

 Chartwell's

# EMACS

The Customer Experience Conference

# 2023 SCHEDULE

September 26-29, 2023 · Phoenix

TUESDAY, SEPT. 26

6:00 - 7:30 PM

Chartwell's EMACS Conference Welcome Reception  
Sponsored by InvoiceCloud

# DAY ONE: WEDNESDAY, SEPT. 27

7:30 - 8:30 AM Breakfast

8:30 - 9:25 AM **Keynote: What, Why and “Wow!” – Unleashing the Power of Behavioral Science to Provide Unforgettable Customer Experiences**

- Andrea Belk Olson, CEO, Pragmadik

9:25 - 10:10 AM **From Sci-Fi to Reality: How Utilities are Capitalizing on the AI & BI Revolution**

- Greg Ziolkowski, Senior Product Manager, Data Analytics, KUBRA

10:10 - 10:30 AM Networking Break

10:30 - 11:20 AM **Sponsor Spotlight: ACI Worldwide**

**Utility Executive Concerns in 2023 and Beyond: Navigating Resiliency, Rates and Rising Expectations**

Moderator: Tracie Boutte, Executive Advisor, Chartwell Inc.

- Marc Ulrich, VP of Operational Excellence, SCE
- Steve Lopez, Senior Director of Customer Strategy, SRP
- Erica Borggren, VP of Customer Solutions, ComEd

11:20 AM - 12:00 PM Team Networking Challenge

12:00 - 1:30 PM Lunch

**GOLD**  
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## BREAKOUT 1

**TOU for All! Elevating the Customer Experience of Modern Rates**

- Brian Kurtz, Manager of Customer Satisfaction & U2.0 Project Management Office, PSEG Long Island
- Nayan Parikh, Technology Group Product Manager, PSEG Long Island

## BREAKOUT 2

**Lessons on Keeping Your Business Customers Happy from California and Georgia**

- Tomaso Giannelli, Key Account Manager, Georgia Power Company

## BREAKOUT 3

**TEP Goes Door-to-Door to Support Customers Most in Need**

- Denise Taylor, Director, Customer Care and Experience, TEP
- Nicole Hopkins, Principal, Customer Centric Research and Innovation, TEP

1:30 - 2:15 PM

2:15 - 3:00 PM

**Nurturing Relationships at Every Step of the Customer Journey**

- Jim Malcom, Chief Operating Officer, Apogee Interactive

**Insights from Evergy & Vistra: Increasing Customer Self-Service Adoption With Conversational AI**

- Steve Hughes, Sr. Director, Utilities Practice, Interactions
- Lindsay Washburn, Senior Digital Product Manager, Evergy
- Ed Anderson, Sr. Manager, CXT Technology, Vistra

**Powering the Future of Mobility: How Total Experience Connects Utilities and Electric Vehicles**

- Abraham Bhutt, Senior Vice President, Connected Experience, Rightpoint
- Bill Thompson, Senior Director of Mobility, Rightpoint

**DAY ONE: WEDNESDAY, SEPT. 27, CONT.**

3:00 - 3:30 PM

Networking Break



3:30 - 4:15 PM

**BREAKOUT 1**

**PSE&G Increases Energy Efficiency with "Welcome to the Saverhood" Campaign**

- Ria Canagon, Manager of Energy Efficiency Outreach, PSE&G

**BREAKOUT 2**

**Unlocking Success with Business Customer Panels, Advisory Boards, and Councils**

Moderator: Jennie King, Principal Consultant, Chartwell, Inc.

- Terry Lombard, Customer Experience Manager, PNM
- Heather Rodriguez, Principal Research Market Specialist, SMUD

**BREAKOUT 3**

**From Feedback to Action: Creating a Comprehensive Strategy for Utilizing VoC Feedback to Enhance Customer Experience and Drive ROI**

- Stacey Rosen-Sturgis, Voice of Customer Lead and Senior Advisor, Southern California Edison

4:15 - 5:00 PM

**From Challenges to Solutions: Chartwell's Networking Roundtables**

- Identifying and Serving Vulnerable Customers
- The Fundamentals of Customer Self-Service
- Incident Response Strategy and Structure
- Attracting and Retaining Rockstar Employees
- Creating a Customer-Centric Culture
- Forging and Maintaining a World-Class VOC Program
- Addressing Trends and Customer Concerns Across Mobile Wallets, Text-to-Pay and Other Emerging Payment Channels
- New Product Development: Innovation without Risk
- Engaging Business Customers Through Proactive Outreach
- (Anti-)Social Media: Friend or Foe?
- Empowering EV Owners: Utility Strategies for Seamless Customer Support

5:30 - 7:00 PM

**EMACS Networking Reception  
Sponsored by Message Broadcast**

**DAY TWO: THURSDAY, SEPT. 28**

7:30 - 8:30 AM

Breakfast

8:30 - 9:25 AM

**Keynote: Data-Driven Decision Making, Customer-Focused Policies, and Executive Buy-In: The Journey of Tucson Electric Power**

- Lynne Petersen, Sr. Director Customer Experience and Customer Care, TEP

9:25 - 10:10 AM

**Empowering Utility Call Centers: Leveraging Direct-to-Customer Digital Communications Technology for Enhanced Customer Engagement**

- Paul Watkins, CX Strategist, Message Broadcast by LINK Mobility
- Sandy Buzzard, Sr. Manager of ECS, Duke Energy

10:10 - 10:40 AM

Networking Break

10:40 - 11:30 AM

**Sponsor Spotlight: DataCapable**

**A Driving Force for Change: Positioning Your Utility for the Growing Electric Vehicle Market**

Moderator: Kathy Knoop, Manager, EV Stakeholder Solutions, General Motors Energy

- Burrell G. Kilmer, Manager, EV Strategy, SRP
- Camila Martins-Bekas, Principal, Beneficial Electrification, TEP
- Karen Apple, Manager of Electric Vehicle Programs, City of Phoenix
- Steve Conte, Electric Vehicle Project Manager, Eversource Energy

11:30 AM - 12:45 PM

Lunch Sponsored by Paymentus  
**Chartwell Best Practices Awards**

12:45 - 1:15 PM

**Dessert with Solution Providers**



1:15 - 2:00 PM

**BREAKOUT 1**

**ComEd's Email Welcome Series for New and Relocating Customers**

- Michele Ptaszek, Manager, Customer Education & Marketing, ComEd
- Natalie Staerkel, Sr. Marketing Specialist, ComEd

**BREAKOUT 2**

**Effective Customer Communication Strategies: Navigating Rate Increases and Promoting Understanding of Time-of-Use Rates**

Moderator: Steve Waters, Director of Councils, Chartwell Inc.

- Ed Baker, Director of Communications, Arizona Public Service
- Rob Rohr, Billing Manager, Alectra Utilities
- Jackie Robinson, Director of Customer Experience, DTE Energy

**BREAKOUT 3**

**A Modern Approach to eBill: TECO's Success in Driving Digital Adoption**

- Melissa Cosby, Director CE Strategy & Service Excellence, Tampa Electric

**DAY TWO: THURSDAY, SEPT. 28, CONT.**

2:00 - 2:45 PM

**BREAKOUT 1**

**Building the Future Energy System: SRP Leverages Customer Input and Advanced Analytics to Optimize Power System Planning**

- Elise Gould, Senior Director of Insights, Brand Strategy and Communications, SRP
- April Smith, Director, Client Services, Bellomy

**BREAKOUT 2**

**Expanding Customer Engagement Through High Performance Programs**

- Dwight Scruggs, Vice President, Business Development and Sales Leader, Cinch Home Services

**BREAKOUT 3**

**EThe Role of CX in Getting More Customers on Time Varying Rates**

- Scott Engstrom, Chief Customer Officer, GridX

2:45 - 3:15 PM

Networking Break



3:15 - 4:00 PM

**BREAKOUT 1**

**Making Progress Toward Clean Energy: SMUD's Clean PowerCity Campaign**

- Jason Casella, Marketing Supervisor, Sacramento Municipal Utility District

**BREAKOUT 2**

**Customer Vulnerability: Causes, Conditions and the Path Back to Stability**

- Moderator: Pat Ricks, Senior Advisor, Chartwell Inc.
- Kirsy Veloz, Section Manager of Credit and Collections, Con Edison
  - Richard Shaw, Manager, Financial Services, ComEd
  - Amanda Engel, Principal Product Manager, Exelon

**BREAKOUT 3**

**How to Build a Customer-First Culture: Insights from Hydro One's Journey**

- Rob Globocki, Director, Customer Care, Hydro One



4:00 - 4:45 PM

**Duke Energy Leverages Mobile App Chatbot to Address Top Customer Pain Points**

- Lisa Cornwell, Product Manager, Duke Energy
- Karen Myers, Product Development Leader, Duke Energy

**Transforming Business Customer Relationships: Becoming a Trusted Advisor**

- Moderator: Jennie King, Principal Consultant, Chartwell Inc.
- Tomaso Giannelli, Key Account Manager, Georgia Power Company
  - Wyndle Young, Director of Customer Service and Government Infrastructure, OPPD
  - Gabe Nunez, Manager, Strategic Programs LCS, BGE



**Disrupting Customer Service: Energy Equity in Action**

- Jesse Hernandez, Director of Equity, Community Strategy & Engagement, CPS Energy
- Laura Jacobs, Sr. Manager of Customer Advocacy, Community Engagement, CPS Energy

5:30 - 8:00 PM

**The Main Event  
Sponsored by KUBRA**

## DAY THREE: FRIDAY, SEPT. 29

7:30 - 8:30 AM Breakfast

8:30 - 9:20 AM **Keynote: Balancing Business Concerns with Serving Customers in Need: A Fireside Chat**

- Tracie Boutte, Executive Advisor, Chartwell Inc.
- Lisa Cagnolatti, Senior Vice President of Customer Service at Southern California Edison

9:20 - 10:05 AM **Transforming Digital Engagement: Delivering Customer-Centric Experiences that Increase Self-Service**

- Travis Murray, AVP, Enterprise Alliances, InvoiceCloud

10:05 - 10:35 AM Networking Break

10:35 - 11:30 AM **Sponsor Spotlight: ProcedureFlow**

**Evolving Voice of the Customer Research in the Utility Industry: Anticipating Future Trends**

Moderator: Jennie King, Principal Consultant, Chartwell Inc.

- Stacey Rosen-Sturgis, Voice of Customer Lead and Senior Advisor, SCE
- Wayne Boone, Principal, Alabama Power
- Valerie Williams, Senior Manager, VOC Program, Liberty Utilities

11:30 - 11:45 AM **Closing Remarks  
Adjourn**