6TH ANNUAL CIS FOR UTILITIES:
WATER/WASTEWATER & ELECTRIC/GAS -
THE CIS ECOSYSTEM: MANAGING ALL PARTIES
IN THE CIS “LIFECYCLE”

August 8-9, 2016
Hyatt at the Bellevue
Philadelphia, PA

PRE-CONFERENCE WORKSHOP:
MANAGING THE PROJECT WHETHER REPLACING,
EXTENDING OR MAINTAINING YOUR CIS
MONDAY, AUGUST 8, 2016

Maintain a Legacy System
Your CIS Path
Work Management
Replacement
Bundled Approach

Host Utility
Sponsors

EUCI is authorized by IACET to offer 1.0 CEUs for the conference and 0.3 CEUs for the workshop.
OVERVIEW

Today’s customer information systems (CIS) are a strategic resource reflecting utilities’ commitment to position themselves as competitive and customer-centric companies. The CIS enables utilities to be timely and proactive in responding to customer requests, market forces and regulatory changes. Utilities have increasing needs for effective customer engagement and the desire for enabling a digital customer experience including mobile devices, web portals, and social media. The CIS is at the heart of their ability to operate as businesses and talk to customers intelligently. The CIS supports many ancillary systems at utilities, which make replacing or extending it a complicated and critical effort that involves various parties.

EUCI’s 6th 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. This unique conference will explore options and opportunities involved with managing CIS projects no matter if a utility is extending, replacing or maintaining its legacy system. The takeaways will further inform utilities on how to define a CIS strategy that can accommodate the customer of today and 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
• Establish a clear path to improve and enhance customer contact channels and processes
• Examine how to improve customer service while keeping costs low
• 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 of organizational change management related to CIS implementations

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

– Manager – Customer Strategy, BC Hydro

"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

Monday, August 8, 2016

12:30 – 1:00 p.m.   Registration

1:00 – 1:10 p.m.   Program Introduction

1:10 – 1:30 p.m.   Overview by Conference Chair
- Jon Brock, President, Desert Sky Group L.L.C.

1:30 – 1:45 p.m.   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 “city of brotherly love”. Ms. Reese will give her perspective on what is necessary to continue to improve ratings for customer care functions in today’s rapidly changing world.
- Hallie Reese, Chief Customer Officer, Exelon Utilities

1:45 – 2:30 p.m.   Lessons Learned from the Region of Peel’s CIS Project
In early 2016 the Region of Peel went live with a new CIS for its utility billing and began providing storm water billing services for another municipality. The project is considered a success in that it came in on time, on budget and met the project scope requirements. While there was minimal customer impact, the project had its ups and downs. This presentation focuses on the lessons learned from the project, specifically the system selection and procurement process, the implementation of business process improvements, and the overall management of the project and minimizing customer impacts.
- Shaun Hewitt, Director – Operations Support Division, Region of Peel

2:30 – 2:45 p.m.   Networking Break

2:45 – 3:45 p.m.   An Inside Look: How a Cloud-Based CIS will Support Sharyland Utilities’ Business--Now and Later
As a public electric utility provider serving over 50,000 customers throughout Texas, Sharyland Utilities wanted a scalable, automated solution that could support the company’s continued growth. Sharyland Utilities selected a cloud-based CIS solution in December 2014, and went live in October 2015. Stabilization was complete by January 2016. During this session, we’ll sit down with Charlie Bratton, Pam Shaw and BJ Flowers from Sharyland Utilities to learn:
- What key drivers compelled the utility to select a cloud-based CIS
- The primary differences between an on-premise and a cloud-based CIS
- The business benefits gained to date
- Their thoughts on the platform’s ability to support their business needs in the future
Moderator: Jon Brock, President, Desert Sky Group L.L.C.
- Charlie Bratton, Director, Customer Operations, Sharyland Utilities
- BJ Flowers, Director, Operational Intelligence, Sharyland Utilities
- Pam Shaw, Process Improvement Manager, Sharyland Utilities

3:45 – 5:00 p.m.   The CIS Ecosystem Enabling a Digital Customer: A Vendor Panel Discussion
The digital customer experience at utilities requires that integration, mobile data, business process and contact centers become key factors in the life-cycle of the CIS. In this segment, vendors interact as to how their CIS solutions have changed or been integrated with other systems to help enable a true, digital, customer experience.
Moderator: Jon Brock, President, Desert Sky Group L.L.C.
Panelists:
- Steve Wenke, Managing Partner, AAC Utility Partners
- John Herron, Business Development Executive, Vertex
- Brian Bradford, VP Industry Strategy, Oracle Utilities

5:00 – 6:00 p.m.   Networking Reception
AGENDA

Tuesday, August 9, 2016

8:00 – 8:30 a.m.  Continental Breakfast

8:30 – 9:15 a.m.  Two Secrets to Improve Utility CIS Implementation

In this segment, E Source will describe how to get the most out of a new CIS by incorporating proactive, intentional customer journey mapping and change management strategies into the project implementation plan. It increases the speed of adoption among front-line staff, as well as improves the customer experience delivery. This session will explore how to:

• Improve employee engagement and participation that supports the changes sought
• Build understanding and support from middle management to ensure the change is sustained for the long term
• Improve the utility customer experience by making it easier to do business with the company

- Julie Rowey, Senior Director, E Source

9:15 – 10:00 a.m.  Taking an Important Step to Upgrade Technology at the City of Baltimore

In late 2014, a new CIS was approved for the City of Baltimore to modernize billing for its 410,000 water customers. The new CIS is the brains behind Baltimore’s automated water meter upgrade program and it enables the City to move away from the existing “minimum bill” model to one that charges based on actual consumption. The new CIS allows the City of Baltimore to continue providing quality customer service for many years. In this session, Maria DeChellis will talk about the various parties involved in this project and share results of how the CIS upgrade is helping provide customers with a better billing experience to help support their personal budgeting.

- Maria Dechellis, Chief – Customer Support and Services, City of Baltimore

10:00 – 10:30 a.m.  Networking Break

10:30 – 11:30 a.m.  Governance and Oversight of IT Projects Across Multiple Operating Companies

Exelon Utilities has implemented governance and oversight models that encompass its entire enterprise. The governance model ensures strategic alignment of IT-enabled projects with Exelon’s plans for consolidation and convergence of IT systems. The oversight model facilitates senior leadership engagement in IT-enabled customer service projects that span across its multiple operating companies. This segment will describe how Exelon Utilities approached the design and implementation of these models and the benefits that have resulted.

- Steve DeMott, Senior Manager – Customer Projects and System Support, PECO
- Stacy Woodward, Senior Manager – IT Strategy, Governance and Planning, Exelon Utilities

11:30 a.m. – 12:15 p.m.  Manage the Journey to a New Customer Service System Implementation

Taking the right approach to implementing a well-functioning system, as well as meeting customer expectations, is easier said than done! A coordinated governance process plays a big part in the “ecosystem process”. The journey starts on day one with commitment from all the parties to “join up”, all the way through the final destination of the budget approval process. Today, utilities are managing the systems well, working with internal partners to assure that the commitment to customer satisfaction remains constant and successes are celebrated along the way! The session will detail how Avista Utilities worked through some of the challenges on its journey to implement a new customer service system and customer bill, including:

• The timeline
• Putting the organization structure in place — at the close of the project and re-birth of the new system
• The initial building blocks for success
• The areas of most impact
• Lessons learned and successes
• Development of a new customer bill and launching it in conjunction with “go live” of the new system

- Vicki Weber, Director – Customer and General Services, Avista Utilities (ret’d)

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AGENDA

Tuesday, August 9, 2016 (Continued)

12:15 – 1:15 p.m.  Group Luncheon

1:15 – 2:00 p.m.  Upgrading for a Multi-Channel Customer Experience

As though implementing a new CIS isn’t a large enough undertaking, the Metropolitan St. Louis Sewer District (MSD) simultaneously upgraded its CIS and self-service portal. At the same time, it also implemented new bill and envelope images, a management reporting tool and a mobile app. This segment will examine the process MSD went through to accomplish this task on time and under budget, as well as its successes and challenges. It will also explore what customer engagement and change management looked like for MSD and how they quickly became key components to a successful project.

- Michelle Vinson, Business Analyst, Metropolitan St. Louis Sewer District

2:00 – 2:45 p.m.  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. In 2012, BWP approved the acquisition of Oracle Utilities Customer Care and Billing application to help modernize its customer service operations. The goal was to provide its 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.

- Osvaldo Hernandez, Information Systems Analyst II, City of Burbank

2:45 - 3:15 p.m.  Networking Break

3:15 – 4:30 p.m.  Utility CIS Roundtable Discussion

In this panel discussion, utilities will discuss successes and challenges relating to their CIS projects and related ecosystems. Various utilities will relay how they are responding to these rapidly changing times in order to provide customer service beyond the normal channels. Attendees can think of this roundtable session as a brainstorm opportunity to develop new initiatives.

- Vicki Weber, Director – Customer and General Services, Avista Utilities (ret’d)
- Michelle Vinson, Business Analyst, Metropolitan St. Louis Sewer District
- Steve DeMott, Senior Manager – Customer Projects and System Support, PECO
- Osvaldo Hernandez, Information Systems Analyst II, City of Burbank
- Shaun Hewitt, Director – Operations Support Division, Region of Peel

4:30 p.m.  Conference Adjourns
PRE-CONFERENCE WORKSHOP:
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MONDAY, AUGUST 8, 2016

OVERVIEW

In these rapidly changing times, utilities have increasing needs for effective customer engagement and the CIS needs to keep pace with changes in technology. Many utilities are coming to the realization that their customer information system (CIS) is near the end of its life. Often, when utilities begin a major project like replacing or extending their CIS, they don’t fully consider the projects relationship and impact on their entire organization. CIS projects are known in the industry as filled with risks and potential career limiting moves. Coordinating the efforts of multiple work teams, managing a multi-million dollar budget, keeping upper management up to date on the project progress without neglecting your normal workload is quite challenging.

This workshop will discuss methodologies to assess, procure and build a business case that supports a decision to update or replace the CIS solution. Various in-depth CIS project examples will be presented, as well as utility case studies. Attendees will learn about setting project expectations and communicating effectively; managing and resolving risk issues; and providing leadership.

LEARNING OUTCOMES

- Apply a comprehensive step-by-step methodology for assessing CIS performance
- Explore how to build a business case that supports a utility’s new technology strategy
- Evaluate a path to take the assessment to the next phase
- Identify available technology and project objective options available to a utility
- Evaluate how to synchronize tasks and communications in order to meet objectives and deadlines

AGENDA

Monday, August 8, 2016

8:00 – 8:30 a.m.   Registration and Continental Breakfast
8:30 – 11:45 a.m.   Workshop Timing

- Understanding the CIS Project Lifespan
- Deployment
- Construction
- Analysis
- Initiation
- The Assessment Process
- Making a CIS Decision
- Taking Action on the CIS Decision
- Setting Project Expectations
- Coordinating Multiple Work Teams
- Keeping Management Informed on the Progress

WORKSHOP INSTRUCTOR

Steve Wenke / Managing Partner / AAC Utility Partners

Steve Wenke is Managing Partner of AAC Utility Partners. He brings a rich history of information systems (IS) experience to AAC. He brings more than 18 years in the CIS industry, with detailed knowledge of both the IS and utility fields, in addition to extensive CIS and utilities mission-critical systems experience. As the company’s senior partner over consulting services, Mr. Wenke has streamlined vendor assessment and selection activities and supplied enhanced project management services provided to all of AAC’s varied clients. Prior to affiliating with AAC, he held leadership positions with TMG Consulting, SunGard (formerly H.T.E.), and UPS.
INSTRUCTIONAL METHODS

Case Studies, Panel Discussions and PowerPoint presentations will be used in this event.

REQUIREMENTS FOR SUCCESSFUL COMPLETION OF PROGRAM

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 and 0.3 CEUs for the workshop.

EVENT LOCATION

A room block has been reserved at the Hyatt at the Bellevue, 200 S Broad St, Philadelphia, PA 19102, for the nights of August 7-9, 2016. Room rates are $199 single or double, plus applicable tax. Call 1-215-893-1234 for reservations and mention the EUCI program to get the group rate. The cutoff date to receive the group rate is July 7, 2016, 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 these conferences may send 1 FREE for every 3 delegates registered. Please note that all registrations must be made at the same time to qualify.

PROCEEDINGS

A copy of the conference proceedings will be distributed to attendees at the event. If you are unable to attend or would like to purchase additional copies, a downloadable link will available two weeks after the conference is complete. The cost per download is US $395. The link includes visual presentations only. Upon receipt of order and payment, the link will be sent to you via email.

NOTE: All presentation sales are final and are nonrefundable.

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:

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Custom sponsorship opportunities are also available. Please contact Grant Neptune at 720-988-1248 or gneptune@euci.com for more information.
**REGISTRATION INFORMATION**

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WWW.EUCI.COM
P: 303-770-8800
F: 303-741-0849

OR, scan and email to: conferences@euci.com

**PLEASE REGISTER THE FOLLOWING**


- **MANAGING THE PROJECT WHETHER REPLACING, EXTENDING OR MAINTAINING YOUR CIS PRE-CONFERENCE WORKSHOP ONLY: AUGUST 8, 2016: US $595, EARLY BIRD ON OR BEFORE JULY 22, 2016: US $495**

- **I’M SORRY I CANNOT ATTEND, BUT PLEASE SEND ME THE CONFERENCE PROCEEDINGS LINK 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?
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**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 8, 2016 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 303-770-8800.

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

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**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 conference 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 26 years organizing conferences.

Sign me up for *Energize Weekly.*