



# ONLINE CONFERENCE

## NORTH AMERICAN CREDIT & COLLECTIONS CONFERENCE FOR UTILITIES

October 27-28, 2020  
Online | Central Time

### ONLINE CONFERENCE

EUCI is pleased to offer this virtual conference on its online interactive platform. Enjoy a valuable learning experience with a smaller impact on your time and budget. You will gain new knowledge, skills, and hands-on experience in from the comfort of your remote location.



*"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

HOST UTILITY



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## OVERVIEW

The coronavirus outbreak has caused far-reaching concern and economic hardship for consumers, businesses, and communities across the globe. Utilities across North America share in this hardship as millions of customers struggle to pay their utility bill during these difficult times. Prior to the pandemic, utilities were already facing increasing pressure from stakeholders and communities to improve their financial performance and profitability by minimizing write-offs for uncollectible accounts. This has become that much more difficult due to COVID-19.

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 from the U.S. and Canada to answer these questions and more. This essential event offers attendees the opportunity to gauge industry benchmarks and hear what actions utilities are taking to deal with this increased debt and the stress that comes with it.

## LEARNING OUTCOMES

- Discuss decisions made as a result of the pandemic
- Discuss how to reach different types of customers (low income, blockchain, etc.)
- Examine methods to improve collection results by improving the customer experience
- Discuss programs that aid low-income/vulnerable citizens
- Explain how to go from combined billing to separate bills and how customers adjust
- Evaluate using customer panels to improve the customer experience
- Discuss how to navigate the OEB's new customer service rules

## WHO SHOULD ATTEND

Individuals working in the following areas will benefit from attending this event:

- Credit and collections directors, manager, supervisors and team leaders
- Call center directors, managers, supervisors and team leaders
- Customer service directors, managers and supervisors
- Billing professionals
- Analysts



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

Commercial Credit  
Program Manager,  
Portland General Electric



***“I was skeptical about the remote learning platform but in fact I found this to be more efficient and overall better than an in person class!!! it was nice to be able to type questions out and have them answered at a good point in the discussion instead of derailing the presentation.”***

Deputy Director, City of Naperville -  
Electric Utility

# AGENDA

TUESDAY, OCTOBER 27, 2020 - CENTRAL TIME

- |                            |   |
|----------------------------|---|
| <b>8:45 – 9:00 am</b>      | <b>Log In</b>   |
| <b>9:00 – 9:15 am</b>      | <b>Opening Remarks</b>  |
| <b>9:15 – 9:30 am</b>      | <p><b>Setting the Stage</b></p> <p>This session will set the context, themes, and participatory discussion tone for the conference. Conference chair, Peter Sorrentino will present current trends in the market as it relates to credit &amp; collections in the utility industry. Attendees will be invited to provide input regarding key discussion interests to highlight throughout the conference sessions.</p> <p><b><i>Peter Sorrentino, President, General Credit Services Inc.</i></b></p>   |
| <b>9:30 – 10:00 am</b>     | <p><b>Bringing 40 Years of Utility Collections Knowledge to the Audience</b></p> <p>Based on his experience with Newfoundland Power and Nova Scotia Power, Mel Osmond will pass along to the attendees the processes he has found to work (and not work) in a Utility collection environment. Mel will speak to the collection decisions his utility made during the pandemic and provide lessons learned from the Dunning Matrix project his Team introduced at Nova Scotia Power last year.</p> <p><b><i>Mel Osmond, Credit Manager, NS Power</i></b></p>   |
| <b>10:00 – 10:05 am</b>    | <b>Short Break</b>  |
| <b>10:05 – 10:35 am</b>    | <p><b>Hydro-Québec's Ongoing Strategy to Improve Collections</b></p> <p>This presentation will provide an overview of Hydro-Québec's strategy to continuously improve collections. Areas of emphasis that will be covered during the presentation and that the company is focusing much of their attention on include the following customers:</p> <ul style="list-style-type: none"> <li>• Low income customers</li> <li>• High-end collections</li> <li>• Blockchain customers</li> </ul> <p><b><i>Angelo Cristofanilli, Credit Risk Management Advisor, Hydro Québec</i></b></p>   |
| <b>10:35 – 10:40 am</b>    | <b>Short Break</b>  |
| <b>10:40 am – 11:10 am</b> | <p><b>Keeping Up with Collections at Peterborough Utilities</b></p> <p>As a smaller utility, Peterborough utilities has always done collections a little differently than some other utilities. In this session, attendees will learn how the utility created a virtual call center with all CS staff working from home except two cashiers who rotate on a weekly basis. In this presentation the following topics will be addressed:</p> <ul style="list-style-type: none"> <li>• Customer service-working through COVID</li> <li>• The installation of water meters</li> <li>• Water disconnection process and how Peterborough recovers water/sewer debt</li> <li>• Separating the bills-going from a combined bill of electricity, water/sewer, rental to two separate bills</li> <li>• How Customer Service Reps utilize Smart Works to try to solve a leak</li> </ul> <p><b><i>Terri Keough, Supervisor Customer Service, Peterborough Utilities Services Inc.</i></b></p> |
| <b>11:10 - 11:15 am</b>    | <b>Short Break</b>  |

# AGENDA

TUESDAY, OCTOBER 27, 2020 - CENTRAL TIME - CONTINUED

- 11:15 – 11:45 am**      **Streamlining Customer Operations when Consolidating Operating Companies**  
Enbridge Gas and Union Gas are now one as the two companies combined to form Enbridge Gas Inc. It is always a challenge when two companies merge as streamlining operations and improving customer service at the same time does not happen overnight. In this presentation, hear the best practices that Enbridge used to make the transition as well as streamline customer operations efficiently and smoothly.  
*Joe Dimeo, Collections Manager, Enbridge*
- 11:45 – 11:50 am**      **Short Break**
- 11:50 am – 12:30 pm**      **Achieving Savings and Efficiency through Collaborative Sourcing and Procurement**  
In today's fast-paced business environments, the function of procurement must be prepared for change – to transition from an 'old school', transactions-based emphasis on savings alone to a more integrated approach to category and supply chain value management. In this session, learn how project management methodologies, supplier management programs, Customer Relationship Programs and Business Intelligence (BI) tools will continue to be foundational to procurement processes and ensure risk mitigation and compliance to trade agreements. As a trusted, not-for-profit collaborative sourcing partner, OECM works hard to provide its customers, value, efficiencies and savings and through collaborative sourcing and procurement.
- Through this session participants will increase their awareness of:
- OECM and supplier partners' response to helping fight COVID-19 in Ontario
  - Insights on the finance portfolio, sector participation and trends
  - BI processes and tools OECM utilize to gather/analyze data to streamline sourcing activities
  - Supplier Recognition Program to engage 200+ supplier partners in achieving key performance metrics, drive greater savings and customer satisfaction
- Taylor Thornhill, Senior Supplier Relationship Manager, OECM*  
*Sarah Chuduwala, Customer Relationship Manager, OECM*
- 12:30 – 1:15 pm**      **Lunch Break**
- 1:15 – 1:45 pm**      **Leveraging Customer Panels to Drive Customer Satisfaction and Experience**  
Tucson Electric Power (TEP) launched its Customer Panel initiative in 2016 as part of a broader customer experience strategy to collect and utilize the voice of the customer to develop, prioritize or launch projects. While customer satisfaction research, tracking surveys and industry best practices helped to identify opportunities and define next steps, ultimately small group discussions with residential or business customers helped validate assumptions, uncover improvements and even put a few things on hold for another time.
- During this session, TEP will share how they implemented the program; mini-case studies on bill redesign, pre-pay energy, and a small business contact center; overall and project specific research findings that increased customer satisfaction; and how you could design and implement a cost-effective customer panel program at your company.  
*John Bord, Manager of Customer Operations, Tucson Electric Power (TEP)*
- 1:45 – 1:50 pm**      **Short Break**

# AGENDA

TUESDAY, OCTOBER 27, 2020 - CENTRAL TIME - CONTINUED

- 1:50 – 2:20 pm**      **Reinstating Collections to Drive Payments While Being Sensitive to the Current Environment**  
At Austin Energy (AE), many customers have stopped paying and have gone ‘radio silent’ because of the pandemic. There is a large percentage of customers at the utility who are not contacting the company to receive funds to pay their bills (if they are impacted by COVID) or entering into payment arrangements. As a result, AE is presenting to their City Council regarding planning for, and the necessity of, re-starting our collections activities sooner rather than later.  
***Elaine Veselka, VP, Customer Account Management, Austin Energy***
- 2:20 – 2:25 pm**      **Short Break**
- 2:25 – 2:55 pm**      **Changes Made to Address the Pandemics Impact on Customers and the Company**  
Like utilities across North America, Intermountain Rural Electric Association (IREA) had to make quick decisions because of the pandemic. This involved implementing some significant changes to accommodate both customers and staff. In this presentation, Rich Brewer will share with attendees the changes that were implemented including:
- Moving most of the staff to a work from home environment
  - Providing an alternative commercial rate to reduce customer costs
  - Revised credit requirements for new customers
  - Implementing multiple outbound past due reminder contact streams
- Rich Brewer, Billing and Payments Director, IREA***
- 2:55 – 3:05 pm**      **Short Break**
- 3:05 – 3:45 pm**      **Robotic Process Automation (RPA) in the Utility Industry**  
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 presentation 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.  
***Jon Brock, President, Desert Sky Group, LLC***
- 3:45 – 3:50 pm**      **Short Break**
- 3:50 – 5:00 pm**      **Utility Panel Discussion**  
The panel will feature several experts talking about what is being done or considered to improve credit and collections practices especially during these difficult times. The objective of this session is to have an open Q&A discussion to conclude the first day of the conference on a high note so “bring your thinking caps”.  
***Moderator: Peter Sorrentino, President, General Credit Services Inc.***  
***Panelists:***  
***John Bord, Manager of Customer Operations, Tucson Electric Power***  
***Joe Dimeo, Collections Manager, Enbridge***  
***Elaine Veselka, VP, Customer Account Management, Austin Energy***  
***Terri Keough, Supervisor Customer Service, Peterborough Utilities Services Inc.***
- 5:00 – 6:00 pm**      **Virtual Networking Reception**

# AGENDA

WEDNESDAY, OCTOBER 28, 2020 - CENTRAL TIME

8:45 – 9:00 am

**Log In**

9:00 – 9:30 am

**How Customer Service Impacts Collections**

The theme of this presentation is to present the characteristics of customer service that impact the ability to collect arrears when dealing with a customer. The presenter will discuss when dealing with a customer on the phone or in person, how a friendly but firm approach and being empathetic will net the best results. Examples of what not to do and what to do from videos and personal experience will be shared. This will be an interactive session as attendees will be asked questions to obtain their involvement. Attendees will look at how best to deal with an upset customer that has received a collection call or notice.

**Enzo Augimeri, Manager Customer Service, Oakville Hydro**

9:35 – 9:40 am

**Short Break**

9:40 – 10:10 am

**Navigating the Ontario Energy Board’s New Customer Service Rules**

The Ontario Energy Board has introduced new rules that significantly affect the way electrical utilities collect from their customers. Over the past year, Waterloo North Hydro has been preparing its team for the latest changes in the company’s collections practices. In this session, attendees will observe how one Ontario utility is adapting to these changes.

Some of the significant changes to our collection’s practices include:

- Extension of the disconnection timelines
- COVID-19’s impact on the collections process
- Changes in how to collect from low-income customers
- Adjustments in the Winter Ban
- Introduction of the “Overdue Notice”

**Aaron Melo, Customer Service Supervisor, Waterloo North Hydro**

10:10 – 10:15 am

**Short Break**



*“Worthwhile and relative discussions with great level of interaction.”*

Manager Collections,  
Enbridge



*“My first EUCI Collections Conference; not my last. Great participation, deep knowledge/insight, broad spectrum of topics, caliber of speakers excellent. Would recommend to others. Great way to learn, collaborate, share best practices, and network.”*

Supervisor/Collection, New Brunswick Power

# AGENDA

WEDNESDAY, OCTOBER 28, 2020 - CENTRAL TIME (CONTINUED)

**10:15 – 11:45 am**

## **Vendor Observations/Reflections**

*(Includes short breaks between speakers)*

In this session, industry experts will discuss what they see as the critical components and challenges for utilities during these difficult COVID times. The presenters will share what they have been seeing and hearing during the pandemic based on the valuable experience and information obtained through their customers' feedback

## **Essential Living Benefits – An Income Unemployment Product**

This presentation will provide the historical background of a unique unemployment product, which is highly appropriate in today's world and unemployment environment. The product can help people pay expenses in the event of involuntary unemployment. The presentation will then segue into the potential uses for utility companies and their customers.

**Erick J. Piper, Vice President, Allied Solutions**

**Ron Lefkoski, Vice President, A & H Affinity Solutions, Chubb**

## **How Meeting Consumer Preferences Can Help You Adapt During a Downturn**

The financial impact of COVID-19 has resulted in a substantial increase in past-due customers, putting a strain on collection agent availability and accelerated the need for more efficient collection processes. In this session, Amir Tajkarimi will unveil results of Lexop's 2020 nationwide survey on how Canadians prefer to pay past-due accounts vs. what they're getting.

**Amir Tajkarimi, CEO, Lexop**

## **Revenue Management and Smart Collections to reshape customer experience & behavior**

*Energy & Utility organization are becoming increasingly concerned over the probability of bad debt levels increasing against the backdrop of a weaker economic landscape. In this session, learn how the use of analytics improves credit & collections operations to reduce costs and bad debt. In addition, learn how this approach helps identify high risk & vulnerable customers as well and determine the likelihood of delinquency.*

**Tom McDonnell, Senior Vice President – Energy & Utility Practice, WNS**

**11:45 am – 12:00 pm**

## **Conference Recap**

Conference Chair Peter Sorrentino will provide a recap of the key points that were covered during the conference. This closing session will also allow conference attendees to ask questions about any presentation, issue or problem.

**Peter Sorrentino, President, General Credit Services Inc.**

**12:00 pm**

## **Conference Adjourns**

## ONLINE COURSE DELIVERY & PARTICIPATION DETAILS

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We will be using Microsoft Teams to facilitate your participation in the upcoming event. You do not need to have an existing Teams account in order to participate in the broadcast – the course will play in your browser and you will have the option of using a microphone to speak with the room and ask questions, or type any questions in via the chat window and our on-site representative will relay your question to the instructor.

- You will need to join the appropriate meeting at the appropriate time.
- You will receive a meeting invitation will include a link to join the meeting.
- Separate meeting invitations will be sent for the morning and afternoon sessions of the course.
  - o You will need to join the appropriate meeting at the appropriate time.
- If you are using a microphone, please ensure that it is muted until such time as you need to ask a question.
- The remote meeting connection will be open approximately 30 minutes before the start of the course. We encourage you to connect as early as possible in case you experience any unforeseen problems.

## REQUIREMENTS FOR SUCCESSFUL COMPLETION

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Participants must login for the entirety of the conference to be eligible for continuing education credit.

## INSTRUCTIONAL METHODS

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This program will include case studies, panel discussions and PowerPoint presentations.

## IACET CREDITS

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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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# ENERGIZE WEEKLY

Energize Weekly is EUCI's free weekly newsletter, delivered to your inbox every Wednesday. We provide you with the latest industry news as well as in-depth analysis from our own team of experts. Subscribers also receive free downloadable presentations from our past events.

Sign me up for Energize Weekly

## PLEASE SELECT

- NORTH AMERICAN CREDIT & COLLECTIONS CONFERENCE FOR UTILITIES ONLINE CONFERENCE:**  
OCTOBER 27-28, 2020: US \$1,195 (Single Connection)
- PACK OF 5 CONNECTIONS:** US \$ 4,780 (20% Discount)
- PACK OF 10 CONNECTIONS:** US \$8,365 (30% Discount)
- PACK OF 20 CONNECTIONS:** US \$14,340 (40% Discount)

### Online Course Delivery & Participation Details

See page 8 for information

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

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Print Name

Job Title

Company

Address

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City

State/Province

Zip/Postal Code

Country

Phone

Email

### CREDIT CARD INFORMATION

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Billing State

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

.....  
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 September 25, 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.