation, contract, connection, metering and operational onboarding. Provide updated capacity availability status for applicants to prevent unnecessary queries and enhance efficiency through applications which can be processed at the time.	Transparent status and reduced applicant effort.
UC11 New product or tariff launch	Product Manager / SME	Design, simulate, approve, configure, test, launch and measure a sector-specific or flexible proposition.	Faster time to market and governed product performance.
UC12 Management retail control tower	Executive / Operational Management	View customer journeys, pipeline, revenue, retention, billing, workforce, products, DER and risk with drill-down to underlying records.	Timely intervention and one trusted view of performance.

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Use case	Primary actor	Required future experience	Business outcome
UC13 Credit and Debt Management (including Payments)	Revenue Team/Retail	Proactive risk analysis and management of customer credit and debt in line with all regulatory and legal compliance	Improved payment levels and reduction in debt
UC14 Meter Estimation Algorithms	Revenue/Retail	Dynamic meter estimation algorithms in line with regulatory requirements and metering technology	Reduced customer noise and accurate revenue reporting

6.1 Use-Case Documentation Standard

- Business problem and intended outcome.
- Primary actor, supporting roles and affected customer segment.
- Trigger, preconditions and required information.
- Main end-to-end process flow.
- Business rules, decisions, approvals and controls.
- Alternative and exception flows.
- AI, automation and integration requirements.
- Customer communications, consent and transparency requirements.
- Completion criteria and resulting data updates.
- Customer, employee, operational and commercial success measures.

End-user design principle

A customer should not need to understand Retail structures, systems or internal hand-offs to receive a service. The business must organise itself around the customer journey, with clear ownership from need identification through fulfilment, billing and ongoing relationship management.

7. Customers and Market Participants in Scope

The future Retail operating environment must support the full diversity of present and future retail relationships. Customer treatment and journeys must be differentiated without fragmenting the underlying customer record or operating platform.

- Residential customers, including prepaid, post-paid, prosumer, EV and smart-home customers.
- Commercial customers, property portfolios, retailers, offices, hospitality and small businesses.
- Agricultural customers, including irrigation, pumping, processing, storage and seasonal-load profiles.

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- Mining customers across operational, expansion, closure and renewable-integration needs.
- Industrial customers, manufacturers, ferroalloy, steel and other energy-intensive users.
- Smelters and customers requiring complex commercial, tariff and load-retention arrangements.
- Municipalities and other licensed or structured supply relationships.
- Data centres and other high-growth, high-reliability demand segments.
- Independent Power Producers, embedded generators and grid-access applicants.
- Prosumers with rooftop PV, batteries or export capability.
- Wheeling participants, energy traders, aggregators and approved partners.
- Electric vehicle customers, fleet operators and charging providers.
- Special Economic Zones, developers and future strategic growth opportunities.

8. End-to-End Retail Capability Scope

Retail capability	Required business outcome
Understand the market and customer	Segment markets; identify opportunities; understand sector economics, Understand Country Context; load profiles, customer value, risks and emerging needs.
Acquire and onboard	Capture leads and enquiries; manage EOI, estimates, quotations, contracting, connection milestones / timelines, account activation and first-bill assurance. Ability to fasttrack based on impact and/or criticality
Serve and resolve	Authenticate the customer; understand context; own the case; coordinate internal work; communicate progress; confirm resolution and learn from failure. Trigger training GAP identification opportunity
Meter, bill and collect	Receive and validate meter data; apply tariffs and contracts; issue transparent bills; process payments; interest calculation, manage disputes, credit and collections.
Retain and grow	Identify churn and revenue risk; manage renewals and retention; cross-sell; upsell; increase share of wallet and customer lifetime value.
Create and manage products	Design, approve, configure, test, launch and monitor products, tariffs, bundles and sector propositions.

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Retail capability	Required business outcome
Enable energy participation	Register and manage generation, storage, EV and flexible assets; aggregate portfolios; measure response; settle and compensate.
Manage commercial performance	Track pipeline, connection milestones, contracted value, billing, collection, IBRO attribution, product performance and benefits.
Manage customer and retail data	Maintain trusted master data, consent, lineage, quality, history and access controls.
Manage the workforce	Provide one workspace, guided work, knowledge, capacity planning, coaching, quality and performance insight.

9. Detailed Customer Journey Scope

9.1 Discover, Acquire and Connect

- Capture requests and opportunities from every authorised channel without duplicate entry.
- Create a unified prospect and customer record at the first interaction.
- Manage Expression of Interest, qualification, needs analysis and solution design.
- Track cost-estimate fees, quotation fees, cost estimates, Cost Estimate Letters, Budget Quotations, payments and approvals.
- Manage commercial and technical dependencies, commitments, documents and correspondence.
- Generate and manage agreements, including Electricity Supply Agreement processes.
- Provide a shared milestone view for the customer, relationship manager and delivery teams.
- Track connection readiness, commissioning, account activation, product enrolment and first billing.
- Measure elapsed time, bottlenecks, conversion, lost opportunities and expected revenue.

9.2 Serve, Resolve and Communicate

- Recognise the customer and display the full relationship and current context.
- Capture once and reuse information throughout the case.
- Classify, prioritise and route work using customer value, risk, urgency, skills and service commitments.
- Assign clear end-to-end ownership and prevent cases from disappearing between functions.
- Coordinate technical, commercial, billing and field activities within one case record.
- Automatically communicate milestones, delays, requests for information and resolution.
- Allow customers to track progress and supply documents digitally.
- Capture root cause, resolution, customer confirmation and lessons for continuous improvement.

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9.3 Meter, Bill, Pay and Reconcile

- Link customers, accounts, premises, services, meters, contracts, tariffs and products correctly.
- Manage Prepaid meter visibility and online payments
- Receive, validate, estimate and reconcile meter and interval data.
- Support simple, complex, multi-site, import/export and customer-specific billing.
- Explain bill components and changes in a customer-friendly manner.
- Detect anomalies before or immediately after bill production.
- Manage disputes, adjustments, rebilling, payments, allocation, arrears and arrangements.
- Provide a complete audit trail from source data and contract terms to the bill.
- Integrate financial performance into customer, portfolio and revenue reporting.

9.4 Retain, Renew and Grow

- Maintain a customer health view combining service, billing, relationship, load, product and payment indicators.
- Predict customers and revenue at risk and initiate accountable retention action.
- Track contract expiry, renewal, customer commitments and commercial interventions.
- Recommend relevant products, tariffs or services based on the customer profile and need.
- Manage saving offers and approvals with measurable revenue protected.
- Measure cross-sell, upsell, product penetration, share of wallet and customer lifetime value.

9.5 Participate as a Prosumer or Flexible Customer

- Register rooftop PV, batteries, EVs, controllable appliances and other approved assets.
- Capture consent, operating preferences, technical limits and participation terms.
- Show consumption, generation, export, storage and flexibility availability.
- Aggregate assets and customers into portfolios for approved products or events.
- Notify customers, execute approved control or participation, and permit override.
- Measure delivered response against an approved baseline.
- Calculate settlement, incentive or compensation and issue a transparent statement.
- Manage exceptions, disputes, opt-in, opt-out and device changes.

10. Customer 360 and Single Source of Truth

The Customer 360 view must be the primary business view of the customer. It must connect information that is currently separated across functions and systems while applying role-based access, privacy and data-governance controls.

- Customer identity, contact details, preferences and consent. Customer Data Management critical.
- Corporate, group, account, site, premise and service-point hierarchies.
- Contracts, products, tariffs, commitments and effective dates.

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- Meters, devices, rooftop PV, batteries, EVs and other energy assets.
- Consumption, demand, generation, export and load-profile insights.
- Bills, payments, credit, disputes, arrangements and revenue history.
- Interactions, cases, complaints, commitments and communication history.
- Applications, quotations, projects, milestones and documents.
- Sales opportunities, forecasts, competitor or churn indicators and retention plans.
- Customer segment, value, profitability, lifetime value and revenue at risk.
- Satisfaction, feedback, service failures and relationship health.
- Recommended actions, offers and unresolved risks.

End state

An authorised employee should be able to understand who the customer is, what Retail has promised, what is currently happening, what the customer has experienced, what revenue is involved, what risk exists and what action is required, without searching across multiple disconnected environments.

11. Omnichannel and Digital Self-Service

- Provide consistent experience across portal, mobile, voice, email, SMS, chat, virtual assistant, walk-in, relationship management, field and partner channels.
- Allow a journey to start in one channel and continue in another without loss of context or repeated information.
- Provide digital identity, authentication, consent and profile management.
- Enable customers to view contracts, accounts, bills, payments, consumption, generation and service status.
- Enable applications, document upload, quotation acceptance, digital agreements and milestone tracking.
- Enable fault reporting, service requests, disputes, payment arrangements and appointment booking.
- Enable DER registration, flexibility enrolment, EV preferences, participation and compensation visibility.
- Provide notifications and proactive alerts according to customer preference.
- Make digital journeys accessible, simple, traceable and supported by assisted service when required.

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12. Customer Resolution Representative and Employee Enablement

- One role-based workspace presenting relevant customer, journey, product, billing and service information.
- Guided workflows that help employees complete the correct end-to-end process.
- AI summaries of customer history and the current issue.
- Relevant knowledge, policy, product and resolution content in the flow of work.
- Recommended actions, eligibility guidance, compliance prompts and escalation support.
- Automatic case notes and customer communication drafts, subject to employee review.
- Skills-based and value-based work routing, queue visibility and workload balancing.
- Clear ownership, service commitments, alerts and supervisor intervention.
- Workforce forecasting, scheduling, training, quality management and coaching insight.
- Controlled collaboration with technical, billing, finance, regulatory and field specialists.
- Reduced navigation between systems and reduced manual recapture.
- Employee feedback and continuous improvement of journeys and knowledge.

13. Sales, Pipeline and IBRO Revenue Management

- The sales and revenue capability must connect opportunity identification to realised financial value. It must support hunting for new opportunities, farming existing relationships and defending customers and revenue at risk.
- Capture and qualify leads, prospects and opportunities by segment, sector, geography, product and value.
- Track the complete pipeline from Expression of Interest through estimate, quotation, agreement, connection, billing and collection.
- Record opportunity value, probability, expected timing, dependencies, risks and accountable owner.
- Provide solution configuration, proposal, approval, commitment and document tracking.
- Alert owners to overdue decisions, stalled milestones, expiry and revenue risk.
- Provide portfolio views for relationship managers, sales leaders and executives.
- Attribute revenue to customer, project, initiative, product, segment, geography and team.
- Compare forecast, contracted, connected, billed and collected revenue.
- Track lost opportunities, reasons, competitor risk and recovery actions.
- Integrate customer retention plans and measure revenue protected through each intervention.

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13.1 IBRO End-User View

IBRO dimension	End-user requirement
Inflow / New Revenue	New customers, projects, connections, loads, products or market opportunities brought into the Retail portfolio.
Build / Grow Revenue	Additional value created from existing customers through load growth, cross-sell, upsell, new services and increased share of wallet.
Retain Revenue	Revenue is protected through renewals, save interventions, load-retention arrangements and improved customer experience.
Optimise / Recover Revenue	Value realised through billing correction, revenue assurance, leakage reduction, collections improvement or approved emerging services.

14. Product, Tariff and Sector Proposition Management

- Maintain one governed catalogue of products, tariffs, services, bundles and eligibility rules.
- Configure standard, time-of-use, flexible, dynamic, customer-specific and sector-specific propositions.
- Support EV charging, excess-energy, demand response, energy efficiency, green energy, wheeling, generation, storage and environmental attribute propositions.
- Support bespoke industrial solutions and approved negotiated or concessionary arrangements.
- Simulate customer bill and revenue impact before an offer is approved.
- Manage proposition design, approval, testing, launch, effective dates, versioning, migration and retirement.
- Link products to contracts, billing, customer journeys, campaigns and revenue attribution.
- Measure adoption, profitability, customer outcome, service performance and retention impact.
- Enable rapid modification when customer, market, regulatory or system conditions change.

14.1 Sector-Specific Intelligence

The solution must assist Retail to tailor engagement and products to the operating profile of each sector. Recommendations must consider relevant characteristics such as load shape, seasonality, reliability needs, energy intensity, growth plans, flexibility, generation assets, sustainability objectives, payment profile and strategic value.

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- Residential: affordability, prepaid or post-paid needs, rooftop PV, batteries, EV charging, smart appliances and digital service.
- Commercial: portfolio billing, operating hours, demand management, solar and storage, property hierarchy and multi-site insight.
- Agriculture: seasonal demand, irrigation and pumping flexibility, remote service, embedded generation and production cycles.
- Mining: expansion projects, reliability, demand flexibility, renewable integration, multi-site operations and long-term load outlook.
- Industry and smelters: complex tariffs, load retention, continuous operations, flexible consumption, major-project pipeline and strategic agreements.
- Data centres: new connections, reliability, rapid load growth, sustainability, flexible demand and portfolio expansion.
- IPP and generators: grid access, connection milestones, contracts, metering, settlement and ongoing relationship management.

15. AI, Analytics and Intelligent Automation

AI end-user principle

AI must assist customers and employees, improve foresight and automate low-value work. It must remain secure, explainable, auditable and subject to appropriate human oversight for material customer, financial and contractual decisions. AI parameters need to be controlled, scripted aligned to the Goals, governance and expected outcomes of Retail.

Customer intelligence

- Predict needs and service events. Monitor channels and social media feeds.
- Recommend relevant products, tariffs and energy actions.
- Identify churn, dissatisfaction and revenue risk.
- Provide personalised energy insight and proactive communication.

Employee assistance

- Summarise history and current context.
- Recommend knowledge, actions and resolution steps.
- Draft responses and case notes for review.
- Highlight risk, missing evidence, commitments and compliance considerations.

Commercial intelligence

- Forecast pipeline, load and revenue.
- Identify growth, retention and product opportunities.
- Model customer value, profitability and offer impact.
- Prioritise portfolios and interventions.

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Operational intelligence

- Detect meter, billing, payment and process anomalies.
- Predict contact demand and workforce needs.
- Identify bottlenecks, delays, repeated failure and revenue leakage.
- Trigger automation, alerts and proactive service.

16. Flexible Energy, DER Aggregation and Device Orchestration

- Register and maintain customer rooftop PV, batteries, generators, EVs, chargers, controllable appliances and flexible industrial or agricultural load.
- Capture consent, programme terms, device status, customer preferences, technical limits and override rights.
- Provide real-time or near-real-time visibility of consumption, generation, export, storage and flexibility.
- Forecast generation, consumption and available response.
- Group eligible customers and assets into portfolios for approved programmes.
- Create events or schedules linked to energy availability, system conditions, pricing or product rules.
- Notify customers and execute participation through customer action or approved automated control.
- Schedule flexible EV charging during favourable or excess-energy periods.
- Optimise battery charging and discharging within customer-approved limits.
- Shift or control approved appliances and loads while protecting safety, comfort and operational constraints.
- Measure actual response against approved baselines.
- Calculate settlement, incentive or compensation and provide transparent customer statements.
- Manage non-performance, communications, exceptions, disputes, enrolment and withdrawal.

17. Metering, Billing, Payments and Revenue Assurance

- Support prepaid, post-paid, multi-account, multi-site, consolidated, interval, import/export and complex agreement billing.
- Apply tariffs, products, effective dates, contract rules, taxes, credits and adjustments accurately.
- Validate source data and identify anomalies before customer impact wherever possible.
- Show customers clear consumption, generation, tariff and billing explanations.

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- Manage rebilling, disputes, approvals and customer communication through a traceable workflow.
- Support multiple payment channels, allocation, deposits, arrangements, collections and debt treatment.
- Reconcile meter, billing, payment, ledger and customer information.
- Identify leakage, unbilled energy, incorrect configuration, delayed activation and collection risk.
- Maintain a complete audit trail from source data and approved terms to billed and collected revenue.

18. IPP, Generator and Grid-Access Experience

- Provide a transparent one-stop application and relationship experience.
- Capture applications, supporting documents, fees and validation outcomes once.
- Track technical studies, commercial reviews, capacity, approvals, estimates, quotations and contracts.
- Provide applicants and authorised employees with milestone, dependency and action visibility.
- Coordinate connection, construction-interface, commissioning, metering and operational onboarding.
- Manage generator, customer, site, contract, meter and settlement relationships.
- Provide proactive communication, case management, dispute resolution and ongoing account management.
- Integrate with specialist engineering, network and market systems while shielding the applicant from internal fragmentation.

19. Data, Integration and Real-Time Visibility

- Establish governed customer, account, contract, site, meter, product, interaction, billing, sales, DER and consent data.
- Assign data ownership, quality rules, common definitions, lineage, retention and access controls.
- Identify and resolve duplicate and conflicting records.
- Integrate relevant meter, finance, field service, work, asset, network, identity, document, payment, data and market environments.
- Use documented interfaces and event-driven updates where real-time or near-real-time action is required.
- Monitor interface health, failures, reconciliation and recovery.
- Migrate required historical and active information without compromising customer balances, contracts, service history or traceability.
- Retain accessible history and progressively remove unnecessary legacy duplication.

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20. Management Control Tower and Performance

Management and operational teams must have role-based dashboards that show performance, risk, exceptions and action required. Measures must be traceable to agreed definitions and underlying customer or transaction records.

- Customer experience, sentiment, NPS or approved satisfaction measures and customer effort.
- Journey volumes, completion, ageing, hand-offs, bottlenecks and service-level performance.
- First-contact resolution, complaints, repeat contact and root causes.
- Billing accuracy, exceptions, disputes, revenue leakage and bill confidence.
- Payments, arrears, arrangements, collection and debt-risk performance.
- Sales pipeline, conversion, milestone ageing, forecast and realised revenue.
- IBRO new, grown, retained and recovered or optimised revenue.
- Churn, revenue at risk, renewals and retention interventions.
- Product take-up, usage, profitability and customer outcomes.
- Digital adoption and self-service completion.
- Workforce demand, capacity, productivity, quality and training needs.
- DER enrolment, available flexibility, event delivery, settlement and compensation.
- Customer, system, interface and operational exceptions requiring action.
- Transformation benefits, adoption and continuous improvement.

21. People, Adoption and Ways of Working

- Redesign roles and accountabilities around end-to-end journeys rather than functional hand-offs.
- Prepare employees and leaders for new processes, decision rights, service standards and performance measures.
- Provide role-based learning, simulations, knowledge and post-implementation coaching.
- Develop Customer Resolution Representative, relationship management, solution selling, product, data and digital capabilities.
- Create a business-owned network of process owners, super users and change champions.
- Engage affected employees and organised labour transparently and position the change as workforce empowerment and business sustainability.
- Measure adoption, employee experience, process compliance and capability gaps.
- Embed continuous feedback from customers and employees into product, process and knowledge improvement.
- Retain sufficient Retail capability to govern, operate and evolve the solution without avoidable dependency.

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22. Target End State: What Good Looks Like

End-state dimension	What good looks like
Customer experience	Customers interact with one Retail, receive consistent information, see progress, complete services digitally or with assistance, and do not have to navigate internal structures.
Employee experience	Employees work from one role-based environment, understand the full customer context, receive intelligent guidance and own journeys through to resolution.
Customer data	Retail has one trusted customer identity linking every account, site, contract, interaction, product, meter, device and commercial relationship.
Commercial capability	Every opportunity and retention action is visible from identification through fulfilment, billing and measurable revenue outcome.
Products	Retail can rapidly create and adapt products and tariffs for different sectors, energy conditions and customer profiles.
AI and foresight	Retail identifies likely needs, failures, churn, revenue risks and opportunities early enough to act proactively.
Operations	Processes are simplified and automated; teams focus on exceptions, judgement, relationships and value creation. This is required across all business environments which enables the customer to be serviced – GRID, Finance, Procurement
Energy services	Retail can aggregate DERs and flexible demand, optimise approved devices and compensate customers transparently.
Management	Leaders operate from a live control tower showing customers, journeys, revenue, workforce, product and operational risks.
Competitive position	Retail is agile, differentiated and trusted, with the ability to retain customers, grow share of wallet and respond to new market entrants.

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23. End-State Experience by Stakeholder

Stakeholder	Required future experience
Customer	I can engage through my preferred channel, see one consistent account of my relationship, track progress, understand my bill, receive relevant offers and participate in new energy services.
Customer Resolution Representative	I can see the complete customer context, understand what is required, follow a guided process, coordinate support and take ownership until resolution.
Relationship Manager	I can see customer health, commitments, opportunities, revenue, risks, products, projects and service issues across my full portfolio.
Sales and Solutions Team	I can manage opportunities from lead through quote, contract, connection and realised revenue, with clear dependencies and next actions.
Product Manager	I can design, approve, launch and measure propositions for specific sectors without long and fragmented manual processes.
Billing and Revenue Team	I can identify exceptions, explain charges, reconcile information and resolve revenue leakage through traceable workflows.
Operations and Service Teams	I receive complete, prioritised and actionable work with customer context, commitments and service deadlines.
SMEs	I can provide agility, timeous information, process improvement opportunities, guidance, direction on specific Retail subjects / Services.
Executive and Management	I have a real-time or near-real-time view of customer outcomes, revenue, pipeline, retention, journey performance, workforce, products and risks.
IPP / Generator	I can submit, track and manage my grid-access and commercial relationship through one transparent journey.
Prosumer / Flexible Customer	I can register energy assets, choose how I participate, see performance and understand how compensation was calculated.

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24. Measures of Success, Traceability and Scope Boundaries

24.1 Business Traceability Matrix

Every requirement must be traceable to the business problem and the customer, employee, operational or commercial outcome it is intended to improve. The detailed design must maintain the following linkage: Problem → As-is failure → To-be process → Enabling capability → Use case → Measure and outcome.

Problem	As-is failure	To-be process	Capability	Use case	Outcome
Multiple hand-offs	Customer and information transferred between functions	One orchestrated journey with persistent ownership	Customer 360, case and workflow management	UC03	Fewer transfers and faster end-to-end resolution
Fragmented customer records	Different functions rely on separate or conflicting information	One governed customer identity and shared journey context. Once set of documents stored and accessible to authorised Users.	Master data, Customer 360 and integration	All use cases	Improved data consistency and decision quality
Pipeline disconnected from revenue	Opportunity tracking is not consistently linked to connection, billing and collection	Opportunity-to-revenue process with IBRO attribution	Sales, pipeline, project milestone and revenue management	UC01, UC02, UC07	Improved forecast and realised-revenue visibility
Reactive customer management	Service, churn and revenue risks identified late	Predictive intervention and proactive communication, avoidance of nuisance push notifications.	AI, customer health, alerts and workflow	UC04, UC05	Avoided service failure and revenue protected
Slow product introduction	Design and implementation cross multiple manual processes	Governed design-to-launch process	Product, tariff, rules, simulation and billing integration	UC06, UC11	Faster time to market and improved product relevance

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Problem	As-is failure	To-be process	Capability	Use case	Outcome
Limited DER participation	Assets, events and compensation not connected end to end	Enrol-to-settlement process	DER registry, orchestration, measurement and settlement	UC08, UC09	Transparent participation and compensation
Limited management visibility	Disconnected and retrospective reporting	Live retail control tower with drill-down	Analytics, alerts and governed metrics	UC12	Earlier intervention and trusted performance view

24.2 End-User Measures of Success

- Reduced time from enquiry or Expression of Interest to quotation, connection and first bill.
- Improved first-contact and end-to-end resolution.
- Reduced customer hand-offs, repeated information requests and avoidable contacts.
- Improved billing accuracy, bill explainability and dispute resolution.
- Increased digital and self-service completion.
- Improved customer satisfaction, trust and retention.
- Reduced churn and revenue at risk.
- Increased pipeline conversion and shorter revenue-realisation cycles.
- Measurable new, grown, retained and recovered or optimised revenue through IBRO.
- Faster product and tariff launch.
- Reduced manual effort, rework and cost to serve.
- Improved employee productivity, confidence and ownership.
- Improved data quality and consistency.
- Successful DER enrolment, flexibility delivery, settlement and customer compensation.
- Timely visibility and action on operational and commercial risks.

24.3 Scope Boundaries

This document defines the required end-user business scope and target state. procurement process, bidder-response, evaluation, pricing and contractual provisions. It also does not require the replacement of specialist engineering, network-control, asset-management or corporate finance systems where they remain authoritative. However, the customer journey, data exchange, workflow integration and visibility needed to deliver a seamless Retail experience remain within the end-user scope.

Final end-state statement

IBTS must enable Retailto operate as one intelligent retail business: customer-led, digitally enabled, commercially accountable and ready for competition. Customers must experience speed, simplicity,

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transparency and relevance. Employees must be empowered with complete information, authority, guidance and intelligent tools. Management must be able to see and steer the entire retail value chain, from opportunity and customer need to service outcome, billing, cash and sustained customer value.

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	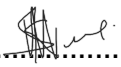	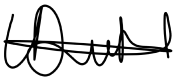	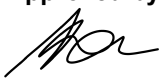
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