



Chartwell

INSIGHT FOR TOMORROW'S UTILITY

2024 Chartwell Leadership Council Fall Meeting

FAQ and Working Agendas

Oct. 8, 2024 • San Antonio, TX

Fall Meeting Frequently Asked Questions

Who can attend the Fall Meeting?

Each member utility gets two passes for the Fall Meeting, including complimentary access to the EMACS conference. Please use the discount code provided to register two (2) individuals per utility for a day filled with engaging discussions, problem solving, and networking opportunities.

What is the purpose of the Fall Meeting?

The Fall Meeting is a full-day council meeting where members will discuss high-priority topics, including utility successes, initiatives, and challenges. Many members rate it as the highlight of the year when they can connect with peers, ask industry leaders questions, collaborate, and learn best practices.

Where is the Fall Meeting taking place?

The Fall Meeting will be held at the Grand Hyatt San Antonio, located at 600 E. Market Street, San Antonio, TX 78205. Our host for Chartwell's EMACS Conference is the Grand Hyatt San Antonio.

We are pleased to offer a discounted room rate of \$269 per night plus applicable fees and taxes in effect at the time of check-in. The cutoff date to book a room at our host hotel is Friday, September 13, 2024. The link to reserve your room will be in your conference registration confirmation email. If you need to cancel or alter your reservation for any reason after booking, please be sure to do so no later than 7 days prior to your arrival to avoid cancellation or no-show penalties.

Fall Meeting Frequently Asked Questions

When is the Fall Meeting?

The Fall Meeting will take place on October 8, the day before the EMACS Conference. Here is the preliminary schedule for the day, with the agenda forthcoming:

Breakfast:	7:30 – 8:30 am
Council Session 1:	8:30 - 10:00 am
Break:	10:00 – 10:30 am
Council Session 2:	10:30 am – Noon
Lunch:	Noon – 1:30 pm
Council Session 3:	1:30 – 3:00 pm
Break:	3:00-3:30 pm
Council Session 4:	3:30 – 4:30 pm
Reception:	5:00 – 6:00 pm

Fall Meeting Frequently Asked Questions

Will there be opportunities for networking?

Absolutely! The Fall Meeting provides ample opportunities for networking with peers, industry leaders, and Chartwell representatives during sessions, breaks, and the reception.

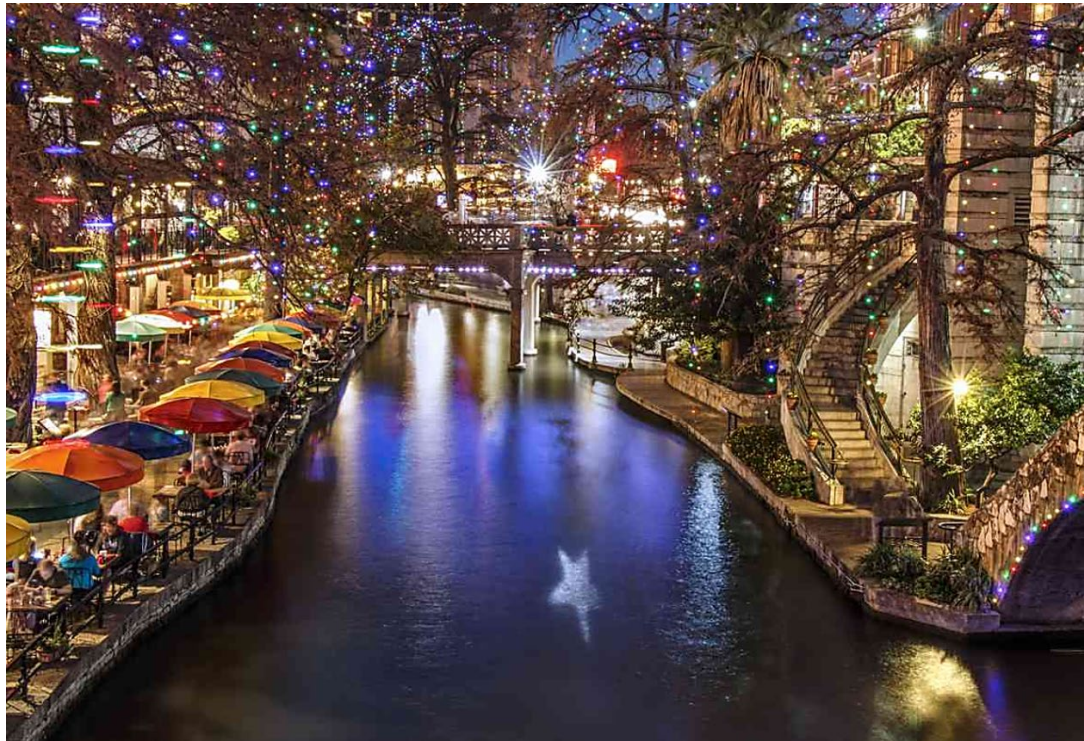
How can I stay updated on Fall Meeting announcements and developments?

Keep an eye on your inbox for updates and communications from Chartwell regarding the Fall Meeting. Additionally, we will announce updates, reminders and highlights during our monthly council meetings.

Who can I contact if I have additional questions about the Fall Meeting?

For any further questions or assistance regarding the Fall Meeting, please reach out to the Chartwell team at memberservices@chartwellinc.com. Your satisfaction and success are important to us, and we're here to help in any way we can.

Business Customer Leadership Council

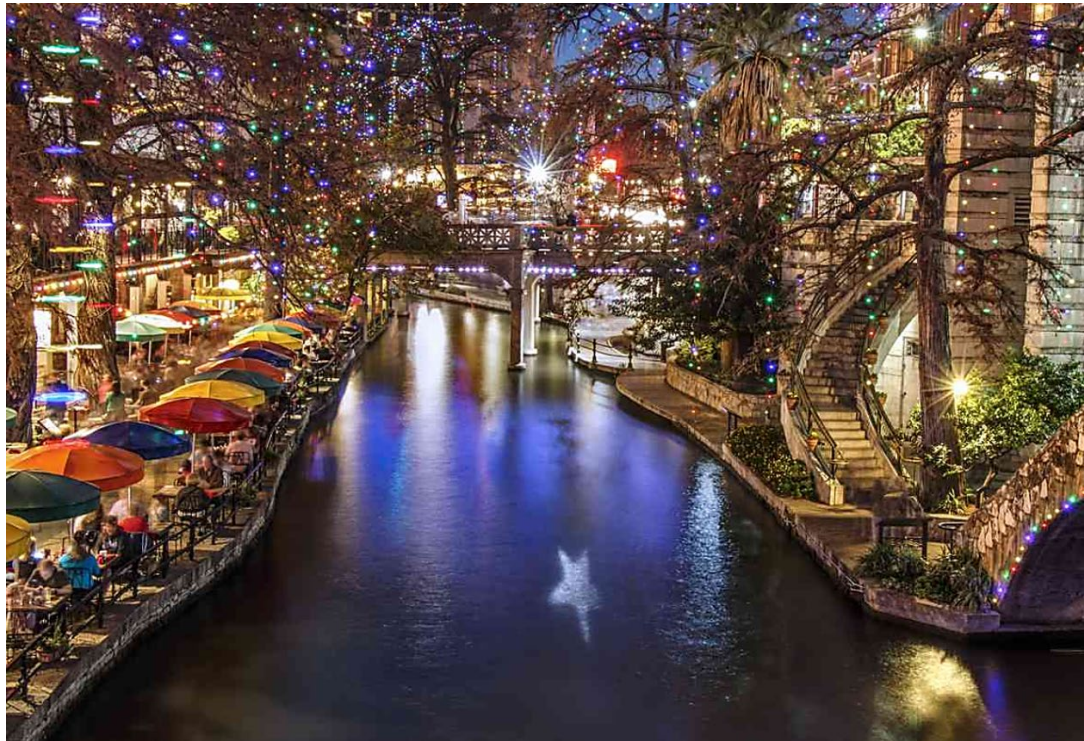


October 8 | San Antonio

2024 FALL MEETING WORKING AGENDA

- *Successes and Initiatives*
- *Building Proactive/Personalized Relationships*
- *Trusted Energy Advisor focus*
- *Innovative Products & Services*
- *Utilizing a CRM tool for your teams*
- *Problem Solving and Challenges*
- *Breakouts by Business Customer Segment*

Billing and Payment Leadership Council



October 8 | San Antonio

2024 FALL MEETING WORKING AGENDA

- *Successes and Initiatives*
- *Levelized Billing*
- *Problem Solving Discussions*
- *Payment Centers, Unbanked Customers and Payment Vendors*
- *Arrears Management/Delayed Billing*
- *Problem Solving and Challenges*
- *Breakouts by Bill, Pay and Collections*
- *Pick your Due Date (Member Update)*

Customer Experience Leadership Council

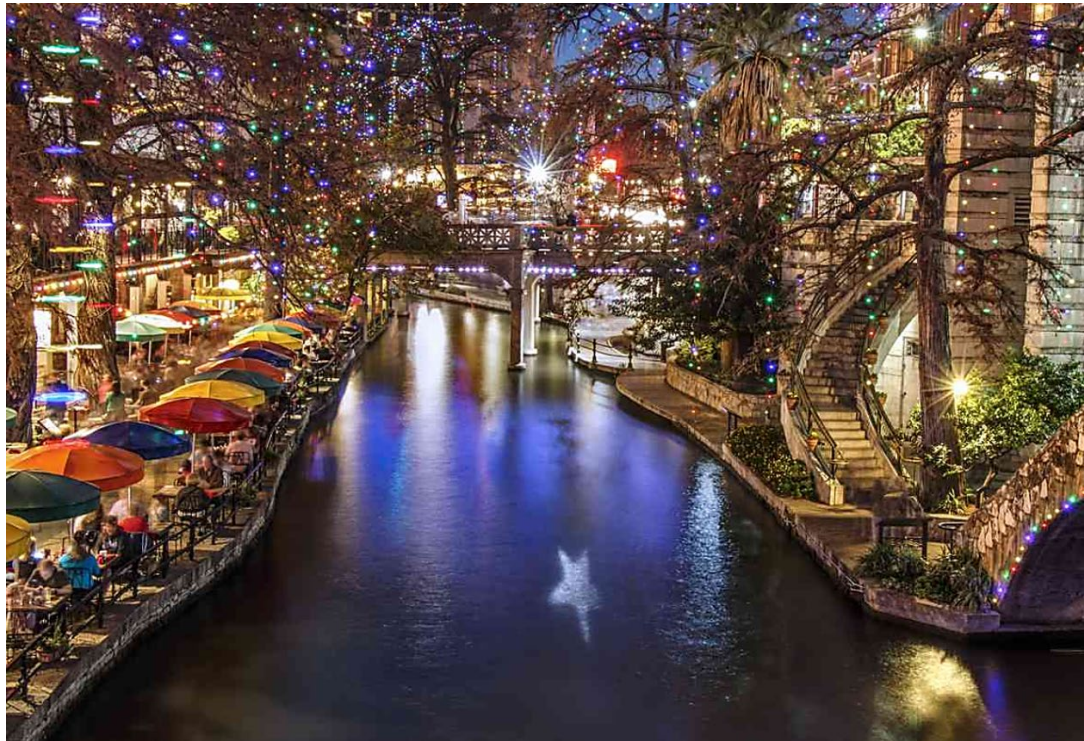


October 8 | San Antonio

2024 FALL MEETING WORKING AGENDA

- *Successes and Initiatives*
- *Data, Analytics and Data Science*
- *Preference Centers, Alerts, Proactive Customer Service*
- *Maximizing Channel Strategies (web, mobile, social media ...)*
- *Guest Speaker: Automation*
- *Problem Solving and Challenges*
- *Breakouts by Functional Area: CX & Channels, Contact Centers, Insights & Research, Marketing & Communications*

Electric Vehicle Leadership Council

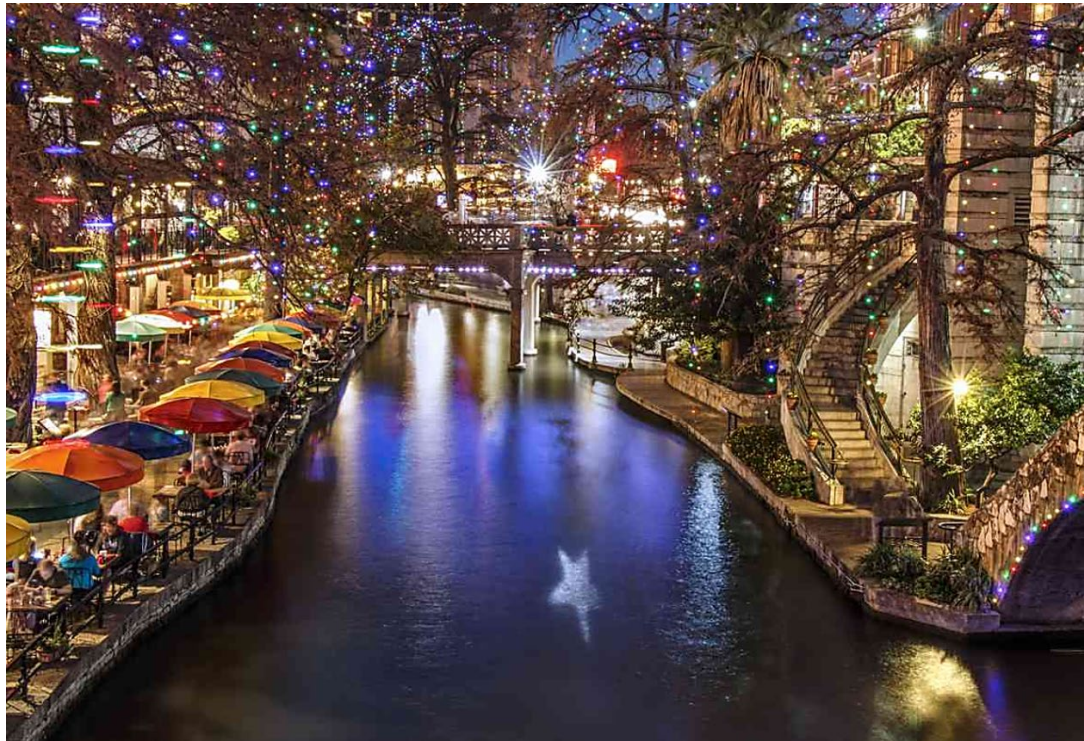


October 8 | San Antonio

2024 FALL MEETING WORKING AGENDA

- *Successes and Initiatives:
Your Utility as the Trusted Advisor*
- *Data, Analytics and Data Science:
2024 EV Utility Industry Benchmarking Survey*
- *Deeper Dives:
Fleet Electrification
EV Marketing & Outreach*
- *Guest Speaker: To Be Announced!*
- *Problem Solving and Challenges*
- *Breakouts by Functional Area:
Fleet Electrification
Grid Integration and Public Charging
EV Marketing & Outreach*

Vulnerable Customer Leadership Council



October 8 | San Antonio

2024 FALL MEETING WORKING AGENDA

- *Successes and Best in Class Vulnerable Customer Initiatives*
- *VCLC Priorities*
- *Data, Analytics and Data Science: 2024 VC Utility Industry Benchmarking Survey*
- *Problem Solving and Challenges*
- *Guest Speaker: To be Announced*
- *Vulnerable Customer Energy Efficiency*