Utility Training By MONTICELLO

LIVE ONLINE COURSE

Utility Credit & Collections 101

A Practical Introduction to Delinquency Management, Customer Treatment, and Recovery Performance in Regulated Utilities



January 27, 2027

10:30 AM–2:30 PM ET

One Live Online Session

Course Overview

A Practical Introduction to Delinquency Management, Customer Treatment, and Recovery Performance in Regulated Utilities

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One Live Online Session

Utility Credit & Collections 101 is a live online course designed for utility professionals who are new to credit and collections, transitioning into related responsibilities, or supporting customer operations, billing, payments, revenue recovery, or performance reporting.

Participants will examine how utility accounts move through the delinquency lifecycle—from billing and payment compliance through arrears management, collection treatment, final bill recovery, and write-off exposure. The course introduces the operational decisions that influence customer outcomes, recovery performance, and regulatory compliance.

Through utility-specific examples, instructor-led discussion, and practical account scenarios, participants will evaluate customer treatment options, identify key performance measures, and understand how credit and collections strategies support revenue protection while operating within regulated utility requirements.

Participants leave with a practical foundation for understanding utility credit and collections operations and applying core concepts within their current or future roles.



Class size is limited to support discussion, applied exercises, and instructor feedback.

Learning Outcomes

After completing this course, participants will be able to:

01 Explain the role of credit and collections within the utility revenue lifecycle and its impact on arrears, cash flow, write-offs, and customer outcomes.

02 Identify how accounts progress from billing and nonpayment through delinquency, treatment actions, payment arrangements, final bill recovery, and write-off exposure.

03 Recognize the operational factors that influence customer payment behavior, arrears growth, and collection treatment decisions.

04 Evaluate basic customer account scenarios and identify appropriate treatment options, escalation paths, and payment-compliance considerations.

05 Describe how utilities use segmentation, treatment timing, payment arrangements, notices, service actions, and outside agencies within a collections strategy.

06 Interpret core credit and collections performance measures, including active arrears, liquidation, bad debt, net write-offs, and days sales outstanding.

07 Recognize the importance of customer treatment standards, documentation, and regulatory requirements in utility collections operations.

08 Connect daily credit and collections decisions to revenue protection, customer experience, compliance risk, and overall utility performance.

> **Participant Outcome:** Develop a practical understanding of the utility delinquency lifecycle and apply foundational credit and collections concepts to customer treatment, recovery performance, and revenue-protection decisions.

Course Agenda

01 Utility Credit & Collections Fundamentals

- Role of credit and collections in utility revenue protection
- Connections among billing, payments, arrears, recovery, and write-offs
- Customer treatment and regulatory expectations

02 The Delinquency Lifecycle

- Account progression from nonpayment through escalation
- Payment arrangements, notices, and service-action considerations
- Final bills, agency placement, and write-off exposure

03 Customer Treatment Strategy

- Factors influencing treatment decisions
- Segmentation, payment behavior, and account circumstances
- Aligning treatment actions with recovery objectives

04 Applied Customer Account Scenario

- Review a utility delinquency case
- Select treatment and escalation actions
- Consider payment compliance, documentation, and customer impact

05 Measuring Collections Performance

- Active arrears, liquidation, bad debt, net write-offs, and days sales outstanding
- Connecting performance measures to operating decisions
- Identifying practical next-step priorities

PARTICIPANT DELIVERABLE

Utility Credit & Collections Decision Framework Exercise

Participants apply the course framework to a customer account scenario and document a recommended treatment decision, relevant considerations, and performance measures.

Who Should Attend

This course is designed for utility professionals who are new to credit and collections, transitioning into related responsibilities, or seeking a stronger operational foundation in delinquency management, customer treatment, and recovery performance.

Ideal Attendees Include:

- New credit and collections analysts, specialists, supervisors, and managers
- Call center and customer service leaders supporting collections-related customer interactions
- Customer operations professionals supporting delinquent accounts and payment compliance
- Performance reporting and business intelligence professionals supporting credit and collections operations
- Billing and payment operations staff whose work affects customer arrears
- Compliance, regulatory, or policy staff seeking operational context
- Revenue recovery and bad debt management professionals
- Utility leaders onboarding employees into credit and collections responsibilities
- Final bill and collection agency support staff

This course is particularly valuable for organizations seeking to strengthen foundational knowledge across teams that influence customer arrears, payment compliance, collection treatment, revenue recovery, and write-off exposure.

Tools & Materials Included

Participants receive practical tools and working materials that support foundational understanding of utility delinquency management, customer treatment decisions, and recovery performance.

Participants leave with adaptable tools for evaluating customer account situations, identifying appropriate collection actions, and connecting treatment decisions to payment compliance, recovery results, and write-off exposure.

CORE WORKSHOP TOOL

Utility Credit & Collections Decision Framework Workbook

A structured working tool that guides participants through:

- Utility revenue and delinquency lifecycle mapping
- Customer account and arrears assessment
- Treatment-action and escalation decisions
- Payment arrangement and payment-compliance considerations
- Customer-treatment and regulatory factors
- Core collection performance measures
- Practical next-step planning

Supporting Materials

Customer Account Scenario Exercise

Apply treatment and escalation concepts to a utility delinquency case.

Delinquency Lifecycle Reference Guide

Review key stages from nonpayment through recovery or write-off.

Key Performance Measures Guide

Understand active arrears, liquidation, bad debt, net write-offs, and days sales outstanding.

Collections Treatment Decision Worksheet

Document account considerations, recommended action, and relevant controls.

Instructor

Robin W. Segur



Retired Manager, Credit and Collections
Consolidated Edison of New York

Robin Segur brings more than 36 years of utility industry experience, including a distinguished career with Consolidated Edison of New York, retiring as Manager of Credit and Collections. His experience includes customer arrears management, credit and collections strategy, final account recovery, agency oversight, payment compliance, regulatory compliance, and accounts receivable performance improvement.

As Manager of Credit and Collections, Robin developed and implemented strategies to reduce arrears, improve cash flow, manage uncollectible accounts, and strengthen collection agency performance. He also served as a liaison with the New York State Public Service Commission and worked closely with the New York City Department of Social Services on public assistance accounts and customer support matters.

Robin's background gives participants a practical utility-based perspective on balancing revenue recovery, regulatory obligations, customer assistance, and fair treatment of customers.

Instructional Methods

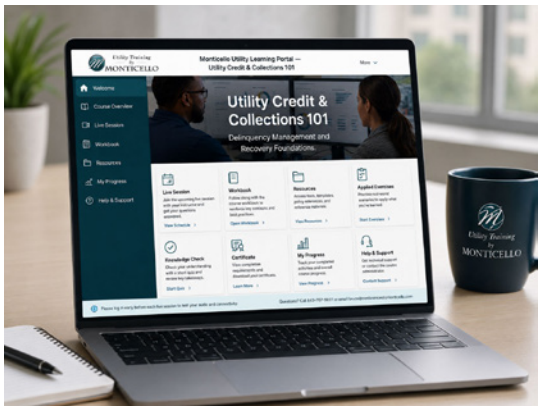
This live online workshop combines instructor-led discussion, utility-specific examples, customer account scenarios, and guided use of the Utility Credit & Collections Decision Framework Workbook.

Participants will apply course concepts to examine delinquency progression, evaluate customer-treatment options, consider payment-compliance and escalation decisions, and interpret foundational collections performance measures.

Online Delivery

This course will be delivered live through Microsoft Teams. Participants do not need an existing Teams account and may join directly through a supported web browser. During the session, attendees may interact with the instructor and fellow participants by microphone or through the chat window.

For the best experience, participants should use the Microsoft Teams application, Microsoft Edge, or Google Chrome. Prior to the course, each registrant will receive an email with access instructions and the link needed to join the session.



> The online meeting room will open approximately 30 minutes before the scheduled start time. Participants are encouraged to log in early to confirm connectivity and resolve any technical issues before instruction begins.

Private Utility Team Training

This workshop can also be delivered privately for utility teams seeking foundational training in delinquency management, customer treatment, payment compliance, and credit and collections performance.

REQUEST TEAM TRAINING INFORMATION

Registration Instructions and Fees

Single Registration: $895 per attendee.

Registration includes live online instruction, the Utility Credit & Collections Decision Framework Workbook, and the practical examples and supporting materials described in this brochure.

1. Register now using the ONLINE REGISTRATION FORM here or on the website.

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

3. DOWNLOAD PDF REGISTRATION FORM. Please email the form to bruce@conferencesbymonticello.com

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

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 Policy: 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.

Call 843-767-9001 for registration assistance.

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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