2023 SCHEDULE

TUESDAY, SEPT. 26

6:00 - 7:30 PM  Chartwell's EMACS Conference Welcome Reception
Sponsored by InvoiceCloud
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<td>7:30 - 8:30 AM</td>
<td>Breakfast</td>
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  - Andrea Belk Olson, CEO, Pragmadik |
| 9:25 - 10:10 AM     | From Sci-Fi to Reality: How Utilities are Capitalizing on the AI & BI Revolution  
  - Greg Ziolkowski, Senior Product Manager, Data Analytics, KUBRA |
| 10:10 - 10:30 AM    | Networking Break                                                     |
| 10:30 - 11:20 AM    | Sponsor Spotlight: ACI Worldwide                                    |
| 11:20 AM - 12:00 PM | Team Networking Challenge                                            |
| 12:00 - 1:30 PM     | Lunch                                                                |
| 1:30 - 2:15 PM      | **BREAKOUT 1**                                                      |
| TOU for All! Elevating the Customer Experience of Modern Rates  
  - Brian Kurtz, Manager of Customer Satisfaction & U2.0 Project Management Office, PSEG Long Island  
  - Nayan Parikh, Technology Group Product Manager, PSEG Long Island |
| 2:15 - 3:00 PM      | **BREAKOUT 2**                                                      |
| Nurturing Relationships at Every Step of the Customer Journey  
  - Jim Malcom, Chief Operating Officer, Apogee Interactive |
| Lessons on Keeping Your Business Customers Happy from California and Georgia  
  - Tomaso Giannelli, Key Account Manager, Georgia Power Company |
| 3:00 - 3:45 PM      | **BREAKOUT 3**                                                      |
| TEP Goes Door-to-Door to Support Customers Most in Need  
  - Denise Taylor, Director, Customer Care and Experience, TEP  
  - Nicole Hopkins, Principal, Customer Centric Research and Innovation, TEP |
| Insights from Evergy & Vistra: Increasing Customer Self-Service Adoption With Conversational AI  
  - Steve Hughes, Sr. Director, Utilities Practice, Interactions  
  - Lindsay Washburn, Senior Digital Product Manager, Evergy  
  - Ed Anderson, Sr. Manager, CXT Technology, Vistra |
| Powering the Future of Mobility: How Total Experience Connects Utilities and Electric Vehicles  
  - Abraham Bhutt, Senior Vice President, Connected Experience, Rightpoint  
  - Bill Thompson, Senior Director of Mobility, Rightpoint |
DAY ONE: WEDNESDAY, SEPT. 27, CONT.

3:00 - 3:30 PM
Networking Break

3:30 - 4:15 PM

**BREAKOUT 1**

PSE&G Increases Energy Efficiency with “Welcome to the Saverhood” Campaign
- Ria Canagon, Manager of Energy Efficiency Outreach, PSE&G

**BREAKOUT 2**
Unlocking Success with Business Customer Panels, Advisory Boards, and Councils
Moderator: Jennie King, Principal Consultant, Chartwell, Inc.
- Terry Lombard, Customer Experience Manager, PNM
- Heather Rodriguez, Principal Research Market Specialist, SMUD

**BREAKOUT 3**
From Feedback to Action: Creating a Comprehensive Strategy for Utilizing VoC Feedback to Enhance Customer Experience and Drive ROI
- Stacey Rosen-Sturgis, Voice of Customer Lead and Senior Advisor, Southern California Edison

4:15 - 5:00 PM
From Challenges to Solutions: Chartwell’s Networking Roundtables
- Identifying and Serving Vulnerable Customers
- The Fundamentals of Customer Self-Service
- Incident Response Strategy and Structure
- Attracting and Retaining Rockstar Employees
- Creating a Customer-Centric Culture
- Forging and Maintaining a World-Class VOC Program
- Addressing Trends and Customer Concerns Across Mobile Wallets, Text-to-Pay and Other Emerging Payment Channels
- New Product Development: Innovation without Risk
- Engaging Business Customers Through Proactive Outreach
- (Anti-)Social Media: Friend or Foe?

5:30 - 7:00 PM
EMACS Networking Reception
Sponsored by Message Broadcast
DAY TWO: THURSDAY, SEPT. 28

7:30 - 8:30 AM  Breakfast

8:30 - 9:25 AM  Keynote: Data-Driven Decision Making, Customer-Focused Policies, and Executive Buy-In: The Journey of Tucson Electric Power

  • Lynne Petersen, Sr. Director Customer Experience and Customer Care, TEP

9:25 - 10:10 AM  Empowering Utility Call Centers: Leveraging Direct-to-Customer Digital Communications Technology for Enhanced Customer Engagement

  • Paul Watkins, CX Strategist, Message Broadcast by LINK Mobility
  • Sandy Buzzard, Sr. Manager of ECS, Duke Energy

10:10 - 10:40 AM  Networking Break

10:40 - 11:30 AM  Sponsor Spotlight: DataCapable

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

Moderator: Kathy Knoop, Manager, EV Stakeholder Solutions, General Motors Energy

  • Burrell G. Kilmer, Manager, EV Strategy, SRP
  • Camila Martins-Bekat, Principal, Beneficial Electrification, TEP
  • Karen Apple, Manager of Electric Vehicle Programs, City of Phoenix
  • Steve Conte, Electric Vehicle Project Manager, Eversource Energy

11:30 AM - 12:45 PM  Lunch Sponsored by Paymentus

Chartwell Best Practices Awards

12:45 - 1:15 PM  Dessert with Solution Providers

BREAKOUT 1  ComEd’s Email Welcome Series for New and Relocating Customers

  • Michele Ptaszek, Manager, Customer Education & Marketing, ComEd
  • Natalie Staerkel, Sr. Marketing Specialist, ComEd

BREAKOUT 2  Effective Customer Communication Strategies: Navigating Rate Increases and Promoting Understanding of Time-of-Use Rates

Moderator: Steve Waters, Director of Councils, Chartwell Inc.

  • Ed Baker, Director of Communications, Arizona Public Service
  • Rob Rohr, Billing Manager, Alectra Utilities
  • Jackie Robinson, Director of Customer Experience, DTE Energy

BREAKOUT 3  A Modern Approach to eBill: TECO’s Success in Driving Digital Adoption

  • Melissa Cosby, Director CE Strategy & Service Excellence, Tampa Electric

1:15 - 2:00 PM
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| 2:00 - 2:45 PM | Building the Future Energy System: SRP Leverages Customer Input and Advanced Analytics to Optimize Power System Planning  
  • Elise Gould, Senior Director of Insights, Brand Strategy and Communications, SRP  
  • April Smith, Director, Client Services, Bellomy | Expanding Customer Engagement Through High Performance Programs  
  • Dwight Scruggs, Vice President, Business Development and Sales Leader, Cinch Home Services | The Role of CX in Getting More Customers on Time Varying Rates  
  • Scott Engstrom, Chief Customer Officer, GridX |
| 2:45 - 3:15 PM | Networking Break                                                            |                                                                           |                                                                           |
| 3:15 - 4:00 PM | Making Progress Toward Clean Energy: SMUD’s Clean PowerCity Campaign  
  • Jason Casella, Marketing Supervisor, Sacramento Municipal Utility District | Customer Vulnerability: Causes, Conditions and the Path Back to Stability  
  Moderator: Pat Ricks, Senior Advisor, Chartwell Inc.  
  • Kirsy Veloz, Section Manager of Credit and Collections, Con Edison  
  • Richard Shaw, Manager, Financial Services, ComEd  
  • Amanda Engel, Principal Product Manager, Exelon | How to Build a Customer-First Culture: Insights from Hydro One’s Journey  
  • Rob Globocki, Director, Customer Care, Hydro One |
| 4:00 - 4:45 PM | Duke Energy Leverages Mobile App Chatbot to Address Top Customer Pain Points  
  • Lisa Cornwell, Product Manager, Duke Energy  
  • Karen Myers, Product Development Leader, Duke Energy | Transforming Business Customer Relationships: Becoming a Trusted Advisor  
  Moderator: Jennie King, Principal Consultant, Chartwell Inc.  
  • Tomaso Giannelli, Key Account Manager, Georgia Power Company  
  • Wyndle Young, Director of Customer Service and Government Infrastructure, OPPD  
  • Gabe Nunez, Manager, Strategic Programs LCS, BGE | 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 |
| 5:30 - 8:00 PM | The Main Event  
  Sponsored by KUBRA                                                           |                                                                           |                                                                           |
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| 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 at Southern California Edison |
| 11:30 - 11:45 AM | Closing Remarks  
Adjourn |
| 9:20 - 10:05 AM | Transforming Digital Engagement: Delivering Customer-Centric Experiences that Increase Self-Service  
• Travis Murray, AVP, Enterprise Alliances, InvoiceCloud |
| 10:05 - 10:35 AM | Networking Break |
| 10:35 - 11:30 AM | Sponsor Spotlight: ProcedureFlow  
Moderator: Jennie King, Principal Consultant, Chartwell Inc.  
• Stacey Rosen-Sturgis, Voice of Customer Lead and Senior Advisor, SCE  
• Wayne Boone, Principal, Alabama Power  
• Valerie Williams, Senior Manager, VOC Program, Liberty Utilities |