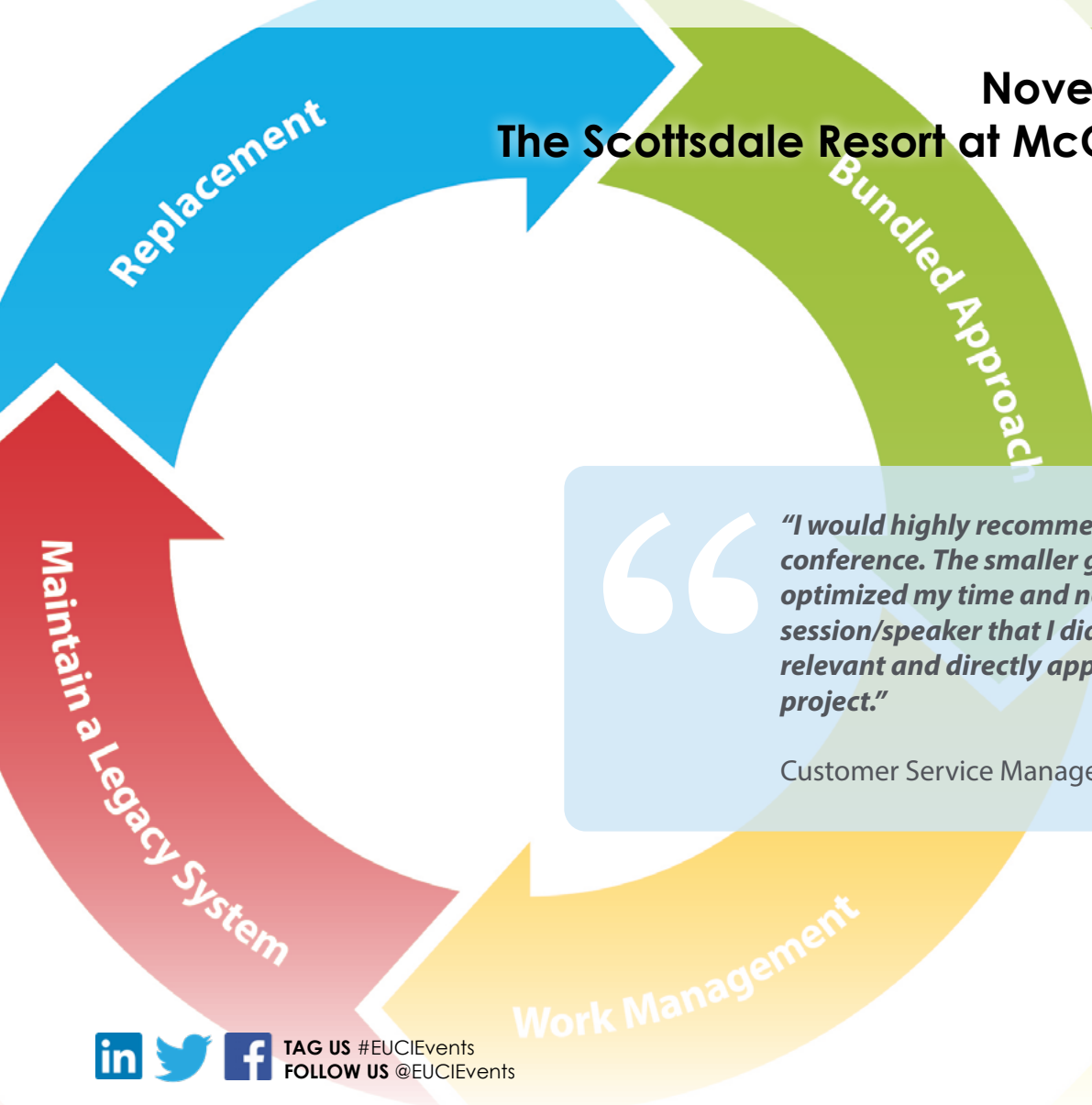


THE CIS/CRM EVOLUTION: *Transforming Your Customer Platform & Experience*

November 5-6, 2018
The Scottsdale Resort at McCormick Ranch
Scottsdale, AZ



“

“I would highly recommend the EUCI CIS conference. The smaller group style really optimized my time and networking. Not a single session/speaker that I didn't learn information relevant and directly applicable to our current CIS project.”

Customer Service Manager, Madison Gas & Electric



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OVERVIEW

There continues to be significant changes that affect the way utilities interact with their customers. New regulation related to distributed generation, real-time pricing and net metering along with advancements in mobile technology have changed the utility to consumer relationship. Most utility customer information systems (CIS) were purpose-built, isolated billing solutions, unable to accommodate the growing demand for multi-channel customer service and agile customer interface. Today, an increasing number of utilities are focusing on CRM and CX to improve customer engagement and streamline customer operations. New tools are assisting customer service professionals to understand the customer better such as journey mapping and omnichannel interaction tracking.

In addition to a customer focus, utilities are also balancing a myriad of new technology upgrades and applications i.e., integrated platforms such as Advanced Distribution Management Systems, which all impact the customer experience and how customer facing systems perform. Further, many Customer Information Systems were not specifically designed to leverage massive AMI/AMR data and rationalize it. Solutions are being developed to use that data to address complex market structures and billing requirements (load aggregation, retail market requirements) to leverage the benefits of ongoing innovations around DER, self-service options, and mobile platforms favored by “digital customers”.

Join us at EUCI's 8th annual CIS Conference where utility and industry professionals will share their best practices in dealing with this CIS/CRM evolution and how organizations continue to transform their customer platforms. The takeaways will further inform utilities on how to define a strategy that can accommodate the customer of today and the future.

LEARNING OUTCOMES

- Explain methods to set the foundation for a new customer information platform
- Discuss the most current thinking in the utility space that will bring customer engagement to a new level
- Examine the organizational needs that are necessary when selecting an integrated solution
- Recognize the necessary components of a good customer experience
- Discuss how to build a strong business case in order to bring a holistic omnichannel experience to your customers
- Explain how to improve customer engagement by making incremental improvements to existing processes or technology
- Discuss how to establish open lines of communication throughout the organization

WHO SHOULD ATTEND

Utility staff to include:

- Chief information officers, chief operations officers, vice presidents, general managers, managers, directors, supervisors and process partners at the executive and managerial levels
- Contact center management professionals
- Customer care professionals
- Strategists and analysts
- Business planning and information systems professionals
- Strategic planning and performance management professionals
- Training and development staff
- Quality assurance managers

AGENDA

MONDAY, NOVEMBER 5, 2018

8:00 – 8:30 am

Registration and Continental Breakfast

8:30 – 8:40 am

Conference Announcements

8:40 – 9:00 am

Opening Remarks and Welcome Address from Arizona Public Service (APS)

APS was founded in 1886 and is the largest and longest-serving electric company in the state, serving 11 of Arizona’s 15 counties. In these changing times, APS recognizes new technologies and growing customer expectations are leading to rapid changes at the company and more generally throughout the industry. Hui Wu Curtis will welcome her power industry colleagues to Scottsdale and review how the conference focus supports this fundamental industry requirement.

Hui Wu Curtis, General Manager, Customer Operations, Arizona Public Service

9:00 – 9:45 am

What Are Utilities Doing on CIS/CRM?

Nearly two decades ago, utilities were replacing the CIS to avoid a Y2K disaster. Most avoided a CRM because they were reserved for retailers selling goods, not commodities. Today, many utilities are entertaining a CRM not to sell goods or commodities, but to provide their customers with a positive experience utilizing multiple channels. Come hear the latest on what utilities are using for the CIS, CRM, and other applications to provide an outstanding customer experience. The presentation will include recent research on what utilities are doing, what they believe the priorities are for their customers, whether the cloud will play a part in their ultimate solution, and how they are procuring and implementing these services.

Jon T. Brock, President, Desert Sky Group, LLC

9:45 – 10:30 am

Leveraging Your New CIS

Meter-to-Cash is a significant process for utility companies as it not only represents their revenue cycle but also touches the end customer directly. The rapid growth of smart meters requires utilities to cope with new demands on their Customer Information System (CIS). A CIS Implementation is complex, time consuming, and fraught with time constraints. Because of the constant pressure to GO LIVE with accurate bills, opportunities to leverage the advanced functionality of a modern CIS are often missed. Fayetteville Public Works Commission leveraged the advanced functionality of the CIS implementation to develop several work streams that look at the full lifecycle of Meter to Cash business processes. The need for such optimization underscores the importance of leveraging CIS integration with other key enterprise systems.

Paul Rao, Director of Information Systems, Fayetteville Public Works Commission



10:30 – 10:45 am

Morning Break



“This event was filled to the brim with excellent information from industry experts. The format was more focused and productive than a trade show and was a great value for me. Thank you EUCL!”

Senior Project Manager, Eugene Water & Electric Board

AGENDA

MONDAY, NOVEMBER 5, 2018 (CONTINUED)

10:45 – 11:30 am



Customer Experience Initiatives at American Electric Power

AEP is embarking on their CRM implementation journey and there has been a tremendous amount of work going into this project. In this session, Eric Davis will share how everything is working together to improve the customer journey including the following initiatives:

- Journey mapping
- CRM
- Mobile app
- Online chat
- Alerts
- Streamlined bill payments
 - o Bill redesign

Eric J. Davis, Digital and User Experience Manager, American Electric Power (AEP)

11:30 am – 12:30 pm



Setting a North Star to light the way for a successful Customer Experience Transformation

Indianapolis Power & Light (IPL) knew that they wanted to transform the way they engaged with their customers to improve their experiences, deepen their relationships and to also drive more value for IPL; but to do this they needed to establish a new vision for what that would look like and how they would get there. Through their work with West Monroe Partners, IPL took a design thinking approach and included their customers in defining their north star vision, the future state experience and roadmap of how they would get there. From there they needed to operationalize this vision across people, process and technology changes in their organization. As part of this, in partnership with West Monroe and Salesforce they deployed Salesforce as the front-end technology engagement platform to their CIS to enable their employees to deliver their customer experience vision seamlessly across Sales, Marketing and Servicing interactions. Come hear from West Monroe, Salesforce and IPL about this exciting journey.

Mazen Ghalayini, Senior Director, West Monroe Partners
Martin Leach, Senior Director – Global Energy, Salesforce
Cody Girod, Principal – Solution Engineering, Salesforce
Joe Bentley, SVP – Operations, Indianapolis Power & Light (invited)

12:30 – 1:30 pm

Group Luncheon

1:30 – 2:15 pm



Customer Experience in the Times of Digital Process Automation

As Utilities embark on a CIS modernization journey, the customer experience paradigm keeps evolving with increasing expectations from the ever-connected customer. Meeting these requires increased agility, seamless customer experience and a process automation focus to augment the CIS strategy. In this session, APS – a leading west coast utility shares their point of view on how to leverage Cloud, Digital and Automation platforms to enable this strategy.

Christopher Montoya, IT Senior Manager, Customer Service Solutions Delivery, Arizona Public Service
Venkata Nimmala, Manager, Arizona Public Service

2:15 – 3:00 pm

Consumer Platform of the Future Study

As economies move to a decentralized, customization-centric approach, the energy ecosystem must also evolve. The emergence of strategic partnerships, aggregators and other new entrants into the energy ecosystems affects the business model for utilities and opens new opportunities for how products and services are configured and offered. This study discusses how online e-commerce marketplaces are evolving into a key piece of post-purchase consumer engagement for utilities and focuses on the changes in the volume and complexity of decisions consumers now make. Audience members will learn insights on the types of offers consumers will want in five years, elements of offers consumers want to be packaged together, and tools that would be helpful in evaluating offers.

Patty Durand, President & CEO, Smart Energy Consumer Collaborative

AGENDA

MONDAY, NOVEMBER 5, 2018 (CONTINUED)

3:00 – 3:15 pm

Afternoon Break

3:15 – 4:00 pm

From Bottom of the Pack to a Top 9 J.D. Powers Ranking

Cobb EMC has always provided first class member services, the lowest prices and been known as one of the most reliable utilities in the nation. However, when it came to member satisfaction they still ranked near the bottom of the pack. A few years ago, Cobb EMC took a very aggressive approach to address this and other issues by implementing Customer Care & Billing, SmartHub (a web and app-based platform) and MDMS in just over a year. In this session, attendees will learn about Cobb EMC's long journey to better customer satisfaction! Nurdan Cornelius will share how the company listened closely to what members were saying, putting them first, meeting their expectations and leveraging insights to better serve them resulting in this remarkable turnaround.



Nurdan Cornelius, Director, Consumer Marketing, Cobb Electric Membership Organization

4:00 – 5:00 pm

Vendor Panel Discussing Various Technologies

Innovative solutions including mobile technologies and self-service portals have brought many changes in the utility industry. CIS and CRM systems have been upgraded and integrated with other systems to help enable a true, digital, customer experience for modern day consumers. In this session, vendors will respond to audience inquiries on how these and other systems have changed for the better to provide customer service beyond the normal channels. Ask as many questions as possible of our panel of experts to learn about what could work best for your utility.

Moderator: Hui Wu Curtis, General Manager, Customer Operations, Arizona Public Service

Panelists:

John Herron, Vice President, Vertex Business Services

Chris Clark, Director – Fraud, Risk and Compliance, Neustar

Ted Mazza, Senior Manager, West Monroe Partners

5:00 – 6:00 pm

Networking Reception



“Great in-depth discussion on CIS needs and strategies – in a smaller but specific audience.”

Director, Billing & Revenue Strategy, National Grid



“The conference is full of relevant, direct experience delivered in a concise timeframe. A great use of my time.”

Manager Customer & Operations Tech, NF Power

AGENDA

TUESDAY, NOVEMBER 6, 2018

8:00 – 8:30 am

Continental Breakfast

8:30 – 9:15 am

Transforming the Customer Experience for the New Energy Consumer



The rapid advancement in smart technologies and customer expectations is shaping the future for the new digitally-engaged energy consumer. Entergy launched a new Digital Customer Roadmap with a bold vision to meet these evolving customer needs. In this presentation, Tracie Boutte will share the steps the utility is taking to design a future customer experience that will increase engagement and satisfaction while driving business value and cost savings. She will discuss the drivers that are making this change happen in technology as well as people, policy and process challenges Entergy is facing to deliver on this customer-centric strategy. Tracie will also share an inspirational view of what Entergy, and the industry at large, may look like as it becomes more innovative and agile to support the new energy ecosystem of the future.

Tracie Boutte, Vice President Customer Experience, Entergy

9:15 – 10:00 am

A Powerful Pair – Omni-Channel Strategy and Journey Mapping

First class customer support in the omni-channel era means providing utility customers with a seamless and integrated experience regardless of channel they use to interact with their power company. Yet, in many respects utilities are still thought to be far behind other industries in focusing on the omnichannel experience. In this session, E Source will present how they helped a utility prepare for its CIS implementation by developing a strategy and roadmap for a holistic omni-channel experience to their customers with a strong business case as to its importance. Highlights from an industry-wide research into customer and utility perceptions of omni-channel experiences will be presented, and tips offered on how to address gaps in omni-channel strategies through journey mapping. Using these examples, utilities will be on the way to developing their own strategic and cohesive omni-channel experience.

Chad Garrett, Managing Director, E Source

10:00 – 10:15 am

Morning Break

10:15 – 11:00 am

The Impacts of Inaccurate Customer CIS Data

Utilities are always looking for ways to improve the customer experience while reducing operational costs through increased IVR self-service or reducing inbound customer calls. At the heart of customer communication is identity — if you don't get it right, everything else will be wrong. Industry benchmarks show that, on average, 20% of customer phone numbers are wrong within utility CIS systems. How are utilities able to effectively communicate with their customers when phone numbers constantly change, and the average U.S. household has 3.8 phone lines but the average utility CIS system only has 1.3. In this session, through proactive phone number management hear how utilities are boosting customer satisfaction scores and reducing operational costs through higher IVR containment rates and reduced inbound calls.

Chris Clark, Director – Fraud, Risk and Compliance, Neustar

11:00 – 11:45 am

Meeting Customer Expectations with a Next Generation CIS



Burbank Water and Power (BWP) serves the City of Burbank and provides its customers with reliable, affordable and sustainable electric and water service. BWP is a leading-edge utility and one of the first to have full water and electric AMI in the region. For the utility's system to stay up to date, investments needed to be made to its CIS. BWP upgraded its CIS to help modernize its customer service operations. The goal was to provide customers with timely and accurate bills, while simultaneously reducing costs, improving efficiencies and building on the utility's existing stellar customer service reputation. This segment will offer insight into BWP's CIS project approach, team, objectives, challenges and successes, what was involved in post go-live efforts plus what's next for BWP.

Oswaldo Hernandez, Assistant Manager, Customer Service Operations, City of Burbank

11:45 am

Conference Adjourns

INSTRUCTIONAL METHODS

PowerPoint presentations and case studies 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 the conference

EVENT LOCATION

A room block has been reserved at the The Scottsdale Resort at McCormick Ranch, 7700 E McCormick Pkwy, Scottsdale, AZ 85258, for the nights of November 4-6, 2018. Room rates are US \$159 + \$15 resort fee plus applicable tax. Call **1-480-991-9000** or [click here](#) for reservations and mention the EUCI event to get the group rate. The cutoff date to receive the group rate is October 12, 2018 but as there are a limited number of rooms available at this rate, the room block may close sooner. ***Please make your reservations early.***

REGISTER 3, SEND THE 4TH FREE

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



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PLEASE SELECT

- THE CIS/CRM EVOLUTION: TRANSFORMING YOUR CUSTOMER PLATFORM & EXPERIENCE CONFERENCE:**
NOVEMBER 5-6, 2018: US \$1395
EARLY BIRD on or before OCTOBER 19, 2018: US \$1195

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

Print Name

Job Title

Company

What name do you prefer on your name badge?

Address

City

State/Province

Zip/Postal Code

Country

Phone

Email

List any dietary or accessibility needs here

CREDIT CARD INFORMATION

Name on Card

Billing Address

Account Number

Billing City

Billing State

Exp. Date

Security Code (last 3 digits on the back of Visa and MC or 4 digits on front of AmEx)

Billing Zip Code/Postal Code

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 October 5, 2018 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 conference 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 at (201) 871-0474