



CASE STUDY

PNM Transforms Electric Service Requests with PowerClerk

Streamlining Service Requests and Improving Stakeholder Satisfaction



Public Service Company of New Mexico (PNM), founded in 1917, is New Mexico's largest energy provider, serving over 525,000 residential and business customers. PNM's service areas include Albuquerque, Rio Rancho, Santa Fe, and numerous other cities, as well as several New Mexico tribal communities. The company focuses on delivering reliable, clean energy and has invested heavily in solar, wind, and geothermal power, supporting the energy needs of over 174,000 homes.

Challenge

Public Service Company of New Mexico (PNM®) faced significant hurdles in accommodating the growing number of customer requests for new and upgraded electric service. Processing these requests requires external communication with customers and developers and internal coordination across multiple departments, where even small inefficiencies and missteps could cascade into significant project delays.

While PNM had already digitized the previous paper-based application process, the existing solution could not keep up with the growth of these service requests, including new and upgraded service connections ranging from single-family homes to commercial and industrial subdivisions, as well as special requests like temporary service energization, service reactivation and meter relocations. **Too many important tasks, such as permit verification, stakeholder communications, and status tracking, were manual and relied on emails and spreadsheets.**

These inefficiencies increased customer inquiries and complaints, further hindering PNM's ability to meet residential and commercial customers' in-service delivery deadlines. With these service requests approaching 12,000 per year in volume, it was essential for PNM to identify a solution that streamlined the intake process and offered a central source of truth for all stakeholders.



Solution: PowerClerk®

PNM looked to PowerClerk, the utility industry's leading workflow automation product for interconnection, service requests, energy programs, and more. PNM expanded its use of PowerClerk—from solar interconnection and several other processes—to improve its electric service request process. With PowerClerk, PNM standardized its application form with conditional logic, enhancing the user experience. Customers and developers can now use PowerClerk to access relevant project information including the application status of projects.

PowerClerk supports parallel workflows with the ability to allocate tasks to specific individuals and automate deadline management and reminders. Role-based access control allows supervisors to assign requests to a designated team member as the PNM point of contact to manage the overall process. Furthermore, the PowerClerk portal supports document uploads—including approved permits—consolidating all relevant project information in one place. **These thoughtful features help PNM shorten timelines without duplicating efforts, while keeping stakeholders informed of project status, from design engineering, all the way through to inspection and energization.**

A crucial feature of the PNM solution is PowerClerk's robust integration capability. API-based integrations between PowerClerk and other back-office systems automate many labor-intensive elements of PNM's service request process that had relied on manual interaction with back-office systems and tools. A deeper look at PNM's key PowerClerk integrations is found below.



“PowerClerk has limitless possibilities—it’s robust, agile, and effortless for internal and external stakeholders to use. Processing over 12,000 new electric service requests annually would have been impossible without Clean Power Research’s PowerClerk, leading to our most successful performance in meeting customer in-service deadlines.”

Aaron Cabral, Technical Program Manager at PNM

Results

Implementing PowerClerk allowed PNM to transform their electric service request process with a digitalized solution which yielded significant benefits to all stakeholders. Automating workflows and centralizing project status tracking expedited PNM's energization process, minimizing the risk of PNM causing project delays. As a result of the PowerClerk implementation, **PNM now processes most energization requests in less than 30 days, and more complex design projects aim for less than 90 days.**

Standardized processes, reduced rework instances and 24/7 online access to project information significantly reduced complaints and improved customer and employee satisfaction, leading to PNM winning Chartwell's Gold Award for Digital Experience in 2021.

Conclusion

PowerClerk significantly improved PNM's productivity and stakeholder experiences for residential and commercial electric service requests. **PowerClerk and its powerful integrations help ensure PNM works towards its goals, including meeting customer energization dates and regulatory deadlines.** The product's ongoing enhancements and integration capabilities continue to optimize PNM's process, demonstrating the power of automation and digital transformation in utility operations.



Results Snapshot

- ✓ Shortened timelines for ~12,000 service requests per year
- ✓ Higher customer, developer and employee satisfaction
- ✓ Chartwell Gold Award for Digital Experience Winner 2021 for:
 - Visual workflows
 - 24/7 online access
 - Automated communications
 - Standardized application processing

Take a deeper look at PowerClerk integrations on the next page:

- How PNM standardized cost estimates with ArcGIS
- How PNM more efficiently allocated resources to projects with Power BI
- How PNM improved contract management and reduced human error with Maximo

Streamlining operations with PowerClerk integrations

Prior to implementing PowerClerk, three major challenges hampered PNM's electric service request process:

- Inconsistent and time-consuming cost estimates
- Lack of visibility into individual project status and resource availability and
- Inefficient and error-prone work order contracting process.

These pain points created significant volumes of administrative work for PNM's engineering team, diverting their bandwidth away from core engineering work. Furthermore, the manual and inconsistent nature of the administrative work hindered PNM from possible continuous process improvements.

To address these challenges, PNM streamlined the process and improved data accuracy by integrating PowerClerk with several core third-party systems and tools.

ArcGIS Survey123

PNM leverages PowerClerk's integration capabilities to process customer requests for electric service request cost estimates against location and asset data from PNM's GIS, Esri ArcGIS Survey123. The project location and other basic information are sent from the GIS to PowerClerk programmatically via PowerClerk's API. PowerClerk then references the stored set of formulas and assumptions to automatically calculate cost estimates. By standardizing the cost estimation process, PNM not only helps customers and developers make informed decisions on whether to proceed but also reduces the engineering labor needed for projects that might never move forward. This ensures a smooth experience for applicants in starting, tracking, and completing their electric service requests.

Microsoft Power BI

PowerClerk feeds scheduled report data files on the current status and throughput of the assigned project managers, into Power BI daily, enabling visual project mapping, and customized dashboards and metrics. PNM uses the reports to build custom project insights in Power BI. This allows managers and engineers to plan resources accordingly, eliminate project scheduling chaos and ensure regulatory compliance.

IBM Maximo®

Integrating PowerClerk with Maximo allowed for a seamless population of work order details. PowerClerk pulls the work order information needed for contracts, including costs, credits and tax, eliminating the need for manual double-entry and reducing human error with accurate data. By leveraging PowerClerk's web adapter integration feature, PNM ensures project statuses are updated promptly. The Maximo integration reduced human error and further streamlined its electric service request process.



Clean Power Research enables utilities to plan and optimize for the clean energy transformation. To learn more about Clean Power Research products and utility solutions, including PowerClerk, [contact us](#).



Energy program digitalization, automation and management



Customer engagement and enrollment, and DER planning



Solar data and intelligence services for solar project development, performance evaluation and operations