

 Chartwell's

# EMACS

The Customer Experience Conference

## 2025 SCHEDULE

October 7-9, 2025 · Dallas, TX

TUESDAY, OCT. 7

7:30 AM - 5:00 PM

*Members & Invited Guests Only:*

**Chartwell's Leadership Council Meetings**

6:00 - 7:30 PM

**Chartwell's EMACS Conference Welcome Reception**

## DAY ONE: WEDNESDAY, OCT. 8

7:30 - 8:30 AM

Breakfast

8:30 - 9:30 AM

### **Keynote - Empowering Customers Through Digital Innovation: Oncor's Journey to Seamless Engagement**

- Joel Austin, Senior Vice President and Chief Digital Officer, Oncor Electric Delivery

9:30 - 10:15 AM

### **The Role of Fintech in CX: Practical Insights for Utilities**

- Jordan Khamra, Senior Vice President of Sales and Client Success, KUBRA

10:15 - 10:45AM

Networking Break

10:45AM - 12:00PM

### **Executive Panel: Navigating the Evolving Landscape of Utility Customer Expectations**

Moderator: Tracie Boutte, Executive Advisor, Chartwell Inc.

- Tricia Pridemore, Public Service Commissioner, State of Georgia
- Raed Adhami, Chief Innovation Officer, Convey

12:00 - 1:00 PM

Lunch

1:00- 1:45 PM

CUSTOMER EXPERIENCE TRACK	AFFORDABILITY TRACK	BUSINESS CUSTOMER TRACK	ELECTRIFICATION TRACK
<b>Strategic Digital Transformation Drives Call Reduction at Evergy</b> <ul style="list-style-type: none"> <li>• Dave Clauson, Director, Digital Strategy, Evergy</li> </ul>	<b>Session Details to be Announced</b>	<b>Best Practices in Serving your Largest C&amp;I and National Account Customers</b> <ul style="list-style-type: none"> <li>• Brad Haley, Senior Key Account Executive, Ameren Missouri</li> <li>• Tomaso Giannelli, Principal Key Account Manager, Georgia Power</li> </ul>	<b>Session Details to be Announced</b>

## DAY ONE: WEDNESDAY, OCT. 8, CONT.

	CUSTOMER EXPERIENCE TRACK	AFFORDABILITY TRACK	BUSINESS CUSTOMER TRACK	ELECTRIFICATION TRACK
1:50 - 2:35 PM	Session Details to be Announced	<b>Title- High-Tech Utility Fraud Attacks: Strategies to Detect and Defend</b> <ul style="list-style-type: none"> <li>• Speaker to be Announced</li> </ul>	Session Details to be Announced	Session Details to be Announced
2:40 - 3:25 PM	<b>Community Engagement Strategies for Utilities</b> Moderator: Dennis Goodman, Senior Consultant, Chartwell Inc. <ul style="list-style-type: none"> <li>• Jennifer-Christine Balneg, Supervisor STEM Education, SMUD</li> <li>• Anne Rickard, Director of Community Partnerships, SRP</li> <li>• Chris Hahn, VP, External Affairs, PSEG Long Island</li> </ul>	<b>How PSE Uses Energy Burden Data to Drive Affordability and Equity</b> <ul style="list-style-type: none"> <li>• Michael Wehling, Program Manager Energy Equity Data Analytics, PSE</li> <li>• Austin Phillips, Manager, Customer Insights, PSE</li> </ul>	<b>Build More Engaging Relationships with SMB Customers Through Communications and Outreach</b> <ul style="list-style-type: none"> <li>• Brandy Davis, Supervisor, Business Energy Solutions, PG&amp;E</li> </ul>	<b>Fleet Electrification: Utilities Leading the Charge</b> <ul style="list-style-type: none"> <li>• Maricela Carlos, eMobility Business Development &amp; Partnerships, SCE</li> <li>• Todd Cahill, Director, Support Services, SDG&amp;E</li> </ul>
3:30 - 4:00 PM	Networking Break			
4:00 - 4:45 PM	<b>Collaborative Roundtables: Solutions for Today's Utility Challenges</b> <ul style="list-style-type: none"> <li>• CX Personalization Through AI and Machine Learning</li> <li>• Chatbots, Self-Service, and Omnichannel Strategies</li> <li>• Proven VOC Strategies for 2025</li> <li>• Engaging Vulnerable Customers With Equity in Mind</li> <li>• Rate Increase Communications</li> <li>• Empowering Business Customers</li> <li>• Electric Vehicle Customer Journeys</li> <li>• Digital Engagement in Energy Efficiency Marketing</li> <li>• Customer Journey Playbooks</li> <li>• Billing and Payment Innovations</li> <li>• Employee Engagement and Retention in CX Roles</li> <li>• IVR Best Practices: Improving CX With Functionality, Usability, and Aesthetics</li> </ul>			
5:00 - 6:30 PM	<b>EMACS Networking Reception</b>			

## DAY TWO: THURSDAY, OCT. 9

7:30 - 8:30 AM

Breakfast

8:30 - 9:25 AM

**Excellence in Customer Transformational Leadership Award  
Keynote Presentation**

9:25 - 10:10 AM

**Real-Time Customer Engagement in the Age of Utility Disruption**

10:10 - 10:40 AM

Networking Break

10:40 - 11:40 AM

**From Noise to Clarity: Leveraging Data as a Strategic Asset**

Moderator: IS Dunklin, CEO, Chartwell Inc.

- Monica Whiting, Vice President, Customer Experience and Communications, APS
- Javier Fernandez, President & Chief Executive Officer, OPPD

11:40 AM - 1:00 PM

**Chartwell Best Practices Awards Luncheon**

1:00 - 1:30 PM

*Dessert with Solution Providers*

	<b>CUSTOMER EXPERIENCE TRACK</b>	<b>AFFORDABILITY TRACK</b>	<b>BUSINESS CUSTOMER TRACK</b>	<b>ELECTRIFICATION TRACK</b>
1:30 - 2:15 PM	<b>Hawaiian Electric Elevates Customer Service Through Employee Empowerment</b> <ul style="list-style-type: none"> <li>• Dr. Tanya Diaz-Chong, EdD, MAM, Manager, Customer Service Improvement, Hawaiian Electric</li> <li>• Laurel Brooks, Learning and Development Consultant, Hawaiian Electric</li> </ul>	<b>Billing and Payment Programs Award Presentation</b>	<b>PSEG Long Island Elevates Business Customer Experience</b> <ul style="list-style-type: none"> <li>• Veronica Isaac, Manager, Customer and Community Partnerships, PSEG Long Island</li> <li>• Michelle Somers, Marketing Manager, PSEG Long Island</li> </ul>	<b>Electric Vehicle Programs Award Presentation</b>
2:20 - 3:05 PM	<b>PECO's Energy Efficiency Awareness Addresses "The Elephant in the Room"</b> <p>Alana Shaw, Manager, Marketing Promotions, PECO</p>	<b>Know Your Costs to Cut Through Complexity, Boost Savings!</b> <ul style="list-style-type: none"> <li>• Nicole Haskins, Vice President of Sales and Marketing, Paymentus</li> </ul>	<b>Session Details to be Announced</b>	<b>Session Details to be Announced</b>

## DAY TWO: THURSDAY, OCT. 9, CONT.

3:10 - 3:40 PM

Networking Break

3:40 - 4:25 PM

### CUSTOMER EXPERIENCE TRACK

#### AI in Action: PG&E's AI Voice Assistant Revolutionizing Customer Interactions

- Kristin Punter, Sr. Director, Customer Service Outreach & Strategic Workforce Management, PG&E
- Matt Vaccarezza, Sr. Manager, Customer Technology Enterprise Call Routing, IVR & Reporting, PG&E

### AFFORDABILITY TRACK

#### Transforming Utility Payments: Enhancing Accessibility and Support

- Moderator: Pat Ricks, Senior Advisor, Chartwell Inc.
- Kasey Dill, CX Solutions Program Owner, APS
  - Raymond Joseph, Billing & Payments Section Manager, Customer Operations, Con Edison
  - Paul Applegate, VP, Alliances and Business Development, InvoiceCloud

### BUSINESS CUSTOMER TRACK

#### Improving Digital Experience for Business Customers

- Moderator: Jennie King, Principal Consultant, Chartwell Inc.
- Treena Mason, Customer Experience and Strategic Operations Leader, Entergy
  - Nichelle Hall, Key Accounts Program Manager, SnoPUD
  - Scott Engstrom, CCO, GridX

### ELECTRIFICATION TRACK

#### EV Grid Integration: How Will We Power the EV Revolution?

- Moderator: Karl Popham, Senior Consultant, Chartwell Inc.
- Panelist To Be Announced

4:30 - 5:15 PM

### Digital Experience Award Presentation

### Serving Vulnerable Customers Award Presentation

### Utilizing a CRM to Improve Service for Business Customers

- Justin Partee, Manager, Sales & Economic Development, Connexus Energy
- Josh Richards, Supervisor, Business Customer Center, SRP

### Session Details to be Announced

5:45 - 8:30 PM

EMACS Main Event at Gilley's Dallas

