

Credit and Collections for Utilities

**Technical and Operational Modifications for Revenue Collections
and Customer Service in a Post-Recessionary Environment**

➔ creditandcollections.platts.com

March 1–3, 2011 • Hyatt Regency Grand Cypress • Orlando, Florida

A distinguished panel of more than 20 economic, collections, and customer service experts:

Carey (Checca) Sullivan, AEP

Glenn Shaul, Alabama Power

Isaac Pigott, Alabama Power

Fidel Marquez, ComEd

Kevin Hankins, Columbia Gas

Lauren Preston, DC Water and Sewer

*James Steffes and Ted Nolte,
Direct Energy*

Bill Parrish,

Experian Information Solutions

David E. Altig, Federal Reserve Bank

John Hazen, J. D. Power & Associates

Jed M. Nosal,

MA Attorney General's Office

David J. Hillery, National Grid

Alvin Frazier,

Orlando Utilities Commission

Michael Turner, Ph.D., PERC

Bernie Molchany, PPL

Michelle LaWall, PPL

Mike Stephens, Salt River Project

Alec Esquivel, Stream Energy

Molly Mulroy, We Energies

Tony Basile, Xcel Energy

2011 Pre-Conference Workshops

- **Workshop A** — Leveraging Technology to Maximize Returns on Outsourced Collections
- **Workshop B** — How to Use Social Media to Enhance Collections/Customer Service Operations: *Twitter, Facebook, YouTube, Google, and Blogging*

Gain Perspective on 2011–2012 US Macroeconomic and Small Business Outlooks

- Consumer debt, job growth, C&I, and residential bankruptcy trends
- Small business customers — Proactive strategies on how to monitor commercial risks before the accounts fall into delinquency

2011 Studies

- Full-file credit reporting pros and cons — Understand its impact on your collections and customer service programs
- Pre-pay programs
- Collecting for utility property damages — Poles, lines, and energy theft
- How rate cap expiration and customer choice/shopping has changed collection metrics
- Getting IT, customer service, call center, and collections onboard for better smart grid program customer communications
- High usage notification alerts
- Optimizing collections operations to maximize field services

UTILITY-ONLY ROUNDTABLES — Gather with your peers to share ideas on industry best practices. Choose from 3 topics:

- A:** Operations/Collections Approaches
- B:** Customer Service/Contact Center Management
- C:** Outsourcing/Agency Management

Quick & Easy Ways to Register!

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Supporting Organizations:



DAY 1: Tuesday, March 1, 2011

- 2:00 pm Registration
- 3:00 Workshop Leaders' Welcome and Opening Remarks

Choose Between 2 Pre-Conference Workshops

Workshop A:

Leveraging Technology to Maximize Returns on Outsourced Collections

- Shifting away from time-based agency outsourcing of collections (the primary, secondary, tertiary approach) toward the development of collections strategies based on an individual's underlying ability and potential to pay
- How this migration can be hampered by yesterday's linear, time-bucket account management technology and a company's IT constraints
- How to overcome these obstacles via non-linear strategic collections that utilize the latest data sources and scores, ensuring your organization effectively manages its agencies for increased netback collections
- Best practices discussion

Moderator: Elke Patten, Senior Product Manager, Experian Decision Analytics
David J. Hillery, Manager, Business Operations Support, Credit and Collections Department, National Grid
Mark Hirschey, Associate Partner, Oliver Wyman
Ted Nolte, Head of Credit Operations, Direct Energy

Workshop B:

Leverage Social Media Websites to Enhance Collections/Customer Service Operations — Twitter, Facebook, YouTube, Google, and Blogging

- Improve communication to this customer base about outage notices, billing options, and energy efficiency, particularly during maximum load periods (summer/winter)
- Social media — Keeping up with the technology needs of your customers and allowing them to interact with you via their channels of choice, i.e. blogs, wikis, *Twitter, Facebook, YouTube, Google*, bulletin boards, etc.
- Building a social media initiative for your utility from the ground-up — Management buy-in, IT needs, program launch, governance, and management over time
- Learn how to use these channels for recruitment, training, customer and employee communication, and to educate customers about security, privacy, and information verification/liability issues
- Leveraging social media to help customer care representatives — Getting a jump on what this tech-friendly demographic is asking for from your utility

Moderator: Isaac Pigott, Communications Strategist, Alabama Power Company
Carey (Checca) Sullivan, Manager, Social Media, American Electric Power
Mike Stephens, Manager, Corporate and Internet Communications, Salt River Project

- 6:00–7:00 Welcome Reception and Early Registration
- There will be a 30-minute networking and refreshment break at 4:30 pm*

DAY 2: Wednesday, March 2, 2011

- 7:15 Conference Registration and Continental Breakfast
- 8:15 Chair's Welcome and Opening Remarks
Bill Parrish, Vice President, Experian Information Solutions
- 8:30 **2011–2012 Economic Outlook**
David E. Altig, Senior Vice President and Director of Research, Federal Reserve Bank

9:00 **Small Business State-of-the-Union — Current Trends and the Use of Data in Evaluating Risk**

Understand current trends of your small business customers and learn tips on how to better manage their accounts, while reducing overall risk exposure. Some of the topics covered during this session include:

- Understanding the overall health of businesses in the United States
- Identifying credit trends and how they affect your existing business accounts
- Why “perfect payers” stop paying
- Proactive strategies on how to monitor small business risk before the accounts fall into delinquency

Mary Kathryn Jarcy, Senior Product Manager, Experian Business Information Solutions

9:30 **Collections Trends — Debt Sales, Scoring/Segmentation, Deposits/Disconnects, and Low Income Customer Approaches**



PANEL DISCUSSION

- Scoring/segmentation approaches that can reduce truck rolls
 - behavior analytics
- What types of technical/operational modifications have companies made to the traditional payment arrangements to assist customers during the economic downturn?
- State PUC/PSC liaisons — In a tough economy, how do you best relate to your regulators?
- Collecting data other than telephone numbers to contact customers, such as email addresses, cell phone numbers — Database management
- How are sales of paper trending?
- How do initiatives within the credit and collections departments align with other departments?
 - how can customer service better assist collections?
 - how do you balance duties?
- Low income programs — Payment terms that work for both parties and Web portal approaches to help local agencies get the information they need

Moderator: *Bill Parrish, Vice President, Experian Information Solutions*

Tony Basile, Director, Credit and Collections, Xcel Energy
Alec Esquivel, Senior Credit and Collections Manager, Stream Energy

Molly Mulroy, Director, Credit and Collections, We Energies
Kevin Hankins, Manager, Revenue Recovery, Columbia Gas Distribution (a NiSource Company)
Alvin Frazier, Vice President, Customer Connection, Orlando Utilities Commission

10:30 **Networking & Refreshment Break**



11:00 **Direct Energy's Pre Pay Program**



CASE STUDY

James Steffes, Vice President, General Manager, Direct Energy

11:45 **Collecting for Utility Property Damages — Poles, Lines, and Energy Theft**



CASE STUDY

Glenn Shaull, Manager Credit and Collections, Alabama Power Company

12:30 **Networking Luncheon**



1:45 **Opposing Views**



OPPOSING VIEWS

Full-File Credit Reporting Pros and Cons — Understand its Impact on Your Collections and Customer Service Programs

There are a whole host of issues for utilities to consider before going down the road of full-file credit reporting. Get both sides of the story.

PRO: *Michael Turner, Ph.D., President and Chief Executive Officer, PERC*

CON: *Jed M. Nosal, Assistant Attorney General, Chief, Business and Labor Bureau, Massachusetts Attorney General's Office*

2:45 **How Rate Cap Expiration and Customer Choice/Shopping Has Changed PPL's Views on their Collection Metrics**

Bernie Molchany, Manager — Revenue Assurance, PPL Electric Utilities

Michelle LaWall, Project Manager-Revenue Assurance, PPL Electric Utilities

3:30 **Networking & Refreshment Break**



4:00 **Utility Only Roundtables**

Best Practices throughout the Customer Revenue Cycle

Gather with your peers to share ideas on industry best practices. Attendees are encouraged to bring questions from the day's sessions into these discussions. Choose from three topics:

A: Operations/Collections Approaches

B: Customer Service/Contact Center Management

C: Outsourcing/Agency Management

6:00 **Cocktail Networking Reception**



Hosted by:



7:00 *Close of Day Two*

DAY 3: Thursday, March 3, 2011

7:30 *Continental Breakfast*

8:15 *Chair's Welcome and Review of Day Two*
Bill Parrish, Vice President, Experian Information Solutions

8:30 **Getting IT, Customer Service, Call Center, and Collections Onboard for Better Customer Connection around Your Smart Grid Program**



KEYNOTE

Fidel Marquez, Senior Vice President, Customer Operations, ComEd

9:15 **Customer Perspectives on Smart Grid Technology Transformation**

This session examines J.D. Power & Associates' utility customer research into their awareness and expectations around smart grid technology. What are customers expecting their utilities to deliver? How much do they understand about new metering systems? Examine how these sentiments translate into satisfied/unsatisfied customers and how your billing, customer care, and collections department operations might be impacted.

John Hazen, Director, Utility Research, J.D. Power & Associates

10:00 **Networking & Refreshment Break**



' challenges. The utility industry is quite open allenges and Platts creates the forum.'

— Voula Sterjovski, Seewind Design (2010 attendee)

10:30

HUNA (High Usage Notification Alert)

Examine the DCWA's HUNA program where a customer can sign up for and get an email whenever their meter readings indicate that an unusually high amount of usage is going on, so they can investigate it and make repairs before their bill gets out of control.

*Lauren Preston, Director, Customer Services,
District of Columbia Water and Sewer Authority*



CASE
STUDY

11:15

Optimizing Collections Operations to Maximize Field Service Disconnects, FSAs, Tracking, and Repletion

Learn how, over the course of the last year, National Grid's collection organization has updated and optimized interactions with its field force to drive better results for forecasting, Service Level Agreements, activity tracking tools, and defining how to optimize its Replevin process.

*David J. Hillery, Manager, Business Operations Support,
Credit and Collections Department, National Grid*



CASE
STUDY

12:00 *Close of Conference*

Platts Upcoming Events

**9th Annual
Strategic Supply Chain
Management for Utilities**
January 17–19, 2011
Miami Beach, Florida

**3rd Annual
Power Storage**
February 23–24, 2011
Houston, Texas

**11th Annual
Caribbean Energy**
January 27–28, 2011
Miami, Florida

**26th Annual
Global Power Markets**
April 10–12, 2011
Las Vegas, Nevada

Past Attending Companies

Just a few of the companies that have attended previous Platts *Credit and Collections for Utilities* events:

AEP	FirstEnergy Corp.	Philadelphia Gas Works
AGL Resources	Florida Power & Light	PPL Electric Utilities
Alabama Gas Corporation	Great Lakes Energy	Progress Energy
Alabama Power Company	GE Financial Services	Puget Sound Energy
Alliant Energy	Horizon Power & Light	Questar Gas
American Water	Huntsville Utilities	Rappahannock Electric Cooperative
Aqua America Inc	Integrus Energy	Sacramento Municipal Utility District
Aquila, Inc	JCP&L	San Diego Gas & Electric
Austin Energy	Kissimmee Utility Authority	Shell Trading
Baldwin EMC	Las Vegas Valley Water District	Small Business California
Baltimore Gas & Electric Company	LCEC	SMUD
Bangor Hydro Electric	LexisNexis	Southern California Edison
BG&E	Liberty Power	Spark Energy LP
Central Maine Power Company	Los Angeles Department of Water and Power	SRP
Centerpoint Energy	Memphis Light, Gas & Water Division	Stream Energy & Gas
Cleco Power LLC	Missouri Gas Energy	Superior Water Light & Power
Citizens Energy Group	MXenergy Inc	Tacoma Public Utilities
Commonwealth Edison	Nashville Electric Service	TouchStar
Chubu Electric Power Company Inc	National Fuel Gas	UGI Utilities Inc.
Dominion Virginia Power	National Grid	United Illuminating Co.
DTE Energy	New Braunfels Utilities	Vectren Energy Delivery
Duquesne Light	NiSource	Washington Gas
Easton Utilities	Northwest Natural Gas Company	We Energies
Enbridge Gas Distribution	NSTAR Electric & Gas	Westar Energy
Enersource Hydro Mississauga	Ohio Consumers' Counsel	Wisconsin Public Service Corp
EPCOR	Orange and Rockland Utilities	Xcel Energy
Equitable Gas Company	Orlando Utilities Commission	
Federal Reserve Bank	PECO	

Maximize Your Networking Opportunities

Join these companies in showcasing your products and services to senior-level decision makers:

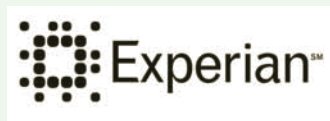
- Experian
- Western Union Global Business Payments
- Televox Software
- Collection Bureau of the Hudson Valley Inc.
- Americollect
- Experian QAS
- Penn Credit Corporation
- CBE Group
- Professional Recovery Consultants Inc.
- I.C. System, Inc.
- National Loan Exchange, Inc.
- Incoho

Platts **10th Annual Credit and Collections for Utilities** offers you an excellent opportunity to maximize your 2011 marketing dollars through these sponsorship opportunities:

Welcome Reception • Luncheon Host • Networking Break Host • Branded Product Giveaways • Exhibitor

To learn more about sponsorship and exhibit opportunities, please contact Lorne Grout, Senior Business Development Manager, at 781-430-2112 or email him at lorne_grout@platts.com

Cocktail Reception
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Exhibitors:



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March 1-3, 2011 • Hyatt Regency Grand Cypress • Orlando, Florida

Gain perspective on the US economic outlook and related collections/customer service best-practices:

- Consumer debt, job growth, C&I and residential bankruptcy trends
- Proactive strategies on how to monitor small business customer risk
- Pre-pay programs
- How rate cap expiration and customer choice/shopping has changed collection metrics
- Understanding the pros and cons of full-file credit reporting

Registration Fee:

	Early Bird Disc.	Standard Rate	Gov't/Muni/Coop Disc.
Conference & Workshop	\$1,495	\$1,795	\$1,095
Conference Only	\$1,395	\$1,695	\$995

The conference registration fee includes breakfasts, luncheon(s), reception, refreshments, and post-conference documentation. Payment in full is required for attendance. If payment or proof of payment is not received before the start of the event, our staff will require a credit card guarantee to allow entry. **All onsite registrations will be charged an additional \$100.**

Discounts: Discounts or promotional offers cannot be combined.

Early Bird Discount — Register by Friday, January 21, 2011 to SAVE \$300 off your registration fee.

Team Discount — Register 2 attendees at the Standard Rate and send 1 additional attendee from your organization FREE. All registrations must be paid for at the same time to qualify. To register with the team discount, please photocopy and fill out this form for each attendee or call.

Government/Muni/Coop Discount — Verification may be required.

Venue:

The Hyatt Regency Grand Cypress Resort at Orlando
One Grand Cypress Blvd., Orlando, Florida 32836 • 888-421-1442 (toll-free in the US)
**Contact Platts Conferences if you have any physical access or dietary restrictions.*

Discount Accommodations:

A limited number of rooms has been reserved for Platts 10th Annual Credit and Collections for Utilities conference participants at the Hyatt Regency Grand Cypress at a rate of \$169/night, single or double occupancy. The discounted rate will be honored until **Monday, February 7, 2011** — based on availability. Reserve by calling 888-421-1442 (toll-free in the US). Be sure to mention that you are attending **Platts 10th Annual Credit and Collections for Utilities Conference** in order to receive the discounted rate.

Substitution & Cancellation:

Your registration may be **transferred** to a member of your organization up to 24 hours in advance of the conference. **Cancellations** must be received in writing on or before **February 22, 2011** in order to be refunded, less a \$195 administrative charge. No refunds will be made after this date. **In case of conference cancellation, Platts liability is limited to refund of the conference registration fee only.** Platts reserves the right to alter this program without prior notice.

CDs Available:

If you are unable to attend the conference or you would like documentation for your colleagues, you can order a CD today. Don't miss out on the valuable information presented by industry leaders exclusively at this event. Articles and presentations are included. The CD is available for only \$298. Add \$50 for international shipments. Simply fill out the order form and the CD will be shipped to you 2 weeks after the conference occurs.

Attire:

Business casual

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- I am registering for the **GOVERNMENT/MUNI/COOP Discount.**
- We would like to take advantage of the **TEAM DISCOUNT** (see left for details).
- I cannot attend. Please send me the CD.

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