

UTILITY COLLECTIONS CONFERENCE 2019

Improving Revenue Assurance

July 22-23, 2019
Hyatt Regency Denver Tech Center
Denver, CO

UTILITY CASE STUDIES

Entergy
Arizona Public Service (APS)
Austin Energy
CPS Energy
DTE Energy Corporation
Eversource
Experian
JEA
Liberty Utilities
Nebraska Public Power District
Xcel Energy

“

“The speakers and presentations provide valuable tools that are essential to the productivity of collections. Because the topics range from basic concepts to large scale issues, attendees will have gained more insight into the scope of collections. Very organized and well put together.”

Collections Manager, Virgin Islands
Water & Power Authority

PRE-CONFERENCE WORKSHOP

**Robotic Process Automation
(RPA) in the Utility Industry**

MONDAY, JULY 22, 2019



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EUCI is authorized by IACET to offer 1.0 CEUs for the conference and 0.3 CEUs for the workshop



OVERVIEW

Utilities face increasing pressure from stakeholders and communities to improve their financial performance and profitability by minimizing write-offs for uncollectible accounts. While collections performance is highly measurable, visible, and actionable, it is also influenced dramatically by local ordinances and challenges that are unique to each utility. There are several best practices that utilities can employ to improve revenue assurance including maintaining good customer data and making themselves accessible. Some utilities are hesitant to change practices, fearing a corresponding drop in customer satisfaction, but the opposite is often the case with utilities that implement and strictly enforce collections policies end up having higher customer satisfaction.

How can the utility sector better identify vulnerable customers, work in partnership with them, strategically engage third parties and improve profits? This conference will bring together forward-thinking credit, collections, billing and customer services professionals within the utility sector to answer these questions and more. This essential event offers utilities the opportunity to gauge industry benchmarks with best practices, providing a platform to look beyond and develop innovative new ways to eliminate bad debt and increase revenues.

LEARNING OUTCOMES

- Discuss how to overcome the challenges associated with accounts receivables
- Explain how using multi-channel payment options such as: autopay, mobile and remote location payment options improve collections
- Demonstrate how to gain a better understanding of low-income consumers and what drives their participation in utility programs
- Discuss how to leverage technology to increase efficiency and reduce bad debt
- Discuss effective techniques for how utilities are working to put a stop to fraudsters
- Discuss how prepay improves customer satisfaction, promotes energy efficiency, and help control operational costs
- Evaluate how to measure and improve collection performance
- Review how offering a new service model using face-to-face interactions with remote customers has helped lower their bills and improve credit & collections

WHO SHOULD ATTEND

Benefitting from attending this event will be professionals working in the following areas:

- Credit and collections
- Revenue management
- Strategy and planning
- Call center operations
- Customer service and support
- Billing
- Financial analysis
- E-business strategy
- Treasury/controller

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AGENDA

MONDAY, JULY 22, 2019

12:30 – 1:00 pm

Registration

1:00 – 1:10 pm

Announcements

1:10 – 1:30 pm

Welcome Address

Chris Cardenas, VP Customer Care with Xcel Energy will welcome conference attendees to Denver and provide an overview of Xcel including the steps the company is taking to continue to improve customer care.

Chris Cardenas, VP, Customer Care, Xcel Energy

1:30 – 2:15 pm



How Austin Energy Came Back from AR Challenges

Five years ago, Austin Energy faced serious challenges when it came to collecting on receivables. All that has changed in recent years as the company is now well within industry standards as a result of great teamwork. In this session, learn how Austin Energy made some dramatic changes by using both core collection activities and specialized programs to turn things around.

Elaine Veselka, Vice President, Customer Account Management, Austin Energy

2:15 – 3:00 pm



The Next Generation of Revenue Recovery for Customers

The information age has dramatically changed customer expectations around how, when and where they want to engage with their utility. They seek fast and easy transactions through their various digital channels including voice, mobile, website, chat, email and social media. APS's ability to collect on customer bills requires rethinking of established notions. Customers expect utilities to offer multi-channel payment options such as: autopay, mobile, and remote location payment options. During this session, Hui Wu-Curtis will discuss the evolving operations and digital strategy at APS geared towards reinventing service delivery to address changing customer needs/behaviors while driving to greater efficiency.

Hui Wu-Curtis, GM, Customer Service Operations & Strategy, Arizona Public Service (APS)

3:00 – 3:30 pm

Networking Break

3:30 – 4:15 pm



The Benefits of Innovative Pre-Payment Programs

In this session, Sheila Pressley will share how JEA's approximate 20,500 prepay customers consume between 8%-10% less (weather normalized and excluding disconnection periods) than post-paid customers. The energy savings result when customer leverage next-day consumption/cost data to make meaningful changes to control their utility consumption thereby improving collections at the same time. The program's account notifications, synergy with payment assistance and the availability of arrears management options also produce high customer satisfaction levels.

Sheila Pressley, Director, Customer Revenue Services, JEA

4:15 – 5:00 pm

Understanding Low-Income Consumers

This session will provide attendees with an understanding of who low-income energy customers are in terms of values and attitudes, and what drives their participation in utility programs. Based on the Smart Energy Consumer Collaborative's research "Spotlight on Low-Income Consumers", attendees will learn what low-income consumers know about energy efficiency, their current levels of interest in utility programs, and ways to deepen program engagement. The session will also provide information on how utilities can help low income consumers meet their needs without relying on LIHEAP or other financial incentives and will include a fun quiz game to test everyone's knowledge about these consumers.

Patty Durand, President & CEO, Smart Energy Consumer Collaborative

5:00 – 6:00 pm

Networking Reception

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AGENDA

TUESDAY, JULY 23, 2019

8:00 – 8:30 am

Continental Breakfast

8:30 – 9:15 am



BOTS: Leveraging Technology to Increase Efficiency and Reduce Bad Debt

Robotic Process Automation or “BOTS” leverage technology to automate manual, routing and rules-based work tasks. Eversource implemented the first “BOT” Customer Care area, specifically focusing on improving its skip trace process for pre and post write off electric and gas service accounts. The company uses its BOT to perform all steps a credit customer service representative would manually take to transfer unpaid balances from inactive to active customer accounts. In this session, learn how implementing the Eversource BOT will help reduce bad debt, save time, safeguard money and enhance resource utilization while reducing company errors.

Karen Palmieri, Manager, Credit & Collections Operations, Eversource

9:15 – 10:00 am



Measuring and Improving Collection Performance

Paying bills and worrying about credit is emotionally draining for consumers and utilities alike. This segment will discuss the different practices that Liberty Utilities has taken which allow for continuous improvements on collection performance and revenue protection. Kelsey Zieba will share the different steps the organization has taken to significantly improve its performance in these areas since first becoming a company.

Kelsey Zieba, Billing Supervisor, Liberty Utilities

10:00 – 10:30 am

Networking Break

10:30 – 11:15 am



Leveraging a Banking Culture for Outsourcing in the Utility Industry

Bringing the banking culture to establishing and managing outsource operations in the utility industry can have a positive influence on the results. Customer experience is an often-overlooked component in what has traditionally been merely a cost-based decision. This presentation will provide examples of how including cultural aspects and goals can provide increased value in customer behavior and experience for utilities.

Andy Schorn, Director, Customer Revenue, CPS Energy

11:15 am – 12:15 pm

Panel Discussion: Elevating the Customer Experience/New Regulations

In this session, a panel of industry experts will discuss several topics including:

- How to elevate the customer experience during the collection process
- The new debt collection regulations
- Complaint mitigation

Conference attendees are encouraged to ask as many questions as possible of our panel of experts to learn about what could work best for your utility.

Moderator: Jon Brock, President, Desert Sky Group LLC

Jim Marshall, Executive Vice President, Aargon Collection Agency

Watse Krol, Chief Operating Officer, Virtuoso Sourcing Group, LLC



“Great conference overall. Subject matter was helpful & comprehensive.”

Commercial Credit Program Manager, Portland General Electric

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AGENDA

TUESDAY, JULY 23, 2019 (CONTINUED)

12:15 – 1:15 pm

Group Luncheon

1:15 – 2:00 pm

It's Lights out for Fraudsters



In this session, DTE Energy will show how it has taken an aggressive approach to identifying fraudsters who play the 'name game' to avoid payment for service. DTE's new enterprise fraud program simplifies the 'turn on' process for good customers, reduces the need for manual identity verification review and detects high risk activities in real time. Conference attendees will learn the practices that have been successful in deterring criminals from submitting altered documents for identity verification purposes. They will also gain insight on how fraudsters have manipulated utility companies by phone, online, chat, mail and payment schemes. This session will leave attendees feeling empowered to take simple steps towards real change.

Jodi Monacelli, Manager, Customer Strategy, DTE Energy Corporation

Eric Thompson, Senior Business Consultant, Experian

2:00 – 2:45 pm

Collections Performance and Dunning Methods



This session will review how Nebraska Public Power District used a variety of different methods to decrease the amount of uncollectible accounts turned over to an external collection agency since 2013. We'll discuss changes in policies, no cost payment methods, contract changes, enabling of remote meters, real-time payment posting and reconnects, changes in late fee standards, and disconnect for non-payment scheduling.

Carol Torczon, Senior Business Analyst, Nebraska Public Power District

2:45 – 3:00 pm

Afternoon Break

3:00 – 3:45 pm

Credit Customer Experience: Meeting Customer & Financial Expectations



This session will touch on Xcel Energy's expansion of digital self-service options available to Residential Credit Customers. It will also address the companies past and ongoing efforts to align Residential Credit Processes and conversations with rising customer expectations while not sacrificing overall financial performance.

Nora Lindgren, Manager Credit & Collections, Xcel Energy

James Fjorden, Business Support Analyst, Xcel Energy

3:45 – 4:30 pm

Utility Panel Discussion

This closing panel discussion will allow conference attendees to ask questions that they didn't get to ask of the utility presenters previously. The objective of this session is to have an open Q&A discussion to conclude the conference on a high note so "bring your thinking caps".

Moderator: Rob Samuels, Vice President, Deposit Alternatives

Carol Torczon, Senior Business Analyst, Nebraska Public Power District

Jodi Monacelli, Manager, Customer Strategy, DTE Energy Corporation

Karen Palmieri, Manager, Credit & Collections Operations, Eversource

Andy Schorn, Director, Customer Revenue, CPS Energy

4:30 pm

Conference Adjourns



"Boutique conference that promotes great networking."

AP National Markets,
Allied Solutions



"Relevant topics with engaging presenters. Continuous learning at its best."

Sr. Business Process Analyst, We Energies

PRE-CONFERENCE WORKSHOP

Robotic Process Automation (RPA) in the Utility Industry

MONDAY, JULY 22, 2019

7:45 – 8:15 am **Registration & Continental Breakfast**

8:15– 11:30 am **Workshop Timing**

OVERVIEW

The utility industry has begun to see its 2 percent annual growth turn into no growth and in some cases an actual decline. Cutting costs has become just as important as investment in this capital-intensive industry. Robotic Process Automation (RPA), while adopted widely in other industries, is becoming a key element in helping utilities reduce costs while improving business processes. Recent activity has seen utilities begin to use RPA in Customer Service, Finance, Accounts Payable, Accounts Receivables, Supply Chain, Back-Office, and Field Operations.

This workshop will cover the history and future of automation in the utility industry, who the players are in the RPA space, what other utilities are doing with RPA, and how to implement RPA successfully at your utility. It will include case studies from other utilities that are actively implementing or using RPA today to cut costs while improving business processes and revenue assurance.

LEARNING OUTCOMES

- Discuss the history of automation in the utility industry and what the future of automation will be
- Discuss how RPA automates manual tasks to improve efficiency
- List the costs associated with implementing RPA
- Review case studies on how utilities are currently capitalizing on automation

AGENDA

- The history and future of automation in the utility industry
- Trends driving RPA at utilities
- Market participants in the RPA industry
- Indicative costs to implement RPA
- RPA to improve collections performance & customer satisfaction
- Actual utility case studies from Entergy, XCEL Energy

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WORKSHOP INSTRUCTOR

Andy Quick

Advisor, Process Improvement, Entergy

Mr. Quick has worked at Entergy for 23 years and currently leads the Robotic Process Automation (RPA) program for the finance organization. In addition to automation, Andy Quick leads the implementation of a process improvement framework across finance. His team provides mentoring, coaching and training to team members involved in identifying and implementing automation and process improvement ideas.

Prior to his current role, Mr. Quick has held various leadership positions in Shared Services and IT, including change management, process improvement, telecommunications infrastructure, data centers, enterprise architecture, and two business unit CIO positions. Prior to joining Entergy, he worked for Andersen Consulting (Accenture) where he was an IT consultant for global, multi-industry companies. He holds a B.S. in computer science from Louisiana State University and an MBA from Tulane University. He is a certified Automation Anywhere RPA trainer and an adjunct instructor at Tulane University where he teaches a class in robotic process automation.

Jon T. Brock

President, Desert Sky Group, LLC

Mr. Brock formed Desert Sky Group to address the needs of the utility and energy industries, specifically the need for independence and unbiased advice in changing markets. Formerly the co-founder, President, and COO of utility advisor UtiliPoint International, Mr. Brock has over 25 years of experience delivering unmatched advice for today's utility and energy markets.

Mr. Brock is highly published and sought after for executive speaking engagements. He serves on the Executive Advisory Committee for CS Week, the Planning Committee for the Smart Grid RoadShow, and is an active member of the Society of Competitive Intelligence Professionals. He has served on utility/energy-related boards in the member and advisory member positions and has provided testimony and audit services to state and provincial commissions related to utility customer service and technology investments. Mr. Brock holds a B.S. in management science/computer systems from Oklahoma State University and an M.B.A. from the University of Tulsa.

John Crennen

Director, Innovation and Transformation Delivery – Robotic Process Automation, Xcel Energy

Mr. Crennen is Director of Innovation and Transformation Delivery at Xcel Energy, with a specific focus on enterprise-wide delivery of Robotic Process Automation. He was responsible for forming, and is currently leading, Xcel's RPA Center of Excellence which coordinates and drives the automation of manual and repetitive work across the Company. Prior to his current role, He led an RPA proof of concept and pilot program within Xcel's Finance Organization, the first of its kind for the Company. He has worked at Xcel for six years, and before leading RPA initiatives, John managed several different accounting departments where he successfully captured savings by driving process improvements. Prior to Xcel, John was an assurance manager at PwC. He is a Certified Public Accountant in Colorado and graduated from Colorado State University's College of Business where he earned his bachelor's degree in Accounting.

INSTRUCTIONAL METHODS

Case Studies, PowerPoint presentations and panel discussions will be used in program.

REQUIREMENTS FOR SUCCESSFUL COMPLETION

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

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.

EUCI is authorized by IACET to offer 1.0 CEUs for this conference and 0.3 CEUs for the workshop

EVENT LOCATION

A room block has been reserved at the Hyatt Regency Denver Tech Center, 7800 East Tufts Avenue Denver, CO 80237, for the nights of July 21-22, 2019. Room rates are US \$169 plus applicable tax. Call **1-303-779-1234** for reservations and mention the EUCI event to get the group rate. The cutoff date to receive the group rate is July 1, 2019 but as there are a limited number of rooms available at this rate, the room block may close sooner. ***Please make your reservations early.***

SPONSORSHIP OPPORTUNITIES

Do you want to drive new business through this event's powerful audience? Becoming a sponsor or exhibitor is an excellent opportunity to raise your profile before a manageably sized group of executives who make the key purchasing decisions for their businesses. There is a wide range of sponsorship opportunities available that can be customized to fit your budget and marketing objectives, including: Platinum, Gold, or VIP sponsor, Reception host, Networking break host, Tabletop exhibit, Workshop sponsor, Lanyard sponsor, Luncheon host and Breakfast host.

Please contact Grant Neptune at gneptune@euci.com or 720-988-1248 for more information.

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EVENT LOCATION

Mail Directly To:

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Please make your reservations early.

PLEASE SELECT

BUNDLE PRICE: UTILITY COLLECTIONS CONFERENCE 2019 AND PRE-CONFERENCE WORKSHOP:
JULY 22 – 23, 2019: Non Utilities US \$2095; **Utilities Rate US \$1595**
Early bird on or before July 5, 2019: Non Utilities US \$1895; **Utilities Rate US \$1395**

UTILITY COLLECTIONS CONFERENCE 2019 ONLY
JULY 22 – 23, 2019: Non Utilities US \$1695; **Utilities Rate US \$1195**
Early bird on or before July 5, 2019: Non Utilities US \$1495; **Utilities Rate US \$995**

PRE-CONFERENCE WORKSHOP ONLY: ROBOTIC PROCESS AUTOMATION (RPA) IN THE UTILITY INDUSTRY: JULY 22, 2019: US \$595
Early bird on or before July 5, 2019: US \$495

I'M SORRY I CANNOT ATTEND, BUT PLEASE EMAIL ME A LINK TO THE CONFERENCE PROCEEDINGS FOR US \$395

ENERGIZE WEEKLY

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

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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 June 21, 2019 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.