



The Pennsylvania Turnpike Commission would like to thank everyone who attended the Industry Forum for the Unified Back Office System on April 14th, 2021.

In response to inquiries at the Industry Forum, we will be providing the following information:

- Link to the posted Industry Forum Video Recording
- The Industry Forum PowerPoint Presentation
- The Industry Forum Attendees
- The Industry Forum Advertisement



Pennsylvania Turnpike Commission Industry Forum for the Unified Back Office System on April 14th, 2021 recording link is below. Please note that the presentation begins at 0:40.

<https://vimeo.com/538694571/31a01faa8c>



PENNSYLVANIA TURNPIKE COMMISSION

Unified Back Office System

Industry Forum

4.14.2021

Welcome

Steve Husic
Director of Enterprise Business Solutions



Welcome

- *Please Note: All Information Provided During the Industry Forum Is Subject to Change and is Unofficial. The RFP will be the Official Document.*
- Recorded Session
- Attendees – Muted and Video Off
- Questions
 - Use Q&A Box
 - Include Company Name in Question

Q & A

×

All (0)

From PA Turnpike: Ask a question here?

Send

Send Privately



Welcome

- Breaks
- Attendee List
- Schedule and Agenda

Agenda

- Welcome – Steve Husic, Director of Enterprise Business Solutions
- Customer Service Vision – Mark Compton, Chief Executive Officer
- Pennsylvania Turnpike Commission Introduction – Laura Marriott, Director of Electronic Toll Collection
- Customer Service History & Background – Kelli Roberts, Director of Policy & External Affairs
- General RFP Scope – Kelli Roberts, Director of Policy & External Affairs
- Procurement Rules – Donald Klingensmith, Assistant Chief Financial Officer
- 10-minute Break



Agenda

- Technical Session – Bhaskar Suryakumar, PTC Functional Lead and Timothy Krout, IT Consultant to PTC
 - PTC Security and IT Standards
 - RFP Options, Detailed Diagram Overview
 - 360 Degree View of Customer
 - Toll Host Integrations and Diagram
 - Case and Knowledge Management
 - PCI
 - Key PTC and Future Integrations
 - Network Architecture
- Questions and Closing – Steve Husic, Director of Enterprise Business Solutions



Customer Service Vision

Mark Compton
Chief Executive Officer





Pennsylvania Turnpike Commission History and System Landscape

Laura Marriott
Director of Electronic Toll Collection



Pennsylvania Turnpike Commission (PTC) History

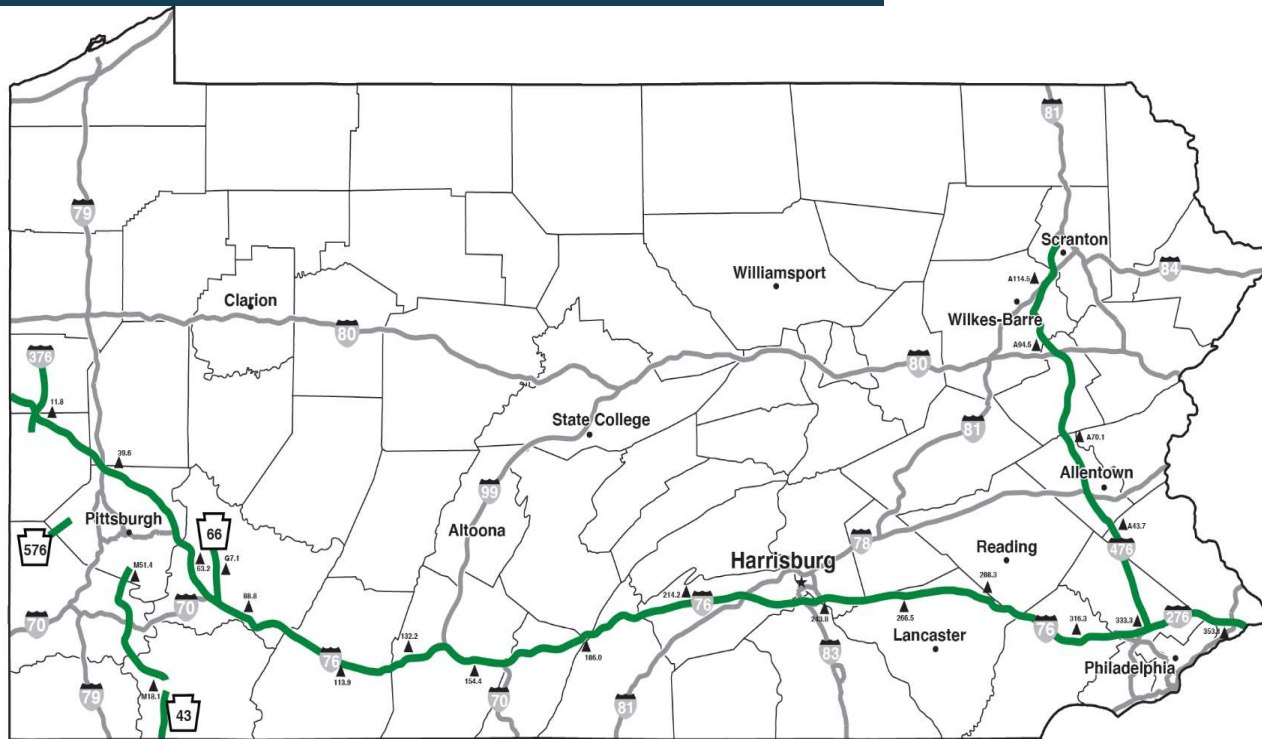
America's First Superhighway

- Opened in 1940
- Legacy of innovation in transportation
- Expanded to current footprint
 - 66 interchange locations
 - 552 total miles



Pennsylvania Turnpike Commission (PTC) System Landscape

A map of the Pennsylvania Turnpike Commission (PTC) System Landscape. The map shows a network of highways, including Interstate 76 (I-76), Interstate 70 (I-70), Interstate 80 (I-80), Interstate 79 (I-79), Interstate 81 (I-81), and Interstate 83 (I-83). Major cities and towns are labeled, including Williamsport, State College, Altoona, Harrisburg, and Pittsburgh. The map also shows various road shields, including route 376, 576, 66, 43, 70, 79, 80, 81, and 83. The PTC system is highlighted in green, showing its path through the region. The map is set against a background of county boundaries.



- Turnpike Mainline
- Northeast Extension
- Western Extensions

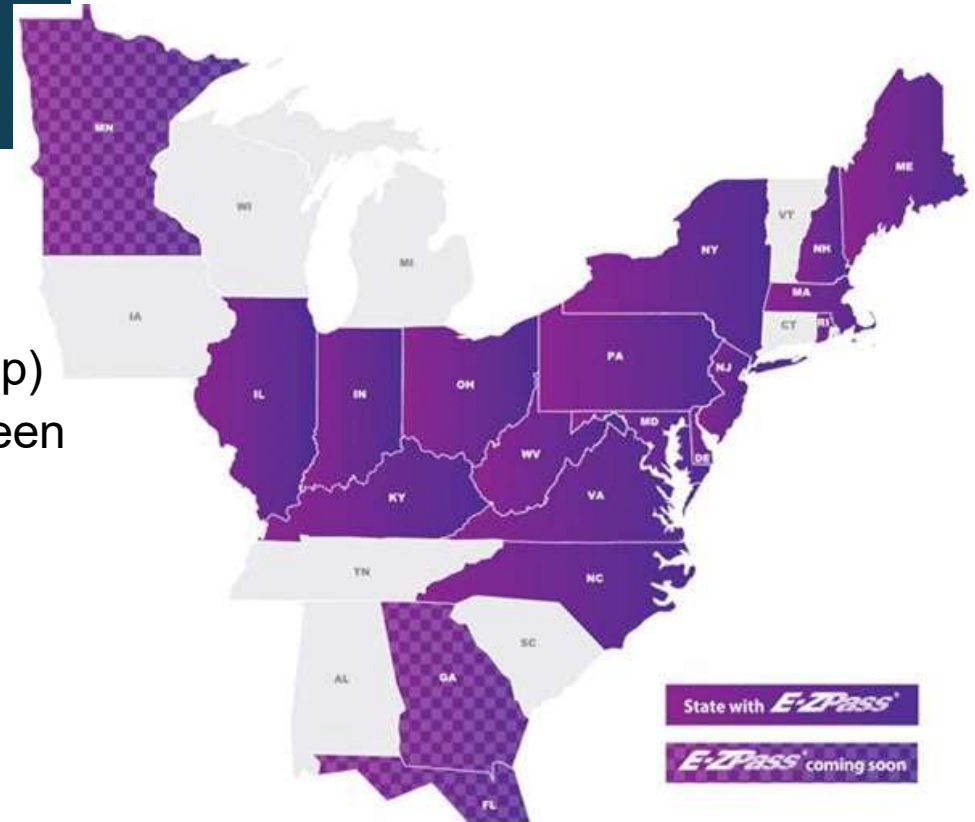
- Beaver Valley Expressway
- Greensburg Bypass (AKA: Amos K. Hutchinson Bypass)
- Mon/Fayette Expressway
- Southern Beltway



E-ZPass Group

E-ZPass Group (Inter-Agency Group)

- Toll charges are reconciled between agencies
 - Specific File Spec



All Electronic Tolling (AET) Options For Payment



85% Approx.

- Transponder-tag read
- Pre-paid, account based
- E-ZPass rate



15% Approx.

- No transponder present
- Image taken of vehicle license plate
- TOLL BY PLATE(TBP) rate
- Registered owner of vehicle invoiced



PTC Customer Service Center

- PTC Customer Service Center (CSC)
 - Capacity for up to 500 staff on site
 - Location of Data Center with DR Site in Philadelphia
- Call Volume (#'s impacted by COVID)
 - 1.64M FY 19
 - 1.60M FY 20
 - 940,486 FY 21 YTD



E-ZPass & TBP Growth

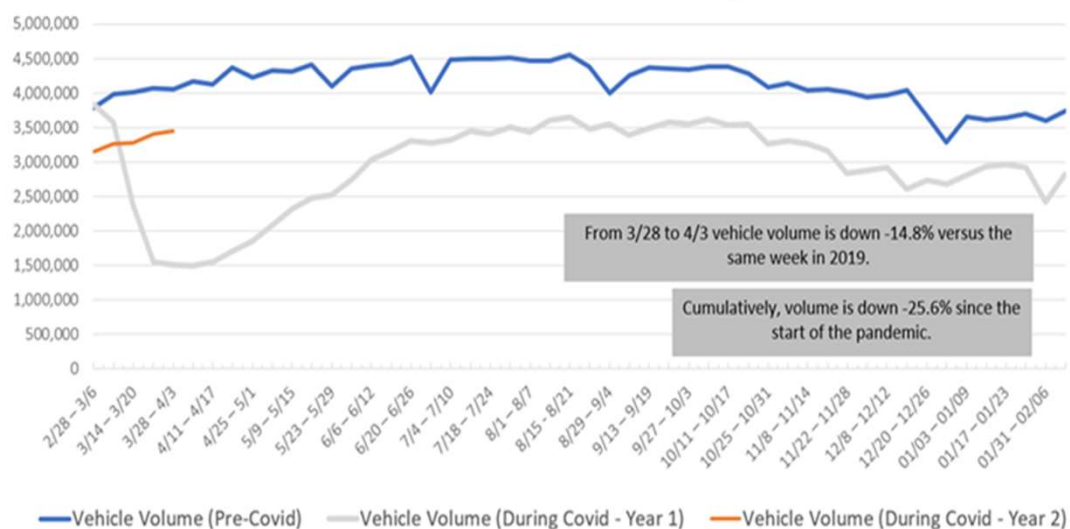
E-ZPass Growth

- 2.5M E-ZPass accounts
- E-ZPass Transactions
 - 150.3M FY 20
 - 94.8M FY 21 YTD

TBP Growth

- Transactions
 - 9.7M FY 20
 - 26.7M FY 21 YTD
- Invoices
 - 3.2M FY 20
 - 26.7M FY 21 YTD

Volume: Pre-Covid vs. During Covid



Toll Collection System

Current Back Office System

- Multiple toll collection system solutions installed
- Transactional data collected at tolling point
 - Entry & Exit transaction (trip-based)
 - Single tolling point transactions (single & bi-directional)
- Data sent to “Toll Host” database
- Transaction/Images Correlated
 - OCR Engine automatically processes approx. 90% of images
 - 10% of images are manually reviewed
- Files sent to Back Office System for processing
 - E-ZPass customer-deducted from pre-paid balance
 - TOLL BY PLATE customer invoiced



Vehicle Classification

Multiple Vehicle Classification Methods

Weight/Axle












- Toll may be based on number of axles, vehicle weight, or both

Height/Axle

- Used at several locations and in the future will be Turnpike-wide

CLASS	WEIGHT CLASSIFICATION
Class 1	Passenger Vehicles
Class 2*	7,001-15,000 lbs.
Class 3	15,001- 19,000 lbs.
Class 4	19,001-30,000 lbs.
Class 5	30,001- 45,000 lbs
Class 6	45,001-62,000 lbs.
Class 7	62,001-80,000 lbs.
Class 8	80,001-100,000 lbs
Class 9	100,001 lbs. & over

* Also includes any vehicle combination with more than two axles but weighing less than 7,000 lbs., except motorcycles with sidecar and/or trailer.

L is vehicle height of 7'6" or lower H is vehicle height of higher than 7'6"	
2L	2 axle, low profile 
3L	3 axle, low profile 
4L	4 axle, low profile 
5L	5 axle, low profile 
6L	6+ axle, low profile 
2H	2 axle, high profile 
3H	3 axle, high profile 
4H	4 axle, high profile 
5H	5 axle, high profile 
6H	6 axle, high profile 
7H	7+ axle, high profile 

Customer Service History and Background

Kelli Roberts

Director of Policy and External Affairs



Re-Focusing on the Customer

- Historically, operations-focused - successful however getting accurate tolls to the right customer in a timely fashion is due diligence; not best in class service.
- Employees have the right instincts, but as an organization we lacked the structure and procedures to understand our customers' changing needs.
- Audit showed disparate delivery resulting in inconsistent and frustrating experience.
- Customer held responsible to figure out our structure – multiple phone numbers and locations for customer service delivery.

Customer Service Program Objectives

- Better **understand our customers**
- Provide our customers with a **consistent, knowledgeable experience**.
- Make communications and payment **easy**; meet customers where they already are; let their preferences guide our offerings.
- Take advantage of **technology and innovation** to exceed customer expectations while managing costs.



Customer Service Program Goals

- 1. Staff Alignment**
- 2. Process Standardization**
- 3. Technology Enablement**

Technology Enablement

Build a unified, modern Back Office system

- Single, unified system for all customers; agnostic of contact center, location or method.
- Omni-channel - Self-service can be realized across multiple contact methods all of which are integrated with each other and pull information from the same, single repository of customer history and account information.
- PCI exposure reduction through tokenization and delegation to cloud-based resources; safer and allows cross-contact center collaboration and coordination.
- Future-proof to take advantage of new and emerging technologies: configured vs. customized.

PTC Prototype

- Opportunity to learn before making significant changes
- Built to perform both toll payment and non-toll payment functions
 - Non-toll payment functionality to GO LIVE and replace internal CRM, permitting and portal payment functions.
 - Toll payment functionality; no GO LIVE, not all needed functions built.
 - Learn and prove PCI approach
 - Better understand data and data migration
 - Document needs, processes and function for future procurement
- **MAY** be used as part of RFP response: more info to come
- Demoed later in presentation to provide functional understanding

RFP General Scope

Kelli Roberts
Director of Policy and External Affairs



PTC Future Back Office General Scope

Separate back office into two contracts; System and Operations

- Begin System procurement first with Operations to follow
- System Contract to include implementation, maintenance and support.
- Focus on enhancements and continuous improvement for duration of relationship.

Unified System

- Handles all customer interactions; omnichannel, integrated and secure
- May be accessed and used by all PTC employees as well as contracted Contact Center employees.

Agile approach to procurement and build

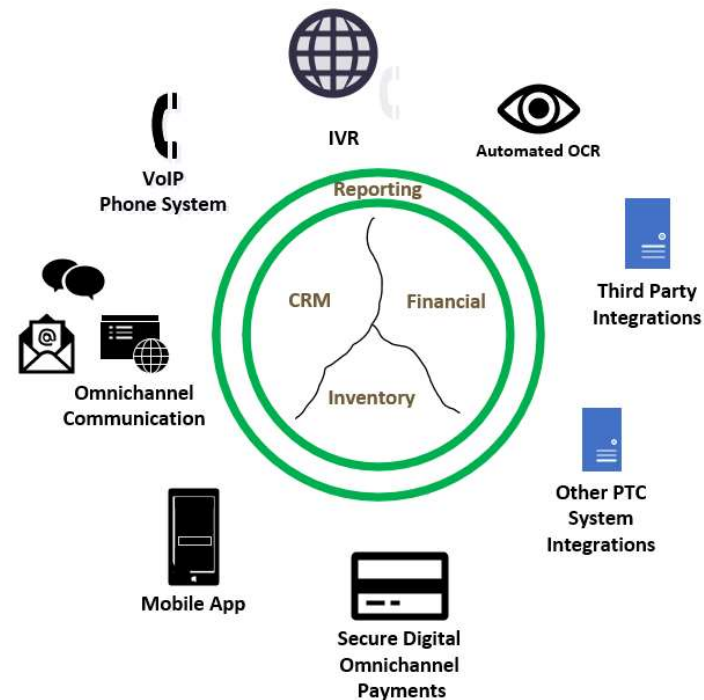
- More collaborative and evolutionary
- Scalable to meet future needs of rapidly changing industry



PTC Future Back Office General Scope

Complete, unified system

- Multiple components, systems and modules
- Fully integrated with each other
- Includes complete integrations with existing PTC systems and 3rd party providers
- Proposers are to provide a solution that contains all of the components on this page



Slide 25

CM7

Picture is rough but this is my general thought. I'll get Jane or soemone with better Visio/graphics skills to clean it up if it is approved.

Clark, Marie, 4/8/2021

Response Options

- Option A – Complete PTC’s prototype system
 - Take over PTC Prototype system in its entirety
 - Add missing functionality and enhancements
- Option B – Propose a solution that meets PTC needs
 - Bring your own system(s) to meet stated needs
- Option C – Anywhere along the spectrum from A to B
 - Take over some portion of the PTC prototype to mix with functionality of your own system.
- Only one solution may be proposed in your response

Procurement Process

Donald Klingensmith, P.E.
Assistant Chief Financial Officer,
Finance & Administration



Procurement Process

- RFP advertised Summer 2021*
 - www.paturndpike.com; Click on: Doing Business – Vendor Portal 2020
 - Must Register in PTC Vendor Portal to submit Questions and to submit a Proposal
 - Addenda to RFP – responsibility of Proposer to monitor Vendor Portal
- Evaluation Criteria
 - Technical (Approach, Qualifications, Experience, etc.)
 - Cost
 - Diverse Business Inclusion
- Proposals due – Summer 2021*
 - Mandatory Responsiveness Requirements – Signed and On-Time
 - Allow sufficient time to upload your proposal
- Contract Award – Fall 2021*

* anticipated dates/timeframes are subject to change



Communications During Procurement

- Question and Answers
 - All Q/A related to RFP will occur through Vendor Portal
 - Non-RFP related questions or issues can be emailed to RFP-Q@paturndpike.com.
- Clarifications – PTC (Contracts Admin.) will initiate any need for clarification
- Demonstrations / Presentations
 - Only if determined necessary by PTC
 - Limited to those determined to be susceptible to being selected for award.

Procurement / Selection Process

Technical Evaluation Team (TET)



Professional Services Procurement Committee (PSPC)



Commission Selection

RFP Release

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PTC Industry Forum

- Coffee Break
- Return in 10 minutes
- Up Next: Technical and Functional Deep Dive



Technical Session Introduction

Bhaskar Suryakumar
PTC Functional Lead

Tim Krout
IT Consultant to PTC



Information Security

- Security Requirements
- PCI Compliance
 - Credit card tokenization
 - No storage of card holder data
- IT Standards
 - <https://paturndpike.service-now.com/kb>

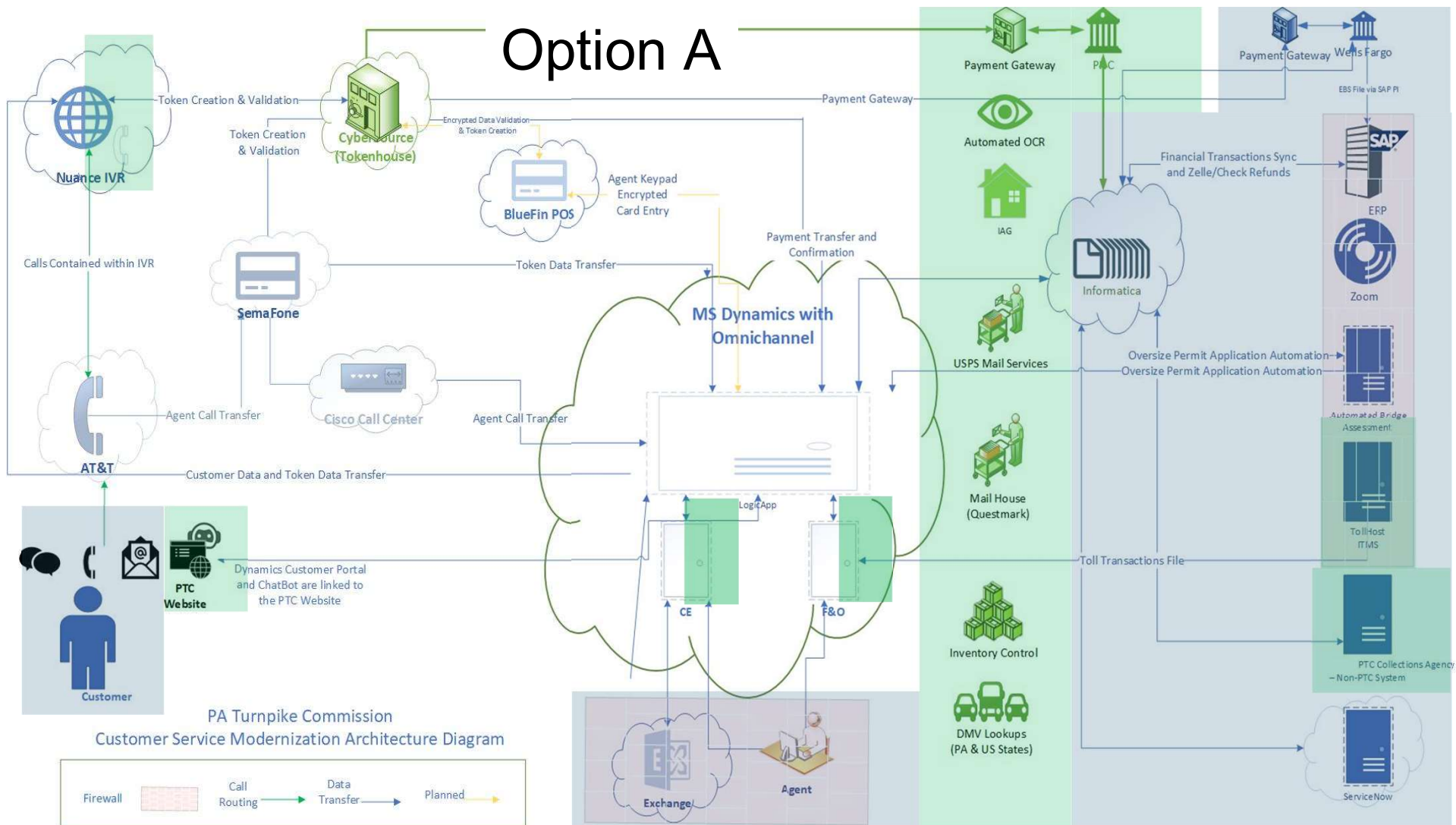
Technical Overview – System Goals

- Better **understand our customers**
- Provide our customers with a **consistent, knowledgeable experience**.
- Make communications and payment **easy**; meet customers where they already are; let their preferences guide our offerings.
- Take advantage of **technology and innovation** to exceed customer expectations while managing costs.

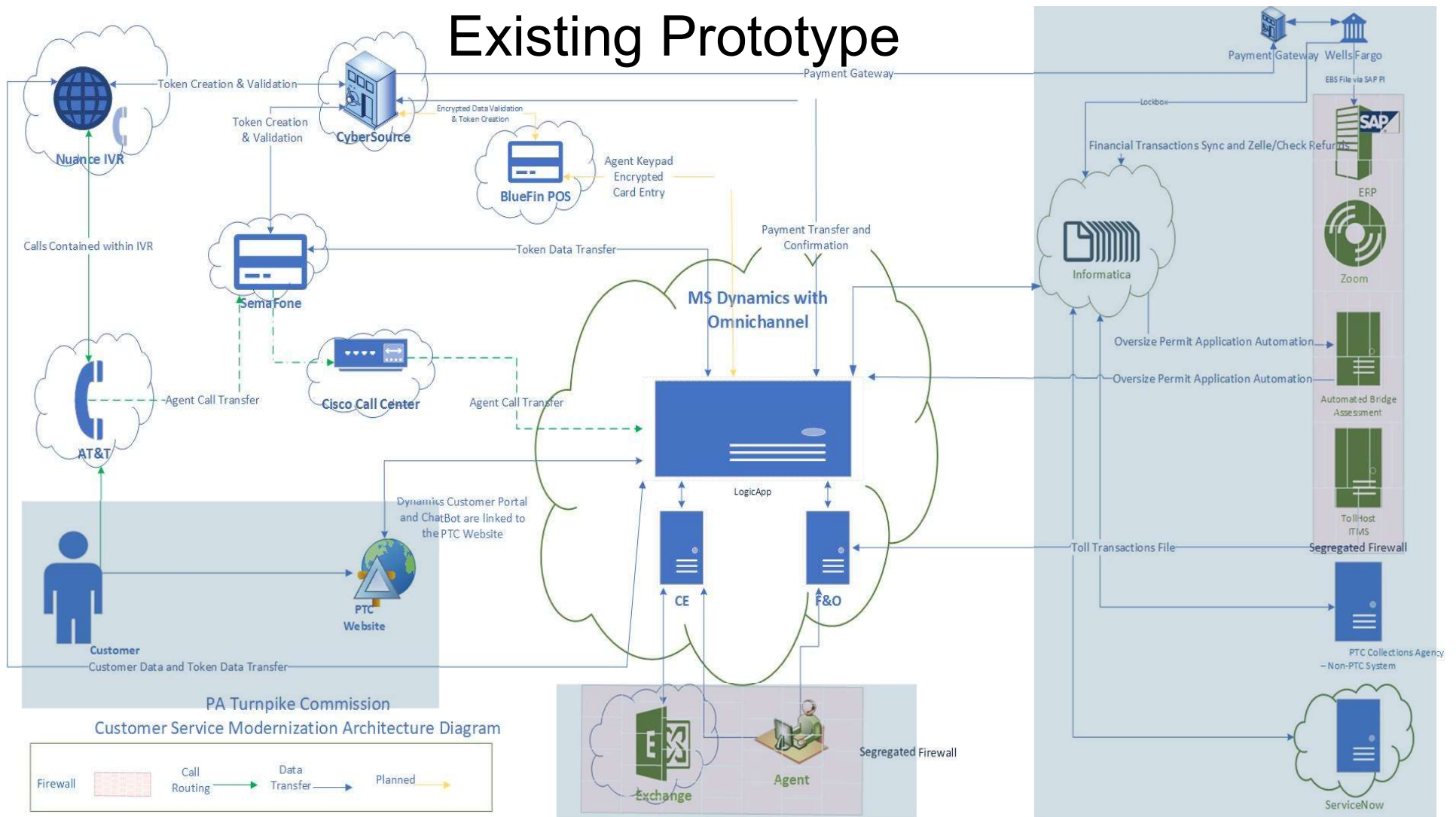
3 Technical Options Available

- Option A – Complete PTC's prototype system
 - Option B – Propose a solution that meets PTC needs
 - Option C – Anywhere along the spectrum from A to B
-
- Only one solution may be proposed in your response

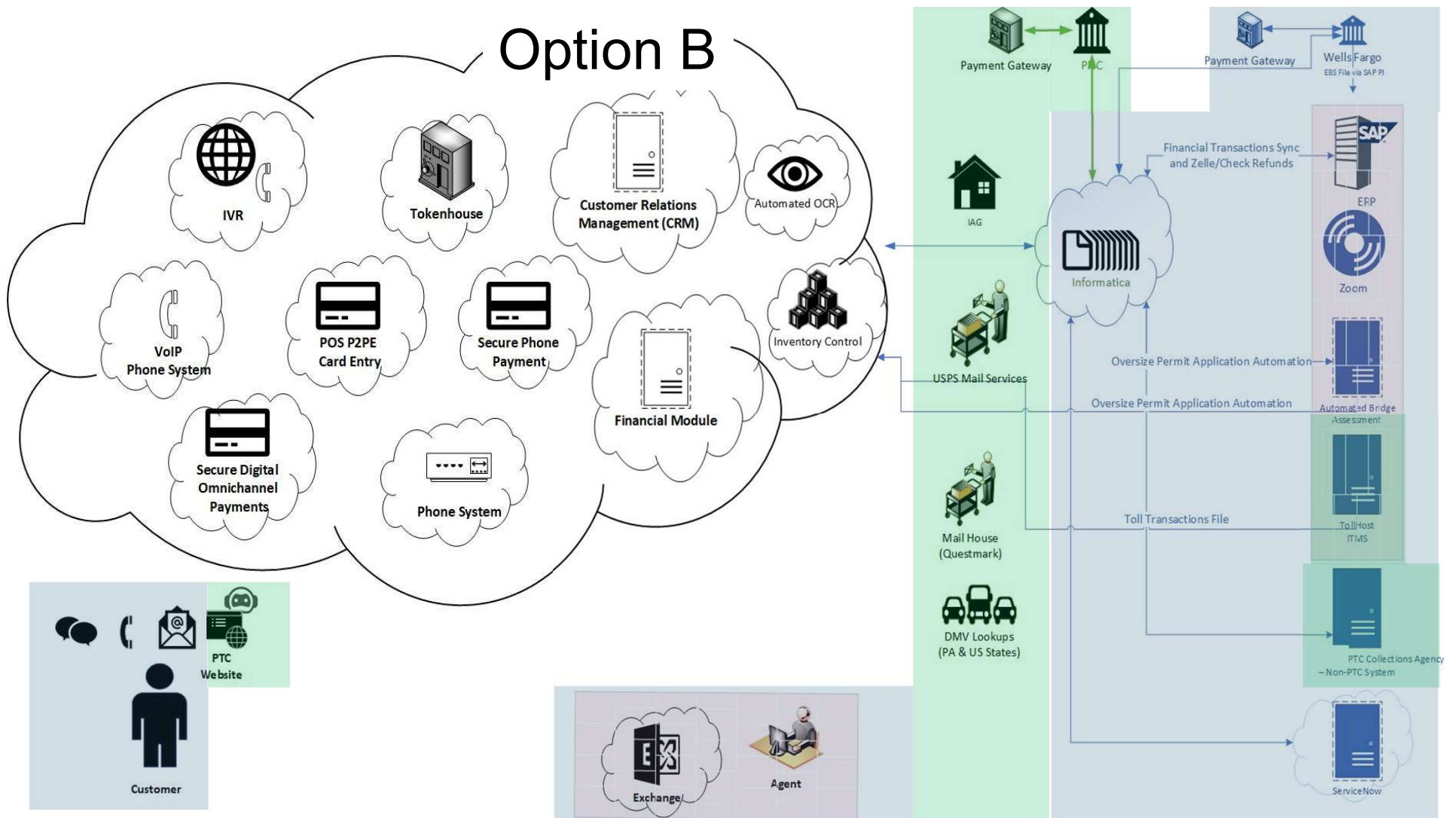
Option A



Existing Prototype



Option B



Option C – Anywhere on the Spectrum from A to B

There is, intentionally, no diagram for Option C anywhere along the spectrum from A to B

Option A – Technical Architecture

Next several minutes are focused on the existing prototype

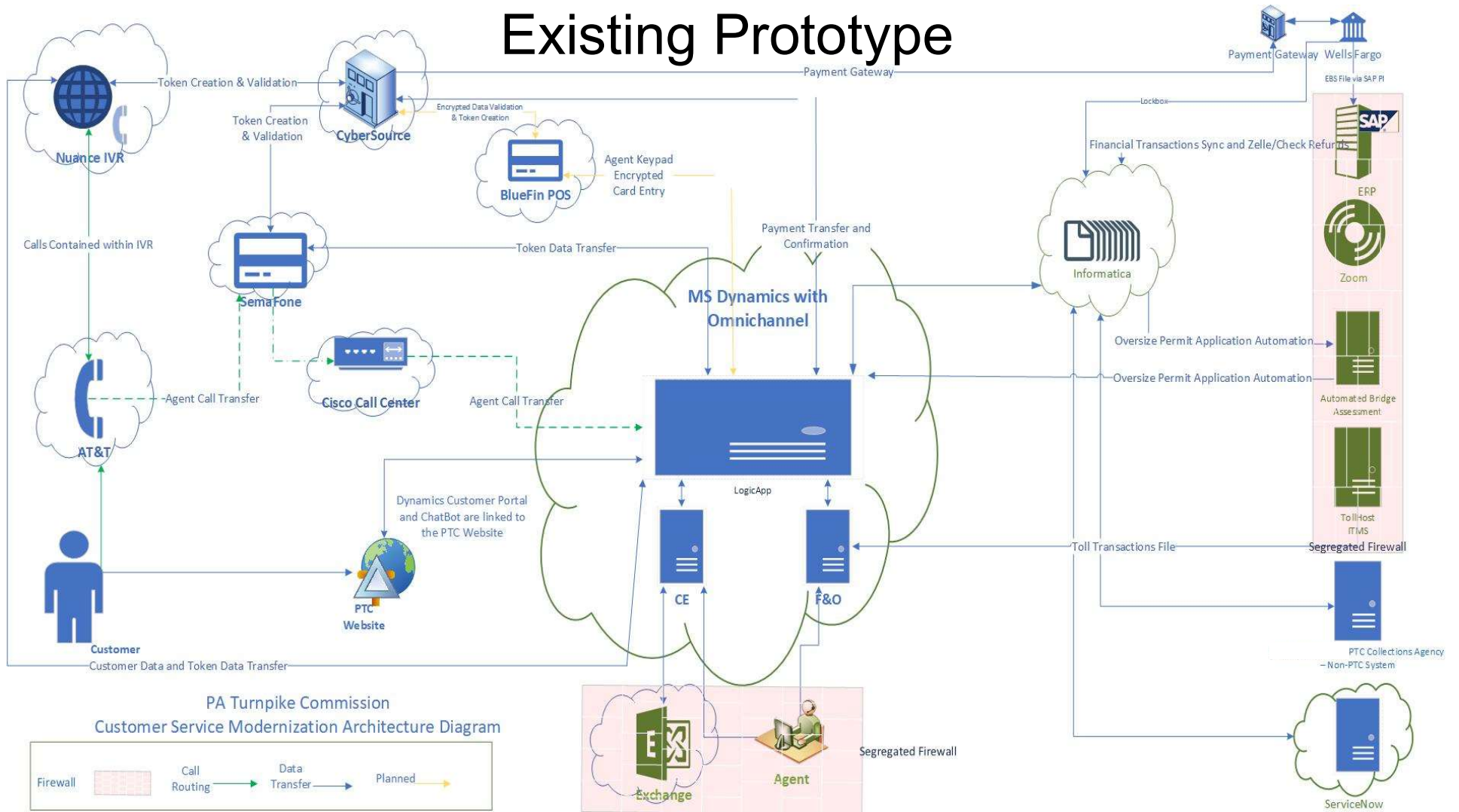
Highlight:

- PCI architecture
- Data migrations & integrations
- Integrations with PTC systems
- Integration with external systems

Concepts from the Prototype apply to all options



Existing Prototype



360 Degree view of Customer

Critical aspect of UBOS system is 360° view of customer

- 1 account – E-ZPass, TOLL BY PLATE, Permit, Disable Vehicle, etc.
 - Systems today are in separate environments – not shared, cannot get a 360° view

Account overview video follows – next slide





TURN
PIKE

Data Migration is a Big Deal

PTC used the prototype to load existing data to ensure understanding of existing data

- CSC data (E-ZPass & Toll By Plate)
- PTC Permit (Over dimensional) system
- PTC General Ledger data (open accounts, e.g. Disabled Vehicle)

PTC will ensure a comprehensive understanding of existing data and its uses



Toll Host and Vendor Server Integration

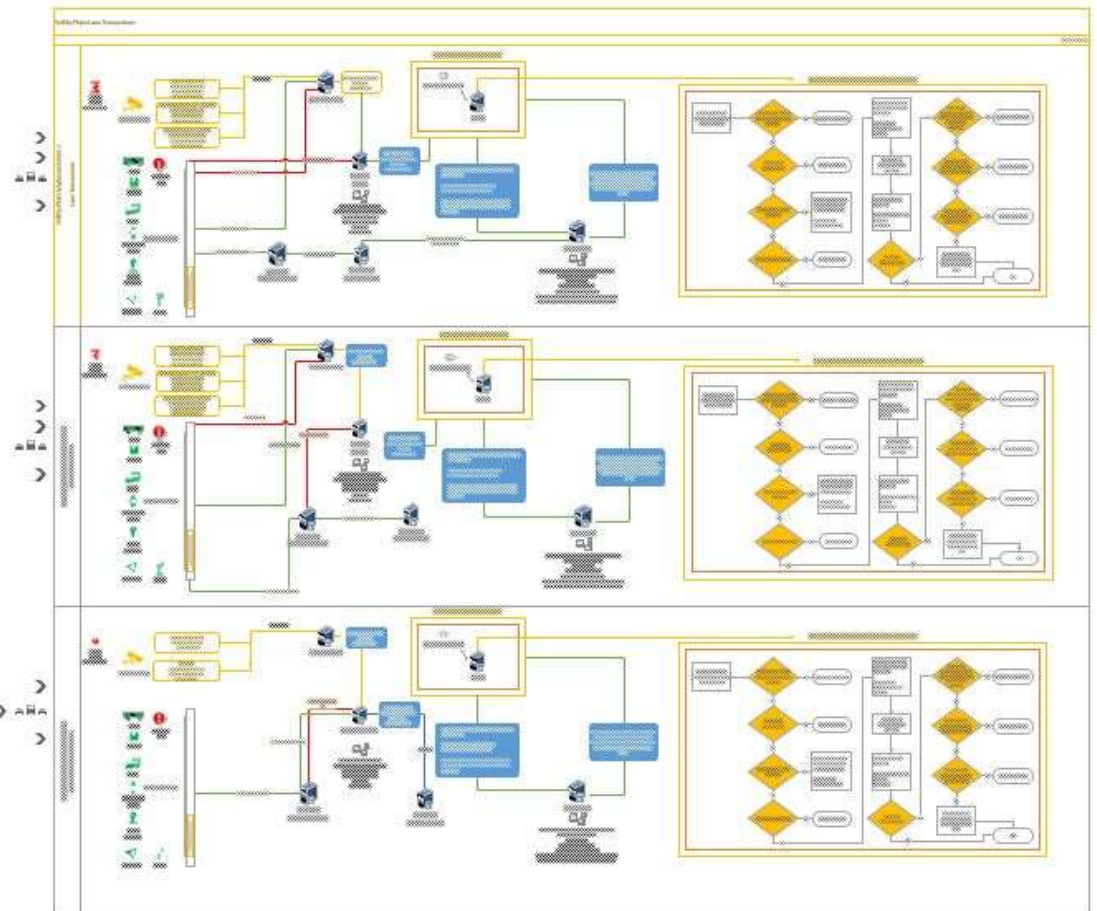
- Bi-directional Integrations with the TollHost
- Integrations with the vendor servers.

Toll Host Integration for TBP

TOLL BY PLATE
Lane System #1

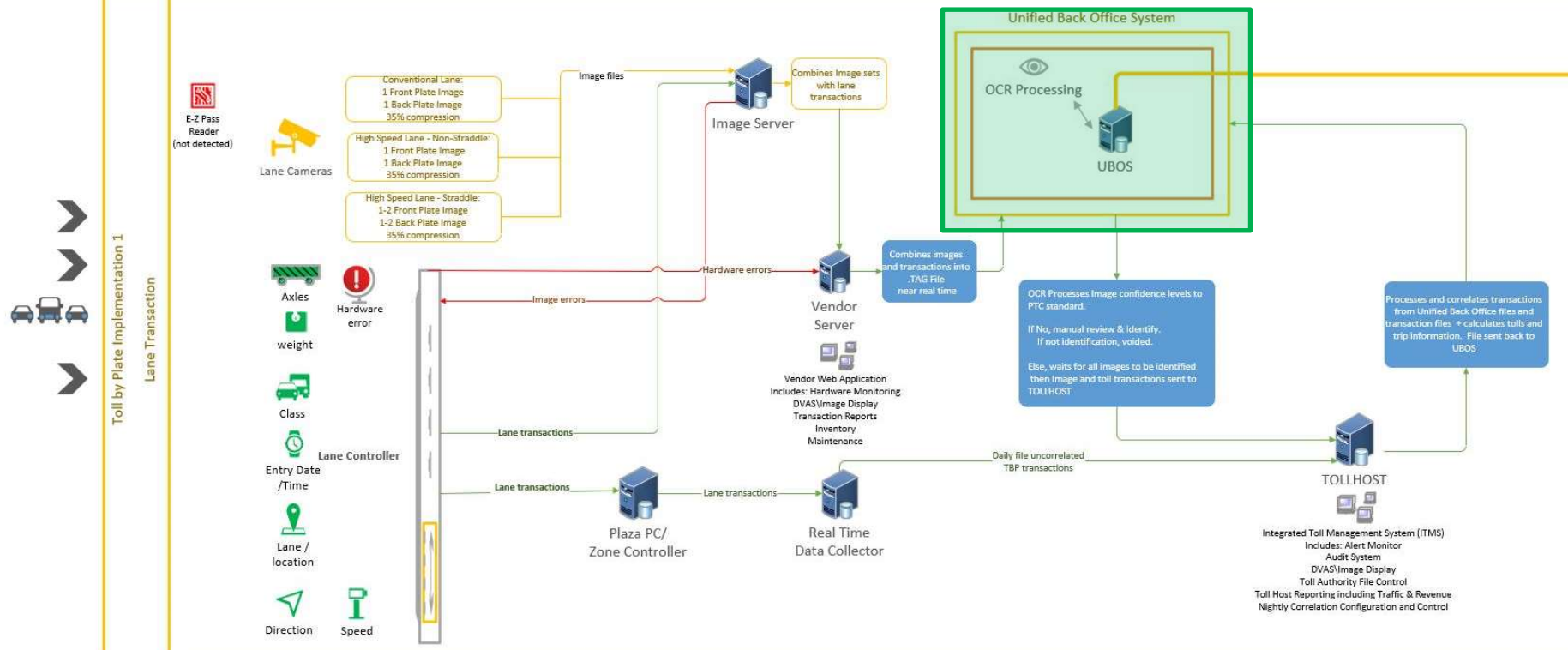
TOLL BY PLATE
Lane System #2

TOLL BY PLATE
Lane System #3



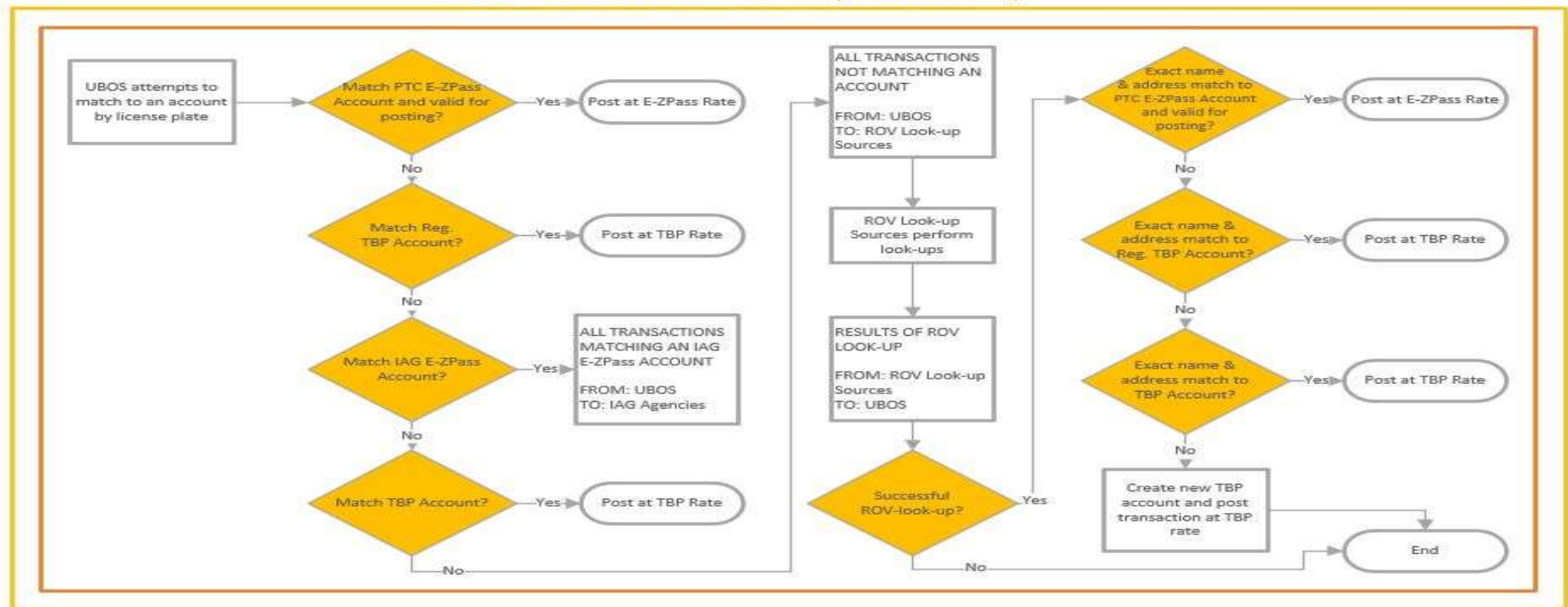
Toll Host Integration for TBP

TOLL BY PLATE Lane System #1



UBOS Processing of Image Transactions

Unified Back Office Toll by Plate Matching



Case Management

- Case management is centerpiece of system
- Every customer interaction is a case
- Every interaction is logged in the system
- More than just toll questions

Three (3) videos follow on next three (3) slides

1. Agent handling a call and updating the case using the generic account
2. Continuation of Agent updating the case
3. Agent creating a ServiceNow case



Video

Next Slide

Agent handling a call and updating the case using the generic account



CSO... [Icons]

File Home Insert Draw Design Layout Refer [Icons]

Clipboard [Icons]

Navigation

Search document [Icon]

Headings Pages Results

- Getting Started
- ACCOUNTANT Scenarios
- AGENT Scenarios
 - CASE MANAGEMENT (CM)
 - Get Ready
 - CM01 | Handle Call (or Chat) using Generic A...
 - 1. Receive Customer Call (or Chat)
 - 2. Interact with the Customer
 - 3. Verify and/or Update the Account typ...
 - 4. Verify and/or Update Case
 - 5. Document the customer interaction
 - 6. Resolve the Case
 - 7. Close the Session
 - 8. Prepare for the Next Call (or Chat)
 - CM02 | Handle Call (or Chat) using Custom...
 - DO NOT USE! DISABLED VEHICLES (DV) NOT RE...
- CUSTOMER Scenarios
- ENGINEERING Scenarios

Display Settings [Icons]

Omnichannel Agent Dashboard [Icons]

csmeuat.crm9.dynamics.com/main.aspx?appid=ab74e72d-d5fc-ea11-a815-001dd8018a6d

Apps OMNI - PTC Sandbox F&O - PTC Sandbox PORTAL - PTC Sand... Toggl Track

Dynamics 365 Omnichannel for Customer Service

SANDBOX

b+s Connects Customer Service ... Omnichannel Agent Dash... [Icons]

Save As + New X Clear Default Refresh All

Search and dial [Icon]

Omnichannel Agent Dashboard

My work items

0 0 Modified On

No data available.

Open work items

0 0 Modified On

No data available.

Closed work items

0 0 Modified On

No data available.

Agent: Thomas Sponder
Agent ID: o-ispender
Extension: 8000010

3:14 PM
4/5/2021

Video

Next Slide

Continuation of Agent updating the case Video



Case: CCM Case: Questions / Need Help - Other

Navigation

- Getting Started
- ACCOUNTANT Scenarios
- AGENT Scenarios
 - CASE MANAGEMENT (CM)
 - Get Ready
 - CM01 | Handle Call (or Chat) using Generic A...
 - 1. Receive Customer Call (or Chat)
 - 2. Interact with the Customer
 - 3. Verify and/or Update the Account typ...
 - 4. Verify and/or Update Case
 - 5. Document the customer interaction
 - Click on the "Enter a note..." field.
 - Click on the "Title" field and ente...
 - Click in the "Enter text..." field an...
 - Click "Add note"
 - Notice that the note is added to L...
 - 6. Resolve the Case
 - 7. Close the Session
 - 8. Prepare for the Next Call (or Chat)
 - CM02 | Handle Call (or Chat) using Custom...
 - DO NOT USE! DISABLED VEHICLES (DV) NOT RE...
- CUSTOMER Scenarios
- ENGINEERING Scenarios

Questions / Need Help - Other

Case

Normal 4/5/2021 7:15 PM In Progress Integration User

Priority Created On Status Owner

Phone to Case Process

Active for less than one mi...

Identify (< 1 Min) Research Resolve

Summary Additional Details Case Relationships Knowledge Base Articles Related

Legislative

No

Account*

IVR Unknown Caller Account

Contact

Case Type*

Questions / Need Help

Case Sub Type

Roadway Condition - Complaint / Inqui...

ServiceNow Case URL

Mode Of Creation

Manual

Customer Issue Type

Timeline

Search timeline

Enter a note...

Note modified by Integration User 4/5/2021 7:15 PM

Auto-post on Questions / Need Help - Other Case: Created by Integration User for Account L... 4/5/2021 7:15 PM

Smart assist

Knowledge article suggestions

No suggestions found for knowledge article.

Similar case suggestions

No suggestions found for similar cases.

3:20 PM 4/5/2021

Video

Next Slide

Agent creating a ServiceNow case





Single Database

- Note the real time integration w/ CRM & IVR
 - There are not 2 sets of accounts
- Prototype does same for Web portal, chat, etc.
- All aspects of system reach into Dynamics CRM & ERP for access to data

PTC believes a single database is a key for consistent customer service



Knowledge Management

Key aspect of system is knowledge articles, and access to them by both customers and agents

- Very important that agents can easily access knowledge base articles

Video of Agent using a Knowledgebase article to answer a customer question on following page.



Call with McKinney, William

2021-04-07 22:08 UTC

Recorded by

Krout, Timothy

System – PCI

- Delegate PCI to partners to maximum extent possible
- Keep PTC core systems out of Cardholder Data Environment (CDE)
- Keep PTC core system out of Customer's Bank Account Information
- Very tight (real-time API) integration with Token House

Delegate: dial-tone masking, digital collection of card / ACH data, phone solution, encrypted Point of Sale card collection
PTC agents see only tokenized PCI data

Three (3) videos follow on next three (3) slides

1. Agent assisting customer enter a new payment method via the phone
2. Customer entering a new payment method via the portal
3. Agent assisting a custom pay an invoice using an existing payment method



Video

Next Slide

Agent assisting a customer to enter a new credit card onto their account



Call with McKinney, William

2021-04-07 22:21 UTC

Recorded by

Krout, Timothy

Video

Next Slide

Customer entering a new payment method via the portal



Disabled Vehicles

2021-02-12 18:04 UTC

Recorded by

Berry, David

Organised by

Berry, David

Video

Next Slide

Agent assisting a custom pay an invoice using an existing payment method



Disabled Vehicles

2021-02-12 18:31 UTC

Recorded by

Berry, David

Organised by

Berry, David

SAP integrations

- SAP is the main General Ledger for PTC Accounting
- UBOS system will need to be the customer subsidiary ledger to PTC's main general ledger (SAP)
- Bi-directional integrations required with SAP

Key Financial Integrations

- Real time seamless integration between the CRM module and the financial module of the UBOS
- Multiple collection agencies
- Token house / Payment gateways
- Bank integrations (2)

UBOS Integrations

Besides SAP and Financial integrations; there are a number of other **existing** integrations

- Bridge Assessment
- ServiceNow
- Collection Agency
- (List is not exhaustive)

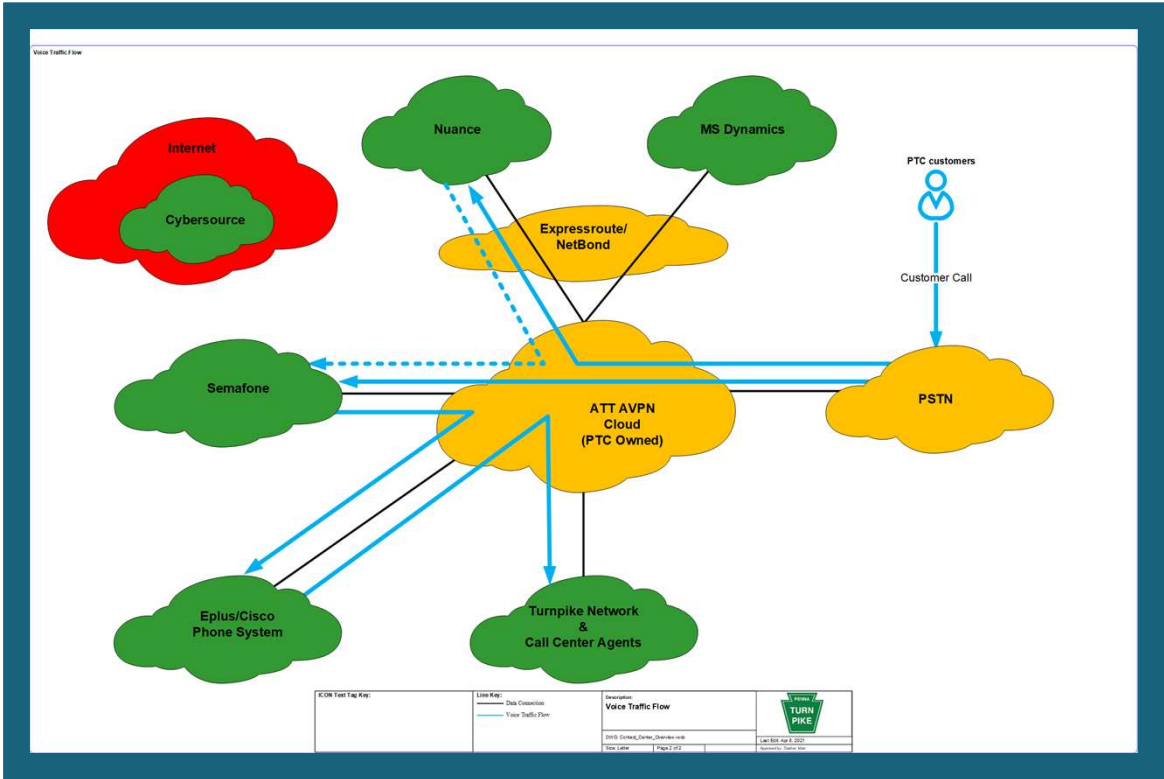
Required **additional** integrations

- Automated OCR and manual image review
- Toll Host and vendor servers
- Transponder related Inventory control
- DMV lookups
- Inter Agency Group (IAG) – E-ZPass consortium
- USP Mail Services
- Mail House
- (List is not exhaustive)

Network interconnecting all the cloud, SaaS, providers is a key aspect of UBOS



Network Architecture



Technical Session – Wrap-up

- PCI Delegation
 - While achieving a Unified Back Office System (UBOS)
- Data Migration is a Big Deal
 - PTC understands our datasets and will have the data prepared for ingest
- Seamless and Automated Integration with existing and new systems
- Customer Focused system which provides a real time 360-degree view of the customer and provides consistent customer services irrespective of how a customer reaches out to PTC.

Technical Session – Wrap-up

Three Options:

- Option A – Complete PTC's prototype system
 - Option B – Propose a solution that meets PTC needs
 - Option C – Anywhere along the spectrum from A to B
-
- Only one solution may be proposed in your response



Q&A

Closing

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- www.paturnpike.com;
Click on: Doing Business – Vendor Portal 2020
- Look for RFP – Summer 2021





PENNSYLVANIA TURNPIKE COMMISSION

Unified Back Office System

Industry Forum – THANK YOU

4.14.2021

Pennsylvania Turnpike Commission Industry Forum April 14th 2021 Attendee List

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Donna	Hale	dhale@5pconsulting.biz	vCIO	5P Consulting
Y'vonne	Ormond	yormond@5pconsulting.biz	CEO	5P Consulting
Tremayne	Terry	tremayne.terry@a2zdiversity.com		A2Z Diversity Solutions
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Mary	Jo Medura	mmedura@bbandt.com	SVP	BB&T now Truist
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Ken	Dodson	kenneth.dodson@cai.io		CAI
Kristee	Blanciak	kristee.blanciak@cbts.com		CBTS
Robert	Hatfield	bob.hatfield@cbts.com		CBTS
Max	Maia	mamaia@cisco.com		Cisco
Kevin	Hall	kevinhal@cisco.com		Cisco Systems
Daniel	Burkholder	dburkhol@cisco.com	account manager, us public sector	Cisco Systems
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Samraj	Ponraj	samraj.ponraj@cognizant.com	Manager Consulting	Cognizant Technology Solutions US Corp
Steve	Pacchioli	stephen.pacchioli@cai.io	Senior Client Executive	Computer Aid, Inc. (CAI)
James	Cockrell	james.cockrell@tigerspike.com		Concentrix Tigerspike
Bryn	Olexy	bryn.olexy@conduent.com		Conduent
Richard	Wise	richard.wise@conduent.com		Conduent
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Sohrab	Zibaii	sohrab.zibaii@coresphere.com	BD	CoreSphere
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Unified Back Office System (BOS)

PA Turnpike Commission

RFP # 6100005876

Project Overview:

The Pennsylvania Turnpike Commission (PTC) is seeking a firm to provide Unified Back Office System (UBOS) Implementation and Maintenance Services for use in its next-generation Customer Service Center. Contact Center operations is not part of this procurement.

The Commission wishes to enter into a long-term contract with a firm that is flexible, future-minded and willing to extend its services to meet Commission service level requirements for a ten (10) year base contract with options to extend. The system required will include but is not limited to the following functions: customer relations, account and case management; customer billing and payment; inventory management and fulfillment; system and data reporting; natural speech IVR; financial services and the ability to integrate with designated existing Commission systems. Additionally, the Commission is requesting website and application development and implementation that correlates to the overall system functionality.

The Commission seeks a system built to allow for the rapid adoption of new technologies to keep pace with evolving customer needs and preferences associated with communications, bill payment and overall customer experience. Furthermore, we are looking for a partner that shares our vision in striving for and achieving these goals.

Procurement Timeline:

A tentative timeline for RFP issuance and contract award is provided below (subject to change):

- RFP issued: late Spring 2021
- Proposals due: Summer 2021
- Contract award: Fall 2021

Industry Forum:

The Commission will hold an Industry Forum to discuss details of the procurement process and timeline, provide an overview of the scope of services, describe interrelated current and planned projects and garner interest from qualified firms.

The Industry Forum will be held on **Wednesday, April 14, 2021, from 9:00 AM to 4:00 PM, virtually.**



Tentative Agenda

- Welcome and Meeting Logistics
- Procurement Rules
- Vision & Direction of PTC Customer Service
- History and Background
- Unified Back Office System RFP
 - Vision and Objectives
 - Future State
- User Story categories and samples
- Technical Dive
- Project Details
- Questions and Answers

Interested firms may register *a maximum of five representatives per each firm*.

Please register by April 9th, 2021, by clicking on: [REGISTER HERE](#) or

<https://paturnpike.webex.com/paturnpike/onstage/g.php?MTID=ec9d85c2e22ade1ecf0926b366dffaf95>

For issues registering, please send an email to: BOSIndustryForum@paturnpike.com