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CS Week 2020 | May 18 - 22, 2020
Fort Worth Convention Center | Fort Worth, TX
Longhorns, CS Week and Lithium Batteries: Going the Distance

As you plan your CS Week 2020 itinerary, be sure to include one iconic adventure that happens every day at 11:30 am and 4 pm on East Exchange Avenue – a longhorn cattle drive led by the Fort Worth Herd. From saddles and chaps to their boots and hats, these real Texas cowhands recreate every detail of moving cattle with historical authenticity.

This must-see attraction has me thinking about sustainability, demand management and convenience, pillars of every utility's CX. Whether herding livestock from cow towns to railheads in the 19th century or meeting the emerging electric vehicle (EV) charging needs of its customers, utilities recognize innovation and their required agility to quickly adapt to changing market conditions are core values of going the distance.

Between 1850 – 1910, cattle drives were a major economic activity in the American West. 27 million cattle were driven from TX to railheads in KS, for shipment to stockyards in LA and points east. The long distances covered, the need for periodic rests by riders and animals and the establishment of railheads led to the development of 'cow towns' across the frontier. Drives represented a compromise between the desire to get cattle to market as quickly as possible and the need to maintain the animals at a marketable weight. On average, a herd could maintain a healthy weight moving about 15 miles per day. Such a pace meant that it would take up to two months to travel from a home ranch to a railhead. The Chisholm Trail was the most important route leading north from the vicinity of Fort Worth, across Indian Territory (OK) to the railhead at Abilene. It was about 520 miles long, but never had an exact location, as different drives took somewhat different paths. The typical drive comprised 1,500–2,500 head of cattle. The typical outfit consisted of a boss; 10 to 15 hands - each of whom had a string of five to 10 horses; a wrangler who handled the horses; and a cook, who drove the chuck wagon. The wagon carried bedrolls; tents were considered excessive luxury. The men drove and grazed the cattle most of the day, herding them by relays at night. (Source: Redacted from en.wikipedia.org)

Today's EVs share something in common with longhorns. Current lithium batteries with a driving range of 100-200 miles must be recharged frequently (or in cattle parlance, rested and re-fed). Battery technology is advancing rapidly, though. The outlook is even rosier for 2020 and beyond with new EVs in the pipeline that can go 300-400 miles on a charge. But one caveat... range estimates are averages based on an instrumented laboratory analysis conducted under strictly controlled conditions. A motorist's real-world range can be wildly different... carrying heavier loads, driving at higher speeds and riding on under-inflated tires tend to drain power cells at an accelerate rate. Driving at highway speeds with the windows or sunroof open will increase an EV's wind resistance and affect its range. Likewise, it takes more battery power to climb steep terrain. Also, an EV runs fewer miles on a charge when subjected to extremely cold or hot weather. My, how lithium batteries and longhorns have a lot in common. (Source: Redacted from www.myev.com)

Utilities and communities are actively collaborating to address the operational challenges to plan, fund and build EV infrastructure. With flexibility and nimbleness to shifting priorities, they are becoming trusted energy partners to EV owners.

Count on CS Week as your go-to education and networking partner for utility industry EV issues with its upcoming EVCx Synergy Group on Tuesday. By working and learning together, we can go the distance.

“By 2030, global plug-in car sales are expected to be between 23 million and 43 million annually, according to the International Energy Agency. In its highest estimate, EVs will comprise 57% of vehicle sales in China, 26% in Europe and 8% in the U.S.”

- The Wall Street Journal, 11/4/19
Customer Self-Service for 2020: Why Today’s Utilities Need a Fresh Perspective

Numbering more than 73 million, millennials have surpassed the baby boomers to become both the largest and most statistically significant demographic group in North America. Those born during the final two decades of the 20th Century have now fully entered adulthood (or, as millennials themselves might say, are now “adulting” full-time) and are purchasing homes and starting families of their own.

Yet, despite their embrace of certain traditional aspects of American culture, this generation is still chiefly characterized by the fact that they came of age during an incredible information era. Millennials grew up with computers and instantaneous communications in their pockets. They are completely at ease navigating the Internet of Things, that hyperconnected environment that allows them to conduct conversations and transactions anytime and anywhere they like using their device of choice. With the power to manage most every other aspect of their lives online, why shouldn’t they expect the same from their utility providers?

In many ways, this power has led to a redefinition of consumers’ notions of convenience. So much so that not only millennials, but their parents and grandparents have followed suit, with many of them closing their checkbooks and choosing to pay their utility bills electronically. Paying one’s bill online, however, only scratches the surface of these new customer expectations. As we approach the start of yet another decade, this fundamental shift in expectations requires us to take a new perspective on the customer experience—one where customer self-service takes a more prominent place in a utility’s customer information systems.

Taking Careful Aim: How to Notch Wins Even When the Goalposts Are on the Move

When information systems evolve, consumer expectations evolve alongside them. Consequently, utility customers, like any other customer today, now expect to access billing statements and account information online. They are also willing to forego human interaction and address their customer service needs by making use of both interactive telephone response systems and virtual assistants.

In other words, nearly all utility service capabilities are now self-service capabilities—or at least they should be. Beyond environmentally friendly paperless options for paying their monthly bills, customers want to be able to monitor their usage and view their account status in real-time. They also expect payments to post immediately and send them an email receipt. They want to be empowered to add to or change their services whenever they like. And they want to do all this from desktop computers, smartphones, tablets, and—most recently—voice-controlled home assistants.

Meeting such expectations—or exceeding them—is an activity for which utility providers must budget. However, implementing a modern customer self-service (CSS) platform will do more than provide your customers with the level of service they demand. It will also help your business realize cost-savings, diversify its revenue streams, and optimize its day-to-day operations.

To Uncover Hidden Costs, It Pays to Rethink ROI

Any CSS platform worth adopting must provide the self-service functionality today’s utility customers demand. But if the user interface (UI) introduces friction to that functionality, adoption of the platform will suffer, meaning even the most beneficial features may be underutilized. The smart investment is in a CSS platform that offers a visually appealing, orderly, and enjoyable user experience (UX).

Choosing such a CSS also requires that you understand your customer journey. What matters most to your customers? What are their goals? Their pain points? What operations can you most effectively automate—that is, allow users to initiate and complete without engaging with a human representative—without sacrificing important aspects of the customer experience?


Continued on page 22
The mission of CS Week:
Is to advance utility customer service through the delivery of unbiased educational opportunities, forums for networking, and sharing of innovative best practices that will advance the customer experience.

**NEWSLINE** Winter 2019

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Winter 2019 Newsline Sponsored by:
### Agenda At-a-Glance

**Fort Worth Convention Center – Preliminary Schedule Subject to Change**

#### Sunday, May 17, 2020
- 9 am – 5 pm: CS Week Registration
- 12 pm – 6 pm: Exhibitor Set-Up
- 1 pm – 5:30 pm: ENGAGE311 Registration/Check In
- 3 pm – 6 pm: Executive Summit Registration

#### Monday, May 18, 2020
- 7 am – 5 pm: CS Week Registration
- 7 am – 9 pm: Executive Summit
- 7 am – 9:30 pm: Key Account Forum
- 7 am – 4 pm: SAP and SEW Synergy Groups
- 7:30 am – 5:30 pm: ENGAGE311 Conference
- 7:45 am – 3:45 pm: CS Week College
- 8 am – 8 pm: Exhibitor Set-Up

#### Tuesday, May 19, 2020
- 7 am – 6 pm: CS Week Registration
- 7 am – 5 pm: Executive Summit
- 7 am – 3:30 pm: Key Account Forum
- 7 am – 3 pm: Business Process Synergy Groups & Oracle Synergy Group
- 7:45 am – 6:30 pm: ENGAGE311 Conference
- 8 am – 11 am: Opening General Session & Keynote Speaker
- 10:30 am – 11:30 am: S2 Workshops & Sponsor Solutions
- 11:15 am – 3:30 pm: Exhibit Hall Invitation-Only Consultations/Demos
- 12 pm – 1 pm: Exhibit Hall Luncheon with Birds of a Feather Tables

#### Wednesday, May 20, 2020
- 6:45 am – 8 am: Women in Utilities Sunrise Event
- 6:45 am – 6 pm: CS Week Registration
- 7:15 am – 8 am: Continental Breakfast
- 7:45 am – 3 pm: ENGAGE311 Conference
- 8 am – 9:15 am: Opening General Session & Keynote Speaker
- 9:15 am – 11:15 am: Exhibit Hall Invitation-Only Consultations/Demos
- 9:30 am – 10:30 am: S1 Workshops & Sponsor Solutions
- 9:30 am – 3:30 pm: Research Roundtable Meeting
- 10:45 am – 11:45 am: S2 Workshops & Sponsor Solutions
- 11:15 am – 6 pm: Exhibit Hall Hours

#### Wednesday... continued
- 12 pm – 1 pm: Exhibit Hall Luncheon with Birds of a Feather Tables
- 1 pm – 1:45 pm: Innovation Talks
- 2 pm – 3 pm: S3 Workshops & Sponsor Solutions
- 3:15 pm – 4:30 pm: Networking, LeadNext & Canadian Receptions
- 4:30 pm – 6 pm: Private Events

#### Thursday, May 21, 2020
- 7:15 am – 8 am: Continental Breakfast
- 8 am – 8:35 am: General Session & Keynote Speakers
- 8:35 am – 9:05 am: Expanding Excellence Awards
- 9:15 am – 10:15 am: S5 Workshops, Awards & Sponsor Solutions
- 9:15 am – 11:15 am: Exhibit Hall Invitation-Only Consultations/Demos
- 10:30 am – 11:30 am: S6 Workshop, Awards & Sponsor Solutions
- 11:15 am – 3:30 pm: Exhibit Hall Hours
- 12 pm – 1 pm: Exhibit Hall Luncheon with Birds of a Feather Tables
- 1 pm – 1:45 pm: Innovation Talks
- 2:30 pm – 3:30 pm: S7 Workshops & Sponsor Solutions
- 3:45 pm – 5 pm: S8 Workshops, Awards & Sponsor Solutions
- 7 pm – 10 pm: Emerald City Extravaganza

#### Friday, May 22, 2020
- 7:15 am – 8 am: Continental Breakfast
- 8:15 am – 9:15 am: S9 Workshops
- 9:30 am – 9:45 am: Closing General Session & Individual Expanding Excellence Awards
- 9:45 am – 10:45 am: Leadership Panel
- 10:45 am: Special Announcements & Vehicle Giveaway

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1 By Invitation-Only or Members-Only events
2 Vendor Synergy Groups end at different times
3 Located at Hilton Fort Worth
4 Located at Omni Fort Worth
5 Located in the Arena

Start and stop times for all venues are inclusive of registration, meals and breaks.
CS Week Online Registration Is Open

REGISTRATION FEES:

<table>
<thead>
<tr>
<th>Event Type</th>
<th>Early 11/19 – 3/31/20</th>
<th>Regular 4/1/20 – 5/16/20</th>
<th>On-Site Starts 5/17/20</th>
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<tr>
<td>Non-Exhibitor Attendee</td>
<td>$3,200</td>
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Conference 44, College and Synergy Groups | Tiered Pricing*

- **20% discount: 3 - 5 attendees**
- **30% discount: 6 - 10 attendees**
- **40% discount: 11+ attendees**

Full Conference attendee registration fee includes admission to breakfasts and keynote speakers’ presentations, Exhibit Hall luncheons, CS Week Conference workshops and all social and networking functions including, but not limited to: Exhibit Hall receptions and the perennial favorite – Thursday Night’s CS Week Special Event.

*To qualify for this Tiered Pricing discount, utilities must register all attendees on the same date. Learn more by emailing Julie Shankles, Registration Manager at jshankles@csweek.org or calling her at 903-893-3214 or 903-821-8631, Monday – Friday, 8:00 am – 5:00 pm CST.

SYNERGY GROUP REGISTRATION FEES:

- Complimentary Vendor Solution Synergy Groups $495
- Complimentary Business Process Synergy Groups $495
- Admittance to Vendor Synergy Groups is subject to vendor approval.
- Business Process Synergy Groups are intended for Utility and Governmental attendees only (with the exception of Analytics).

COLLEGE REGISTRATION FEES:

- $495 College with Conference Registration*
- $595 College Only

*A discounted College registration fee is offered to those who register for both College and Conference.

College is intended for Utility and Governmental attendees only.

For Exhibit Hall booth registration, please email Gail Farmer at gfarmer@csweek.org or call her at 903-821-8623.
CS Week Accommodations Tick the Boxes

When traveling, security, comfort, services and proximity are high on the hotel must-haves list. CS Week has selected five hotels within walking distance of the Convention Center, all situated on Molly the Trolley’s loop. Links are posted online on the Registration/Accommodations tab of www.csweek.org. For virtual tours, click the hotel names below.

Please do not give your credit card information to anyone calling to offer you lower hotel rates in Fort Worth - THIS IS A SCAM!

**Omni Fort Worth**
1300 Houston St, Fort Worth, TX 76102
- Site for: Executive Summit (Monday and Tuesday)
- Key Account Forum (Monday and Tuesday)
- Research Roundtable (Wednesday)
- 5 dining options range from casual walk-ups to a 5 star-rated restaurant. A full-service spa, outdoor pool and fitness center invigorate and relax. Shop for something artsy at the Kimbell Art Museum store.

**Sheraton Fort Worth**
1701 Commerce St, Fort Worth, TX 76102
- Ellipticals, treadmills, stationary bikes and free-weights, plus an indoor heated pool.
- Chef’s Table is open for breakfast, lunch and dinner for classic American favorites.
- Located just a short walk from the Fort Worth Convention Center and Fort Worth Water Gardens.

**Hilton Fort Worth**
815 Main St, Fort Worth, TX 76102
- Site for: ENGAGE311 (Monday – Wednesday)
- From room service to a white linens-dining experience, the Hilton boasts six dining options. 1,000 square-foot contemporary fitness center features both weight and aerobic machines by Precor.

**Courtyard by Marriott Fort Worth Downtown/Blackstone**
601 Main St, Fort Worth, TX 76102
- Besides room service, Corner Bakery Café is located in the hotel lobby.
- A rooftop outdoor pool, cardiovascular equipment, free weights, treadmills, elliptical bikes all with individual TV’s, showcase a great fitness center. Pet-friendly hotel rooms and suites feature luxury bedding, complimentary Wi-Fi and ergonomic workspaces.

**The Worthington Renaissance Fort Worth Hotel**
200 Main St, Fort Worth, TX 76102
- Bar Wired, Vidalia’s and Lobby Lounge, casual meeting places for food and drink, are short walks from guest rooms. Cardiovascular equipment and free weights, massage services by appointment, plus an indoor pool and whirlpool and outdoor tennis courts round out the Worthington’s fitness options. Striking downtown vistas and nearby local attractions are hotel hallmarks.
**WEDNESDAY Keynote:**

“Growing Up a Digital Native”

Digital Sociologist Julie M. Albright, Ph.D. kicks off Wednesday’s opening General Session asking probing questions and offering answers grounded in years of clinical study and research:

- What does it mean to grow up in an always-on, always digitally connected world?
- How have technology and the electronic devices we engage with impacted the family, normal socialization, self-esteem, mental and physical health, even our driving behaviors, not to mention the rise of cyberbullying and increased cybersecurity risks?

In her new book, *Left to Their Own Devices: How Digital Natives Are Reshaping the American Dream*, Dr. Albright examines how “young people brought up with the Internet, smartphones, and social media are quickly rendering old habits, values, behaviors, and norms a distant memory – creating the greatest generation gap in history.”

A thought leader positioned at the growing intersection of society, behavior and technology, Dr. Albright’s keynote speech promise to be stimulating, eye-opening and provocative. Utilities everywhere, charged with constantly evaluating and tweaking their customer experience models across multiple channels, will want to tune into Dr. Albright’s insights. This topic, like many offered by CS Week’s keynote speakers, will transcend work life and strike personal heartstrings as well.

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**THURSDAY:**

**Annual Expanding Excellence Awards**

CS Week’s CEO claims his favorite job duty happens at Thursday’s General Session. That’s when utilities, large and small, are recognized with videos and an awards presentation for implementing stellar projects and innovations that have significantly improved operations, reduced expenses and made a value difference in the customer experience their utility provides. Trendsetters all, these utilities are indeed shaping the CX that other companies follow.

Company awards are presented on Thursday, while individual awards are showcased on Friday. See Page 11 for information about the annual application and nomination process, both of which are currently open until January 10, 2020.
Sessi ons

FRIDAY Panel: “If I’d Only Known Then What I Know Now: Myths vs. Facts”

We’re all familiar with urban myths, those widely circulated truisms that typically combine a kernel of fact with a bushel of exaggeration and sometimes outright distortion. Like communities where myths are passed down from generation to generation, most industries embrace their own urban myths including axioms about how to best manage customers or produce motivated, successful employees. Sayings like ‘The customer is always right’ and ‘Information is power’ are just two examples of urban myths in the utility customer service space.

Conference 44’s Friday Leadership Panel, “If I’d Only Known Then What I Know Now,” will feature a group of respected leaders who will unpack and share a cross-section of perspectives on common industry myths. Seasoned and tested-by-fire, these leaders will home in on utility customer service myths ripe for debunking with reality stories and boots-on-the-ground testimonies. They will demonstrate how their early perceptions about the utility customer service space have matured to a more nuanced wisdom. Attendees will participate by using their smart phones/devices to respond to and ask questions. Watch for panelists to be announced in the 2020 Program and Spring Newsline.

Customer Service Truisms: Myths or Facts?

1. If you can’t measure it, it is irrelevant to that company’s operation.
2. There’s a labor crisis in entry level utility positions.
3. First Call Resolution is a top priority.
4. Walk in customer service centers are a waste of money.
5. Customers want service that is fast, accurate and courteous.

FRIDAY: Vehicle Giveaway

As the saying goes, “When in Rome, do as the Romans do.” This year’s winner of CS Week’s signature vehicle giveaway will receive keys to an icon synonymous with Fort Worth and frontier culture - a 2020 Chevrolet Silverado LT pickup truck. Utilitarian while luxurious, this vehicle will help the winner make a statement – big, powerful, proud.

Becoming eligible to win is easy. Utility attendees simply walk the Exhibit Hall starting as early as Tuesday afternoon, locating vehicle sponsors and securing vendor stamps on their pre-numbered CS Week Vehicle Giveaway Card. After getting all the stamps, cards are checked for completeness and can then be submitted to the golden hopper on Wednesday or Thursday.

After Friday’s Leadership Panel concludes, walk-out music starts and lights flash, building excitement and anticipation. CS Week even shows attendees a video of how to react once their name is announced. So, pack your insurance card and be prepared to cancel your flight home. The odds are actually pretty good. One lucky utility winner will be sporting a new ride. Maybe, it will be you!

“Chevrolet is one of the world’s largest car brands, doing business in more than 100 countries and selling more than 4.0 million cars and trucks a year. Chevrolet provides customers with fuel-efficient vehicles that feature engaging performance, design that makes the heart beat, passive and active safety features and easy-to-use technology, all at a value.” (Source: MediaChevrolet.com)
LeadNext Site Visit: Different Business Model, Comparable Challenges

With its one-of-a-kind ownership/management structure, Citizens Energy Group (CEG) opened its doors to the 2020 LeadNext Class for a September 2019 visit. A Public Charitable Trust, Citizens is a not-for-profit, like a public utility, but controlled by a non-political Board of Trust and Board of Directors and regulated by the Indiana Utility Regulatory Commission. Twelve LeadNext participants, four coaches, venue executive Vic Hatridge and CS Week’s Education Director Lisa Collins spent a long, productive day at this Indianapolis water/wastewater/stormwater and natural gas utility:

- Learning about CEG’s structure, community characteristics and customer service vision;
- Being briefed on their customer experience mapping initiatives;
- Hearing about customer satisfaction history and where Citizen’s stands today;
- Visiting via virtual reality goggles a “DigIndy” down shaft site, a $2B CEG project that is boring a 28-mile network of 12-foot diameter tunnels under the city to collect, treat and discharge stormwater into the White River;
- Touring the Call Center virtually;
- Appreciating the challenges this Midwest utility faces that are shared in common by LeadNext participants like how CEG is answering affordability, customer engagement through machine learning, communications strategies in a rising rate environment and digital engagement including social media and chat.

CS Week is especially grateful to this CEG leadership team who hosted the event and presented such a content-rich visit:

- Jeffrey A. Harrison, Pres & CEO
- Curtis H. Popp, VP, Customer Ops
- Jeff Ford, Dir, Billing & Customer Services
- Jody Whitney, VP, Human Resources & Chief Diversity Officer
- Michael D. Strohl, SVP & CCO
- John Meehan, Mgr, User Experience
- Gregory A. Sawyers, Dir, Customer Relationships
- Jeff Brown, Dir of Brand Dev

Does the idea of gaining a deeper understanding of the CX lifecycle resonate with you? Would having an assigned, seasoned coach who facilitates and guides this learning through example sound attractive? Could participating in a 12-month leadership development program energize your career or even move it to another level of responsibility? Maybe LeadNext is for you.

Review the online LeadNext brochure and Nomination Form or download them from www.csweek.org. Read the Program’s syllabus, schedule and requirements. Candidates must have financial and logistical support from their utility. Apply early to capture one of the 14 slots reserved for the Class of 2021.

Want to connect with past participants to ask questions and see what’s the buzz with LeadNext? Contact Lisa Collins at 903-821-8675 or lcollins@cweek.org.
Question: What do these seven utility companies have in common?

Answer: Not size. Not service territory. Not governance models. What they share is the coveted honor of being CS Week’s 2019 Expanding Excellence Awards winners.

Go to csweek.org/web/Awards or click the logos above to watch short videos shown during General Session at Conference 43 in Phoenix. Each highlights an outstanding project or implementation, many of which ushered in cost savings, an enhanced CX and enterprise benefits.

CS Week is proud to annually showcase utility customer service excellence, to share success stories as inspiration and example, and to shine a light on industry trends in four award categories:

**Best CIS Implementation**

**Best Analytics Project**

**Innovation in Digital Customer Engagement**

**Innovation in People & Process**

In 2019, CS Week launched two individual Expanding Excellence Awards: Distinguished Leader and Rising Star. Darren McIlwraith of Enbridge Gas Distribution was recognized as its first Distinguished Leader and Laura Butler of Central Hudson Gas & Electric as its first Rising Star. Eligibility and criteria are straightforward, and, like company awards, all applications and nominations are reviewed and selected by CS Week’s Awards Subcommittee.

**Distinguished Leader Award:**

- Open to current, active utility employees of any position level who work in some aspect of the Customer Experience Lifecycle or its supporting information technology functions. Self-nominations will not be accepted.
- Nominee demonstrates consistent, progressively more mature and respected leadership skills as supported by multiple specific examples.

**Rising Star Award:**

- Open to current, active utility employees who hold a non-executive position and work in some aspect of the Customer Experience Lifecycle or its supporting information technology functions. Self-nominations will not be accepted.
- Nominee demonstrates an aptitude and a variety of skills and behaviors that indicate a desire to grow, willingness to go above and beyond and potential for broader responsibilities and higher roles.

Award applications/nominations close on January 10, 2020. Rachel White, Expanding Excellence Awards Mgr, is available at rwhite@csweek.org or 903-893-3214 to answer questions and provide useful tips to help make your submission solid and complete.

It’s easy:

1. Go to csweek.org/web/Awards or if viewing this issue online click the company or individual award title underlined above.
2. Review the description and locate the Download Application button at the page bottom.
3. Click to open the official application/nomination, then complete the fillable PDF form.
4. Additional text documentation in PowerPoint or Word may be added to supplement your submission.
Making Connections That Matter and Grow

C-level utility customer service and IT professionals attending Executive Summit have come to expect rich, horizon-looking content and presentations that address top-of-mind questions and tee up strategic challenges. Anticipating its 17th year, Executive Summit has earned a reputation for being THE place where industry execs share and broaden their perspectives as they engage in Deep Dives, Rapid Fire Solutions and CS Week Trends.

Its venue executive, Connie McIntyre, recognizes execs will use this by invitation-only confab to achieve business-focused goals. She encourages them, however, to sharpen the point of Summit – making connections! A core value of McIntyre’s, connecting with others personalizes Summit and promotes both professional and personal growth. She will likely challenge attendees to reach out and meet someone new, share conversation with unfamiliar faces and exchange business cards with complete strangers. “It’s the human connections that we remember and truly matter,” says McIntyre. So, pack lots of business cards and get ready to ‘disconnect to connect,’ another Connie-ism that attendees will likely hear from this year’s podium.

Connie McIntyre
Venue Executive

2020 Executive Summit Sponsors:
Level I:

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Level II:

OAAC
EY
Infosys
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REDCLAY
SAP
SEW

A quick drive from the Omni Fort Worth, Whiskey Ranch is the location for Monday night’s Executive Summit reception and dinner. Owners Firestone and Robertson founded their namesake company, the first craft bourbon and whiskey distillery in North Texas, in a nearby warehouse and later expanded to convert a historic golf course property into Whiskey Ranch. Whether standing around the outdoor fireplace or settled into the Oak Room for dinner, attendees will find many places to sample small batch libations while enjoying easy conversation and delicious cuisine.

Besides the great products they distill, Firestone & Robertson’s signature is their bottle caps. They initially used leather repurposed from boots donated by friends and visitors to punch out unusual caps. Now, exotic skins and various leathers from the best boot and saddle makers are primary sources. With unique tools, they punch out a circle, measure the thickness to determine which cork size to use, and hammer a custom-made wood ring over the leather, securing it with small reinforcement pins. Attendees are welcome to bring a pair of boots to Monday’s event. They can customize their own caps and purchase take-home bottles. What a conversation starter at your next party!

In a preview keynote before appearing as Wednesday’s opening General Session speaker, Dr. Julie Albright will engage Summit attendees around the subject of digital natives and how their interactions with technology have changed relationships with people, places, jobs and stabilizing structures. Learn about her research and hear her synthesized insights on the impacts digital technology is making on society.

Based on her book, Left to Their Own Devices: How Digital Natives Are Reshaping the American Dream, Dr. Albright is a frequent media commentator and a highly successful professor on the psychology of interactive media and sustainable infrastructure.

Dr. Julie Albright
Digital Sociologist
USC
Prepare and Plan for
Today’s Unprecedented Pace of Change

Rest assured, this year’s Steering Committee, led by Duke Energy’s Vakesia Graves, is rising to the challenge, identifying relevant content for the 2020 Forum. Over the next weeks, they will be confirming presentations, panels and discussion topics while gaining speaker commitments. Attendees can look for these and other pertinent topics:

- Technology solutions in the marketplace that are making it easier for utilities to do business with their largest customers;
- How effective organizations are leveraging their CRM to improve customer relationships;
- A “day in the life of” panel; and
- The popular Top of Mind brainstorm session that paves the way for later group and small discussions.

“Whether new to key account management or seasoned professionals in this specialized utility business area, the agenda seeks to strike the right balance,” explained Greg Dunlap. “The job KAF managers did two years ago is not the job they are faced with today, because the pace of change is propelling us forward so quickly. We must be ready with tools, solutions and answers. Now more than ever, the industry is recognizing the importance of customer relationship management.”

This by invitation-only venue will post its agenda and itinerary online in the coming weeks. In the meantime, plan now to register by phone with Rachel White, Key Account Forum Manager, at 903-893-3214.

One of Fort Worth’s most popular restaurants, Reata, which translates to “rope” in Spanish, is named for the sprawling ranch from the 1950’s epic movie “Giant,” starring James Dean, Rock Hudson and Elizabeth Taylor. This iconic movie portrays the strength, spirit and exhilaration of wildcatting days in TX during the mid-20th century. Reata is the site for Monday’s Key Account Forum networking reception and dinner.

Located just blocks from the Omni Fort Worth, Reata will be an encore visit for KAF attendees. Several years ago, a party of 50+ spent a delightfully warm evening swapping business cards and enjoying great food and spirits at this rooftop location. The dinner menu features signature dishes like blackened buffalo ribeye, jalapeno grits and pecan pie a la mode. So, bring your appetite; you can leave the lariat at home.
Let College Courses Prepare You for Future Challenges

Designed and taught by respected industry partners, CS Week’s College sets up day-long courses where participants gain valuable insights and prepare themselves for projects and implementations that require advanced skillsets. Participants can also earn CPE credits. This year’s lineup features topics to enhance leadership skills, broaden perspectives and deliver success-critical tips, tools and techniques. Review these course summaries and register for one that best fits your needs.

**Putting Some SaaS in Your Solution**

CIS (and other system) vendors are putting increasing emphasis and investment in SaaS solutions. It is coming; is your utility ready? This course will take participants through a comprehensive understanding of “Cloud” and why it is important for utilities to understand and consider SaaS. Discussion will include industry-specific benefits and challenges, ways to prepare and how to successfully transform your organization utilizing SaaS solutions.

*Lyndal Haddox, VP, Innovative Solutions and Christina Schueneman, Dir, Technology Assessment & Selection, both of AAC Utility Partners*

**Continuous CX Improvement: Delivering Measurable Value to Frontline Organizations**

Traditionally, utilities have honed their expertise in process design and efficiency improvements. With the industry shifting to a focus on customers, leading utilities are revamping how they build continuous improvement into their operations by directly integrating CX design and execution into their day to day business. This session will define the Continuous Customer Experience Design and Execution process, with major focus on reviewing case studies of utilities and other organizations putting it into practice. It will demonstrate how AI-based technology is being used to make these improvements happen faster for customers and employees.

*Simon Watson, Executive Dir and Joanne Campbell, Sr Mgr, Power & Utilities Customer Practice, both of EY*

**Six Steps to Prepare for a Successful Enterprise System Implementation**

Utilities of all sizes and services, when managing multiple concurrent projects and initiatives, experience similar difficulties. Each organization typically seizes the opportunity to budget their projects and, if there is no master project gatekeeper, they overlap priorities and resources, adding unnecessary risks and challenges. Four disciplines are vital to bringing order and effectiveness to project delivery. This course suggests a degree of centralized management is necessary for success: governance, constant planning, unflagging change management and omni-present risk management. Facing a queue of inter-dependent initiatives calls for a new response, one that gradually dissolves silo walls to deliver in predictable ways the value that has been promised.

*Jim Hendershot, Sr Consultant and Jennifer Baldwin, Sr Consultant, both of TMG Consulting*

**Expanding the Role of Change Management in Your Implementation Strategy**

For utility professionals, effectively leading organizational change is not a one-size-fits-all or a one-and-done proposition. To achieve success, organizations are hard-pressed to facilitate change through multi-level engagement. Tactical engagement requires strategy and clarity to manage expectations, readiness and capacity to change. This course establishes a solid foundation for understanding organizational behavior, design, development and change before introducing key concepts for effectively facilitating initiatives at all levels. Participants will be introduced to a range of organizational change approaches and leading research on the value of incorporating a change strategy in concert with major projects. They will be challenged to develop and defend a convincing business case. Participants preparing for major initiatives can expect to take away strategies and ideas to support the vital work ahead.

*Penny Tootle, Consultant, Utilligent, LLC*

Questions about CS Week Colleges? Contact Danise Mullendore at dmullendore@csweek.org or 903-821-8680.
Why do utility professionals initially attend CS Week Synergy Groups and return year after year for these day-long confabs? Let’s hear testimonials from 2019 attendees:

- “The presenters were all informative and offered a very interactive Q&A.”
- “The engagement and dialogue were outstanding; I’m walking away with value.”
- “I enjoyed the examples of things that improved at companies when they incorporated certain analytics.”

Monday’s vendor-sponsored groups showcase successful case studies and forecast enhancements and upgrades, giving attendees a chance to share and compare. Tuesday’s business process-focused groups connect utilities, small and large, in meaningful ways as they discuss how similar customer service business processes are handled by various electric, gas and water companies. CX grounds every Group.

For more information about Synergy Groups, contact Shawnna Ansley at sansley@csweek.org or call her at 903-821-8648.

New for 2020, the EVCx (Electric Vehicle Customer Experience) Forum is prepping an exciting agenda. Energized by two standout webinars from ConEd of New York and Eversource this fall, the EVCx work group is currently developing topics and identifying speakers/panelists for the May 19 Forum.

Stay tuned for the posted online agenda, but attendees can likely look forward to presentations and discussion reflecting various EV views: Utility, Customer, Charger Vendor, Manufacturer and Fleet Operator. A keynote speaker is also slated to present a broad World view of this quickly evolving industry.

Join utility peers in the driver’s seat or come along for the ride by registering today for the first EVCx Forum!
Analytics sponsored by: itineris
- Drive Operational Improvement with AI & ML
- Develop and Launch Analytics Capabilities
- Data Science to Drive Personalized Rates and Energy Usage Education
- Leverage Your Data to Connect with Your Customers
- What Is the Right Metric for Measuring Performance vs. Cost?
- Drive Incentive Pay with VOC Analytics and Benchmarking
- Customer 360: Using Data & Analytics to Improve Customer Experience
- Which Tools Are Right for Your Analytics Toolbox?
- Taking Temperatures: How Electric Meters Can Enhance Safety and Prevent Fires

Billing & Payments sponsored by: Paymentus
- Prepaid Pilot Delivers Payment and Billing Innovations
- AMI and Its Impact on Traditional Billing Processes
- Optimizing TOU Rate Plan Participation While Maximizing Customer Satisfaction
- Refreshed: New Approaches to the Walk-In Center
- Engaging Customers in Community Solar: It Takes a Village
- Using Smartphones to Ensure Billing/Automation Excellence
- Accelerated Paperless Adoption
- By the Million$: Energy Robotics and Process Automation Successes

Credit & Collections sponsored by: Virtuoso sourcing group
- Safeguarding Your Company's Data from Cybercriminals
- Creating Low Income Customer Centric Programming
- Reduce Bad Debt with Middleware and AI
- Utilities United Against Scams: Update and Status
- Improve CX and Revenue Collection with Segmentation Strategies
- AMI Strategy for Collections
- Compliance Matters

Digital Customer Engagement sponsored by: Level One
- The Social Media Journey: One Voice, Many Engagers
- Transforming a Customer Engagement Portal
- The Power of Digital Robotics in the Customer Service Space
- Energy Engagement Through Smart Meters
- It Starts with a Simple “Hello”
- Leveraging Customer Engagement through an Omni-Channel Approach
- Digital Solar Initiatives Answer Consumers’ Demands
- Digital Customer Engagement Transformation Journey

Contact Center sponsored by: Desert Sky Group
- Training with a Digital Approach
- Culture, Shocked: Driving Cultural Changes to Improve Contact Center Performance
- Predicting Intent: Personalized CX with Analytics and Machine-Learning
- Measuring Contact Center Training and Coaching Effectiveness
- Build a High-Performing and Engaged Work-at-Home Culture
- Customer Education: Tools to Help Customers Make a Change
- Managing Talent in the Contact Center
- Organizational Benefits of the Universal Agent

Field Services sponsored by: KloudGin
- Skill Up and Scale Down
- Customer Service at the Front Door
- Virtual Reality Training for Field Employees
- Vehicle Telematics: The Road to a Safer and More Efficient Field Fleet
- Investing in Training Field Employees of the Future
- We’re Floaters Not Sinkers: Optimizing Workflow Through Special Initiatives
- Keep Me Informed Along the Residential Customer Journey
- Protect and Collect: Successful Revenue Assurance Programs
At-a-Glance

Workshops At-a-Glance

**Strategies & Management** sponsored by: **Bridgewater Consulting Group**

- A Solution for a Decarbonized, Digitalized, Decentralized, Democratized Energy Future
- Employees as Advocates
- Driving Organizational Change Through Diversity and Inclusion
- LeadNext: A Path to Career Growth
- Electric Vehicle Customer Experience - Utility Best Practices
- Leadership Styles: Learned vs. Desired Traits of Effective Leaders
- Agile vs. Waterfall: Collaborating with IT
- Keep, Upgrade, Replace: Strategic Decisions in a Major CIS Implementation
- Power Up! Empowering Women Today
- Future of Utilities and the Impacts on CX Strategy
- Attract Talent & Improve CS through EX

**Sponsor Solutions**

- **Aclara**
  - Leveraging AMI Data to Understand Your Customers
- **bidgely**
  - 1-800-CUSTOMER-VALUE: How AI Is Evolving Customer Service into Customer Value
- **KUBRA**
  - You Had Me at “Venmo” – Billing and Payment Trends
- **ORACLE Utilities**
  - A View from the Cloud: Stories of Leading Soaring Utilities
- **SEW Smart Energy Water**
  - When Utility Customer Engagement Meets Digital: Elevating CX
- **TMG Consulting**
  - Contemporary IT Planning Risks and Mitigation
- **Utegra**
  - Mastering the Changing Utilities Market Model

**2020 Expanding Excellence Award Winners**

- Best Analytics Project
- Best CIS Implementation
- Innovation in Digital Customer Engagement
- Innovation in People & Process

NEW for 2020!
Expanding Excellence Award winners will be announced in the 2020 On-Site Guide.

Note: This Conference Workshops At-a-Glance was current at the time of printing. Please visit our website: [csweek.org/web/conference](http://csweek.org/web/conference) for objectives and summaries of these sessions.

For questions about Conference Workshops, please contact Danise Mullendore at dmullendore@csweek.org or 903-893-3214
Why This One? What’s Up with ENGAGE311?

Ask previous attendees why they choose CS Week’s ENGAGE311 and EXPO311 Conference experience, and most will identify four key takeaways:

- Networking opportunities with industry colleagues;
- Rich content that reflects the everyday challenges and issues faced by call centers;
- The chance to hear from award-winning professionals;
- Personal empowerment this Conference confers.

Make plans today to register for the 2020 Conference. The CS Week 311 Steering Committee is finalizing the 3-day agenda which will be posted online in January. Take advantage of early registration and group discounts.

Emotional intelligence. If this buzzword isn’t already flying around your customer service center, it most certainly will be after its founder’s keynote at 2020’s ENGAGE311 Conference. Dr. Stevie Dawn, founder and CEO of Orange Compass Ltd, an emotional intelligence-based training company, has researched the importance and real-life practicality of EI - the learned ability to identify, experience, understand and express human emotions in healthy and productive ways. In her keynote, “Leadership Without a Title,” Dr. Dawn will help attendees, regardless of their position in the organizational chart, identify personal emotions and the emotions of others with whom they work. By introducing ways to make better decisions in stressful situations typical of customer service centers, Dr. Dawn will teach attendees how to channel emotions more effectively. A popular speaker, Dr. Dawn promises to challenge her customer service-centered audience to re-orient workplace behaviors that have previously stymied effectiveness and efficiency to ones of positivity and high-energy leadership.

Curious to see how your center measures up? Join metrics-driven centers by participating in annual surveys:

**311 TECHNOLOGY SURVEY: Closes 12/20/19**
Identifies and assesses technological needs and trends for 311 Call Centers. Information shared gives new and established 311 call centers a technology perspective for capital planning, operations and efficiency.

**311 COMPARATIVE SURVEY: 1/15/20 – 3/4/20**
Provides data on call center operations, volume, staffing, training, recognition and performance from 311 call centers across North America.

By participating in these surveys, your company will have full access to the raw data results.

Each year, CS Week 311 recognizes one centralized government customer service center that has consistently demonstrated a customer-focused approach to improving local government.

The 2020 award will be presented during the CS Week ENGAGE311 Conference in Fort Worth, TX. Click Award or visit csweek.org/web/311 to review this process. Applications are now open until February 5, 2020. For tips about submitting your service center for the 2020 Award of Excellence, participating in surveys and more about CS Week 311, including ENGAGE311 and its EXPO311, please contact Amber Wiens at awiens@csweek.org or 903-821-8721.

Sapphire Sponsors:

For EXPO311 booth registration, please contact Amber Wiens.
EMPOWERING
WOMEN...

Try to think of a better way to rise, shine and greet the day! Yes, 2020’s Women in Utilities Sunrise Event begins early, across the street from the Fort Worth Convention Center at the Omni, but the congeniality and networking opportunities last well beyond this keynote breakfast. Watch for details about the featured speaker and planned agenda online.

Wednesday, May 20, 2020 | Omni Fort Worth Hotel | Second Level | Texas Ballroom Pre-function Room

“Power Up! Empowering Women to...” is this year’s theme for CS Week’s Women in Utilities venue, which includes three educational/networking components:

- Four webinars that leads up to and follow Conference 44. The first one, “Empowering Women to Think Like a CEO,” features JEA’s Customer Assistance Program Manager Elizabeth Paulson. Register now for this exciting January 9 kick-off.
- Sunrise Event on May 20. Be sure to reserve your spot for this SRO event when you register for CS Week 2020.
- Thursday Conference workshop in the Strategies & Management track. Panelists will unwind topics that support the “Power Up! Empowering Women Today” theme.

Questions about Women in Utilities? Shawnna Ansley is your go-to CS Week resource at sansley@csweek.org or 903-821-8648.

WOMEN IN UTILITIES:

Get Your Party on at Emerald City Extravaganza

Headlining Thursday’s Special Event, Emerald City Band will bring a high-energy performance to the CS Week stage, this year located in the Convention Center Arena and adjoining areas. With its state-of-the-art light show and exciting choreography, Emerald City Band has a national reputation and is broadly known as “America’s premier event & live entertainment cover band.” CS Week is thrilled to partner with its long-time sponsor for what looks to be a extravaganza evening.

Besides the Band, look for a variety of Southwest food favorites and specialty beverages. There will also be quieter spaces for those who want to enjoy talking and socializing over dinner and drinks.

“Wow wow wow. If you need a big-time band that’s going to keep everybody going and just ignite your event, this is the one. No matter what’s your occasion they will keep everyone engaged. Seems like R&B, classic dusties and top 40 music are specialties, but I would not be surprised if they could tap into other music areas. Very professional and tasteful. You won’t be disappointed. All ages. If they had six stars, I would give it!!” - Yelp review

Questions about Women in Utilities? Shawnna Ansley is your go-to CS Week resource at sansley@csweek.org or 903-821-8648.

Elite Sponsor:

Co-Sponsor:

MAY 18-22, 2020 | FORT WORTH, TX
# 2020 CONFERENCE SPONSORS

## PLATINUM

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<td>Harris Utilities</td>
<td>Registration Counters, Thursday Night’s Special Event, Thursday Keynote Speaker, Splash Branding, eNews</td>
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<td>Oracle</td>
<td>Wednesday Luncheon, Banner Branding, Exhibit Hall Lounge, Information Desk, On-Site Guide</td>
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<td>HANSEN Technologies</td>
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<td>TMC Consulting</td>
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**HOST Utility Industry Partners**

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<td>EEI - Edison Electric Institute</td>
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Map Your Journey to Connect With Conference 44 Exhibitors

**Featured Exhibitors:**

- AAC Utility Partners, LLC
- ACI Speedpay
- Aclara Technologies LLC
- Allconnect
- American Express
- American Gas Association
- Avertra
- Bill2Pay
- Black & Veatch Corporation
- Bridgevine, Inc.
- Bridgewater Consulting Group, Inc.
- Edison Electric Institute
- Ernst & Young LLP
- Hansen Technologies
- Harris Utilities
- IBM
- Infosys Limited
- Intoollect
- Itineris
- JOMAR Softcor International Inc.
- KloudGin
- KUBRA
- Level One
- Milestone Utility Services
- Open International LLC
- Oracle
- Paymentus
- Questline
- Red Clay Consulting
- Research America, Inc.
- SAP America
- Smart Energy Water
- TMG Consulting
- TransUnion
- Uplight
- Utilitec
- Utility Solutions Partners, LLC
- Utiligent
- Vertex
- Virtuoso Sourcing Group
- Vlocity
- WCG Consulting
- West Monroe Partners

**Early Booth Selection:**

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Contact **Gail Farmer**, Sponsorship/Exhibitor Manager, to reserve your company’s prime booth location at gfarmer@csweek.org or 903-821-8623.

Make your Exhibit Hall time productive and efficient by using Conference 44’s interactive Exhibit Hall Floor plan on the Exhibitors tab of csweek.org to map out your moves.
A CSS that allows customers to pay their bills, enroll in loyalty programs, update their address, and access their historical billing information will help you reduce labor costs at call centers, walk-in facilities, and other customer touchpoints. Assuming an average cost per call of $6\textsuperscript{3}$, even a modest 50,000 self-service operations per year will yield $300,000 in savings.

Moreover, utilities can achieve additional savings as ease-of-use encourages customers to embrace paperless billing, which eliminates printing, postage, and other expenditures associated with legacy systems.

**Connections That Add Up to Engagement Equal New Revenue**

The digital revolution has changed the way consumers learn about new products and special offers. A modern CSS platform gives utilities the ability to integrate cross-sell and up-sell opportunities into the digital customer experience. This, in turn, has the potential to transform how utilities calculate the true costs of customer acquisition and retention.

Mass mailings, billing statement enclosures, and email blasts aren’t efficient means of growing sales. That’s because these tactics broadcast identical marketing messages to an audience that, in fact, has diverse needs and interests—and they expect that whatever offers they receive from you will be personalized. Modern customer information systems collect data that make it possible to target marketing campaigns to consumers with the most relevant and useful offers. Doing so leads to higher conversion rates and a greater ROI on your marketing investments.

**If You Aren’t Tuning into Your Customers’ Expectations, Your Competitors Are**

Customers may want their utility providers to keep them informed of new products, special offers, and money-saving bundled services. But they also expect and rely on alerts from their provider when there are abnormalities in their usage that may indicate a natural gas leak, electrical equipment failure, broken water pipe, or some other issue that must be addressed quickly.

Utility customers today want—even need—to access their accounts 24/7, 365 days a year, and via their preferred devices. Newer CSS systems allow interpretation of customer and usage data to send proactive communications to those devices, helping build trust between providers and consumers.

Further, in deregulated markets, this elevated level of personalized customer experience can even serve as a differentiator, giving a provider a competitive edge that helps them expand their existing customer base. In regulated markets, the cost efficiencies associated with the implementation of a modern CSS will satisfy regulators that billed costs are both prudent and reasonable.

**Your Organization’s New Year’s Resolutions: Leaner Operations and Healthier Attitudes Towards Automation**

Advanced technology has enabled the automation of repetitive, predictable tasks in almost every industry. This trend is expected to grow exponentially in the coming decades. Forrester projects that robotic process automation (RPA) vendors will earn almost $8 billion in revenue in 2020\textsuperscript{4}, with the global market for their services set to exceed $12 billion by 2023. Innovative utility providers have led the way here, by adopting robust CSS platforms that facilitate the streamlining of customer service operations.

Automating commonplace, often tedious, clerical tasks allows utility providers to tap more deeply into their employees’ knowledge, skills, and creative problem-solving capabilities. Better utilization of human resources leads to higher employee satisfaction and, in turn, contributes to continuous improvement as well as growth across the organization.

\textsuperscript{3} https://www.icmi.com/Resources/2019/the-metrics-of-contact-center-productivity
One division that can benefit immediately from a reallocation of human resources is customer service. Once routine requests can be entrusted to chatbots or self-service applications, customer service representatives can dedicate their energies and talents to those issues that merit escalation.

Meanwhile, other team members could be assigned the responsibility of performing predictive analyses based on previous customer service interactions and outcomes. Such efforts only enhance the differentiating qualities of the customer service experience your brand provides.

Making 2020 the Year You Capitalize on the Transformative Power of Customer Self-Service Technology

Two decades into the 21st century, we find that it isn't the heightened expectations of just millennial customers that require a fresh perspective on a utility’s customer self-service capabilities. It is the changed expectations of all utility customers. Whether they are millennials, baby boomers, digital natives, or relatively new adopters of smart technology, today's customer base has responded to digital disruption by forming high expectations—transparency, socially responsible business practices, instantaneous universal access, and near-endless customization.

Now is an opportune time to take a fresh look at the customer experiences your utility offers its customers—but not solely from your customers’ standpoint. It’s also time to consider how adding more comprehensive CSS capabilities can benefit your own organization in 2020 and beyond. Measurable cost-savings, combined with the creation of new revenue sources made possible by upgrading your information systems, will only strengthen your utility’s position in a time of rapidly advancing technology and energy market volatility.

Michelle Gillum is the Digital Account Manager at Vertex Business Services. In this role, Michelle specializes in driving marketing strategy and execution in the utility space. Michelle oversees Vertex’s marketing campaigns and concepts from ideation to creation with a special knack for managing content. Michelle is deeply committed to driving forward change and efficiency in utilities for the purpose of advancing the customer’s best interest.
At the Intersection of Experienced and Leading-Edge

Paved in 2019 by eight industry partners, Innovation Alley offered short, focused presentations, similar to TED Talks®, around the theme of innovation. Speakers with a handful of PowerPoint slides teed-up stretch topics and various approaches that piqued attendees to adjourn to their Exhibit Hall booths for more discussion. Last year’s stellar lineup featured:

- Innovation in Customer Experience Transformation - Infosys, Ltd.
- Innovation in Digital Customer Enablement - Simple Energy
- Innovation in Broadband as a Utility - HansenCX
- Innovation in Innovation: Accelerating Adoption of New Technology - Capgemini
- Innovation in Combating Call Blocking & Spam Mislabeled - Neustar
- Innovation in CIS: RIP Traditional CIS - Oracle Utilities
- Innovation in Cloud: 3 Surprising Things to Learn in 2019 - Vertex
- Innovation in Digital Personalization - Allconnect

Revisiting the same theme for 2020, CS Week invites platinum and gold level sponsors to pave the next lane of Innovation Alley with new 7-minute talks. To reserve your spot and for more information about Innovation Alley, please contact Lisa Collins at lcollins@csweek.org or 903-821-8675.