



Powering positive change

The Hatch H.G. Acres symposium

April 15-16, 2025 | Hotel X, Toronto, Canada

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#HatchSymposium #Poweringpositivechange

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speaker bios, topic
previews, and the
complete agenda



HATCH

A roadmap of roadmaps to a modernized digital grid



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Agenda

1



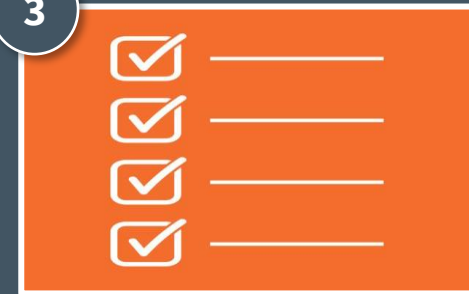
Set the Stage

2



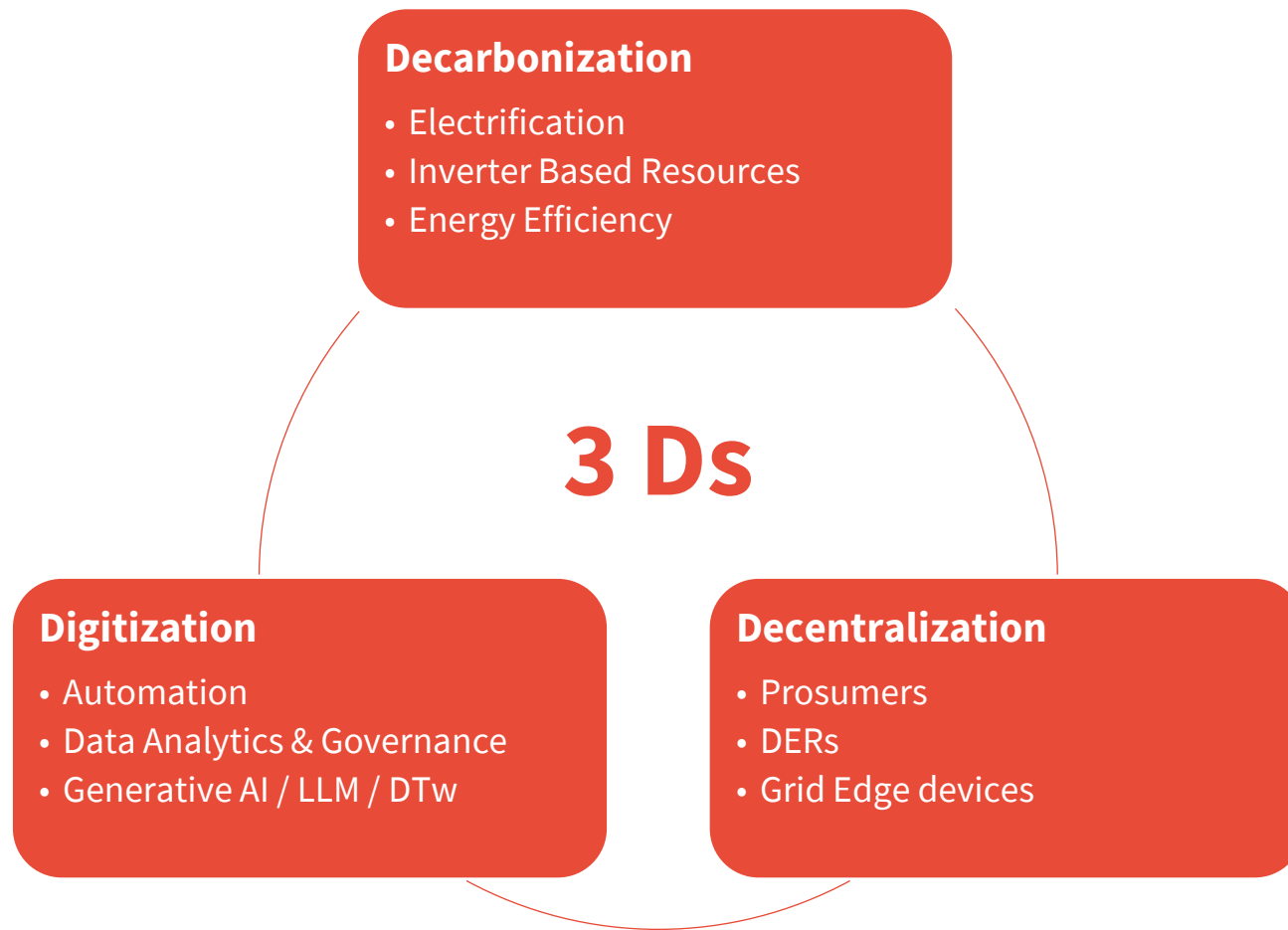
Integrated Framework

3



Benefits of an Integrated Framework

The Expanding Utility Challenges



Aging Infrastructure

- Condition Assessments
- Capital prioritization
- Increased system observability/controllability

IT / OT Modernization

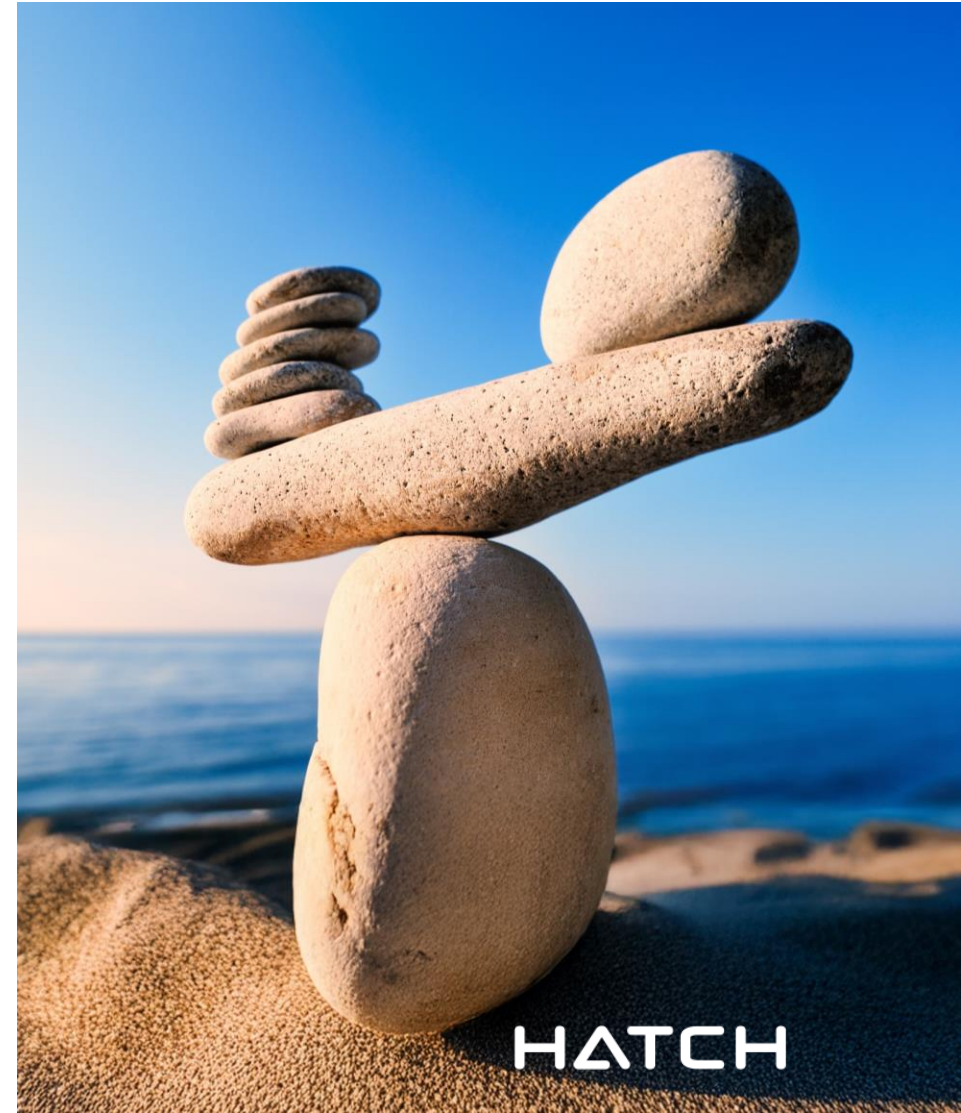
- EMS/ADMS
- AMI 2.0
- GIS (Network Model)
- DER Management
- Telecommunications

Technological Advances

- Long planning cycles vs. shorter technological obsolescence
- “Shiny Objects”

Balancing Conflicting Priorities

- Various departments have own priorities
 - Often not aligned
 - Multiple roadmaps / plans from different teams
- **Reliability Needs vs. Capital Budget**
 - Prioritization of asset renewal vs. network expansion
- **Shiny Objects**
 - Unsure how to integrate into existing plans
 - Distraction from established plans
 - New functionality vs. desired capability
 - Are supportive systems available?



Solution: Bring the Pieces Together

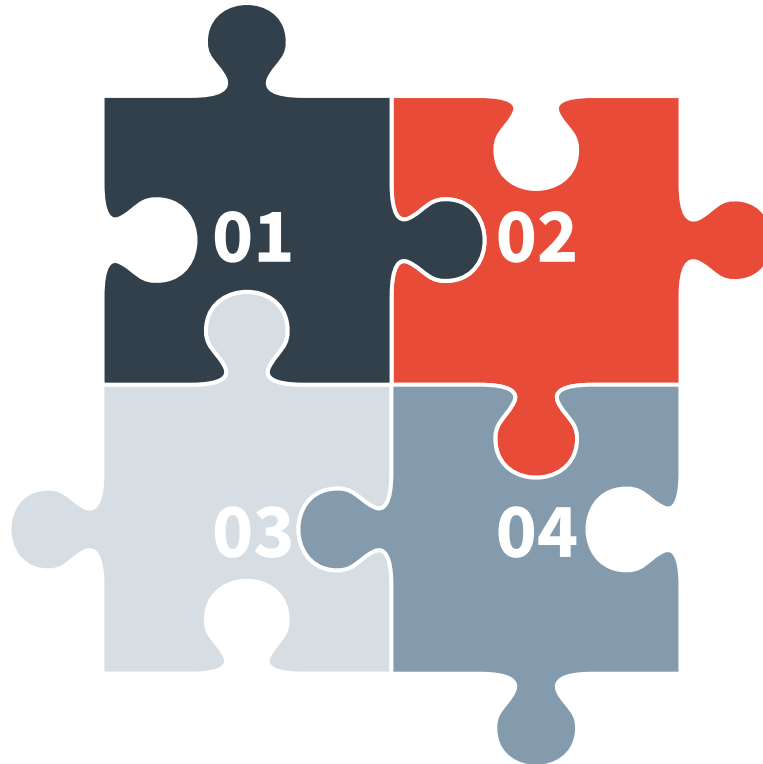
Integrated Framework (e.g. Modernization Focus)

IT Roadmap

- Functional Architecture
- System Architecture
- Data Architecture
- Data Governance
- Data Hierarchy

Planning Roadmap

- Condition Assessment
- Capital prioritization
- Asset Accounting
- Asset Management
- Risk Management



Operations Roadmap

- Control Room Integration
- Outage Management
- Field Crew dispatch
- System Monitoring
- Mobile worker

DER Roadmap

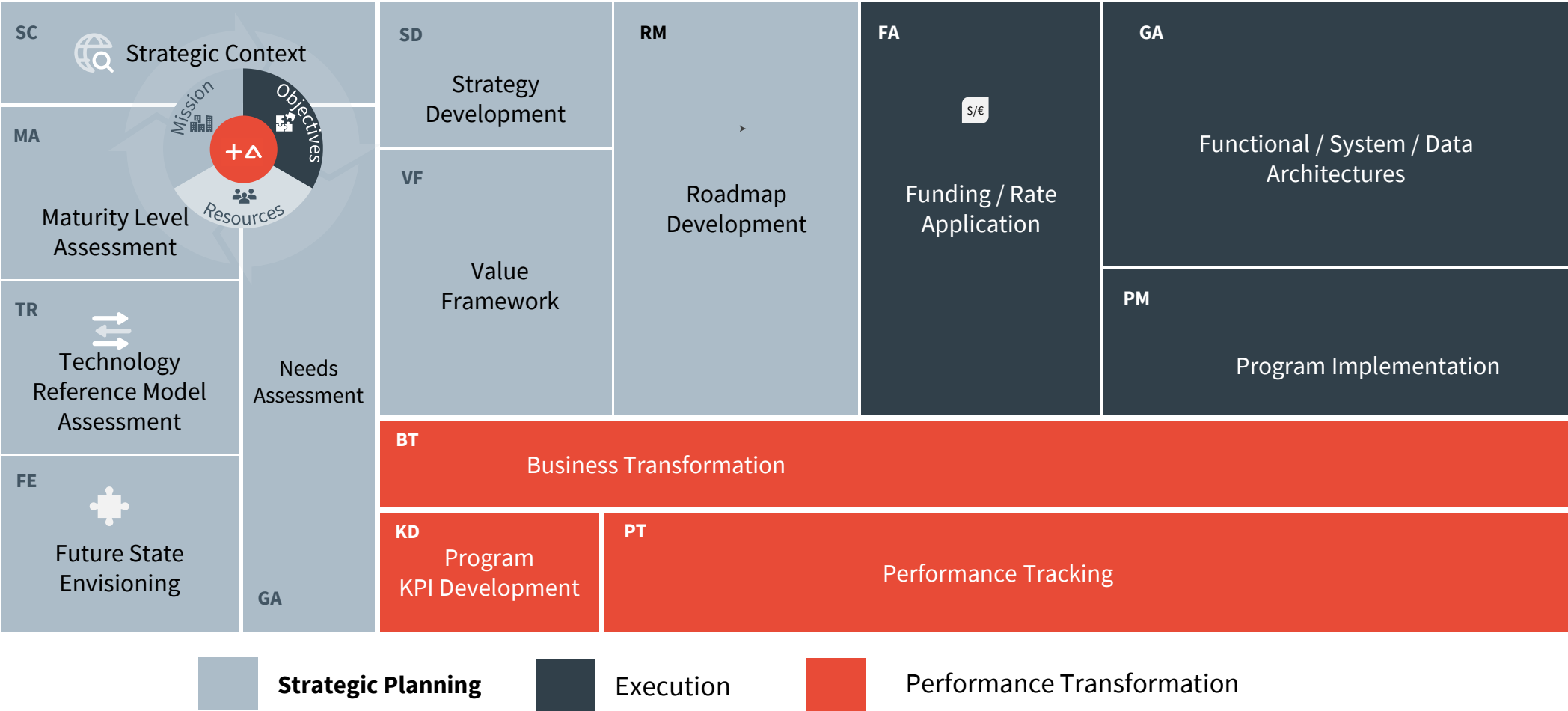
- DER Management System
- Hosting Capacity Mapping
- DER Use Case Strategies
- Market Clearing Process

Program Alignment

- Program Governance
- Modernization KPIs
- Regulatory Impacts
- Environmental Impacts
- Organization Structure
- Training & Development
- Change Management

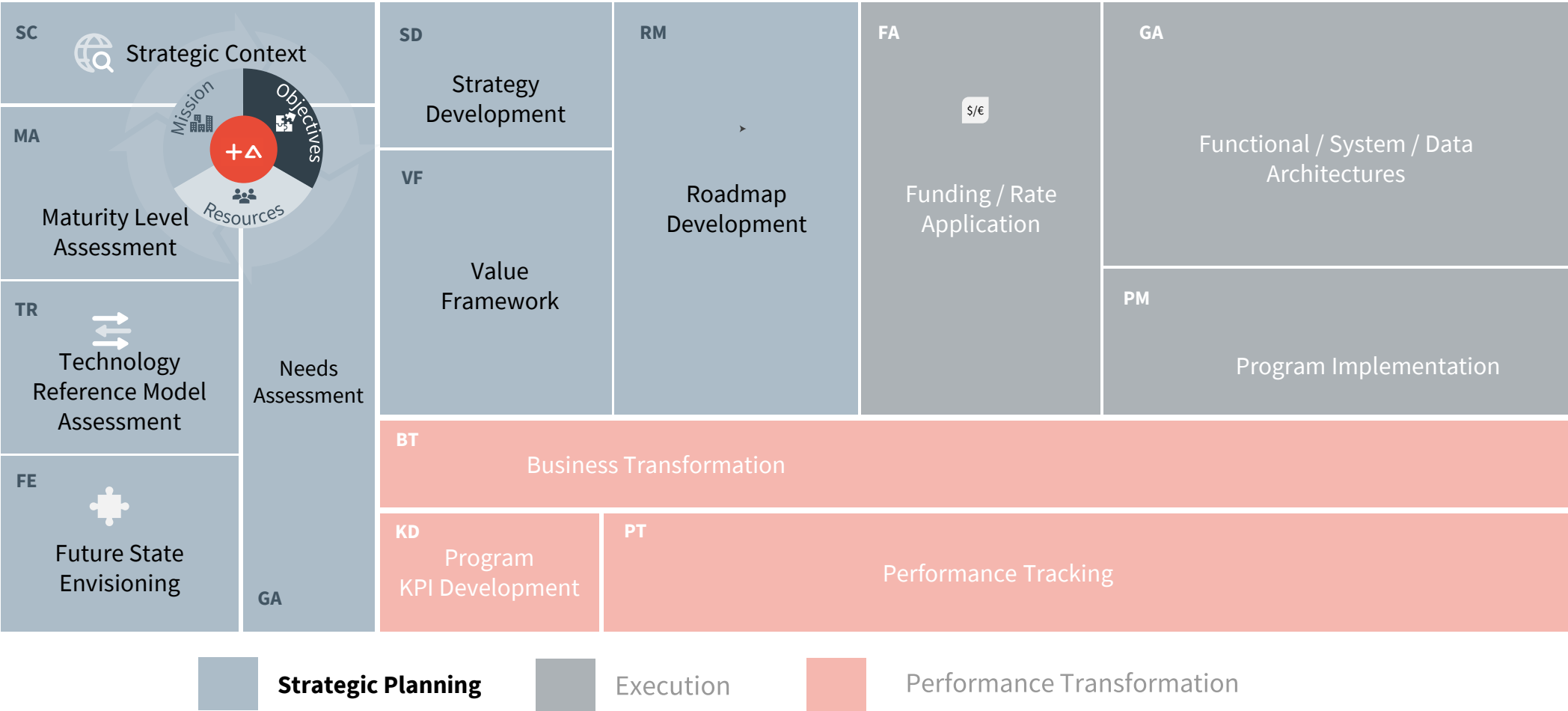
Integrated Modernization Framework

Performance-Based Modernization (PBM) Model



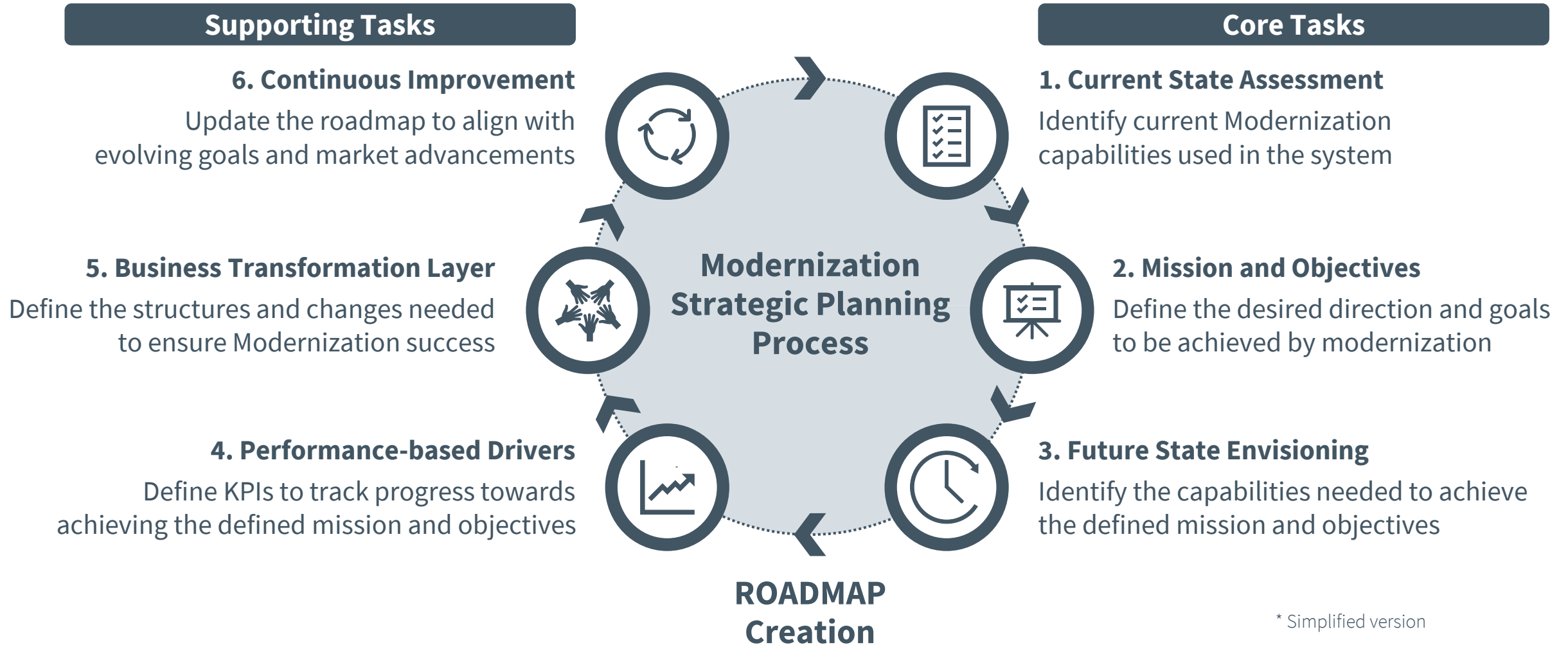
Integrated Modernization Framework

Performance-Based Modernization (PBM) Model



PBM Model

Strategic Planning Process*



* Simplified version

PBM Model

Strategic Planning Process*

Supporting Tasks

6. Continuous Improvement

Update the roadmap to align with evolving goals and market advancements

5. Business Transformation Layer

Define the structures and changes needed to ensure Modernization success

4. Performance-based Drivers

Define KPIs to track progress towards achieving the defined mission and objectives

Core Tasks

1. Current State Assessment

Identify current Modernization capabilities used in the system

2. Mission and Objectives

Define the desired direction and goals to be achieved by modernization

3. Future State Envisioning

Identify the capabilities needed to achieve the defined mission and objectives



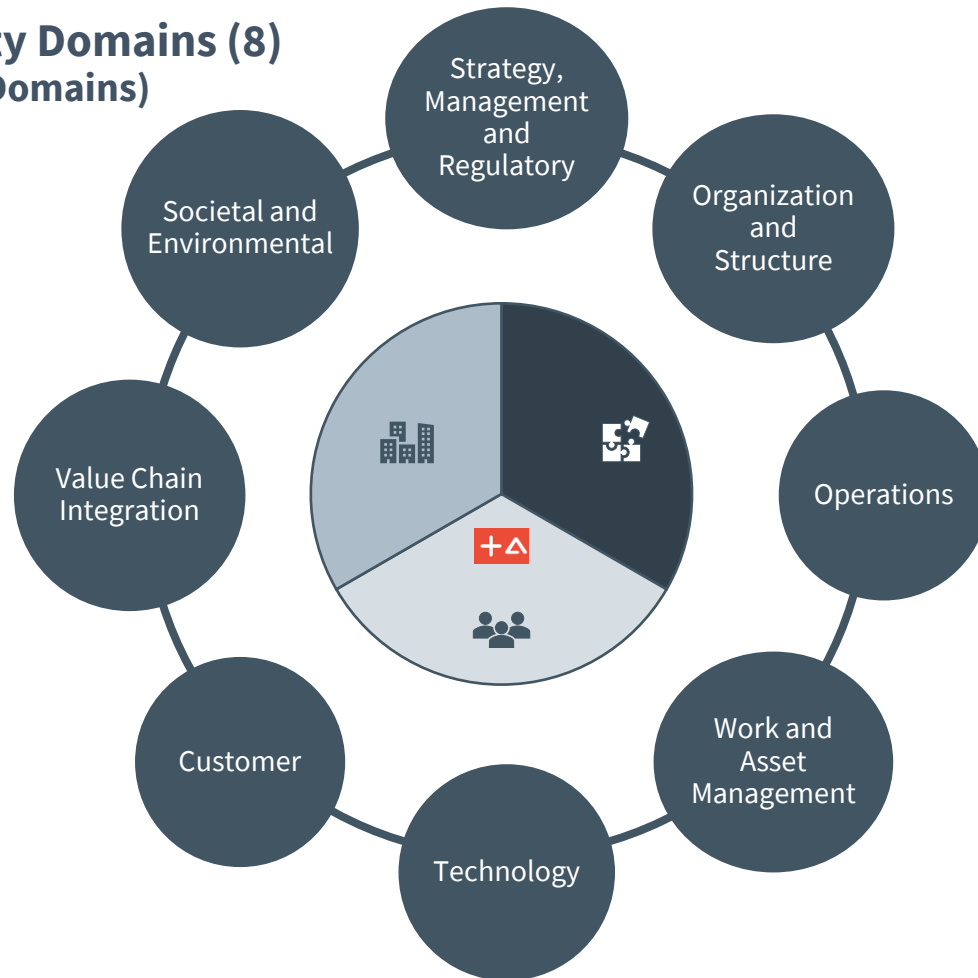
**ROADMAP
Creation**

* Simplified version

PBM Model

1. Current State Capability Assessment

Capability Domains (8) (~65 Sub-Domains)



Maturity Level (5)

| | |
|-------------|--|
| PIONEERING | Breaking new ground; industry-leading innovation |
| 5 | |
| OPTIMIZING | Optimizing grid modernization to benefit entire organization; may reach beyond organization; increased automation |
| 4 | |
| INTEGRATING | Integrating grid modernization across the organization, realizing measurably improved performance |
| 3 | |
| ENABLING | Investing based on clear strategy, implementing first projects to enable grid modernization (may be compartmentalized) |
| 2 | |
| INITIATING | Taking the first steps towards capability, exploring options, developing the vision for grid modernization |
| 1 | |
| DEFAULT | Default level (no capability) |
| 0 | |

PBM Model

1.1 Technology Mapping

- Current technology / software stack
- Sorted by:
 - Enterprise
 - Operations / Control
 - Field



PBM Model

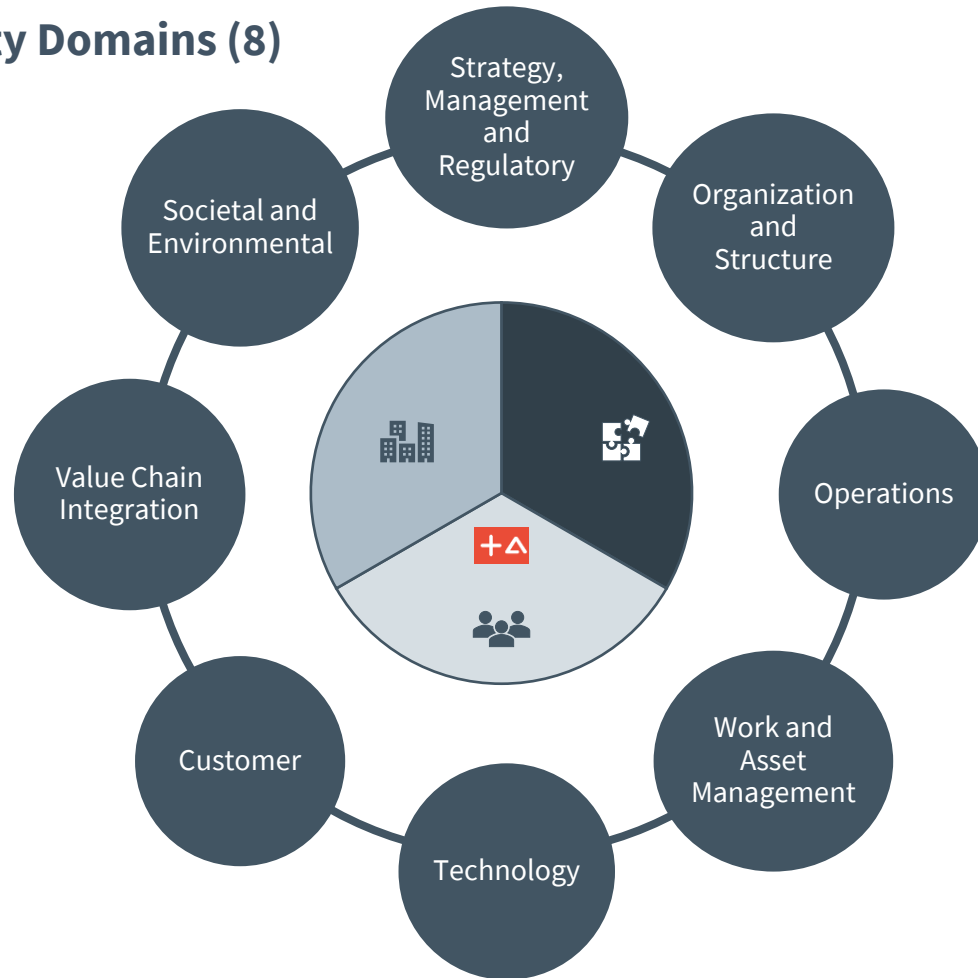
2. Mission and Objectives



PBM Model

3. Future State Envisioning

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PBM Model

3.1 Technology Opportunities

- Consider Future state technology opportunities
 - GenAI
 - Automation
 - LLMs
 - Systems Integrations & Interoperability
 - Systems Optimization



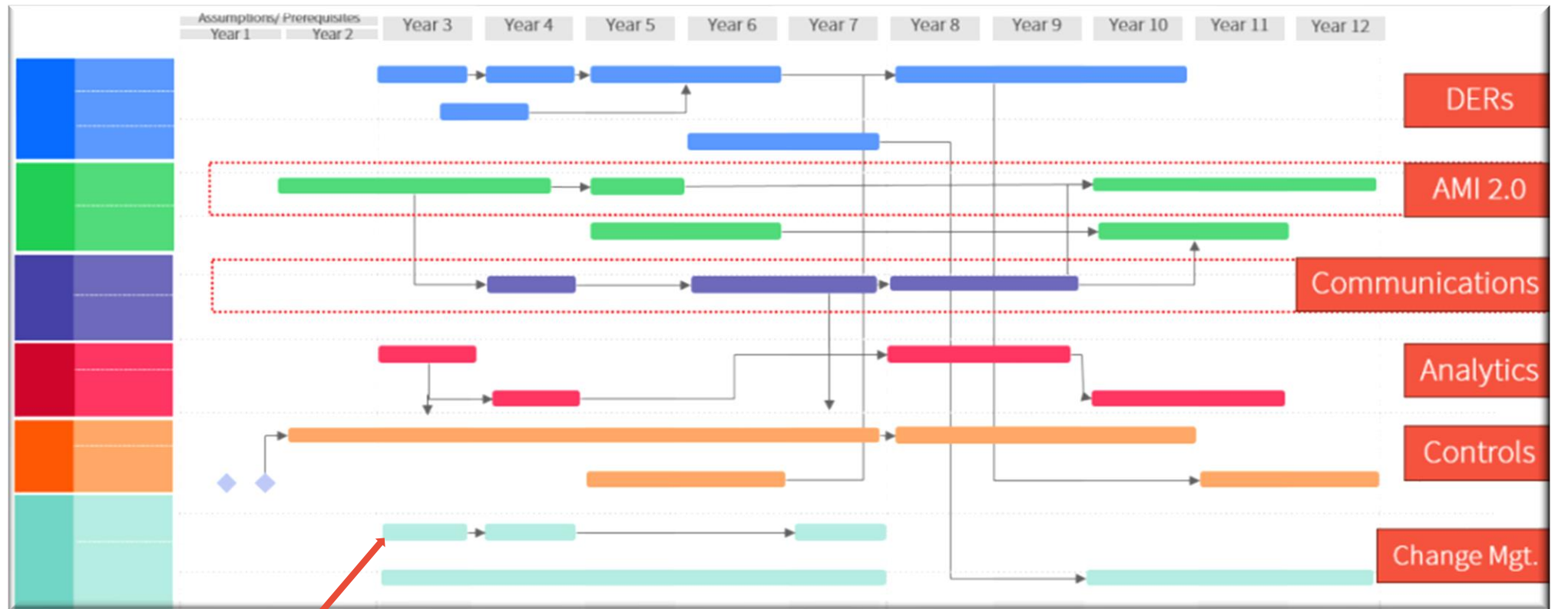
PBM Model

Roadmap Creation



PBM Model

Themes & Initiatives in Roadmap



Initiatives

- Will become one or more specific projects

Themes

- Connects related initiatives

PBM Model

Initiative Planning Requirements

Owner

- Responsible person or team to plan and execute the initiative

Level of Effort

- Amount of time to plan and execute each phase of the initiative

Budget

- Order of Magnitude capital cost (Class 5)

People

- Captures the resources and maturity levels for both current and future states

Process

- What new processes, changes process, or obsolete processes impact the future state

Technology

- What new, changes, or obsolete technologies impact future state
- What is the interoperability impact

Benefits of an Integrated Roadmap

Key Takeaways

- ✓ Process ensures **executive support**
- ✓ How to manage new **shiny technology**
- ✓ Clarity of **interdependencies** between initiatives
- ✓ Understand impacts of **deferring capital** spend
- ✓ **Foundational technology** planning
- ✓ **Change management** & training integrations
- ✓ MOST IMPORTANT: Aligned **single vision**



Questions

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Thank you.

For more information,
please visit www.hatch.com