

New Service Delivery (NSD) Webinar

Presented by PNM Business Development

BEST PRACTICES FOR IMPROVING THE PROGRESS OF YOUR NSD PROJECTS



SEPTEMBER 27, 2023

WHO WE ARE

PUBLIC SERVICE COMPANY OF NEW MEXICO

- **Our core mission is to provide reliable, low-cost, safe and environmentally responsible energy to our customers**
- Founded in 1917
- First New Mexico business on the NYSE
- Annual revenues \$1.4B
- Employs 1,500 New Mexicans
- Gives over \$4M from shareholders to local non-profits annually



SERVING NEW MEXICANS FOR OVER 100 YEARS



- 530,000 customers in 40 communities
- Over 15,000 miles of transmission and distribution lines
- Currently the PNM generation portfolio is 61% carbon free
- PNM plans to be carbon free five years ahead of schedule while maintaining affordable rates

OVERVIEW

Goal

Educate customers and contractors on best practices for helping PNM to keep projects moving forward. There will be four key takeaways from the presentation:

1. Application Submission Requirements, Requests & Best Practices
2. Project Timeline Expectations
3. Permit Submission Process
4. Ballpark Estimate Requests

Target Audience

Managed & Passive customers, as well as Contractors for those Managed & Passive customers

SUMMARY

Our intent of the webinar is to discuss best practices with customers when:

- Preparing to submit a New Service Delivery (NSD) application
- Monitoring progress on an application
- Where to go for help when you have questions

We will provide details on customer-facing tools and guidance on best practices for a smooth, predictable process.

Our goal and commitment is to ensure a positive customer experience throughout your new service and upgrade process.

We appreciate the opportunity to meet with you and value your time.

PRESENTERS



ELISHA SAAVEDRA

DIRECTOR OF CUSTOMER MARKETING.

Elisha Saavedra is a New Mexico native, having grown up in Albuquerque's South Valley. She currently serves as the Director of Customer Marketing for PNM where she oversees Economic Development, Large Account Management and Business Customer Marketing. In this role, she is responsible for ensuring that existing and prospective large customers have a first-class, customized and seamless experience working with PNM. Helping others is Elisha's greatest passion. She enjoys partnering with community stakeholders and collaborating with prospective and current customers, to assist them in navigating the electric service process.



RYAN SAIZ-BUCHANAN

MANAGER, - CUSTOMER OPERATIONAL EXCELLENCE

Ryan graduated from Embry-Riddle Aeronautical University with a BS in Engineering Physics. From 2005-15, he worked in the aerospace and was responsible for the design, fabrication and testing of solar arrays for satellites. From 2015-20, Ryan worked in the automotive industry where he was responsible for the installation of automation at automotive manufacturing plants. In July of 2020, he joined PNM as the Technical Program Manager and developed and launched the PowerClerk New Service Delivery (NSD) Program. In February 2022, Ryan accepted the Renewables Engineering Supervisor position in the Customer Interconnection Department. In July 2023 he was promoted to Manager of Customer Operational Excellence.

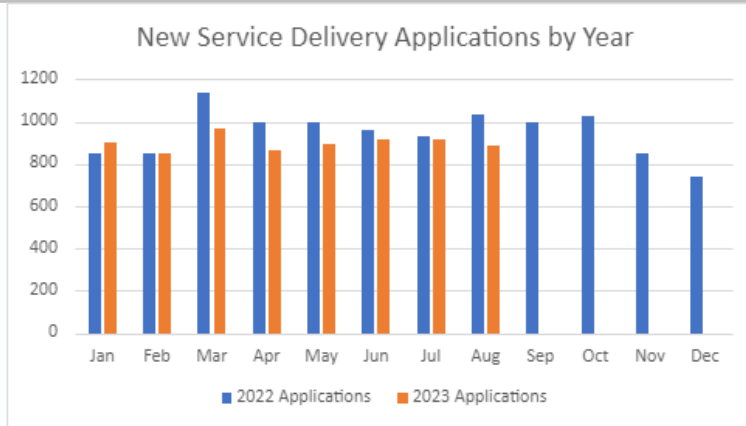
POLL QUESTION #1

**From your experience, how easy is it to use PowerClerk?
(On a scale of 1 to 5 with 5 being the easiest)**

- 1
- 2
- 3
- 4
- 5

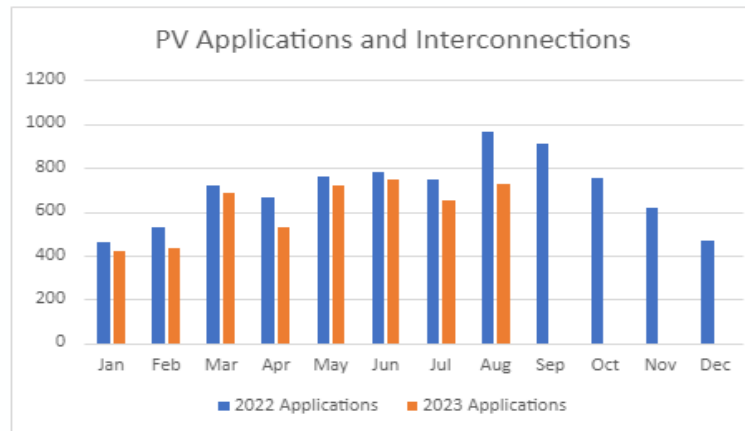
ANNUAL APPLICATION STATISTICS

APPLICATIONS ARE **DOWN** IN 2023 (**7% NEW SERVICE**; **13% SOLAR**)



12,000 New Service Delivery Applications

- 68% Residential Upgrade
 - 20% New Residential
 - 12% New Commercial + Upgrades + Subdivisions
- www.pnm.com/esg



8,500 Solar Applications

www.pnm.com/solar

PROJECT TIMELINE EXPECTATIONS

OUR GOAL IS TO MEET YOUR IN-SERVICE DATE

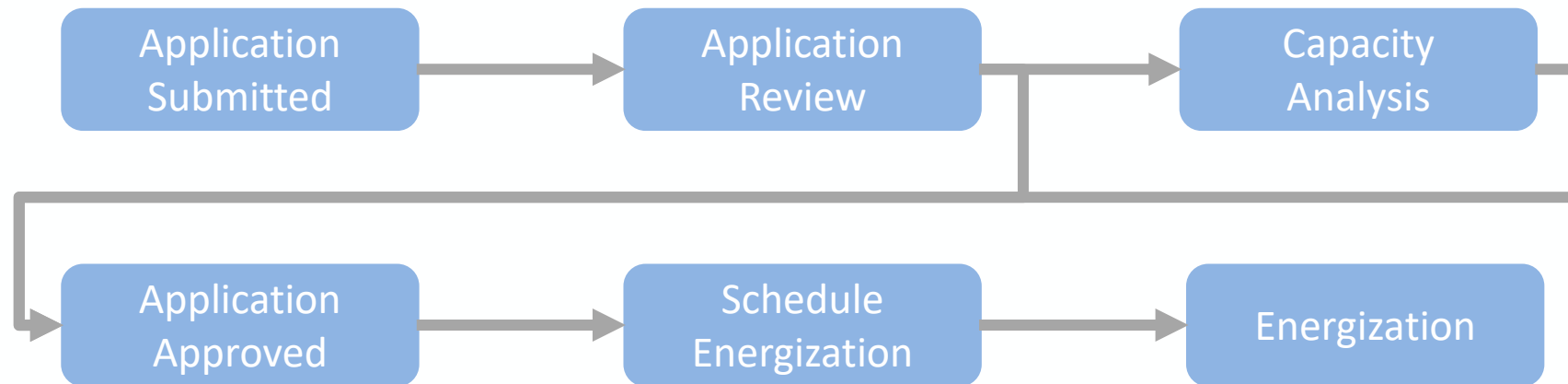
- PNM is committed to meeting customer supplied in-service dates
 - Accurate in-service dates are appreciated for our planning purposes
 - Long duration project forecasting
 - Inform us of delays or changes
- New Project Review Tracks allow us to process faster with fewer handoffs
 - Simplified – Upgrades, no-load applications, disconnect/reconnects, <200A
 - Fast-Track – Requires site visit to determine service requirements
 - Design Project – Line Extensions, Transformer Upgrades, Requires Design Engineering Support
 - ❖ Simplified and Fast-Track projects can be determined to require Design Engineering Support and the project type will automatically be updated

PROJECT TIMELINE EXPECTATIONS

SIMPLIFIED WORKFLOW

Upgrades, no-load applications, disconnect/reconnects, <200A

- August Metrics – Average 13 days from Application Received to Energized
- No Handoffs - Single PNM department performs process start-to-finish
- PNM contacts project POC to schedule energization

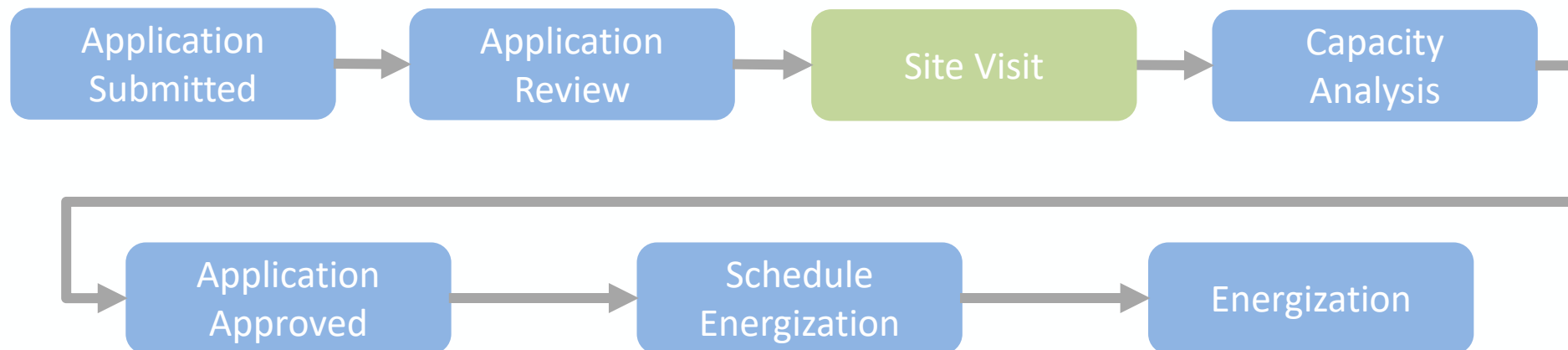


PROJECT TIMELINE EXPECTATIONS

FAST TRACK WORKFLOW

Projects Requiring a Site Assessment

- August Metrics – Average 18 days from Application Received to Energized
- Single PNM department performs process start to finish
- PNM contacts project POC to schedule energization

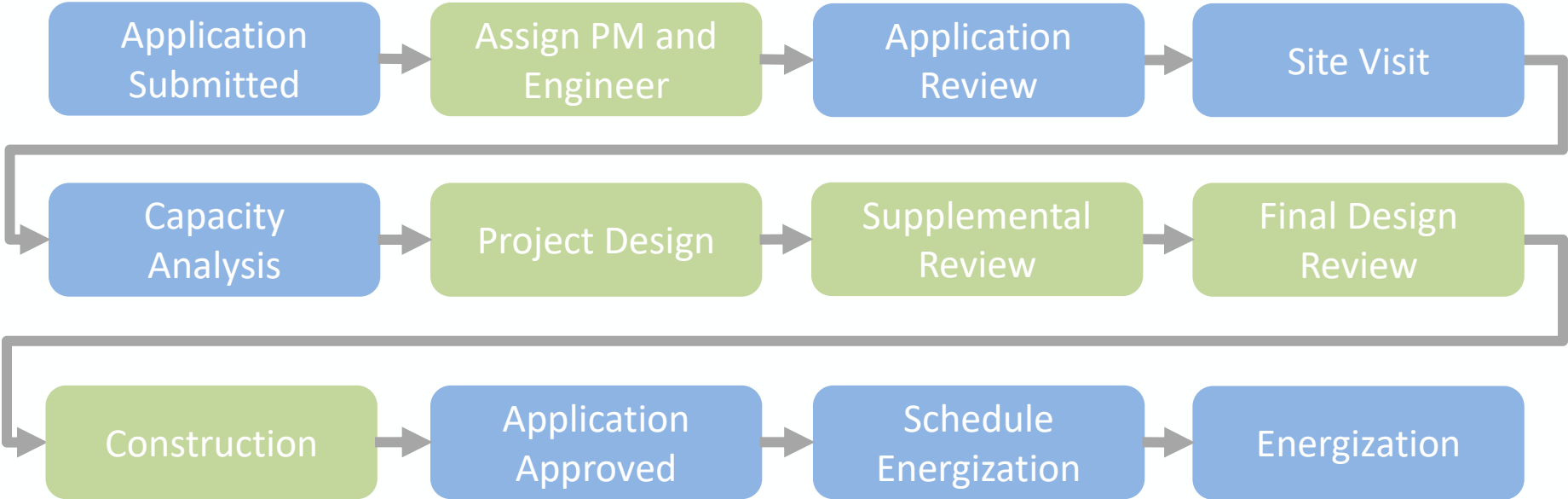


PROJECT TIMELINE EXPECTATIONS

DESIGN PROJECT

Line Extensions, Transformer Upgrades, Requires Design Engineering Support

- August Metrics – Target less than 60 days Application Received to Energized
- Three PNM departments perform process start to finish



APPLICATION SUBMISSION

ACCURATE CONTACT INFORMATION IS CRITICAL

- Contact Information
 - Extremely important to provide account information that is identifiable as a Managed Account
 - If electrician completing application, include customer contact as additional contact
 - Request to include PNM Account Manager as an additional contact
 - ❖ Notifies AM that project has been submitted/ progress

Do you have a PNM Account Number for the new construction site? *

- Yes
 No

[Click here for an example of where to find the Account Number on your bill.](#)

First 9 Digits of Account Number * ⓘ

7 Middle Digits of Account Number * ⓘ

Does the property have a PNM electric meter? *

- Yes
 No

Meter Number ⓘ

Type in your Meter # above, then [click this button to retrieve the Customer Information](#)

Would you like to list additional contacts? If so, how many?

Contact 1 Type

Contact 1 Information

Name

Company

Address

Email

APPLICATION SUBMISSION

PROJECT DETAILS

- Project Details
 - Provide accurate in-service dates – without this date, we process FIFO.
 - Provide as much detail about the project as possible – including urgency, special needs/circumstances
 - For new construction, state in Project Description the project is for a PNM Managed Account
 - Include comment if customer is on Summary Billing

What is your estimated ~temporary~ In-Service Date?

8/31/2024



What is your estimated ~permanent~ In-Service Date?

10/1/2025



Please give a brief description of the scope of your project: *

PNM Account Manager: Manuel Quintana

APPLICATION SUBMISSION

TRIBAL PROJECTS

- Tribal Projects
 - For Tribal Governments, verify that the tax exemption letter is on file with PNM for that calendar year

Is this project being performed on Tribal land? *

- Yes
 No

TRIBAL TRUST LAND:

Tribal lands held in trust by the Federal Government are not subject to NM Gross Receipt Tax (NMGRT), including construction services, with the proper documentation. If the project is on tribal land but not within tribal trust boundaries, the project will be subject to NMGRT.

On which Tribal Entity's land is the project being performed? *

Select... ▼

Is this project for the Tribal Government or an Individual Tribal Member? *

- Tribal Government
 Individual Tribal Member

Is the project on Tribal Trust land or non-trust Tribal land (Fee Simple)? * ?

Tribal Trust ▼

TRIBAL GOVERNMENT LETTER FOR EXEMPTION

If not yet complete for this calendar year, please submit the Tribal Government Letter for Exemption to New Mexico Gross Receipt Tax to the PNM Tax Compliance Department at tax.department@pnmresources.com

APPLICATION SUBMISSION

INCLUDING DOCUMENTS IN THE APPLICATION EXPEDITES REVIEW

- Commercial New Construction
 - **Recorded** Plat
 - **Stamped** Grading Plan
 - **Stamped** 1-line diagram, 3-line >400A
 - **Stamped** Panel schedule >400A
 - Site Plan DWG – Cad file
- Commercial Upgrade Existing Service
 - **Recorded** Plat
 - **Stamped** 1-line diagram
 - **Stamped** Panel schedule >400A
 - Load Diagram >200A
 - Site Plan DWG – Cad file
- 1/1/2024 - All infrastructure designs that are publicly accessible will require a PE stamp

Recorded Warranty Deed
 Browse

Recorded Plat
 Browse

Electrical One-Line Diagram
 Browse
Allowed file types: .docx, .pdf, .jpg, .png, .tif, .bmp, .xlsx, .csv, .jpeg

Panel Schedule
 Browse
Allowed file types: .docx, .pdf, .jpg, .png, .tif, .bmp, .xlsx, .csv, .jpeg

Grading Plan
 Browse
Allowed file types: .docx, .pdf, .jpg, .png, .tif, .bmp, .xlsx, .csv, .jpeg

Utility Site Plan
 Browse
Allowed file types: .docx, .pdf, .jpg, .png, .tif, .bmp, .xlsx, .csv, .jpeg

Optional Documents:

Additional Document Upload:
 Browse
Allowed file types: .docx, .pdf, .jpg, .png, .tif, .bmp

Additional Document Upload:
 Browse
Allowed file types: .docx, .pdf, .jpg, .png, .tif, .bmp


APPLICATION SUBMISSION


BEST PRACTICES


- Include thorough description, project or business name
- Include an in-service date (especially for designed projects)
- Provide as much detail is possible
- Avoid having duplicate applications processed (if getting bids from multiple contractors, inform us of your selected contractor so we can cancel projects that won't proceed)
- Contact your Project Manager (for designed projects) for questions.
- Call 505-241-3425 if you have any questions!

What is your estimated ~temporary~ In-Service Date?

What is your estimated ~permanent~ In-Service Date?

Project or Business Name (e.g. Taco Bell, Barnes and Noble, etc.) * 

Business Type * 

Please give a brief description of the scope of your project: * 

Walk in Service Center Locations open
Tuesday & Thursday 7:30am-3:00pm

- Albuquerque – 4401 Masthead St NE
- Santa Fe – 4565 Highway 14

POLL QUESTION #2

What obstacles, if any, have you experienced during the New Service Delivery Process? (Select all that apply)

- Getting the project connected on time
- Getting timely communications on the status of projects
- Getting the process finalized

PROJECT MANAGEMENT SUPPORT

DEDICATED SUPPORT FOR YOUR PROJECT

- PNM hired 7 additional Project Managers to support Design Projects
- Projects assigned daily and phone number and email provided to customer
- Single point of contact for entire project life cycle
- Project Managers work in tandem with the Account Managers to keep project progressing and provide updates

PROJECT MANAGERS

CONTACT INFORMATION

Metro Project Managers

- Robert Fullbright 505-241-3356 Robert.Fullbright@pnm.com
- Stella Murdoch 505-241-3369 Stella.Murdoch@pnm.com
- DeAndra Lopez 505-241-2549 DeAndra.Lopez@pnm.com
- Celestina Blair 505-241-4735 Celestina.Blair@pnm.com
- Thomas Martinez 480-337-5678 Thomas.Martinez@pnm.com
- Carlos Ramirez 505-357-3368 Carlos.Martinez@pnm.com
- Linda Martinez 480-712-0341 Linda.Martinez@pnm.com
- Jared Roybal, Supervisor 505-241-3342 Jared.Roybal@pnm.com

Northern Project Managers

- Monica Martinez 505-241-3678 Monica.Lachioma@pnm.com
- Kelly Gragg 505-241-3490 Kelly.Gragg@pnm.com

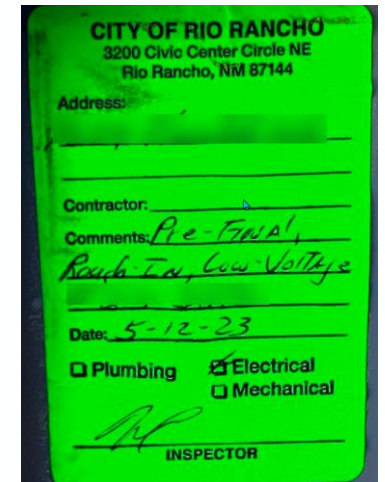
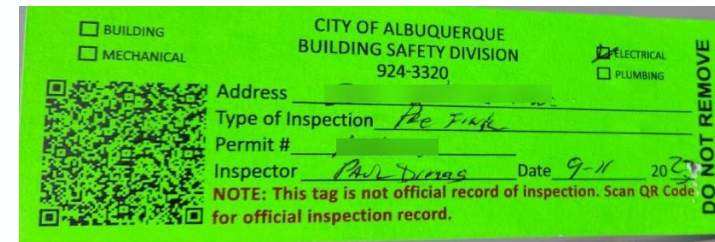
Southern Project Managers

- Debbie Young 575-956-1455 Deborah.Young@pnm.com
- Theresa Snyder 575-443-6644 Theresa.Snyder@pnm.com

UPDATED PERMIT PROCESS

UPLOADING PERMITS EXPEDITES PROJECTS

- PNM is now accepting images of the approved pre-final permit tags
- Can be submitted at any time during the process for all project types
- PNM inspection may be required in addition to city/county/state inspection
- Will enable PNM team to call POC when project application is approved to schedule energization
- Saves days to weeks on project energization



BALLPARK ESTIMATE REQUEST PROCESS

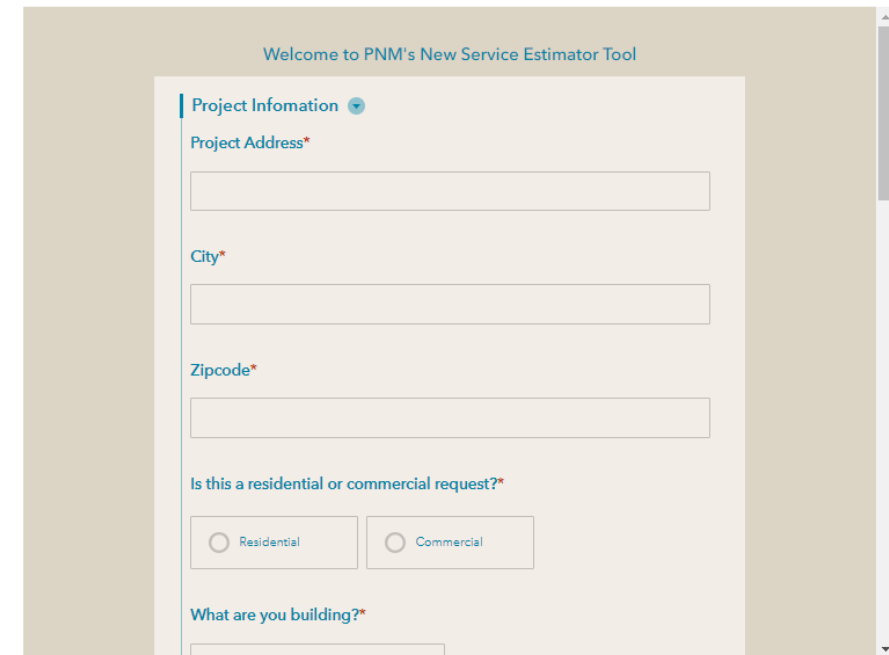
COST ESTIMATES IN 5 BUSINESS DAYS

- New service residential and commercial ballpark estimates can be requested via online portal
- Estimates are free of charge
- Does not require commitment to complete application

<https://www.pnm.com/ballparkestimator>

PNM Ballpark Estimate Tool

The PNM Ballpark Estimate tool provides a general estimate based on customer inputs and is offered to assist customers in their decision to submit an application for Residential and Commercial Service. The Estimate tool will request basic contact, property location and project information. A PNM Customer Interconnection team member will review the submitted request and generate a proposed design and estimated cost to deliver electric power to the location selected.



The screenshot shows a web form titled "Welcome to PNM's New Service Estimator Tool". The form is divided into sections, with the first section being "Project Information". This section contains the following fields and options:

- Project Address***: A text input field.
- City***: A text input field.
- Zipcode***: A text input field.
- Is this a residential or commercial request?***: Two radio button options, "Residential" and "Commercial".
- What are you building?***: A text input field.

SERVICE UPGRADE/ FIRM ESTIMATE REQUESTS

MAY TAKE UP TO 15 BUSINESS DAYS TO GENERATE

- Service Upgrade and Firm estimates require additional analysis and design work to be performed in order to provide cost
- Requires completed NSD application per PowerClerk Portal
- May require design deposit
- Completed Design/ Material List/Cost provided to customer
- Contract and Fee for construction only required if customer accepts estimate

POLL QUESTION #3

Is there anything you would do differently in the new service delivery process now that you've attended this webinar?

- No
- Yes (Please specify below)

Questions



