EUCI is authorized by IACET to offer 0.9 CEUs for the conference.

February 12 - 13, 2018
Hyatt Regency New Orleans
New Orleans, LA

CASE STUDIES
- Entergy
- Gainesville Regional Utilities
- Intermountain Rural Electric Association
- Water Company of America

"Excellent topics and presentations! Definitely worth my time."
CEO, TMG Consulting

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OVERVIEW

A utility company’s primary means of communications is the billing process. Each and every customer receives a billing statement, and it is critical to customer satisfaction that billing is understandable, efficient, and accurate. Meeting these demands results in customer retention and satisfaction and an increase in company revenue. Customers are no longer captive ratepayers locked into a static meter-to-cash process; they have choices. This is shifting the focus of traditional billing and customer information systems to a more customer-centric approach that includes a strong focus on loyalty.

As technology continues to make significant impacts on metering, rates, CIS systems and automated/web based payments, the utility billing process continues to become ever more complex. The most advanced utilities are well into their digital transformation projects. Smart metering, smart grid technology, smart home services, and myriad other new revenue streams create more complex relationships with utility customers and require more complex, flexible infrastructures to support new business models. Customer billing plays a vital role in the utility smart grid transformation and helps utilities with the ongoing battle to offset rising energy costs and related debt-recovery issues.

This conference will bring together utility and industry experts who interact daily with the billing process and payment systems. They will draw upon their experience to address issues surrounding advances in billing technology and payment processing as well as continuous improvement in customer service. Conference attendees will learn best practices, keep up with the latest developments, and enjoy quality networking with industry peers.

LEARNING OUTCOMES

• Discuss how technology can make the payment processing easier for consumers
• Demonstrate ways in which utilities and telecom can work together to better serve consumers nationwide
• Discuss the history of billing and customer service in the utility industry and where it is going
• Explain how to reduce back office billing exceptions volume and cost
• Examine how utilities can create great workplaces that maximize team engagement and potential
• Assess how to leverage new billing channels to improve customer communications

WHO SHOULD ATTEND

This conference was developed for those working or specializing in the following areas:
• Retail mass market, commercial, and industrial customer billing
• Wholesale billing
• Electronic billing presentment and payment (EBPP)
• Revenue management
• Analytics
• Customer service
• Strategy and planning
• Web services
• Finance
• Communications
• E-business strategy
• Business planning
• Information systems
• Community service and development
• Pricing
• AMI

“I loved all of the speakers. This was my first EUCI conference and I had no idea of what to expect, but the details and content of each speaker were superb!”

Supervisor, Billing & Payments, TECO Energy
AGENDA

MONDAY, FEBRUARY 12, 2018

8:00 – 8:30 am  Registration and Continental Breakfast

8:30 – 8:40 am  Opening Announcements

8:40 – 9:00 am  Welcome Address from Entergy
Entergy New Orleans CEO Charles Rice will welcome his power industry colleagues to “The Big Easy” and get the 15th Billing & Payment conference underway.
Charles Rice, President & CEO, Entergy New Orleans

9:00 – 9:45 am  Payment Improvements at IREA
With nearly 40% of IREA’s consumers on electronic billing, a major focus has been using technology to make payment processing easier for consumers. In September 2017, IREA enhanced its eBill solution by adding mobile and one click technology to the free payment option within the eBill. This allows customers to pay via their saved payment details with a click of a button and makes viewing and paying their bill easier from their mobile phone. IREA also recently redesigned its bill to better display the amount due and added more details about budget billing and pay arrangements. IREA’s future considerations include remittance outsourcing and prepay, as its AMI pilot project is scheduled to begin in 2018. This case study will review the steps involved in this transformation and lessons learned.
Jennifer Tran, Billing Services Director, Intermountain Rural Electric Association

9:45 – 10:30 am  Bridging the Gap between Utilities and Telecom
In an ever-changing world, the blue collar and white collar worker can be differentiated by the type of job one has, but both are similar in that they are striving to achieve the same goal. Each benefits at some point from the expertise of the other. The same can be said of telecommunications companies and electric utilities. One utility has found a way for both industries to profit from each other in the areas of billing and collections. This presentation will explore how the practices followed can also point the way to demonstrate the different, but related, industries can work together to better serve consumers nationwide.
Buddy Flake, Credit Manager, Public Service North Carolina

10:30 – 10:45 am  Networking Break

10:45 – 11:30 am  Reducing Back Office Billing Exceptions Volume and Cost
Billing exceptions have created large volumes of work for the utility industry. If not handled efficiently, billing exceptions cost a company time, money and customer satisfaction. Entergy Corporation continues to explore ways to combat this issue through innovative approaches. The utility’s goal is to meet the needs of customers by delivering timely, accurate invoices in a safe and cost-effective manner. This session will fully examine potential drivers, what can be done to reduce the incoming volume and the cost of processing these exceptions while maintaining customer satisfaction.
Jacqueline Gray, Customer Invoicing & Accounting Supervisor, Entergy Corporation

11:30 am – 12:15 pm  The Next Generation of Billing and Customer Service Metrics
Billing and customer service in the utility industry have undergone a major transformation in how they are delivered and tracked. Customers demand multiple channels for interacting with the utility and transacting business. This session will explore the history of billing and customer service in the utility industry and where it is going, including new metrics service levels that are emerging for tracking customer satisfaction and utility effectiveness in providing service to its customers.
Jon T. Brock, President, Desert Sky Group, LLC

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MONDAY, FEBRUARY 12, 2018 (CONTINUED)

12:15 – 1:15 pm   Group Luncheon

1:15 pm – 2:00 pm   Promoting utility programs and services through the bill pay process
The focus of this session is to improve customer access, awareness and engagement with voluntary products and services through the monthly billing and payment process including best practices for phone (customer contact centers), paper (bill inserts, bill messages, and bangtails), and online (self-service portal, microsites, digital correspondence). The session will explore:
• The role of bill inserts and bangtails in a suite of marketing tactics
• How to best leverage your customer contact center staff to increase participation without negatively impacting service level
• How you can eliminate obstacles to enrollment, create better tracking, integrate with marketing, and learn more about your customers through improvements to the online customer experience
Stasia Brownell, Sr. Manager, Utility Partnerships, 3Degrees
Eric Dahnke, CEO and Founder, Project Economics

2:00 – 2:45 pm   Handle with Care: Facilitating Protected Customer Bill Payment
Collections for delinquent medical and life support accounts are difficult for all utilities. It is essential to have dedicated customer service teams trained to deal with the particular need of customers in vulnerable economic and social circumstances. In this session, a review of the different types of protections available to vulnerable customers and one utility’s approach to facilitating customer bill payment from this vulnerable population will be covered.
Karen Keough, Manager – Credit and Collections, Eversource

2:45 – 3:00 pm   Afternoon Break

3:00 – 3:45 pm   Building High Performance Billing and Payment Teams
Building teams that perform at consistently high levels benefits all key stakeholders—but can be challenging in today’s utility industry. A team will only achieve its fullest potential when people are engaged and inspired to do their best work. Research shows highly engaged employees on average are 50% more likely to exceed expectations than the least engaged workers. Companies with highly engaged staff outperform organizations with the most disengaged workers—by 54% in employee retention, 89% in customer satisfaction and by nearly 2 to 1 in financial performance. The question is, they create great workplaces that maximize team engagement and potential – and the potential of the larger organization? In this session, Wes Friesen will be sharing the latest research and practical ideas to help motivate people and build teams that are high performing!
Wes Friesen, President, Solomon Training & Development (ret’d Manager, Portland General Electric)
3:45 – 4:30 pm  The Big Diversification
As utilities have offered an increasing number of billing channels and payment methods, consumers have increasingly sorted themselves into the methods and channels that suit their lifestyles. Based on nearly 60,000 residential customer interviews, this presentation will help attendees look past the noise of this “big diversification” in the meter-to-cash cycle and understand how to:

• Optimize their billing and payment strategies for today’s consumers
• Leverage new billing channels to improve customer communications
• Identify emerging opportunities to enhance customer experience

K.C. Boyce, Senior Product Director, Market Strategies International

4:30 – 5:15 pm  Don’t Leave your Customers in the Dark!
Are you serving your customers the way they want to be served and maximizing customer satisfaction? Consumer expectations are on the rise – it’s not just about reliability and satisfactory customer service any more. More than ever, consumers are seeking added value, personal connection and products and services that align with their lifestyles—all of which go beyond the traditional energy experience. Through a combination of unique ethnographic and custom market research, E Source has gained fascinating insights about how customers truly think and feel about energy, their utility bill and their utility companies that will challenge the way you think about designing customer offerings and interacting with your customer base.

Rachel Cooper, Lead Analyst, Market Research Services, E Source

5:15 – 6:15 pm  Networking Reception

TUESDAY, FEBRUARY 13, 2018

8:00 – 8:30 am  Continental Breakfast

8:30 – 9:15 am  Hidden Treasurers: Identifying and Billing Unbilled Revenues
As is well known, utilities must bill revenue to collect the receivables from the customer. Gainesville Regional Utilities (GRU) has been testing innovative concepts to increase revenue and reduce expenses and has refined these models that have now blossomed into permanent programs. GRU will provide updates on their water/wastewater revenue recovery program, including stopped meter methodology, leveraging interns to augment staff and reports, and their successful partnership with Water Company of America. The organization will discuss how it’s pursuing it’s three primary objectives:

• Increase water and wastewater revenues with minimal budget impact
• Identify and counter common operational assumptions that impact revenues
• Leverage relationships with outside organizations to maximize budget use and recoveries

Steve Hooper, General Manager, Water Company of America
Kinnzon Hutchinson, Interim Customer Operations Director, Gainesville Regional Utilities
Herb Firsching, Director, Utegration LLC
TUESDAY, FEBRUARY 13, 2018 (CONTINUED)

9:15 – 10:00 am  Bundling Customer Engagement with Payment Processing
This session will explore how a single integrated solution for customer engagement and payment processing increases operational efficiencies and leads to improved customer satisfaction and employee morale. Attendees will learn how Bolivar Energy Authority leveraged their current customer engagement and prepay solution to quickly layer additional customer payment options on top of their pre-existing payment channels while simplifying their internal processes.

Tony Kirk, Chief Financial Officer, Bolivar Energy Authority
Stephen Johnston, Strategic Advisor, Exceleron Software

10:00 – 10:15 am  Networking Break

10:15 – 11:00 am  Enhancing the Customer Experience with Flexible Payment Options
Consumers want to pay their bills whenever, however and wherever it's most convenient for them. Billers will spend the coming year finding new ways to enhance the customer experience by providing that flexibility. People are on the go, and their baseline expectation is that their bills can go with them. Mobile bill pay, either through biller apps or consumers' financial institutions, is standard across the market, and recent quarterly consumer research by Fiserv confirms it. The Expectations & Experiences: Consumer Payments survey showed mobile bill pay is now used by 65 percent of mobile bankers.

Billers, though, know consumers expect more than mobility. People want seamless, hassle-free experiences that mirror the satisfaction they get when they use, for instance, Amazon. They want freedom to pay their bills at a biller’s website, through their financial institutions, with a phone app or through their digital wallet. They want the flexibility to use a credit card, debit card, ACH or cash. They want to control the amount and decide whether it’s a one-time or auto payment. And they expect reliable and timely alerts and notifications no matter the channel. Come here more what consumers expect and what Utility companies can do to meet those expectations.

Marc Schroeder, Director of Product Marketing, Fiserv Billing Solutions
Prafull Koli, Billing Manager, Liberty Utilities

10:30 – 11:30 am  Practices in Billing/Payments: A Roundtable Discussion
This roundtable discussion will feature utility and industry experts discussing what is being done or considered to improve billing and payments. This interactive panel will respond to inquiries from the moderator and audience on how to help streamline the billing/payment process. This session also gives attendees the opportunity to brainstorm new ideas to develop new customer and billing initiatives at their utilities.

Jacqueline Gray, Customer Invoicing & Accounting Supervisor, Entergy Corporation
Wes Friesen, President - Solomon Training & Development (ret’d Manager, Portland General Electric)
Jennifer Tran, Billing Services Director, Intermountain Rural Electric Association
Prafull Koli, Billing Manager, Liberty Utilities

11:30 am  Conference Adjourns
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.

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.

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 0.9 CEUs for this conference.

EVENT LOCATION

A room block has been reserved at the Hyatt Regency New Orleans, 601 Loyola Avenue, New Orleans, LA 70113, for the nights of February 11-12, 2018. Room rates are $189 plus applicable tax. Call 1-504-561-1234 for reservations and mention the EUCI event to get the group rate. The cutoff date to receive the group rate is January 14, 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.

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
- Workshop sponsor
- Reception host
- Lanyard sponsor
- Networking break host
- Luncheon host and Breakfast host
- Tabletop exhibit

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

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### PLEASE SELECT

- **BILLING AND PAYMENTS CONFERENCE**  
  FEBRUARY 12 - 13, 2018: US $1395  
  Early bird on or before January 26, 2018 US $1195

- **I’M SORRY I CANNOT ATTEND**, but please email me a link to the conference proceedings for US $295

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### ENERGY WEEKLY

EUCI’s Energize Weekly e-mail newsletter compiles and reports on the latest news and trends in the energy industry. Newsletter recipients also receive a different, complimentary course presentation every week on a relevant industry topic. The presentations are selected from a massive library of more than 1,000 current presentations that EUCI has gathered during its 30 years organizing courses.

Sign me up for Energize Weekly

### CREDIT CARD INFORMATION

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OR Enclosed is a check for $_________ to cover ____________ registrations.

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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 January 12, 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 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 303-770-8800.

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