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BUSINESS CONCEPTS FOR ENGINEERS/ UTILITY PROFESSIONALS

April 20-21, 2020
EUCI Conference Center
Plaza Tower One Conference Center
Denver, CO



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EUCI is authorized
by IACET to offer
1.6 CEUs for the
course

OVERVIEW

Supplement your current expertise with critical insight into wider business concepts & skills to accelerate your career and help develop the management skills needed to lead your industry. This course will provide the opportunity to analyze and appreciate the global perspective of your work in a different way and understand today's changing and complex utility business environment. It will give you a competitive edge that expands your insight and understanding of today's utility business:

- Identify the implications of emerging technology on electric utility business operations
- How the theories learned in this course can be applied to solve real day to day problems
- Understand the existing and evolving business structures and the regulatory environment of utilities
- Practice organizational management tools such as leading teams and controlling projects

After this course you will walk away with a greater understanding of the inner workings of a utility business and the many new external factors acting upon it. You will become more proficient with utility finance, economics, marketing, project management, organizational leadership, and human resource management skills.

LEARNING OUTCOMES

- Identify and review the basics of accounting and finance related to utilities
- Discuss utility markets and economics
- Review the basics of marketing and how it applies to the utility industry
- Discuss project management steps and how methodology can improve productivity, quality and customer satisfaction while lowering prices and defects
- Identify strategies to be a successful leader
- Discuss how to effectively categorize, plan and create effective meetings and agendas

WHO SHOULD ATTEND

- Utility professionals and engineers who would like to round out their current skill set with more advanced business knowledge, critical insights, and a marketable skill set
- Utility professionals and engineers who are interested in transitioning to a leadership role
- Utility professionals and engineers who want to enhance their ability to collaborate and communicate effectively at a senior level
- Utility professionals and engineers who are new to the utility industry
- Utility professionals and engineers who are interested in project management, finance, marketing, human resource or another career path in a utility company

AGENDA

MONDAY, APRIL 20, 2020

7:30 – 8:00 am

Registration & Continental Breakfast

8:00 – 11:00 am

Utility Finance & Accounting

- What is an integrated resource plan?
- The difference between rate base, rate case and rates.
- What is a Public Utility Commissions and a rate cases process?
- What are the regulating entities governing a utility company?
- What is unique about how utilities make money?
- When a utility invests in an asset where does that money come from?
- How do utilities earn money using the rate making formula?
- What is the difference between an above the line and below the line cost?
- What costs are recovered in rates and which by shareholders?
- Why utilities are so risk averse
- Difference between Capital (Asset) and O&M (Expense)
- How depreciation of capital assets work
- What is accelerated depreciation
- What is decoupling
- Understanding the Income Statement, Balance Sheet and Statement of Cashflows
- Describe the primary forms of a business organization
- Understanding financial statements, their purposes and uses
- Primary forms of financing activities
- How to find the most common questions about a business from the financial statements
- What is the debt to total asset ratio?
- What is the gross profit rate?
- What is the current ratio?
- What are stranded assets

11:00 am – 12:00 pm

Economics

- What are the different energy markets and how do they balance a demand curve?
- Understand the responsibilities of a balancing authority
- How are utilities natural monopolies?
- What are the pros and cons of a monopoly?
- What is deregulation and what does it means for you?
- What are the differences between Investor Owned Utilities, Municipalities, Cooperatives and Community Choice Aggregates?
- What are the benefits and negative aspects of being a vertically integrated utility?
- How are upcoming disruptive business model and technologies changing the traditional model of a utility?
- What should utilities invest in now to stay relevant?

12:00 – 1:00 pm

Group Luncheon

AGENDA

MONDAY, APRIL 20, 2020 (CONTINUED)

1:00 – 2:00 pm

Economics (Continued)

2:00 – 3:00 pm

Marketing

- How to conduct market research and why it's important
- The only marketing strategy you will ever need: R (Research) + STP (Segmentation, Targeting and Positioning) + PM (Product Mix) + I (Implementation) + C (Control)
- How to use the Segmentation, Targeting, Positioning technique for a focused effort
- How to use the Product Mix to get the right combination of Product, Place, Promotion and Price
- Inside-out vs outside-in products
- How to determine what your next product should be
- What is the difference between Customers, Evaluators and Potentials?
- Disruptive innovation examples in the electric utility industry
- Using marketecture and tarchitecture

3:00 – 5:00 pm

Project Management

- How to succeed at each step of a project
- Initiate, plan, execute, document, monitor/control and close
- Identifying project, activity and complexity risks
- Risk mitigation tools and strategies
- Conducting first-rate kick off meetings
- Preparing a Work Breakdown Structure
- Find and manage the critical path
- Balancing priorities between scope, schedule and budget
- How to avoid the most common causes of project failure
- Incorporating the qualities of a successful project manager
- How LEAN methodology can improve productivity, quality and customer satisfaction while lowering prices and defects
- Does LEAN apply to such a regulated environment
- How to identify and eliminate waste
- How to identify and focus on value added activities

TUESDAY, APRIL 21, 2020

7:30 – 8:00 am

Registration & Continental Breakfast

8:00 am – 5:00 pm

Course Timing

8:00 – 11:00 am

Organizational Leadership

- How to lead without authority
- How to be first, fair, firm and flexible
- How to provide vision, resources, reduce obstacles, and lead by example
- How to recognize differences and flex to specific personality values
- When to micro-manage and when not to
- How to have successful accountability conversations
- Focusing on observations and verbs
- Common conversation derailments and how to manage them
- How to conduct a SWOT analysis

AGENDA

TUESDAY, APRIL 21, 2020 (CONTINUED)

11:00 am – 12:00 pm

Meetings

- How to categorize a meeting type and manage them differently
- Alternatives to meetings
- How to prepare for a meeting to increase efficiency
- How to create an effective agenda
- Who to invite
- How to effectively use roles during a meeting
- Types of people in meetings and how to direct each

12:00 – 1:00 pm

Group Luncheon

1:00 – 2:00 pm

Meetings (Continued)

2:00 – 4:45 pm

Human Resource Management

- What is the International Brotherhood of Electrical Workers (IBEW)?
- The National Labor Relations Act (NLRA)
- The difference between bargaining and non-bargaining
- What is bargaining, a collective agreement and mandatory subjects?
- How to avoid NLRA violations
- Tips to building an extraordinary resume
- How to apply change management best practices to guide change
- How can you develop emotional intelligence in yourself and your team?
- What 5 choices can you make at the start of a business day to improve productivity
- Some tips to sort through the many distractions to find the few essential tasks with the greatest returns?

4:45 – 5:00 pm

Course Review and Round-Table Discussion

INSTRUCTOR



Brent Olsen

President, 3 Phase Consulting

Brent has 20+ years of experience working for large electric utility industries including Arizona Public Service, Salt River Project, and Portland General Electric. He has worked in distribution, transmission and generation engineering and is currently a Project Manager for Portland General Electric's Specialized Energy Operations where he manages the installation of generation facilities, microgrids, and various research and development projects. He leads a user group of utility professionals at Portland General Electric who discuss business and technological changes in the electric utilities industry.

Brent is an electrical engineer specializing in utility power systems with a masters in Energy Policy and Management and an MBA. He is also a PMP, has a degree in Spanish and is the two-time winner of Portland General Electric's Project Manager and Project of the Year award.

REQUIREMENTS FOR SUCCESSFUL COMPLETION

Participants must sign in/out each day and be in attendance for the entirety of the course to be eligible for continuing education credit.

INSTRUCTIONAL METHODS

PowerPoint presentations and open discussion will be used in this course.

IACET CREDITS



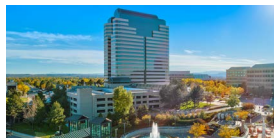
EUCI has been accredited as an Authorized Provider by the International Association for Continuing Education and Training (IACET). In obtaining this accreditation, EUCI has demonstrated that it complies with the ANSI/IACET Standard which is recognized internationally as a standard of good practice. As a result of their Authorized Provider status, EUCI is authorized to offer IACET CEUs for its programs that qualify under the ANSI/IACET Standard.

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REGISTER 3, SEND THE 4TH FREE

Any organization wishing to send multiple attendees to this event may send 1 FREE for every 3 delegates registered. Please note that all registrations must be made at the same time to qualify.

EVENT LOCATION



Plaza Tower One Conference Center

6400 S Fiddlers Green Cir.
Greenwood Village, CO 80111

The EUCI conference center is conveniently located adjacent to the Arapahoe at Village Center Light Rail Station, allowing easy access to and from DIA, Downtown, and Local Area Attractions.

NEARBY HOTELS

Each of these hotels offers a complimentary shuttle to and from the EUCI conference center.

Hyatt Regency Denver Tech (2.8 miles away)

7800 E. Tufts Ave. Denver, CO 80237
303-779-1234

Special EUCI Room Rate: \$179.00

To access EUCI room rate visit

denvertechcenter.regency.hyatt.com

Click "Book Now", then click "Special Rates",

Click "Corporate or Group Code" and enter **CR102338**

You may also call central reservation at **1-800-233-1234** and give them the corporate code of **CR102338**

Springhill Suites DTC (0.3 miles away)

7900 East Peakview Ave., Greenwood Village, CO 80111
303-721-3321

Wingate by Wyndham (0.3 miles away)

8000 E. Peakview Ave., Greenwood Village, CO 80111
303-626-2641

Hyatt Place DTC (2.1 miles away)

8300 E. Crescent Pkwy, Greenwood Village, CO 80111
303-804-7000

Denver Marriott Tech Center (3.1 miles away)

4900 S. Syracuse St., Denver, CO 80237
303-779-1100

To Register Click Here, or

Mail Directly To:

PMA Conference Management
PO Box 2303
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See nearby hotels on page 6

PLEASE REGISTER

**BUSINESS CONCEPTS FOR ENGINEERS/
UTILITY PROFESSIONALS COURSE**

APRIL 20-21, 2020: US \$1495

Early bird on or before April 10, 2020: US \$1295

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How did you hear about this event? (direct e-mail, colleague, speaker(s), etc.)

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List any dietary or accessibility needs here

CREDIT CARD INFORMATION

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Billing City

Billing State

Exp. Date

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Visa and MC or 4 digits on front of AmEx)

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OR Enclosed is a check for \$ _____ to cover _____ registrations.

Substitutions & Cancellations

Your registration may be transferred to a member of your organization up to 24 hours in advance of the event. Cancellations must be received on or before March 27, 2020 in order to be refunded and will be subject to a US \$195.00 processing fee per registrant. No refunds will be made after this date. Cancellations received after this date will create a credit of the tuition (less processing fee) good toward any other EUCI event. This credit will be good for six months from the cancellation date. In the event of non-attendance, all registration fees will be forfeited. In case of course cancellation, EUCI's liability is limited to refund of the event registration fee only. For more information regarding administrative policies, such as complaints and refunds, please contact our offices.

EUCI reserves the right to alter this program without prior notice.