Utility Training By MONTICELLO

LIVE ONLINE COURSE

Mastering Utility Final Bill Collections

Assess Recovery Performance, Redesign Treatment Strategy, and Reduce Write-Off Exposure



January 13 and 20, 2027

10:30 AM–2:00 PM ET Each Day

Two Live Online Sessions

Course Overview

Assess Recovery Performance, Redesign Treatment Strategy,

and Reduce Write-Off Exposure

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Mastering Utility Final Bill Collections is an applied program for utility professionals responsible for final bill recovery, collections strategy, and write-off exposure. The course connects performance assessment with practical program design and implementation.

Using the fictional Lakeview Regional Utilities case and synthetic dataset, participants establish a recovery baseline, map workflow and decision controls, test data readiness, and analyze liquidation, vintage performance, net recovery, and cost-to-collect.

The course then moves from diagnosis to treatment strategy. Participants compare segmentation, channels, placement timing, and tier design while defining governance, performance measures, reconciliation controls, and technology enablement.

Across nine applied exercises, participants build a Future-State Final Bill Recovery Improvement Plan and a prioritized 30/60/90-Day Action Plan.



From evidence to action

Use a structured case to connect recovery findings, treatment choices, controls, and implementation priorities.

Learning Outcomes

After completing this course, participants will be able to:

01 Assess final bill inventory, placement, liquidation, net recovery, cost-to-collect, and remaining write-off exposure to establish a performance baseline.

02 Map the final bill recovery workflow and identify delays, decision gates, ownership gaps, holds, and handoff risks.

03 Evaluate data readiness and define consistent cohort, vintage, segment, agency, and tier measures for reliable analysis.

04 Analyze aligned liquidation and vintage results, net recovery, and diminishing returns to support recovery decisions.

05 Design administrable customer segments and treatment strategies supported by recovery opportunity, risk, and operational constraints.

06 Compare internal, early-out, agency, and tier options using recovery opportunity, capacity, cost, customer-treatment risk, and controls.

07 Define KPIs, data sources, owners, review cadence, thresholds, and corrective actions, with appropriate technology enablement.

08 Develop a future-state recovery improvement plan and prioritize implementation through a 30/60/90-Day Action Plan.

Course Sessions / Agenda

SESSION 1 | January 13, 2027

M1 Performance Baseline

Establish inventory, placement, recovery, cost, and exposure measures.

M2 Workflow and Decision Controls

Map handoffs, decision gates, ownership, holds, and control gaps.

M3 Data Readiness and Metric Definitions

Test data fitness and align definitions before interpreting results.

M4 Liquidation, Vintage, and Net Recovery

Compare aligned results and identify diminishing recovery returns.

BETWEEN SESSIONS | Required 30–45-minute validation task

Validate one non-confidential baseline, workflow, or data-readiness fact—or document an unavailable data point and its decision impact. This task is not graded.

SESSION 2 | January 20, 2027

M5 Segmentation and Treatment Strategy

Translate recovery opportunity and constraints into treatment choices.

M6 Channel, Placement Timing, and Tier Design

Compare operating options and define practical placement controls.

M7 Performance Management and Enablement

Specify KPIs, governance, review triggers, and enabling capabilities.

M8 Integrated Future-State Capstone

Integrate findings and choices into a defensible recovery program.

M9 30/60/90-Day Action Planning

Prioritize actions, owners, dependencies, and evidence of completion.

PARTICIPANT DELIVERABLES

Future-State Final Bill Recovery Improvement Plan

Prioritized 30/60/90-Day Action Plan

Who Should Attend

Designed for utility professionals who assess, operate, govern, or support final bill recovery programs and the decisions that shape recovery performance.

Credit and Collections Leaders

Utility credit and collections leaders, final bill teams, and revenue-recovery professionals responsible for program results.

Customer Operations

Customer operations leaders and program owners who manage recovery workflows, service handoffs, and operating decisions.

Analysts and Finance

Analysts and finance partners who evaluate recoveries, collection costs, performance trends, and write-off exposure.

Data and Technology

Data and technology partners who support reporting, metric definitions, data readiness, and program enablement.

Agency and Vendor Management

Professionals responsible for collection agency relationships, placement strategies, performance reviews, and vendor oversight.

Compliance and Operational Risk

Compliance and operational-risk partners who support decision controls, governance, accountability, and risk management.

Recommended preparation

Working familiarity with utility arrears and collections is recommended. Utility Credit & Collections 101 or equivalent experience is recommended for newer practitioners, but is not mandatory.

Tools & Materials Included

Four principal participant resources support the course's case work, analysis, exercises, and implementation planning.

01 Final Bill Student Workbook

Structured prompts, worksheets, and decision records guide the nine applied exercises, between-session validation, capstone, and action planning.

02 Final Bill Analysis Workbook

An Excel-based course tool for analyzing baseline performance, liquidation, vintage, net recovery, segmentation, and treatment choices using the case data.

03 Final Bill Metric Dictionary

Shared definitions and calculation guidance support consistent interpretation of final bill recovery measures and performance comparisons.

04 Lakeview Regional Utilities Case and Dataset Brief

The fictional utility scenario and synthetic dataset provide a common foundation for assessing current performance and designing a future-state program.

> Nine applied exercises build toward two practical outputs: a Future-State Final Bill Recovery Improvement Plan and a prioritized 30/60/90-Day Action Plan.

Instructor

Bruce A. Gay



President

Monticello Consulting Group

Bruce A. Gay is President and founder of Monticello Consulting Group, a consulting and training organization focused on utility credit, collections, revenue recovery, and meter-to-cash operations.

Before founding Monticello, Bruce held utility leadership roles involving credit, collections, and debt recovery program strategy. His experience includes evaluating collection performance, assessing final bill recovery programs, developing collection agency management frameworks, and identifying opportunities to reduce write-offs and improve recoveries.

Through Monticello Consulting Group and Utility Training by Monticello, Bruce develops utility-specific conferences and online training programs addressing credit risk, customer arrears, payment compliance, collection agency oversight, final bill recovery, and performance management.

> Utility experience connected to practical recovery-program assessment, agency oversight, and operational improvement.

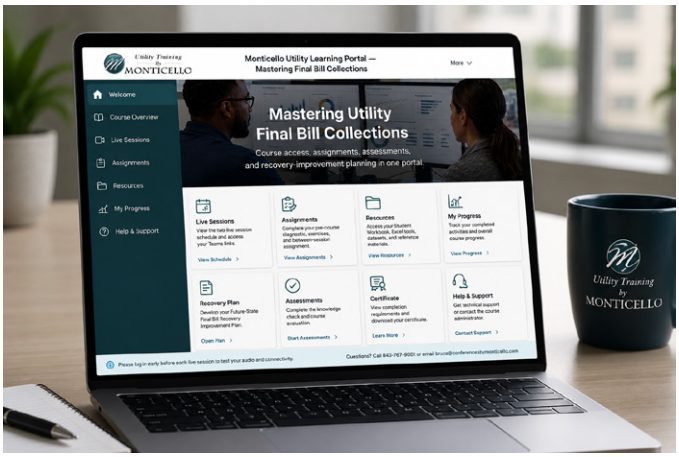
Instructional Methods / Online Delivery

Two live Microsoft Teams sessions combine instructor-led discussion, utility-specific case work, Excel analysis, and structured workbook exercises.

Work through the fictional Lakeview Regional Utilities case and synthetic dataset to interpret recovery evidence, test assumptions, compare treatment choices, and connect findings to a future-state program. Instructor-led discussion supports the applied exercises and capstone.

Learning Portal / Course Access

Learning Portal support connects course resources, the between-session assignment, and completion activities. The required 30–45-minute validation task brings a non-confidential baseline, workflow, or data-readiness fact—or a documented data gap—into Session 2.



Illustrative course-portal image.

Completion and Certificate Eligibility

Eligibility requires attendance at the approved live sessions; participation in or submission of the Future-State Final Bill Recovery Improvement Plan and the 30/60/90-Day Action Plan; completion of the final course evaluation; and a score of at least 80% on the 10-item knowledge check, with one approved retake.

An administrator verifies that all approved completion criteria are satisfied before a certificate is issued.

Registration Instructions and Fees

Single Registration: $1,295 per attendee

Registration includes both live online sessions, Learning Portal support, the four principal participant resources, nine applied exercises, between-session validation, capstone and action planning, and course completion activities. See page 8 for certificate eligibility requirements.

1. Register using the ONLINE REGISTRATION FORM.

2. Call 843-767-9001 for registration assistance.

3. DOWNLOAD PDF REGISTRATION FORM

4. Email the completed PDF form to bruce@conferencesbymonticello.com.

Team Discounts: Organizations registering three or four participants for the same course receive a 10% discount on each registration, including the primary registrant. For groups of five or more, contact Monticello for private team training or group pricing.

Substitutions and Cancellations

Cancellation requests must be submitted in writing at least five business days before the course start date to qualify for a refund. A $95 administrative fee will be deducted from the refund.

Registrations may be transferred to another participant within the same organization. Monticello's liability is limited to refunding the registration fee.

Utility-Focused Training Built for Operational Results

Utility-Focused Training for Credit, Collections, and Meter-to-Cash Professionals

Utility Training by Monticello develops practical online courses for utility professionals responsible for credit, collections, revenue recovery, customer operations, billing, payments, and meter-to-cash performance.

Our programs combine utility-specific instruction, applied exercises, analytical tools, and implementation planning to help participants strengthen strategy, improve operational performance, and reduce write-off exposure.

Why Choose Monticello?

Utility-Specific Focus: Courses built around the operating realities, regulatory oversight, and performance challenges of utilities.

Practical Application: Workbooks, analytical tools, case exercises, and action plans designed for immediate use.

Experienced Instruction: Programs developed and delivered by professionals with direct utility credit, collections, and revenue-recovery experience.

Explore upcoming live online courses and professional training programs.

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