

## THE FUTURE CUSTOMER: EXECUTIVE ONLY MEETING

WEDNESDAY, SEPTEMBER 27, 2023 | 12:00 - 3:00 PM  
 SHERATON GRAND AT WILD HORSE PASS | PHOENIX, AZ  
 MEETING ROOM: GILA MONSTER

12:00 - 12:45 PM

Lunch hosted by Chartwell  
**Welcome and Introduction**

- Philip Dunklin, CEO, Chartwell Inc.



**The Great Balancing Act:  
 Executive Priorities, Challenges, and  
 Strategies for Success**

- Tracie Boutte, Executive Advisor, Chartwell Inc.



12:45 - 1:00 PM

**Maximizing Chartwell's Services**

- Tracie Boutte, Executive Advisor, Chartwell Inc.

1:00 - 1:15 PM

Networking break

1:15 - 1:45 PM

**Customer and Operational Benchmarks  
 Deep Insights Powered by Chartwell**

- I.S. Dunklin, Director of Revenue, Chartwell Inc.



1:45 - 2:15 PM

**Future Customer Behavior: Do Customers  
 Walk the Talk?**

- Andrea Belk Olson, CEO, Pragmadik



2:15 - 2:30 PM

Networking break

2:30 - 3:00 PM

**Electric Vehicles: The Intersection of  
 Adoption and Readiness**

- Kathy Knoop, Manager, EV Stakeholder Solutions, General Motors Energy



3:00 PM

Adjourn

## THE EXECUTIVE EXPERIENCE AT EMACS

Tuesday,  
September 26  
8:30 AM - 4:30 PM

### Chartwell Leadership Council Meetings:

- Billing & Payment
- Customer Experience
- Vulnerable Customer

Executive members and guests are welcome to attend the Leadership Council meetings.  
*Please confirm your attendance for planning purposes.*

Wednesday,  
September 27  
10:30 - 11:20 AM

### Utility Executive Concerns in 2023 and Beyond: Navigating Resiliency, Rates, and Rising Expectations

#### Panelists:

- Marc Ulrich, VP of Operational Excellence, SCE
- Steve Lopez, Senior Director of Customer Strategy, SRP
- Erica Borggren, Vice President of Customer Solutions, ComEd

#### Moderator:

- Tracie Boutte, Executive Advisor, Chartwell Inc.



Friday,  
September 29  
8:30 - 9:20 AM

### KEYNOTE – Balancing Business Concerns with Serving Customers in Need: A Fireside Chat

- Tracie Boutte, Executive Advisor, Chartwell Inc.
- Lisa Cagnolatti, Senior Vice President of Customer Service, SCE



## ADDITIONAL SESSIONS OF INTEREST TO EXECUTIVES

Thursday,  
 September 28  
 8:30 - 9:25 AM

### Keynote: Data-Driven Decision Making, Customer-Focused Policies, and Executive Buy-In: The Journey of Tucson Electric Power

- Dallas Dukes, Vice President of Customer Experience, TEP
- Lynne Petersen, Senior Director Customer Experience and Customer Care, TEP



Thursday,  
 September 28  
 10:40 - 11:30 AM

### A Driving Force for Change: Positioning Your Utility for the Growing Electric Vehicle Market

Panelists:

- Burrell G. Kilmer, Manager of EV Strategy, SRP
- Camila Martins-Bekat, Principal of Beneficial Electrification, TEP
- Karen Apple, Electric Vehicle Program Manager, City of Phoenix

Moderator:

- Kathy Knoop, Manager, EV Stakeholder Solutions, General Motors Energy



Thursday,  
 September 28  
 4:00 - 4:45 PM

### Disrupting Customer Service: Energy Equity in Action

- Jesse Hernandez, Director of Equity, Community Strategy & Engagement, CPS Energy
- Laura Jacobs, Sr. Manager of Customer Advocacy, Community Engagement, CPS Energy

