

 Chartwell's

EMACS

The Customer Experience Conference

2024 SCHEDULE

October 8-11, 2024 · San Antonio

TUESDAY, OCT. 8

6:00 - 7:30 PM

Chartwell's EMACS Conference Welcome Reception
Sponsored by Paymentus

DAY ONE: WEDNESDAY, OCT. 9

7:30 - 8:30 AM

Breakfast

8:30 - 9:25 AM

Keynote - Transmitting Excellence: Transforming Utility Customer Service the USAA Way

- Angela Alanis, Vice President of Property and Casualty Service, USAA
- Tom Grothues, CEO, Tom G. Consulting

9:25 - 10:10 AM

Customer-Centric Billing: Understanding and Adapting to Payment Trends

Moderator: Tara Mondelli, Vice President, Client Success, KUBRA

- Andy Schorn, Director Customer Revenue, CPS

10:10 - 10:25 AM

Networking Break

10:25 - 11:30 AM

Sponsor Spotlight: Oracle

Enterprise Transformation: Executive Perspectives on Navigating the Future Utility Landscape

Moderator: Tracie Boutte, Executive Advisor, Chartwell Inc.

- Gurb Hari, VP, Projects & Construction, ATCO
- Jody Allison, VP, Algonquin Power & Utilities/Liberty
- Michael Forrester, Senior Advisor, Department of Energy

11:30 AM - 12:00 PM

Team Networking Challenge

12:00 - 1:30 PM

Lunch

BREAKOUT 1

Evergy's Digital Evolution Journey with the Interactions IVA as a Full-Service Customer Engagement Tool

- Lindsay Washburn, Senior Digital Product Manager, Evergy
- Steve Hughes, Sr. Director, Utilities Practice, Interactions

BREAKOUT 2

Level Up Your Customer Service: A Roadmap to AI-Powered Modernization for Utilities

- Mike Dolloff, Chief Revenue Officer, InflowCX, an Amplix Company

BREAKOUT 3

Revolutionizing Customer Experience through Outage Insights

- Jason Howard, CEO, DataCapable
- Bill Potter, Executive Chairman, DataCapable
- Zac Canders, Co-founder, DataCapable
- Jennifer Neiswonger, Director, Customer Experience, Duquesne Light Company

1:30 - 2:15 PM

DAY ONE: WEDNESDAY, OCT. 9, CONT.

2:20 - 3:05 PM

BREAKOUT 1

Making a Difference: Strengthening Business Customer Relationships with Tailored Energy Solutions

Moderator: John Bord, Senior Consultant, Chartwell Inc.

- Tomaso Giannelli, Key Account Manager, Georgia Power
- Benjamin Jung, Business Liaison, CPS

BREAKOUT 2

LIHEAP Overview and Advocacy Outlook for 2024: Navigating Challenges in the Utility Sector

- Katrina Metzler, Executive Director, National Energy and Utility Affordability Coalition

BREAKOUT 3

Electrifying Transportation: Insights from Utility Leaders

Moderator: Karl Popham, Senior Consultant, Chartwell Inc.

- Amy Atchley, EV Equity Development Manager, Austin Energy
- Becky Whitman, Business Development Manager, Electric Vehicles & Charging, Ameren Missouri

3:05 - 3:35 PM

Networking Break

3:35 - 4:30 PM

Collaborative Roundtables: Solutions for Today's Utility Challenges

- Enhancing Customer Experience with AI and Machine Learning
- Innovative Self-Service Solutions for Utility Customers
- Strategies for Elevating Small Business Customer Satisfaction
- Equitable Payment Structures for Utility Customers
- Engaging Customers through Gamification and Incentives
- Comprehensive Support Strategies for Vulnerable Customers
- Driving EV Adoption through Strategic Programs and Partnerships
- Enhancing CX through Field Operations and Business Partner Training
- Optimizing VOC Programs and Customer Surveys for Actionable Insights
- Multicultural Marketing and CX: Strategies for Inclusive Engagement
- Building Strong Vendor Partnerships: Best Practices for Successful SLAs
- Optimizing IVR for Utilities: Enhancing Efficiency, Reducing Costs, and Improving Customer Experience

5:00 - 6:30 PM

EMACS Networking Reception
Sponsored by DataCapable

DAY TWO: THURSDAY, OCT. 10

7:30 - 8:30 AM

Breakfast

8:30 - 9:25 AM

Keynote - Rising Stronger Together: CPS Energy's Customer Satisfaction Journey

Moderator: Karl Popham, Senior Consultant, Chartwell Inc.

- Rudy Garza, President and CEO, CPS Energy
- DeAnna Hardwick, Chief Customer Strategy Officer, CPS Energy

9:25 - 10:10 AM

Personalize Customer Engagement: Table Stakes for Resilient Operations

- Michael Williams, Principal Manager – CED Operations, Southern California Edison
- Sandy Buzzard – Senior Product Manager, Duke Energy
- Maulik Datanwala, CEO, Message Broadcast
- Paul Watkins, Director, Product Management and Strategy, Message Broadcast

10:10 - 10:25 AM

Networking Break

10:25 - 11:30 AM

Sponsor Spotlight: GridX

The Future of Customer Experience: Executive Strategies for the Next Decade

Moderator: IS Dunklin, CEO, Chartwell Inc.

- Alex Chiang, VP Customer Solutions & Experience, Manitoba Hydro
- Robert Globocki, VP, Customer Experience and Billing Operations, Hydro One
- Timothy Davis, CCO, Memphis Light, Gas and Water

11:30 AM - 12:45 PM

Chartwell Best Practices Awards Luncheon

12:45 - 1:15 PM

Dessert with Solution Providers

1:15 - 2:00 PM



BREAKOUT 1

BGE's Strategic Outreach Provides Comprehensive Support to Vulnerable Customers

- Shawnita Johnson, Sr. Revenue Management Specialist, BGE



BREAKOUT 2

Evergy Incorporates Start-Service Functionality into IVA

- Lindsay Washburn, Senior Digital Product Manager, Evergy



BREAKOUT 3

PG&E Effectively Elevates Small Business Customer Satisfaction

- Alicia Romer, Sr. Manager, Small Business Engagement, Pacific Gas & Electric Company

DAY TWO: THURSDAY, OCT. 10, CONT.

		BREAKOUT 1		BREAKOUT 2		BREAKOUT 3
2:05 - 2:50 PM		<p>Enbridge Gas Uses Whimsy and Gamification to Collect Meter Read Recordings</p> <ul style="list-style-type: none"> Meghna Nath, Senior Advisor, Marketing, Enbridge Gas 		<p>Hydro One's Use of AI and Analytics Strengthens Customer Journey Blueprint</p> <ul style="list-style-type: none"> Jonathan Buckley, Senior Manager, Business Process and Change, Hydro One 		<p>Consumers Energy Equitably Restructures Card Payments</p> <ul style="list-style-type: none"> Brian Lewis, Executive Director of Customer Operations, Consumers Energy
2:50 - 3:20 PM		Networking Break				
		BREAKOUT 1		BREAKOUT 2		
3:20 - 4:05 PM		<p>Utility Survey Says: Featuring City of San Angelo</p> <ul style="list-style-type: none"> Petra Trevino, Manager, Customer Service, City of San Angelo, TX Matt Pritzel, AVP of Sales, InvoiceCloud 		<p>Battling Payment Fraud: Entergy's High-Tech Counterstrike</p> <ul style="list-style-type: none"> Leigh Ann Burt, Manager - Payment Processing - Integrated Customer Organization, Entergy Tarun Grover, Principal New Business Developer, ACI Worldwide Inc. 		
						
4:10 - 4:55 PM		<p>Orange and Rockland Uses Strategic and Inclusive Approach to Drive EV Adoption</p> <ul style="list-style-type: none"> Andrew Farrell, Director of E-Mobility, Orange and Rockland Utilities, Inc. 		<p>TEP Enhances Customer Payment Experience with Mobile Wallets</p> <p>Moderator: Vida Hotchkiss, Senior Consultant, Chartwell Inc.</p> <ul style="list-style-type: none"> Regina Rowden, Supervisor, Customer Care Remittance, Tucson Electric Power 		<p>Enhancing Outage Communications with Real-Time Customer Feedback and Benchmarking</p> <p>Moderator: Jennie King, Principal Consultant, Chartwell Inc.</p> <ul style="list-style-type: none"> Chance Kinnison, Systems and Programs Analyst, CPS Energy Arnold Santayana, Sr Manager, Enterprise Customer Experience, CPS Energy Ann Kinnard, Director, Customer Experience, CPS Energy
5:30 - 7:30 PM		THE MAIN EVENT Sponsored by Message Broadcast				

DAY THREE: FRIDAY, OCT. 11

7:30 - 8:30 AM

Breakfast

8:30 - 9:30 AM

Keynote - Beyond the Hype: Navigating Real-World Opportunities and Risks in Artificial Intelligence

- Jay Boisseau, Founder, Austin AI Alliance

9:30 - 10:00 AM

Balancing Today and Tomorrow: Building Product Roadmaps That Align Business, Customer, and Tech Priorities - a fireside chat

- Andrew Dalton, VP of Professional Services, Mindgrub
- Russ Henderson, Director of Research, Chartwell Inc.

10:00 - 10:15 AM

Networking Break

10:15 - 10:45 AM

Engaging Customers on Their Terms: Chartwell Insights on Consumer Expectations, Communication, and Resilience

- Casey Collins, Senior Research Analyst, Chartwell Inc.
- Ben Murdock, Senior Data Analyst, Chartwell Inc.

10:45 - 11:15 AM

Customer Experience Transformation: Navigating the Peaks and Valleys of Change

- Julie McGinnis, Director, Customer Experience & Engagement, ATCO Electric

11:15 - 12:00 PM

Closing the Knowledge Circuit: Opportunities and Challenges to Engage Customers in the Energy Transition

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

- Stacy Maloney, Director of Customer Experience, Portland General
- Brian Phillips, Director, Brand, Advertising, Customer and Digital Communications, LG&E & KU
- Julie McGinnis, Director, Customer Experience & Engagement, ATCO Electric

12:00 PM

**Closing Remarks
Adjourn**