

SMART METERING 101

March 19, 2018
EUCI Conference Center
Denver, CO



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OVERVIEW

Smart meters and their associated information technology systems are revolutionizing the way that utilities conduct their business. Advanced Metering Infrastructure (AMI) systems use smart meters at residential, commercial, and industry premises to communicate energy consumption data to the electric, water, or gas company using brief low-level radio frequency (RF) transmission signals. Compared to traditional meters, smart meters provide utility companies, homeowners, and businesses a more flexible system for tracking energy usage and enable a multitude of advanced benefits through a near real-time connection to all its customers, providing actionable information to consumers and utility staff.

This course is designed to provide a practical overview of smart meters for utility and other industry personnel who want to learn more about AMI and smart meters. An in-depth introduction to smart meter technologies will be provided to give the necessary background for all attendees to understand the basic concepts and complexities of smart meters. The overall process for a utility to execute AMI, from building a business case, to vendor selection, to the complex aspects of implementation will be covered. The business transformation and organizational change management aspects that have proven vitally important to project success will be examined in-depth. Lessons learned from the instructor's experience on hundreds of successful projects will be incorporated throughout.

LEARNING OUTCOMES

- Explain the functionality of smart meter technology
- Discuss the background of smart meters so attendees can understand the basic concepts and complexities
- Explain the business transformation and organizational change management aspects that are necessary for a project's success
- Discuss how customers benefit from smart meters
- Explain the implementation process and how to make it successful

WHO SHOULD ATTEND?

This conference was developed for those working or specializing in the following areas :

- AMI and smart metering
- Smart grid implementation and management
- Billing
- Contact center management
- Revenue management
- Analytics
- Operations
- Customer service
- Product development
- Finance
- Communications
- E-business strategy
- Business planning
- Community service and development

REGISTER TODAY! CALL **303-770-8800** OR VISIT **WWW.EUCI.COM**

COURSE TIMING

MONDAY, MARCH 19, 2018

8:00 – 8:30 am **Registration & Continental Breakfast**

8:30 am – 5:00 pm **Course Timing**

12:00 – 1:00 pm **Group Luncheon**

AGENDA

Introduction

- Smart Meters Basics
 - o What is a Smart Meter?
 - o AMI (Advanced Metering Infrastructure)
 - o State of the Industry
- The Business Case
 - o Building the business case
 - o Identifying and valuing benefits & costs
- System Implementation Roadmap
 - o Implementation Planning Effort
 - o Integrations across the Enterprise
- Vendor Selection
 - o Selecting the best vendor for your needs
 - o How to decide on one or multiple requests for proposals
- Project Team Organization
 - o Identifying and selecting the internal team players
 - o Putting the organization structure in place
 - o Managing the executive relationship
- Business Process Transformation
 - o What business processes are impacted by AMI
 - o How life will be different for utility operations
 - o Developing the “to-be” utility model
- The Consumer Element
 - o Educating the consumer
 - o What business processes are impacted by AMI
- The Critical Start
 - o Starting the implementation phase
 - o Developing the project baseline
 - o Avoiding costly errors and setbacks
- The Science of Implementation Success
 - o Governance model
 - o Project Execution Plan
 - o Project Schedule
 - o Risk & Issue management
 - o Configuration management
 - o Vendor management

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AGENDA

MONDAY, MARCH 19, 2018 (CONTINUED)

- Organizational Change Management
 - o Developing employee buy-in
 - o Training and Reinforcement
- The Art of Implementation Success
 - o Leadership & Vision
 - o Team Morale
 - o Communication
 - o Negotiation and Conflict Management
- Transition & Ongoing Operations
 - o Developing the transition plan
 - o Knowledge transfer

INSTRUCTORS



Jim Ketchledge
President and CEO, Excerpt Corporation

Mr. Ketchledge is a certified PMP, is one of the most experienced and successful AMI and Smart Grid project managers in the industry and the founder of Excerpt Corporation. He has built a career around successfully delivering highly complex and multidimensional projects ranging from space satellite systems to electrical utility Smart Grid projects. With more than 30 years of experience, he is a recognized leader in the utility industry who has helped dozens of clients from the early stages of projects through to “go-live.” He has melded project management skills, deep technical and engineering expertise, along with people and change management skills to manage all aspects of intricate implementations. His experience includes leading one of the very first Meter Data Management System (MDMS) implementations in the industry, deploying many complex utility projects, and rescuing troubled projects for various utilities. His project management work has contributed significantly to projects that have won industry awards for outstanding performance.

Mr. Ketchledge joined GE at the start of his career and was selected for the Prestigious Edison Engineering program where he was a finalist for the Young Engineer of the Year in 1991. He then progressed through various engineering and management leadership positions at Hughes Electronics, Convergent Group, and Enspira Solutions, where he helped grow the start-up business from inception to successful acquisition by Black & Veatch in 2010. He has authored many articles and is a utility conference fixture with highly rated workshops and courses. His 2015 book, “Successful Smart Grid Implementation,” is the definitive guide on smart grid project development and implementation. Jim holds Masters and Bachelor degrees in electrical engineering from Drexel University and Syracuse University, respectively.

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INSTRUCTORS



Lynn Adams

Vice President and Executive Consultant, Excerpt Corporation

Ms. Adams provides business and management consulting services to clients as they integrate business strategy with operational demands. With more than 25 years of experience in the consulting / utility industry in both energy and water sectors, her work encompasses strategy development and business consulting for various clients, as well as sustainability and stakeholder engagement. Clients have recognized her ability to impact direction and create enduring strategy. Ms. Adams' book, *The Art of Strategic Leadership*, provides a practical planning guide and approach to lead organizations through uncertain times that includes overall strategic direction and practical execution plans.

Prior to joining Excerpt in 2013, she served in a variety of positions during her near 20-year tenure at R. W. Beck / SAIC including Vice President for the Utility Business Consulting practice and on the Board of Directors of R. W. Beck. She holds a Bachelor of Science in Communications and a Certificate in Change Leadership, both from Cornell University.



Mark Hatfield

Executive Consultant, Excerpt

Mr. Hatfield brings 25 years of experience in utility operational technologies. His wide-ranging expertise includes project management, strategic visioning, business process modeling, requirements definition, business case development, vendor selection, integration and implementation planning, system configuration, deployment strategies, and project audits. Mr. Hatfield specializes in providing consulting and architecture support for the acquisition, deployment, integration and implementation of Smart Grid, meter data management, field automation, mobile workforce management, and geospatial systems for gas, water, and electric utilities. He holds Masters and Bachelor degrees in Geography from the University of Illinois and the U.S. Air Force Academy, respectively.



Joel Westvold

Executive Consultant and Sr. Program Manager, Excerpt

Mr. Westvold brings a unique perspective to addressing smart grid issues facing utilities based upon his 30 years of experience implementing programs at utilities and providing technology solutions to utility customers. He has experience in a senior management capacity for a large electric utility as well as executive management experience with a technology solutions provider to the utility industry. During his 20-year career at Portland General Electric, Joel led a team that implemented an award winning AMI project that involved the installation of over 800,000 electric meters, the network to communicate with the meters and integration of the technology with utility systems to gain the most financial benefit and efficiency possible. In his role with a technology provider prior to joining Excerpt in 2015, he led teams of engagement directors and project managers in the delivery of nearly a hundred smart grid projects, including an area of focus on several large projects of over 1 million meters/endpoints. Joel is passionate about doing everything possible to see clients succeed in their smart grid projects. Mr. Westvold brings a number of skills ranging from project management, engineering expertise, strong people management, and communications at all levels within the organization to assure that success is achieved. He holds an Executive MBA from the University of Washington and a B.S. in Chemical Engineering from Oregon State University.

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REQUIREMENTS FOR SUCCESSFUL COMPLETION

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

INSTRUCTIONAL METHODS

Case Studies and PowerPoint presentations will be used in this course.

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 0.8 CEUs for the course.

EVENT LOCATION

EUCI Conference Center

4601 DTC Blvd., B-100
Denver, CO 80237

NEARBY HOTELS

Preferred Hotel

Hyatt Place Denver Tech Center

8300 E. Crescent Parkway, Greenwood Village, CO 80111 (0.9 miles away)

Call Central Reservations at **888-492-8847** and ask for the EUCI rate of US \$149 plus applicable tax (**CODE: EUCI**) or visit [Hyatt Place Denver Tech Center - EUCI](#)

Hyatt Regency Denver Tech Center

7800 E. Tufts Ave
Denver, CO 80237
Phone: 303-779-1234
0.3 miles away

Hilton Garden Inn Denver Tech Center

7675 E. Union Ave
Denver, CO 80237
Phone: 303-770-4200
0.6 miles away

Denver Marriott Tech Center

4900 S. Syracuse St
Denver, CO 80237
Phone: 303-779-1100
0.7 miles away

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REGISTRATION INFORMATION

EVENT LOCATION

Mail Directly To:

EUCI
4601 DTC Blvd., Ste. 800
Denver, CO 80237
OR, scan and email to: conferences@euci.com
Please make all checks payable to: EUCI

WWW.EUCI.COM
p: 303-770-8800
f: 303-741-0849

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SEE NEARBY HOTELS ON PAGE 6

PLEASE REGISTER

BOTH SMART METERING 101 AND ADVANCED SMART METERING COURSES

March 19-20, 2018: US \$1895
Early bird on or before March 2, 2018: US \$1695

SMART METERING 101 COURSE

March 19, 2018: US \$995
Early bird on or before March 2, 2018: US \$895

ENERGIZE 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.

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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?

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State/Province

Zip/Postal Code

Country

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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 February 16, 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.

