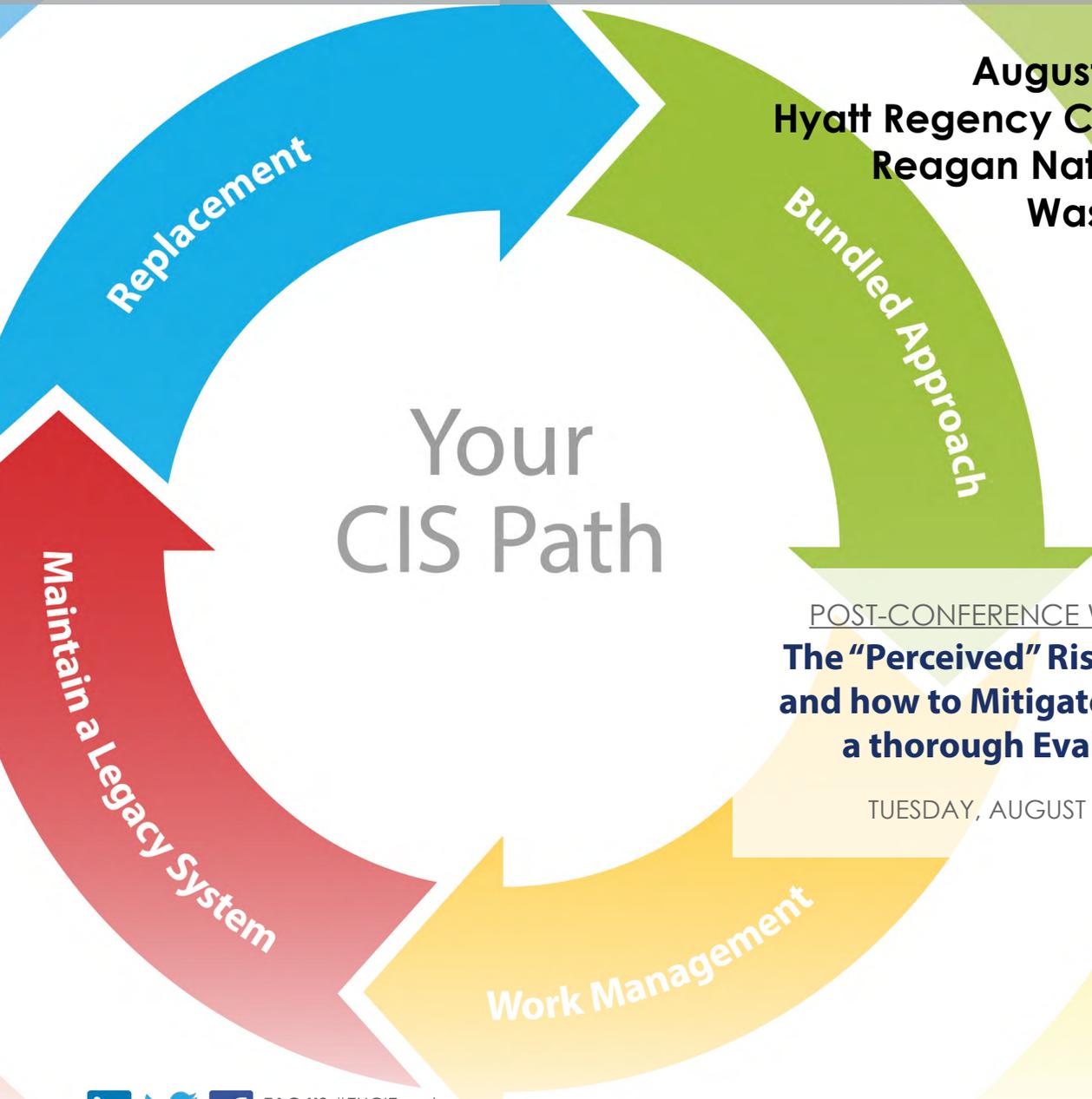


# 7TH ANNUAL CIS FOR UTILITIES

**August 21-22, 2017**  
**Hyatt Regency Crystal City at**  
**Reagan National Airport**  
**Washington, DC**

## Your CIS Path



POST-CONFERENCE WORKSHOP  
**The “Perceived” Risks of Cloud  
and how to Mitigate Risks with  
a thorough Evaluation!**

TUESDAY, AUGUST 22, 2017

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EUCI is authorized by IACET to offer 0.9 CEUs for the conference and 0.4 CEUs for the workshop

### SPONSORS



## OVERVIEW

A Customer Information System (CIS) is far and away one of the most important and significant investments in technology that all electric, gas and water utilities make. It is at the heart of their business operations, which are so reliant on the meter-to-cash value chain. The CIS is the glue that binds the consumption and metering process to payments, collections and other downstream processes that affect a company's top line. In today's rapidly changing times, utilities need to derive much greater customer value and insights from newer technology platforms.

Many utilities across North America have legacy CIS systems, which lack sufficient data capabilities to allow for a robust customer experience. The CIS supports many ancillary systems at utilities, which make replacing or extending it a necessary but complicated and critical effort that involves various parties. Replacing a CIS is an expensive and daunting project for utilities that requires a considerable amount of time and energy. On the other hand, a new CIS enables utilities to be timely and proactive in responding to customer requests, market forces and regulatory changes.

EUCI's 7th annual CIS conference will bring together thought-leaders among utilities, industry experts, solution providers and integrators who will take a deep dive into the issues, pain points and resolutions around the CIS ecosystem. It will help attendees learn how utilities are filling the gap years before replacement and what type of cloud solutions are in play to take the burden off of the CIS. Attendees will also acquire tips on how to define a CIS strategy that can carry their utilities into the future.

## LEARNING OUTCOMES

- Discuss ways to improve a utility's CIS implementation and increase the speed of adoption
- Explain methods to set the foundation for a new customer information platform
- Create a CIS project approach with checks and balances to streamline the overall process
- Explain the methodology, tools and participants involved to evaluate a CIS replacement
- 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
- Discuss the benefits and organizational change management related to CIS implementations

## 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
- Strategists and analysts
- Business planning and information systems
- Strategic planning and performance management
- Training and development
- Quality assurance



***"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 EUCI!"***

Senior Project Manager, EWEB

# AGENDA

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MONDAY, AUGUST 21, 2017

- 8:00 – 8:30 am**      **Registration and Continental Breakfast**
- 8:30 – 8:45 am**      **Program Introduction**
- 8:45 – 9:30 am**      **Welcome Address from Exelon**  
 On behalf of Exelon, a FORTUNE 100 company and the nation's leading competitive energy provider, Hallie Reese, Chief Customer Officer will welcome her power industry colleagues to the 7th annual CIS conference. Ms. Reese will describe the necessary steps that Exelon is taking to continually improve its customer care functions.  
**Hallie Reese, Chief Customer Officer, Exelon Utilities**
- 9:30 – 10:30 am**      **Setting the Stage – The Value of CIS for Energy Utilities**  
 This session will set the context, themes, and participatory discussion tone for the conference. Conference chair, Jon Brock will address the value and importance of the CIS for utilities in today's rapidly changing times. Attendees will be invited to provide input regarding key discussion interests to highlight throughout the conference.  
**Jon Brock, President, Desert Sky L.L.C.**
- 10:30 – 11:00 am**      **Networking Break**
- 11:00 – 11:45 am**      **Making the CIS Call – from Vision to Decision**  
 This session will focus on the initial decision to replace DC Water's aging Customer Information System (CIS) and the process that led to the selection of the VertexOne CIS and Kona work management solutions. The presentation will cover the methodology, participants and tools used to evaluate the various options and highlight the reasons for DC Water's decision. It will also discuss the rationale for selecting a cloud based solution rather than the traditional on-premise option.  
**Tom Kuczynski, CIO, DC Water**
- 11:45 am – 12:30 pm**      **Implementing a New CIS: The Washington Gas Experience**  
 Taking the right approach to implementing a well-functioning system, as well as meeting customer expectations, is easier said than done. Implementing a new CIS presents challenges for all utilities from picking the right product and partners, to maintaining customer satisfaction and smooth daily operations during implementation, to leveraging the new system to improve business processes. Washington Gas experienced one of the most successful CIS implementations in recent years. In this session, Washington Gas will share its selection strategy, project management, conversion activities and more.  
**Mark Shaver, CIS Project Director, Washington Gas**
- 12:30 – 1:30 pm**      **Group Luncheon**
- 1:30 – 2:30 pm**      **Setting a New Industry Benchmark for Complex CIS Implementations: It Can Be Done**  
 In this session, attendees will learn about the best practices and methodologies used to implement the new industry benchmark set by Arizona Public Service's CIS Transformation Program, CINERGY. A third party independent quality assurance vendor, involved in more than 200 CIS implementations, rated the APS CIS implementation as the best in the industry setting a new industry benchmark for these types of complex programs. APS will discuss what they did to set a new industry benchmark and how this "secret sauce" can be scaled and applied to any project, program or enterprise portfolio.  
**Jassi Arora, Director, CIS Replacement Program, Arizona Public Service (APS)**  
**Christine Gonzales, Program Management Office Lead, Arizona Public Service (APS)**

# AGENDA

MONDAY, AUGUST 21, 2017 (CONTINUED)

**2:30 – 3:15 pm**

**Life after a CIS Implementation**

The utility survived its CIS implementation!! Now what? Intermountain Rural Electric Association (IREA) will share some of the process changes that happened after “go-live” and best practices for on-going training and testing. IREA continues to update its business process and create efficiencies as the G&T continues to learn its CIS system. Employee engagement will still play a big role after implementation. IREA’s Billing Services Director will detail how the utility prepared for its CIS upgrade and what it has learned from previous upgrades.

**Jennifer Tran, Billing Services Director, Intermountain Rural Electric Association (IREA)**

**3:15 – 3:45 pm**

**Networking Break**

**3:45 – 5:00 pm**

**Open Vendor/Sponsor Panel Discussion**

CIS transformations carried out in the 1990s included massive modification efforts before implementation. These CIS implementations are already proving inadequate for handling the influx of changes brought about by regulation and innovations such as the smart grid, electric vehicles, mobile technologies and self-serve portals. In this interactive panel discussion, vendors will respond to audience inquiries on how their CIS has changed to accommodate these innovations, how to mitigate inherent implementation risks, and to learn about what could work best for your utility.

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

**Panelists:**

**Steve Wenke, Managing Partner, AAC Utility Partners**

**Kim Schafer, Vice President – Industry Principal, Vertex Business Services**

**Brian Bradford, VP Industry Strategy, Oracle Utilities**

**5:00 – 6:00 pm**

**Networking Reception**



***“Really good information and presented in a clear, straight forward way.”***

VP, CIO, NJ Resources



***“Excellent conference/session. I acquired many valuable points to consider as we move toward the possibility of replacing our CIS software.”***

App Sys Mgr, Franklin PUD

# AGENDA

TUESDAY, AUGUST 22, 2017

**8:00 – 8:30 am**

**Continental Breakfast**

**8:30 – 9:30 am**

**Using Customer Journey Mapping as the Cornerstone for CIS Replacement**

Madison Gas & Electric (MGE) knew it was time to replace its CIS. It was also time to reaffirm that customer experience was a top priority at the company. The utility used the CIS replacement as an opportunity to unite all employees—from leadership to frontline staff—around understanding and improving key moments of truth through customer journey mapping. Best of all: the insights gleaned through journey mapping would guide and enhance the CIS project implementation.

***Sarah Zepnick, Customer Experience Manager, Madison Gas and Electric (MGE)***

***Melanie Wemple, Managing Director, E Source***

**9:30 – 10:15 am**

**The CIS is a Vital Component of the Meter-to-Cash (M2C) Value Chain**

The economy has improved, but still remains a little sluggish, which puts pressure on utilities to achieve greater cost savings, heighten process efficiencies and demonstrate faster meter-to-cash conversion. In this session, Hydro Ottawa will discuss how it is leveraging its new CIS to create better programs and processes. Some of the benefits of how the CIS binds the consumption and metering process to payments, collections and other downstream processes that affect Hydro Ottawa's top line will be shared.

***Sally Barakat, Manager, Meter-to-Cash Support, Hydro Ottawa Ltd.***

**10:15 – 10:45 am**

**Networking Break**

**10:45 – 11:45 am**

**Utility CIS Roundtable Discussion**

In this panel discussion, utilities will discuss successes and challenges relating to their CIS projects and related ecosystems. Utilities will have the opportunity to talk with their counterparts about any relevant tips and pointers. The roundtable session will also provide attendees and panelists the opportunity to brainstorm ideas for developing new initiatives.

***Sarah Zepnick, Customer Experience Manager, Madison Gas and Electric (MGE)***

***Jennifer Tran, Billing Services Director, Intermountain Rural Electric Association (IREA)***

***Sally Barakat, Manager, Meter-to-Cash Support, Hydro Ottawa Ltd.***

***Vicki Weber, Vice President, Blue Heron Consulting (ret'd Director, Avista Utilities)***

**11:45 am**

**Conference Adjourns**



***“Outstanding balance of theory, practice and real life examples. Strongly supports an excellent learning environment.”***

Manager – Customer Strategy, BC Hydro

## POST-CONFERENCE WORKSHOP

# The “Perceived” Risks of Cloud and how to Mitigate Risks with a thorough Evaluation!

TUESDAY, AUGUST 22, 2017

**12:30 – 1:00 pm**      **Registration**

**1:00 – 4:30 pm**      **Workshop Timing**

## OVERVIEW

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Widespread adoption of Internet-based technologies has steadily and aggressively changed the way companies do business. With the arrival of the age of cloud computing, the system integration platforms are changing from the servers and storages of the on-premise age to become virtualized cloud platforms. Cloud computing is rapidly gaining momentum because it is becoming increasingly inefficient and expensive for IT departments to own, operate and maintain all of the infrastructure and software needed to run their business from their physical locations.

This workshop, conducted by one of the industry’s leading advisory services consulting firms, will guide attendees through the process that will ensure that there are no mistakes in their utility’s CIS solution selection process. It will examine a methodology to assess, procure and build a business case that supports your decisions on the cloud. The workshop will also address the five misconceptions of the cloud (unreliable, unsecure, expensive, less flexibility, too many resources) and discussions/strategies on what utilities need to know to select the best Cloud option.

## LEARNING OUTCOMES

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- Identify a comprehensive step-by-step methodology for assessing the cloud
- Discuss the different delivery models, cloud types and pricing models
- Explain the five misconceptions of the cloud
- Demonstrate how to build a business case and develop roadmaps
- Discuss how to move forward after making a decision

## WORKSHOP AGENDA

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- Overview of dominant cloud technologies and cloud provider profiles
  - Document use cases for cloud computing and where it will most add value
  - Identify areas where cloud computing can deliver the highest returns
  - Developing a cloud computing roadmap for your utility
- Consider five misconceptions of the cloud
  - Unreliable
  - Unsecure
  - Too expensive
  - Less flexibility & control
  - Too many resources required
- Analysis
- Initiation
- Business case development
- Making a CIS decision and taking action

## WORKSHOP INSTRUCTOR

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Steve Wenke

**Managing Partner of AAC Utility Partners**

As senior partner over consulting services, Mr. Wenke has successfully streamlined vendor assessment and selection activities to enhance the delivery of project management services to AAC's varied clients. He brings a rich history of information systems experience with more than 18 years in the CIS and utility industries.

## INSTRUCTIONAL METHODS

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This program will include PowerPoint presentations and panel discussions

## REQUIREMENTS FOR SUCCESSFUL COMPLETION

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Participants must sign in/out each day and be in attendance for a minimum of four hours to be eligible for any continuing education credit.

## 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.

**EUCI is authorized by IACET to offer 0.9 CEUs for this conference and 0.4 CEUs for the post-conference workshop**

## EVENT LOCATION

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A room block has been reserved at the Hyatt Regency Crystal City at Reagan National Airport, 2799 Jefferson Davis Hwy Arlington, VA 22202, for the nights of August 20-21, 2017. Room rates are \$109 USD, plus applicable tax. Call **703-418-1234** for reservations and mention the EUCI event to get the group rate. The cutoff date to receive the group rate is July 20, 2017 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

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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.

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## PLEASE REGISTER

- 7TH ANNUAL CIS FOR UTILITIES CONFERENCE AND WORKSHOP**  
AUGUST 21-22, 2017: US \$1795  
Early bird on or before August 4, 2017: US \$1595
- 7TH ANNUAL CIS FOR UTILITIES CONFERENCE ONLY**  
AUGUST 21-22, 2017: US \$1395  
Early bird on or before August 4, 2017: US \$1195
- POST CONFERENCE WORKSHOP ONLY**  
AUGUST 22, 2017: US \$595  
Early bird on or before August 4, 2017: US \$495
- I'M SORRY I CANNOT ATTEND, BUT PLEASE EMAIL ME A LINK TO THE SYMPOSIUM PROCEEDINGS FOR US \$395



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 July 21, 2017 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 at (201) 871-0474.