



Mastering RFPs for Utility Collections

A Master Class in Strategy, Compliance, and High-Performing Collection Agency Partnerships

June 18 & 25, 2025 | 4-hour sessions each day

Online Master Training Course



Conferences
By

MONTICELLO



MASTERING RFPs FOR UTILITY COLLECTIONS

A Master Class in Strategy, Compliance, and High-Performing Collection Agency Partnerships

June 18 & 25, 2025 | 4-hour sessions each day

Course Overview

This comprehensive 8-hour, instructor-led online course is designed specifically for utility professionals involved in credit, collections, procurement, or vendor management. Whether preparing to issue your first RFP for collection agency services or looking to enhance your current procurement and oversight strategies, this course provides the tools, templates, and insights you need to succeed.

Participants will explore the full lifecycle of the RFP process, from internal assessment and strategic planning to vendor onboarding and long-term performance management. Real-world examples and case studies highlight best practices in crafting RFPs that attract top-performing agencies, negotiating legally sound contracts, and leveraging technology and middleware to streamline operations.

Through hands-on activities, sample documents, and guided instruction, attendees will leave with a practical roadmap for building and managing effective, compliant, and results-driven agency partnerships.

Class size is limited to encourage participation and increased collaboration. Register early to secure your spot! Register today to secure your spot!

MASTERING RFPs FOR UTILITY COLLECTIONS

*A Master Class in Strategy, Compliance, and High-Performing
Collection Agency Partnerships*



Learning Outcomes

After completing this online course, participants will understand the end-to-end RFP process for utility collection services. The course equips learners with tools, templates, and strategic insights to lead practical procurement efforts and manage high-performing collection agency partnerships aligned with utility goals. Needs Assessment: Evaluate current collection practices and define objectives for outsourcing.

Scope Development: Determine account types, balance thresholds, and segmentation strategies for placement.

Vendor Strategy: Compare in-house vs. third-party models and identify where agencies add value.

RFP Creation: Develop compliant, competitive RFPs tailored to utility collections.

Scoring & Evaluation: Apply weighted evaluation matrices to assess proposals based on recovery rates, compliance, and experience.

Agency Selection: Recruit qualified vendors using industry referrals and sourcing platforms.

Contract Structuring: Draft MSAs with key legal protections, audit rights, and termination clauses.

Compliance Assurance: Align contracts and operations with FDCPA, FCRA, TCPA, and state regulations.

Onboarding & Go-Live: Manage a smooth implementation process, including secure data transfer, system integration, and kickoff training.

Performance Oversight: Monitor KPIs like recovery performance and customer complaints; conduct audits to ensure ongoing compliance.

Renewal & Exit Planning: Evaluate vendor performance for renewal decisions and plan for transitions when needed.

Middleware Collaboration: Explore technology solutions that improve data handling, placement automation, and performance tracking.



This course prepares participants to confidently lead the RFP lifecycle, ensuring efficient vendor partnerships and measurable results in utility collections.





MASTERING RFPs FOR UTILITY COLLECTIONS

A Master Class in Strategy, Compliance, and High-Performing Collection Agency Partnerships

Course Schedule: Day 1 - June 18, 2025 (all times in EDT)

10:15 AM – Log in and Preparation

10:30 AM – Course Begins

12:00 PM to 12:45 PM – Lunch Break

3:30 PM – End of Day 1

Agenda: Day 1 Content

1. Strategic Planning & Internal Assessment

- a. Defining collection goals (liquidation rates, cost, write-off reduction, etc.)
- b. Segmenting accounts and evaluating in-house vs. outsourced models
- c. Determining the scope of work (account age, balance, geography)
- d. Group Activity: Draft your current state assessment

2. Procurement Preparation

- a. Building a cross-functional sourcing team
- b. Compliance, integration, and data security requirements
- c. Setting evaluation criteria: cost, performance, compliance
- d. Breakout Activity: Create your internal RFP checklist

3. RFP Development & Release

- a. Writing RFP components (scope, SLAs, timelines, insurance)
- b. Building an evaluation matrix (weighted scoring)
- c. Releasing RFPs: pre-bid Q&A, sourcing methods
Case Example: Review of a utility RFP

4. Recruiting & Selecting Agencies

- a. Identifying and qualifying potential agencies
- b. Educating sourcing teams on priorities beyond cost
- c. Legal considerations: liability, audits, termination clauses



MASTERING RFPs FOR UTILITY COLLECTIONS

*A Master Class in Strategy, Compliance, and High-Performing
Collection Agency Partnerships*



Course Schedule: Day 2 - June 25, 2025 (all times in EDT)

10:15 AM – Log in and Preparation

10:30 AM – Course Continues (Day 2)

12:00 PM to 12:45 PM – Lunch Break

3:30 PM – Course Concludes

Agenda: Day 2 Content

- 1. Contract Finalization and Agency Onboarding**
 - a. Developing enforceable, compliant contracts
 - b. Case Study: Real-world examples of agency onboarding
 - c. Transitioning from selection to contract execution
- 2. Implementation & Onboarding**
 - a. Internal readiness and secure data transfers
 - b. Vendor training and brand compliance
 - c. Defining the go-live and escalation process
 - d. Checklist: Onboarding readiness tool
- 3. Oversight & Performance Management**
 - a. KPIs: recovery rate, RPCs, complaints
 - b. Scorecards and vendor ranking
 - c. Onsite audits and monthly reviews
 - d. Business reviews and corrective actions
- 4. Renewal, Transition, or Exit Strategy**
 - a. Annual vendor review practices
 - b. Planning for contract end, recalls, and offboarding
 - c. Risk mitigation for underperforming vendors
- 5. Working with Middleware Software Partners**
 - a. Identifying technology partners
 - b. Automating placements, reporting, and security
 - c. Case Studies: Utilities improving ROI through middleware



MASTERING RFPs FOR UTILITY COLLECTIONS

A Master Class in Strategy, Compliance, and High-Performing Collection Agency Partnerships

Instructor

Michelle Lawall

Online Course Instructor | Utility Operations & Revenue Management Expert

Michelle Lawall brings over three decades of deep industry expertise to her role as an online instructor, delivering practical, real-world insights to utility professionals. A 1987 graduate of Cedar Crest College with a Bachelor of Science in Public Policy and Economics, Michelle launched her career at PPL Corporation in 1989 and built a legacy of excellence until her retirement in 2025.



During her distinguished tenure at PPL, Michelle held multiple key leadership roles, including Staff Paralegal (Regulatory and Litigation), Credit Analyst, Project Manager – Collections, Credit and Collection, Director – Revenue Operations, and Director – Customer Operations. Her work spanned the entire customer operations lifecycle, overseeing significant functions such as contact centers, billing, collections (and vendor management), metering (including large power accounts), and revenue protection. Most recently, she served as Senior Advisor for IT Product during the Rhode Island Energy integration into the PPL family of companies.

Michelle is known for leading high-performing teams and driving innovation in customer service, revenue optimization, and operational efficiency within the utility sector.

In addition to her professional accomplishments, Michelle is deeply committed to community and educational service. She serves as Treasurer for the Northeast Utilities Credit and Collection Conference and as a Trustee and Advancement Committee Chair for Cedar Crest College. Her past service includes board positions with the Civic Theatre of Allentown, Lehigh County Meals on Wheels, the Celtic Cultural Alliance, ArtsQuest, and the Cedar Crest College Paralegal Advisory Committee.

The Lehigh Valley Woman of Influence Award (2018) and the Cedar Crest College Alumnae Award for Professional Achievement (2020) recognized her for her leadership and service.

Michelle's passion for mentoring and teaching makes her a dynamic and trusted instructor. She is ready to help today's utility professionals elevate their performance and prepare for tomorrow's challenges.



MASTERING RFPs FOR UTILITY COLLECTIONS

*A Master Class in Strategy, Compliance, and High-Performing
Collection Agency Partnerships*



Who Should Attend

This course is designed for professionals involved in the procurement, management, and oversight of utility collection agency partnerships. Whether you're initiating your first RFP or looking to optimize your current vendor strategy, this master class delivers practical insights for every stage of the process. Ideal attendees include:

Credit & Collections Managers – seeking to improve recovery rates and reduce internal workload

Procurement Professionals – responsible for sourcing, evaluating, and contracting with third-party vendors

Regulatory & Compliance Officers – ensuring adherence to FDCPA, FCRA, TCPA, and data protection standards

Customer Service and Operations Leaders – aligning collection practices with customer experience goals

IT and Integration Specialists – supporting secure data exchange and system compatibility with agency partners

Legal Counsel and Contract Managers – drafting enforceable agreements and protecting utility interests

Finance and Billing Executives – overseeing the cost-effectiveness and financial impact of outsourced collections

This course benefits both experienced practitioners and those new to managing the RFP process for utility collections.





MASTERING RFPs FOR UTILITY COLLECTIONS

A Master Class in Strategy, Compliance, and High-Performing Collection Agency Partnerships

Course Requirements

To get the most value from this course, participants should have prior experience or familiarity with the following:

Utility Account Management – Understanding of final bill and inactive account collection workflows.

RFP or Procurement Processes – Basic knowledge of vendor sourcing, proposal evaluation, or contract administration.

Third-Party Collection Agencies – Experience working with or overseeing outsourced collection partners.

Regulatory and Compliance Standards – Familiarity with FDCPA, FCRA, TCPA, and state-level utility regulations.

Data Analysis and Performance Metrics – Ability to interpret recovery data, collection trends, and key performance indicators.

Strategic and Process-Oriented Thinking – A mindset focused on continuous improvement, cost reduction, and program optimization.

This course is designed to build on foundational knowledge and provide practical tools to lead or contribute to the RFP process for utility collections.



MASTERING RFPs FOR UTILITY COLLECTIONS

*A Master Class in Strategy, Compliance, and High-Performing
Collection Agency Partnerships*



Online Delivery

In our upcoming online course, we've chosen Microsoft Teams as the platform for your seamless participation. You don't need an existing Teams account to join the action. You'll be able to view the course directly in your web browser. During the sessions, you can communicate with the instructor and fellow participants by using your microphone to ask questions or typing them into the chat window.

For an enhanced experience, we recommend [downloading and installing the Teams App](#) if available. Alternatively, you can use either the Edge browser or Chrome for access. We'll send you a separate email with a unique link to a personalized landing page. This landing page will give you easy access to all the event sessions.

Our remote meeting connection will become available roughly 30 minutes before the course begins. We encourage you to log in as early as possible in case any unexpected technical issues arise. Your seamless online learning experience is our top priority!



Instructional Methods

Case studies, PowerPoint presentations and classroom exercises will be used





MASTERING RFPs FOR UTILITY COLLECTIONS

*A Master Class in Strategy, Compliance, and High-Performing
Collection Agency Partnerships*

Registration Instructions and Fees

Single Registration: \$1,395.

1. Register now using the [ONLINE REGISTRATION FORM](#) here or on the website.
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

Substitutions and Cancellations

Cancellation Policy: If you need to cancel, please submit your request in writing by five (5) business days before the course start date, to be eligible for a refund. Please be aware that we will deduct a \$95 administration fee 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 registration fee only. For further assistance or inquiries, please don't hesitate to contact us at 843-277-1620.





Conferences
By
MONTICELLO

Conferences and Learning Courses for Utility Professionals

Monticello's Utility Industry Events: Where Knowledge Meets Opportunity!

Discover a world of insights and connections with Monticello's premier conferences and events exclusively designed for the utility industry. With years of industry expertise, we create events that provide a unique blend of learning and networking opportunities.

Why Choose Us?

Valuable Insights: Benefit from our extensive knowledge of the utility industry.

Inclusive Gatherings: Join a diverse community of industry professionals, vendors, and suppliers.

Networking Excellence: Forge meaningful connections that transcend the utility spectrum.

Don't miss out on our upcoming live events and online learning courses. Register now and participate in the utility industry's most empowering events.

Contact: Bruce A. Gay
Office: 843.277.1620
bruce@conferencesbymonticello.com
www.conferencesbymonticello.com

www.conferencesbymonticello.com