Learn, Network and be Inspired at the 2024 Symposium

Conferences By MONTICELLO

2024 Annual Utilities Credit & Collections Symposium

March 18–20, 2024
Hyatt Regency Coral Gables
Miami-Coral Gables, Florida

Symposium Brochure

2024
ANNUAL UTILITIES CREDIT & COLLECTIONS SYMPOSIUM

MARCH 18-20, 2024
MIAMI-CORAL GABLES, FLORIDA

Hyatt Regency Coral Gables, Miami, FL

Welcome to Conferences By Monticello's Annual Utilities Credit & Collections Symposium, the pinnacle of educational events for credit and collections professionals within the utility industry. We invite vice presidents, directors, managers, supervisors, analysts, and other dedicated professionals from utility companies to join us.

In addition to utility industry experts, this symposium offers an unparalleled opportunity for industry vendors and solution providers to engage with and support the utility community. Your expertise and solutions are vital in advancing the sector, and we encourage your active participation.

Our symposium unfolds in the heart of Miami, Florida, at the Hyatt Regency Coral Gables. This splendid venue is located within the vibrant "Beverly Hills of Miami," a stone's throw away from the Art Deco District and Miracle Mile's upscale boutiques and dining establishments.

Embrace the opportunity to explore the enchanting surroundings of Key Biscayne, the vibrant ambiance of Miami Beach, or the artistic allure of Coconut Grove and the galleries at the Village of Merrick Park.

We encourage you to arrive early for those eager to soak up the Florida sunshine. Our symposium officially commences on **Monday, March 18, 2024, at 1:30 p.m.**, featuring the unmissable Utility-Only Roundtable Discussions. We recommend that you register early.

Prepare to gain invaluable insights from the real-world experiences of utility companies. Over two full days, immerse in a dynamic learning environment led by seasoned utility company speakers. Engage with captivating case studies, participate in thought-provoking panel discussions, and connect with credit and collection industry leaders.

SCHEDULE AT A GLANCE

Monday
March 18, 2024

1:30–4:30	Symposium Registration
2:00–4:45	Moderated Roundtable Sessions (Utilities Only): Jeff Koenig, National Grid and Kim Soreil, PSEG Long Island
3:15–3:45	Afternoon Refreshment & Networking Break
5:15–6:45	Cocktail & Networking Reception

Tuesday
March 19, 2024

7:30–8:30	Registration and Networking Breakfast—Hosted by NRA
8:30–8:40	Symposium Kick-Off
8:40–9:10	Opening Welcome: Yadelene Braswell and Mark Schweiger Florida Power & Light Company
9:10–10:00	Case Study: Christy Barone, PSE&G New Jersey
10:00–10:30	Morning Refreshment and Networking Break
10:30–11:15	Case Study: Joe Duggan, ConEd and Patrick Carberry, Bottom Line Impact
11:15–12:00	Case Study: Laura Stroman, Tucson Electric Power
12:00–1:00	Group Luncheon—Hosted by Eastern Account System, Inc.
1:15–2:00	Case Study: Joe Duggan, ConEd and Matt Buffalini, Remitter USA
2:00–2:45	Panel Discussion: Jeffrey Koenig, National Grid; Joe Duggan, Consolidated Edison, and Michael Sedlak, PSEG Long Island
2:45–3:15	Afternoon Refreshment & Networking Break—Sponsored by EXL
3:15–4:45	Utilities Only Session: Mimi Kelly, LG&E and KU Energy and Christy Barone, PSE&G New Jersey
5:15–6:45	Cocktail & Networking Reception

Wednesday
March 20, 2024

7:30–8:30	Registration and Networking Breakfast—Hosted by Teleperformance
8:30–9:15	Case Study: Adam D'Amato, National Grid
9:15–10:00	Case Study: Kim Soreil and Michael Sedlak, PSEG Long Island
10:00–10:30	Morning Refreshment and Networking Break—Sponsored by EXL
10:30–11:15	Case Study: Jacqueline Kunkel, Manager, Exelon Corporation
11:15–12:00	Case Study: Mimi Kelly, LG&E and KU Energy
12:00	Symposium Concludes

The Agenda is subject to change. All speakers confirmed

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Agenda is subject to change. All speakers confirmed, unless noted.

Agenda: Monday, March 18, 2024

1:30–4:30 Registration for Pre-Symposium Workshop and Symposium

2:00–4:45 **Pre-Symposium Workshop**

Interactive Session

Utility-Only Round Table Discussions

Utility company participants will have the opportunity to join a group. Each group (i.e., round table discussion) will focus on one of the following topics:

- Final Bill Collections
- Collection Agency Management
- Trends in payment plans
- Management of outside collection agencies
- Digital communication and collection strategies
- Open discussion

Moderators:

- *Jeffrey Koenig, Director, Collections and Payment Processing at National Grid*
- *Kim Soreil, Manager Back Office Collections at PSEG Long Island*

3:15–3:45 Afternoon Refreshment & Networking Break

5:15–6:45 Cocktail & Networking Reception

Agenda: Tuesday, March 19, 2024

7:30–8:30 Registration and Networking Breakfast—**Hosted by:**

8:30–8:40 **Welcoming Remarks and Symposium Kick-Off**

8:40–9:10 **Commencement and Keynote Address**

Keynote Address

Join us as Yadelene Braswell and Mark Schweiger kick off the event with a brief introduction to the highlights and experiences awaiting you in Coral Gables, our host city. Gain valuable insights into the various attractions and activities available during your stay. Moreover, delve into an informative discussion on the Florida Power & Light Company, focusing on its credit and collection department. Explore the company's pivotal role in the utility industry and its significant impact on the local community.

- *Yadelene Braswell, Senior Manager Strategic Initiatives & Analytics at Florida Power & Light*

- *Mark Schweiger, Senior Business Analyst at Florida Power & Light*

9:10–10:00 **Beyond Predictions: Transformative Insights from PSE&G's Next Best Action Deployment**

Case-Study: Next Best Action (NBA)

Join Christy Barone, Manager of Credit and Collections at PSE&G, for an insightful session on the impactful Next Best Action (NBA) Deployment. Learn firsthand how PSE&G is revolutionizing customer engagement by replacing traditional behavioral scoring models with NBA. Christy will delve into innovative strategies for informed decision-making, optimized customer relationships, and enhanced collections. Key Highlights:

- Discover how the NBA enables real-time decision-making, dynamically adjusting recommendations for unfolding customer interactions.
- Delve into the multi-channel approach, including the strategic use of SMS campaigns, ensuring a seamless and integrated customer experience.
- Understand how PSE&G aligns NBA initiatives with overarching goals, emphasizing improved satisfaction and operational efficiency.

Christy will demonstrate NBA's predictive analytics, showcasing its power to anticipate and personalize customer interactions. Gain valuable insights into PSE&G's customer-centric approach, addressing past-due balances and enhancing utility sector engagement. Take advantage of this chance to learn from an industry expert and gain practical takeaways and understanding of NBA's transformative impact.

- *Christy Barone, Manager of Credit and Collections at PSE&G*

10:00–10:30 Morning Refreshment and Networking Break

10:30–11:15 **Unlocking Hidden Revenue: The ConEd and Bottom Line Impact Success Story**

Case-Study: balance transfers

Joe Duggan, Manager of Credit and Collections at ConEd, and Patrick Carberry, Founder and President of Bottom Line Impact, will present a transformative collaboration that significantly improved ConEd's financial performance.

During the session, you'll learn how ConEd, under Joe Duggan's strategic guidance, partnered with Patrick Carberry's Bottom Line Impact to improve its financial performance. The Automated Revenue Miner, an advanced CIS-independent tool featuring proprietary algorithms, was the centerpiece of this success story.

The session will explore how the collaboration enabled ConEd to identify inactive customers with outstanding debts from closed accounts and match them to active accounts, resulting in significant reductions in write-off expenses. It will also highlight the pivotal role of balance transfers in this process. Attendees will learn about the tangible impact on ConEd's bottom line and valuable insights into strategies and measurable financial results.

- *Joe Duggan, Manager of Credit and Collections at ConEd*

- *Patrick Carberry, Founder and President at Bottom Line Impact*

11:15–12:00 **Empowering Low-Income Customers: Collaborative Strategies for Arrears Management**

Case-Study: collaborative arrearage strategies

Laura Stroman, Credit and Collections Supervisor II at Tucson Electric Power, will present an overview on key strategies and programs to assist low-income customers in arrears, emphasizing effective coordination between the credit and collections area and the Special Plans Group. The key points include:

- Coordination for Impact: Gain insights into Tucson Electric Power's successful coordination efforts between credit and collections and the Special Plans Group. Learn how this collaboration optimizes the identification and application of financial assistance to customers in need.
- Tailored Financial Assistance Programs: Explore innovative financial assistance programs implemented by Tucson Electric Power to support low-income customers facing arrears. Understand how these programs address the specific challenges of economically vulnerable individuals and families.
- Best Practices for Success: Delve into the best practices employed by Tucson Electric Power in managing accounts of customers in arrears. Discover practical strategies that balance the company's financial considerations and its commitment to social responsibility.

This session explores the link between utility credit, collections, and supporting low-income customers. Attendees will gain insights into coordination strategies, tailored assistance programs, and best practices for financial inclusion in the utility industry.

- *Laura Stroman, Credit and Collections Supervisor II at Tucson Electric Power*

12:00 – 1:00 Group Luncheon—**Hosted by:** EASTERN

1:15 – 2:00 **Advancing Credit and Collections through AI-powered Innovation: A Case Study with ConEd and Remitter**

Case-Study: AI Innovation

Join Joe Duggan, Manager of Credit and Collections at ConEd, and Matt Buffalini, Senior Vice President of Sales at Remitter USA Inc., as they explore the strategic deployment of cutting-edge AI-powered technology in the credit and collections process. In this session, ConEd will provide a comprehensive overview of how it is crucial in enhancing their credit and collections operations, resulting in improved recoveries and operational efficiency.

Explore critical insights, including the following:

Strategic Deployment of Intelligent Automation: Understand how ConEd strategically implements AI-powered digital communication technology to optimize the credit and collections processes.

Enhanced Operational Efficiency: Learn how Remitter technology contributes to increased recoveries and operational efficiency in ConEd's credit and collections operations.

Leveraging Remitter's AI-Enriched Platform: Delve into ConEd's journey of using Remitter's platform, enriched with artificial intelligence, to personalize customer experiences within the collections landscape.

Personalized Customer Journeys: Gain valuable insights into how ConEd tailors individualized customer journeys to enhance communication and streamline payment processes.

Practical Case Study: Explore ConEd's experience as an empirical case study, offering actionable takeaways for industry peers interested in adopting advanced intelligent solutions in their credit and collections strategies.

This session provides a detailed exploration of the transformative potential of AI-powered digital communications in credit and collections. Don't miss the opportunity to learn from real-world experiences and gain practical insights into the evolving landscape of credit and collections processes.

- *Joe Duggan, Manager of Credit and Collections at ConEd*
- *Matt Buffalini, Senior Vice President of Sales at Remitter USA, Inc.*

2:00 – 2:45 **Panel Discussion on Digital Collections, Handling Medically Protected Customers and Meter Pre-Pay Programs**

Panel Discussion:

Panelists:

- *Jeffrey Koenig, Director, Collections and Payment Processing at National Grid*
- *Joseph Duggan, Manager, Credit & Collections, Consolidated Edison*
- *Michael Sedlak, Sr. Customer Operations Supervisor – Back Office Collections at PSEG Long Island*

2:45 – 3:15 Afternoon Refreshment & Networking Break—**Sponsored by:** EXL

3:15 – 4:45 **Utilities Only Session: open discussion on credit, collections, debt recovery and account management**

Utility Companies Only: open discussion

Discussion will include best practices and solutions for achieving process and performance improvement. Utilities will have an opportunity to submit questions and topics for open discussion.

Session Moderators:

- *Mimi Kelly, Acting Director of Revenue Integrity at LG&E and KU*
- *Christy Barone, Manager of Credit and Collections at PSE&G*

5:15 – 6:45 Cocktail & Networking Reception

Agenda: Wednesday, March 20, 2024

7:30–8:30 Registration and Networking Breakfast—**Hosted by:** Teleperformance

8:30–9:15

Case-Study: SMS technology and strategies

Revolutionizing Collections: National Grid's SMS Success

Adam D'Amato, Manager of Residential Collections at National Grid, will discuss the game-changing implementation of outbound SMS collection campaigns via Marketing Cloud Software in December 2023. Facing TCPA restrictions, the team leveraged text messaging as a powerful alternative communication channel, resulting in three targeted campaigns: Current Bill Reminder, Defaulted Payment Agreements, and Target Arrears Customers.

The SMS tool achieved remarkable success, collecting payments from 4 out of every ten customers contacted. Gain insights into the strategic decisions, key metrics, and lessons learned from National Grid's journey, offering valuable takeaways for credit and collections professionals navigating the evolving landscape, including:

- Overview of Outbound SMS Collection Campaigns
- Challenges and Alternatives: Navigating TCPA Restrictions
- Strategic Approach: Targeted Campaigns (Current Bill Reminder, Defaulted Payment Agreements, Target Arrears Customers)
- Rapid Success: 40% Hit Rate, 20% Liquidation, $13M in AR collected, and only a 0.6% Customer Opt-Out Rate

- *Adam D'Amato, Manager of Residential Collections at National Grid*

9:15–10:00

Case-Study: arrearage reduction strategies

Tailoring Arrears Reduction Strategies: Insights from PSEG Long Island

Reducing arrears represents a critical challenge in utilities management, yet there needs to be more than a one-size-fits-all solution. At PSEG Long Island, we've embarked on a journey to implement diverse techniques and strategies to mitigate arrears effectively. Our approach emphasizes the importance of flexibility, data-driven decision-making, and fostering strong collaborative relationships across various teams. In this speaking session, we will delve into the specifics of our journey, highlighting key strategies, challenges faced, and lessons learned along the way. Attendees can expect actionable insights on tailoring arrears reduction efforts to their unique organizational contexts, leveraging data insights and interdepartmental collaboration to drive tangible results, including:

1. Leveraging Data for Informed Decision-Making
2. Building Collaborative Relationships
3. Results and Lessons Learned

In this session, attendees will acquire valuable insights into how they can tailor arrears reduction strategies to suit their organizations' specific needs and circumstances, exploring these approaches.

- *Kim Soreil, Manager Back Office Collections at PSEG Long Island*

- *Michael Sedlak, Sr. Customer Operations Supervisor – Back Office Collections at PSEG Long Island*

10:00–10:30 Morning Refreshment and Networking Break—**Sponsored by:** EXL

10:30–11:15

Case-Study: collection agency management

The Anatomy of Recovery: Metrics, Segmentation, and Settlements

In this session, Jacqueline Kunkel from Exelon Corporation will delve into crucial aspects of Third-Party Agency Management, focusing on critical elements such as Metrics, Risk Assessment, Inventory Management, and Settlements.

- **Metrics:** Explore the comprehensive Agency Metrics categorized by Tier and Operating Company. Learn how these metrics provide valuable insights and aid in gauging the performance and effectiveness of third-party agencies.
- **Assessing and Segmenting Accounts by Risk:** Gain insights into Exelon's strategies to evaluate and segment accounts based on risk. Understand how this segmentation approach enhances the precision of recovery efforts and allows for targeted actions on high-risk accounts.
- Dealing with Large Inventory Placements: Address the challenges and solutions of managing prominent inventory placements. Discover effective methods Exelon employs to handle sizable portfolios and optimize the recovery process.
- **Settlement Strategies:** Delve into the settlement procedures implemented by Exelon in the context of third-party collections. Explore how these procedures contribute to resolving unpaid balances on inactive accounts, ensuring a streamlined and efficient process.

Join us for a comprehensive exploration of Third-Party Agency Management, where you will gain valuable insights into the intricacies of metrics, risk assessment, inventory handling, and settlements within Exelon Corporation's credit risk management framework.

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

11:15 – 12:00

Case-Study: AMI Implementation

Remote Control: A Comprehensive Exploration of LG&E and KU's AMI Implementation

Join Mimi Kelly, Acting Director of Revenue Integrity at LG&E and KU, in a dynamic session where she will present a compelling case study on the impact of implementing Advanced Metering Infrastructure (AMI). Highlights include:

- Meter Inventory and Deployment: Discover strategies for optimizing meter tracking and deployment processes.
- **Meter Data:** Gain insight into analyzing the data provided by the new technology.
- **Billing:** Explore how AMI impacted billing accuracy, efficiency, and error tracking.
- **Remote Disconnections:** Learn about implementing remote disconnection features' operational benefits and challenges.
- **Staffing and Workforce Development:** Understand the shifts in staffing requirements and strategies for workforce planning during technological transitions.
- **Collections Management:** Delve into the effects of AMI on collections processes and financial outcomes.

Take advantage of this opportunity to gain practical insights and best practices from LG&E and KU's AMI integration project, offering valuable takeaways for utilities aiming to enhance operational efficiency and revenue integrity.

- *Mimi Kelly, Acting Director of Revenue Integrity at LG&E and KU*

12:00 Symposium Concludes

SUPPORTING ORGANIZATIONS

AGA American Gas Association

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(click logos for more information)

HOTEL INFORMATION

Hyatt Regency Coral Gables, Miami-Coral Gables, FL

50 Alhambra Plaza, Coral Gables, Florida, USA, 33134

- Reservations by phone, call 1-888-421-1442
- The direct number is 305-441-1234
- Room rate is $335 single or double occupancy, plus applicable taxes
- Hotel cut-off date for group rate is Monday, February 26, 2024

Please indicate that you are with the Conferences by Monticello's "Utility Credit & Collections Symposium" to receive the group rate. There are a limited number of rooms available at the conference rate. Please reserve your room early!

▸ Click for direct link to group reservation block

Directions:

Hyatt Regency Coral Gables is minutes from Miami Beach, and a short drive or trolley ride from Miami's favorite attractions.

Miami International Airport–4 miles/15 minutes

Ft. Lauderdale Airport–29 miles/40 minutes

REGISTRATION INFORMATION

Utility Company and Creditor Registration Fees

Utility Company registration: $1,295.

The registration fee includes breakfast, luncheon, reception(s), refreshments and post-conference proceedings and speaker presentation packages.

General Registration Information

1. Register now using the Online Registration Form to secure your spot.
2. Or you may call us at 843-277-1620.

- **Team discounts** are available. Explore team discounts on our Website and the online registration form or you can contact us at 843-277-1620.
- A PDF version of the Registration Form is available for download. Please email the form to marilynn@conferencesbymonticello.com
- Payments accepted include VISA, MasterCard, American Express, Discover, PayPal

Commercial/Non-Utility Company Registration

Industry solution providers and vendors must sponsor to attend. Please get in touch with us for sponsorship opportunities.

Substitutions and Cancellations

Cancellation Policy: If you need to cancel, please submit your request in writing by Friday, March 1, 2024, to be eligible for a refund. Please note that a $195 administration fee will be deducted from your refund. You can transfer your registration to another member within your company. Conferences By Monticello's liability is limited to the refund of the conference registration fee. For further assistance or inquiries, please don't hesitate to contact us at 843-277-1620.

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