



Conferences
By
MONTICELLO

2022

Annual UTILITIES CREDIT & COLLECTIONS SYMPOSIUM

March 21–23, 2022—Virtual Event

Learn, Network and be Inspired at the 2022 Symposium



2022

ANNUAL UTILITIES CREDIT & COLLECTIONS SYMPOSIUM

MARCH 21-23, 2022
VIRTUAL EVENT



Virtual Event

Conferences By Monticello's Annual Utilities Credit & Collections Symposium is the premier educational event for utility industry credit and collections professionals. We invite and encourage utility company vice presidents, directors, managers, supervisors, analysts and other industry professionals to attend.

The Symposium starts on Monday, March 21, 2022 at 12:00 pm—don't miss the Utility-Only Roundtable Discussions. Register early!

Learn from utility company case-studies, including the following topics:

- Process improvement and change-management
- Collection and bad-debt reduction strategies
- New collection technologies strategies

Three half-days of learning conducted by utility company speakers! Hear case studies, interact in panel discussions and join with credit and collection leaders. Some of recent participants:

- Florida Power & Light
- ComEd
- FirstEnergy
- Ameren Missouri
- Consolidated Edison
- DTE Energy
- UGI Utilities Inc.
- CenturyLink
- Alliant Energy
- Black Hills Energy
- Washington Gas Company
- Portland General Electric
- ONE Gas



FULL EVENT SCHEDULE AT A GLANCE

All times Eastern Time, all sessions online

Monday
March 21st

- 11:30 Attendees Login to Lobby—review daily schedule and messages
- 11:30 – 12:00 Expo and Sponsor Showcase
- 12:00 – 12:15 Attendees Login and Welcome
- 12:15 – 12:30 Conference Kickoff and Platform Overview
- 12:30 – 1:30 Economic Outlook: Amy Crew Cutts, AC Cutts and Associates LLC
- 1:30 – 2:00 Expo & Sponsor Showcase
- 2:00 – 2:15 Speed Networking 1:1 Video Conversations
- 2:15 – 3:30 Moderated Roundtable Sessions (Utilities Only)
- 3:30 – 4:00 Expo and Sponsor Showcase
- 4:00 – 5:00 Case Study: Mitch Carmosino, Duke Energy Corp. & Christoph Turner, ONLINE
- 5:00 – 6:00 Networking Reception—Sponsorship opportunity

Tuesday
March 22nd

- 11:30 Attendees Login to Lobby—review daily schedule and messages
- 11:30 – 12:00 Expo and Sponsor Showcase
- 12:00 – 12:15 Conference Day 2 Kickoff and Opening Remarks
- 12:15 – 1:15 Case Study: Joe Duggan, ConEd and Kathleen Maley, Experian
- 1:15 – 1:30 Speed Networking 1:1 Video Conversations
- 1:30 – 2:30 Case Study: Justin Good, FirstEnergy
- 2:30 – 3:00 Expo and Sponsor Showcase
- 3:00 – 4:00 Moderated Roundtable Sessions (Utilities Only)
- 4:00 – 5:00 Case Study: Christy Barone, PSEG New Jersey

Wednesday
March 23rd

- 11:30 Attendees Login to Lobby—review daily schedule and messages
- 11:30 – 12:00 Expo and Sponsor Showcase
- 12:00 – 12:15 Conference Day 3 Kickoff and Opening Remarks
- 12:15 – 1:15 Case Study: Jacqueline Kunkel, Exelon
- 1:15 – 1:30 Speed Networking 1:1 Video Conversations
- 1:30 – 2:30 Case Study: Laura Rosenthal, NiSource
- 2:30 – 3:00 Expo & Sponsor Showcase
- 3:00 – 4:00 Panel Discussion: Duke Energy, NiSource, and ConEd
- 4:00 – 4:30 Conference Wrap-Up and Giveaways

Note: Agenda subject to change



EXPO HALL SCHEDULE AT A GLANCE

All times Eastern Time, all sessions online

Monday
March 21st

11:30 – 2:00

Expo and Sponsor Showcase—Booths Open

3:30 – 4:00

Expo and Sponsor Showcase—Booths Open

Tuesday
March 22nd

11:30 – 3:00

Expo and Sponsor Showcase—Booths Open

Wednesday
March 23rd

11:30 – 3:00

Expo and Sponsor Showcase—Booths Open

Note: Agenda subject to change



Click logos for more information

Platinum Sponsors

REMITTER



Gold Sponsors



Silver Sponsors



Bronze Sponsors





Note: Agenda subject to change

Agenda: Monday, March 21, 2022

11:30 ET **Attendees Login to Lobby—review daily schedule and messages**

11:30–12:00 **Expo and Sponsor Showcase**

Expo: Attendees can visit the Expo area and learn about relevant products and resources from our sponsors. Participants can “walk-around” to visit the booths and interact with the sponsors in a dedicated Booth video chat.

Note: Expo Hall will remain open until 2:00 pm; and re-opens at 3:30 pm (runs concurrently with event)

12:00–12:15 **Attendees Login and Welcome**

12:15–12:30 **Conference Kickoff and Platform Overview**

12:30–1:30 **Keynote Session: Economic Outlook**

Economic
Outlook

This session examines the current economic conditions and considers important topics affecting your businesses over the coming year, including inflation, interest rates, supply chains, and consumer and small business financial health.

- Amy Crew Cutts, President at AC Cutts and Associates LLC

1:30–2:00 **Expo and Sponsor Showcase**

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2:00–2:15 **Speed Networking 1:1 Video Conversations**

Networking:

It's personal, it's fun, and it's smooth! Speed networking is a one-to-one, roulette-style networking feature that randomly pairs attendees, like an experience on FaceTime or Hangouts, where two people connect over a direct video call. Just click the Join button, then the system will search for someone else who has also clicked the Join button. If someone else is available, the person's profile details show up on the screen for some seconds and then the two are matched instantly and the video chat begins.



Agenda: Monday, March 21, 2022

2:15 – 3:30

Moderated Roundtable Sessions (utilities only)

Utilities-Only
Session

Open discussion on billing, credit, collections, arrearage, and debt recovery management issues and strategies. Discussion will include best practices and solutions for achieving process and performance.

Moderators:

- *Tiffany Dennison, Vice President of Revenue Services and Metering at Duke Energy Corporation*
- *Joe Duggan, Manager, Credit & Collections at Consolidated Edison*
- *Maribel Ellison, Manager of Credit & Collections at Orlando Utilities Commission*
- *Alan Michel, Director, Revenue Operations at FirstEnergy Corp.*

3:30 – 4:00

Expo and Sponsor Showcase

Expo:

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4:00 – 5:00

Creating an Efficient “Move In” Application Process

Case-Study:
move-in
process
strategies

Duke Energy, along with ONLINE, developed an enhanced new customer move-in process that mitigates interruptions to customers starting a new service. Mitch Carmosino and Christoph Turner will discuss the innovative process, tools, and self-service efficiencies that reduce back-office work, enhance the customer’s experience, and assist in Red Flag reporting.

- *Mitch Carmosino, Accounts Receivable Director at Duke Energy*
- *Christoph Turner, Director of Sales and Marketing at ONLINE*

5:00 – 6:00

Networking Reception—Hosted by: **REMITTER**

Networking
Reception



Agenda: Tuesday, March 22, 2022

11:30 ET **Attendees Login to Lobby—review daily schedule and messages**

11:30–12:00 **Expo and Sponsor Showcase**

Expo: Attendees can visit the Expo area and learn about relevant products and resources from our sponsors. Participants can “walk-around” to visit the booths and interact with the sponsors in a dedicated Booth video chat.

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12:00–12:15 **Conference Day 2 Kickoff and Opening Remarks**

12:15–1:15 **Consolidated Edison’s New Strategy to Assess Customer Risk by Blending Internal and External Data**

Case-Study:
scoring and
account
prioritization
strategies

ConEd, along with the help of Experian, is deploying a new strategy to blend internal customer behavioral data with external consumer credit data to better evaluate risk and prioritize accounts for field disconnection. Joe Duggan will discuss the new strategy and how the combined score provides a 50% lift over business as usual.

-*Joseph Duggan, Manager, Credit & Collections, Consolidated Edison*

-*Kathleen Maley, Vice President, Analytics, Product Management Decision Analytics at Experian North America*

1:15–1:30 **Speed Networking 1:1 Video Conversations**

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1:30–2:30 **Engaging Customers and Increasing Collections with Digital Collection Strategies**

Case-Study:
digital
collections
strategies

FirstEnergy has utilized digital collection strategies to achieve a significant increase in collections. The Company has partnered with industry solution providers that utilize AI to understand how to communicate with customers and change messaging. Justin Good will review how the technology works, the ROI for the project, and future plans for automating manual steps.

-*Justin Good, Manager, Revenue Operations - Pennsylvania at FirstEnergy*



Agenda: Tuesday, March 22, 2022

2:30–3:00

Expo and Sponsor Showcase

Expo:

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3:00–4:00

Moderated Roundtable Sessions (utilities only)

Utilities-Only
Session

Open discussion on billing, credit, collections, arrearage, and debt recovery management issues and strategies. Discussion will include best practices and solutions for achieving process and performance.

Moderators:

- *Tiffany Dennison, Vice President of Revenue Services and Metering at Duke Energy Corporation*
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- *Maribel Ellison, Manager of Credit & Collections at Orlando Utilities Commission*
- *Alan Michel, Director, Revenue Operations at FirstEnergy Corp.*

4:00–5:00

Practical Ways to Forecast Bad-Debt and Write-Off Reserve Calculations

Case-Study:
Forecasting
bad-debt

Christy Barone will detail how she calculates and forecasts Accounts Receivable and future bad debt at PSEG New Jersey, including modifications due to the Pandemic. She will review how the elimination of shut-off activity has impacted final bills and write-offs.

- *Christy Barone, Manager Collection Operations at PSEG New Jersey*



Agenda: Wednesday, March 23, 2022

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11:30–12:00 **Expo and Sponsor Showcase**

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12:00–12:15 **Conference Day 3 Kickoff and Opening Remarks**

12:15–1:15 **Outside Collection Agency Management Overview**

Case-Study:
Agency
Management

Exelon has one of the largest collection agency management operations in the U.S. utility industry. The six Exelon operating companies, ComEd, PECO Energy, BG&E, Pepco, Delmarva Power, Atlantic City Electric, place accounts with multiple agencies in various tiers. Jackie Kunkel will discuss her operation and management of the agencies, including the RFP (i.e., Request for Proposal) process, agency selection and de-selection, performance metrics, and internal staffing.

-*Jacqueline Kunkel, Manager, Credit Risk at Exelon*

1:15–1:30 **Speed Networking 1:1 Video Conversations**

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1:30–2:30 **NiSource's New Coordinated and Enhanced Customer Programs Designed to Improve Customer Satisfaction**

Case-Study:
Customer
Programs

Before the Pandemic, many of NiSource's customer programs, such as payment plans, budget billing, energy efficiency, and energy assistance, were managed in silos. Laura Rosenthal will discuss how NiSource redesigned and enhanced these programs and coordinated the management and promotion to improve customer satisfaction.

-*Laura Rosenthal, Director, Meter Reading, Collections & Revenue Recovery at NiSource*

Agenda: Wednesday, March 23, 2022

2:30–3:00 **Expo and Sponsor Showcase**

Expo:

Attendees can visit the Expo area and learn about relevant products and resources from our sponsors. Participants can “walk-around” to visit the booths and interact with the sponsors in a dedicated Booth video chat.

4:00–5:00 **Panel Discussion on Hot Topics Facing the Utility Industry**

Case-Study:
Customer
Programs

- *Alan Michel, Director, Revenue Operations at FirstEnergy Corp*
- *Laura Rosenthal, Director, Meter Reading, Collections & Revenue Recovery at NiSource*
- *Joseph Duggan, Manager, Credit & Collections, Consolidated Edison*

4:00–4:30 **Conference Wrap-Up and Giveaways**

SUPPORTING ORGANIZATIONS



(click logos for more information)

REGISTRATION INFORMATION

Registration Fees

- Utility Company registration (single connection): \$749
- Commercial registration (i.e., industry solution provider, single connection): \$1,049
- Sponsors, please contact us for opportunities

The registration fee includes all sessions March 21-23, 2022. All sessions conducted online. All attendees will connect and attend from their computer, one connection per purchase.

Group Discounts

Multiple registrants from the same company qualify for a team discount. Please see the website or registration form for details, or contact us at 843-277-1620. No discounts on commercial registrations.

General Registration Information

Ways to register:

1. Direct link to [Online Registration Form](#)
2. Go to [website](#)
3. Call us at 843-277-1620
4. Complete the [Registration Form](#) and email

Payments accepted include VISA, MasterCard, American Express, Discover, PayPal.

Virtual Event Platform

The online virtual event platform is Hopin. Hopin is the world's leading all-in-one virtual event platform with multiple interactive areas that are optimized for connecting and engaging. Attendees can move in and out of rooms just like an in-person event and enjoy the content and connections created for them.

The latest versions of Chrome or Firefox guarantee the best experience. Please avoid Brave, Safari, Microsoft Internet Explorer or Edge since these browsers lack the modern web technologies support necessary for online events to run in a web browser. Please sign in approximately 15 minutes before the start of the event.

- Prior to the event, we will schedule weekly test sessions so participants can verify access and familiarity with the Hopin platform
- We will provide a website link to access all event resources, including a Help Desk
- All sessions are recorded and will be available in near real-time during the event, eliminating the chance of missing any of the content

Substitutions and Cancellations

Registrations may be transferred to other members of the same company. Cancellation requests must be received in writing by Friday, March 11, 2022 in order to process a refund, less a \$50 administration fee. Conferences By Monticello's liability is limited to refund of the conference registration fee only. For more information, please contact us at 843-277-1620.

Sponsorship Opportunities

For sponsorship opportunities, please contact Marilyn Gay at 843-277-1620 or email her at Marilynn@conferencesbymonticello.com