

2019 CREDIT AND COLLECTIONS CONFERENCE FOR UTILITIES CANADA

April 4-5, 2019
Hilton Garden Inn Ottawa Downtown
Ottawa, ON

**Featuring a Tour of
Hydro Ottawa's Chaudière
Falls Hydroelectric Facilities**

FRIDAY, APRIL 5, 2019

“

“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

   TAG US #EUCIEvents
FOLLOW US @EUCIEvents

HOST UTILITY



SPONSOR



EUCI is authorized by IACET to offer 1.0 CEUs for the conference.

SUPPORTING ORGANIZATION



CREDIT BUREAU OF CANADA COLLECTIONS



TALKINGTECH
engaging customers... better. smarter.

OVERVIEW

Utilities face increasing pressure from stakeholders and communities to improve their financial performance and profitability by minimizing write-offs for uncollectible accounts. Improving collections performance has a significant bottom line impact for utilities as even one-half a percentage reduction in bad debt write-offs generates significant financial return and it improves utility reputations in the communities they serve.

As utilities seek to improve customer service and satisfaction, it makes sense to look at all customer touch points, especially collections processes. For many utilities, a holistic view of the customer experience they provide leads to better customer satisfaction, increased standing among their peers, and improved financial results.

Join us at EUCI's 11th Annual Credit and Collections for Utilities: Canada conference, where utility and industry experts will speak on potential solutions as well as challenges on the horizon in this critical effort to improve collections. Conference attendees will take away knowledge necessary to implement effective solutions within the area of credit and collections for their companies and have many opportunities for quality networking with industry peers.

LEARNING OUTCOMES

- Explain the art and science of a collection call
- Discuss how to reach different types of customers (seniors, millennials, etc.)
- Examine methods to improve collection results by improving the customer experience
- Discuss programs that aid low-income/vulnerable citizens
- Discuss what to consider when modifying or designing your billing stream processes
- Discuss the legalities of collections for utilities
- Examine how to understand the factors that influence customers decision-making
- Discuss the Protection of Vulnerable Energy Customers Act introduced by the government

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



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

Manager Collections,
Enbridge



“Always good to see what other organizations are addressing issues that your organization is facing. I also like the informality, which makes it more engaging.”

Manager, Billing & Collections, Hydro Ottawa

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

AGENDA

THURSDAY, APRIL 4, 2019

- 8:00 – 8:30 am** **Registration and Continental Breakfast**
- 8:30 – 8:40 am** **Opening Remarks**
- 8:40 – 9:00 am** **Welcome Address from Hydro Ottawa**
 Hydro Ottawa the proud host utility for this conference, is wholly-owned by the City of Ottawa. The company's core businesses are electricity distribution, renewable energy generation and energy conservation and management services. Julie Lupinacci will welcome her power industry colleagues to Ottawa and review how the focus of this conference supports this critical effort to improve collections.
Julie Lupinacci, Chief Customer Officer, Hydro Ottawa
- 9:00 – 9:45 am** **Keynote address: "The Reluctant Collector"**
 "Lucky You!" Two words that Kevin Hobbs, recently fired from his job and reassigned to receivables, did not expect to hear. He was soon to hear much more, including 'when someone hands you a lemon, you can quit, make lemonade or...make the best lemonade – ever!
- From his latest book, "The Reluctant Collector", Tim Paulsen shares why Kevin is 'lucky' and a few of the lessons learned from the owner of the lemonade stand including:
- The content of your letter or email does not matter
 - Beware of accountants
 - Don't negotiate
 - Switch from the Tangle to the Tango
 - The art and science of a collection call
- Tim Paulsen, Founder and Managing Director, International Centre for Professional Collections (ICPC)**
- 9:45 – 10:30 am** **Customer Experience and Revenue Assurance**
 In this presentation, ENMAX will provide an update on how they continue to improve collections and cover the following topics:
- Operating in a retail and regulated environment, where revenue assurance and customer experience are both top of mind
 - Where we came from with respect to customer experience to where we are today
 - How customer feedback has shaped our conversations, processes and overall effectiveness in collections
 - Our (near) future state, where technology and process enhancements will deliver an improved customer experience with benefits to operational efficiency and bad debt
- Rob Mulligan, Manager, Mid-Markets & Revenue Assurance, ENMAX Customer Care**
- 10:30 – 10:45 am** **Networking Break**
- 10:45 – 11:30 am** **Best Collections Practices at Peterborough Utilities**
 Peterborough utilities has a customer base of approximately 36,000 customers. As a result of being a smaller utility, we are more apt to see our customers out in the community than larger utilities. In this session, attendees will learn how we do collections a little differently and the following topics will be addressed:
- Lower arrears
 - What are utilities doing regarding moratoriums
 - Reaching different customers (seniors, millennials, etc.)
 - Scripting for call centers
- Terri Keough, Supervisor Customer Service, Peterborough Utilities Services Inc.**

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

AGENDA

THURSDAY, APRIL 4, 2019 (CONTINUED)

- 11:30 am – 12:15 pm** **Neighbours Helping Neighbours – Manitoba Hydro’s Crisis Intervention Fund**
Since 2004, Manitoba Hydro has partnered with the Salvation Army to provide Manitoba’s most vulnerable citizens assistance when faced with a crisis. Customers are provided with emergency funding (up to \$400) in addition to flexible payment options as required to assist with energy bills to help avoid disconnection of services. Customers are also provided with referrals to community support services providing counseling and job training. The cost of operating the Neighbours Helping Neighbours Program is primarily funded by Manitoba Hydro, with additional funding provided through customer contributions of neighbours helping neighbours. This presentation will discuss how joining forces with the Salvation Army has helped Manitoba’s most vulnerable population for many years.
Colleen Galbraith, Credit & Recovery Services Manager, Manitoba Hydro
- 12:15 – 1:15 pm** **Group Luncheon**
- 1:15 – 2:00 pm** **Utility Collection Legalities**
Ensuring customers pay for the services they receive is a crucial aspect for all utilities. In this presentation, Senior Counsel from Hydro Ottawa will talk about the litigation process and collecting on the judgment. The comparison between collections in a regulated environment (i.e. electricity account) and an unregulated environment (i.e. damages to a plant) will be shared. This presentation will provide with a better understanding of the legalities associated with collections.
Shaun Logue, General Counsel, Hydro Ottawa
- 2:00 – 2:45 pm** **The 5 W’s of Controls in the Billing process**
In a world of increasing automation, regulation, data volumes, customer service expectations, and management expectations, controls are inherent in all our work activities. This presentation will cover from both a theoretical and practical perspective, the why, who, what, when, and where of controls. You will gain a better appreciation of: what to consider when modifying or designing your billing stream processes; how internal auditors can help; why a preventative control is superior to a detective control; and what the benefits of controls are. The presenter will provide real world examples based on his 25 years of power industry experience, covering multiple functions, areas, and perspectives.
Darcy Mazurkewich, Supervisor Site Management, Fortis Alberta
- 2:45 – 3:00 pm** **Networking Break**
- 3:00 – 3:30 pm** **The Digitization of Collections**
Understanding your customer and their channel preferences and providing them with an ability to engage in a frictionless, personalized manner increases the likelihood of payment and reducing your costs. Digitization is a monumental change that is even greater than the internet. Exponential technology advances, greater consumer power and increased competition mean all industries face the threat of commoditization. The utilities that act now by building a strategic advantage will leave their counterparts wondering what happened. In this session, Simon Howard will share the types of solutions now available to Canadian utility providers and show how they can be deployed simply with minimum investment using an agile method and what an immediate impact on your collection’s process will look like.
Simon Howard, Business Development Director, TALKINGTECH
- 3:30 – 4:15 pm** **Understanding Taxpayer Behaviour**
Organizations are constantly striving to better meet their clients’ needs and expectations. However, these efforts can be complicated by the fact that what people say and what they do may be quite different. How then can we hope to understand the factors that influence our clients’ decision-making? The Canada Revenue Agency’s Innovation Lab is tackling this question by adapting principles from economics, psychology, and even anthropology to better understand taxpayer behaviour. This presentation will discuss how the Lab has incorporated these insights into its communications products, from the wording used in letters all the way up to big picture themes.
Aaron Rosenberg, Principal Policy Analyst, Canada Revenue Agency

AGENDA

THURSDAY, APRIL 4, 2019 (CONTINUED)

4:15 – 5:15 pm

Panel Discussion: Utilities and Collection Agencies

In this panel discussion, panelists will respond to audience inquiries on how collections can continue to improve while providing exceptional customer service. Collections experts will weigh in on the impact from changes to collection legislation across Canada. Ask as many questions as possible of our panel of experts to learn what could work best for your utility.

Moderator: Peter Sorrentino, President, General Credit Services Inc.

Shaun Logue, General Counsel, Hydro Ottawa

Colleen Galbraith, Credit & Recovery Services Manager, Manitoba Hydro

Shirley Siega, Collections and Payments Performance Manager, BC Hydro

John Kim, EVP/Principal, SinglePoint Group International

Simon Howard, Business Development Director, TALKINGTECH

5:15 – 6:15 pm

Networking Reception

FRIDAY, APRIL 5, 2019

7:45 – 8:15 am

Continental Breakfast

8:15 – 9:00 am

New Mandatory Requirements for Disconnects and Reconnections

In late 2017, the Ontario Energy Board (OEB) released a decision order following the passage of the Protection of Vulnerable Energy Customers Act introduced by the government earlier in the year. This order from the OEB bans electricity distributors from disconnecting or threatening to disconnect homes for non-payment from November 15 to April 30 every year and requires that homes currently disconnected due to non-payment be reconnected without charge. In this session, learn what Hydro One has done to deal with a shorter disconnection period, tactics to keep account receivables and bad debt in check during and after the Winter Moratorium, help reconnected customers get back on track and how customer satisfaction increased as a result of this change in approach.

Cesar Martinez, Customer Care Manager, Hydro One

9:00 – 9:45 am

Roll Rates – A New Metric for EPCOR

One of the primary initiatives that EPCOR is focused on to improve in house collections are Roll Rates (movement in age of arrears from one aging bucket to another monthly). This includes some technology changes along with how the company is reallocating resources to be most effective. In this session, the presenters will share their perspective and include the following topics:

- Review definition of Roll Rates
- Why did we look at this?
- Starting point
- What actions we took in 2018
- Where we are now
- What's next

Holly Strach, Collections Manager, EPCOR Utilities

Adrian Szeligowski, Analyst, EPCOR Utilities

9:45 – 10:00 am

Morning Break



The tight focus of the conference ensured that all speakers presented topics that were very relevant and current to the attendees."

Director, Accounts Receivable, Toronto Hydro

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

AGENDA

FRIDAY, APRIL 5, 2019 (CONTINUED)

10:00 – 10:45 am

Customer Service Realignment at Toronto Water

Toronto Water is undergoing a Customer Service realignment, which includes a 24 / 7 Customer Care Center. This Customer Care unit will be the central point from which all customer contacts are managed and will also manage the Customer Care Centre. The team is responsible for working directly with the customer and field staff when responding to a service request. This presentation will cover some of the areas that this new customer and operations unit will support including:

- Billing issues
- Utilizing digital information for customers
- Toronto Water Program Services
- Reduced truck rolls

Carlo Casale, Manager, Customer Care Services, Toronto Water

10:45 – 11:30 am

The Customer Crisis Fund at BC Hydro

This presentation will provide an update on the Customer Crisis Fund that BC Hydro launched in May 2018. The Customer Crisis Fund is a program that offers support for residential customers who are experiencing a temporary financial crisis, such as a loss of employment, unanticipated medical expenses, or a death in the family, and are facing disconnection of their BC Hydro service, despite attempting to make payments. BC Hydro has made collections part of the Contact Centre Team, which allows the company to flex the workforce between Collections and Contact Centre to offer some seasonal benefits. An update on post-repatriation collections will also be included in this presentation.

Shirley Siega, Collections and Payments Performance Manager, BC Hydro

Hydro Ottawa Chaudière Falls Tour

11:30 am – 12:45 pm

Leave for Chaudière Falls Tour

Join us for this interesting tour of Chaudière Falls Hydroelectric Facilities and experience the breathtaking views of the Ottawa River, while learning about clean energy and the storied history of this historically significant site. The Ottawa River and Chaudière Falls played a significant role in how Canada was formed. The events most central to the history and formation of Canada occurred along, and because of, the Ottawa River. Learn how Hydro Ottawa continues its hard work to be a leader in clean, green, sustainable power generation.

12:45 pm

Return to Hotel and Conference Adjourns

“

“I always appreciate and value the content and networking opportunities that the conference provides.”

Supervisor, Customer Service, CNP

“

“It’s been great to come together with industry experts and leaders to share optimization tools and share expertise to bring back to our respective businesses. Very much appreciated and enjoyed!”

Senior Bankruptcy Analyst, Office of the Superintendent of Bankruptcy

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

INSTRUCTIONAL METHODS

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

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.

REGISTER 3, SEND THE 4TH FREE

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.

EVENT LOCATION

The event is located at the **Hilton Garden Inn Ottawa Downtown, 361 Queen St, Ottawa, ON K1R 0C7, Canada**. A room block has been reserved for the nights of April 3-4, 2019. Room rates are \$199 CAD +13% HST. Call +1 613-234-6363 for reservations. Mention the EUCI event to get the group rate. The cutoff date to receive the group rate is March 3, 2019 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, Reception host, Networking break host, Tabletop exhibit, Workshop sponsor, Lanyard sponsor, Luncheon host and Breakfast host.

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

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

REGISTRATION INFORMATION

EVENT LOCATION

Mail Directly To:

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

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

The event is located at the **Hilton Garden Inn Ottawa Downtown, 361 Queen St, Ottawa, ON K1R 0C7, Canada**. A room block has been reserved for the nights of April 3-4, 2019. Room rates are \$199 CAD +13% HST. Call +1 613-234-6363 for reservations. Mention the EUCI event to get the group rate. The cutoff date to receive the group rate is March 3, 2019 but as there are a limited number of rooms available at this rate, the room block may close sooner. **Please make your reservations early.**

PLEASE REGISTER

- 2019 CREDIT AND COLLECTIONS CONFERENCE FOR UTILITIES CANADA: APRIL 4-5, 2019: CAD \$1995 +13% HST (CAD \$2254.35)**
Early bird on or before March 15, 2019: CAD \$1795 +13% HST (CAD \$2028.35)
SPECIAL RATE FOR UTILITIES: CAD \$1695 +13% HST (CAD \$1915.35)
Early bird on or before March 15, 2019: CAD \$1495 +13% HST (CAD \$1689.35)
- YES, I WOULD LIKE TO ATTEND THE OPTIONAL TOUR CHAUDIÈRE FALLS HYDROELECTRIC FACILITIES**
FRIDAY, APRIL 4-5, 2019
- I'M SORRY I CANNOT ATTEND, BUT PLEASE EMAIL ME A LINK TO THE CONFERENCE PROCEEDINGS FOR US CAD \$495 +13% HST (CAD \$559.35)

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.

Sign me up for Energize Weekly

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)

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 March 1, 2019 in order to be refunded and will be subject to a \$295 CAD 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 303-770-8800. EUCI reserves the right to alter this program without prior notice.

