



CMUA Customer Engagement & Programs Committee

Creating Customer Partnerships

Annual Customer Engagement Summit
September 28 – 29, 2016
Los Angeles, CA



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California Municipal Utilities Association

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2016 Annual Customer Engagement Summit
September 28 & 29 – Hosted by Los Angeles Department of Water & Power
John Ferraro Building, Room 1514
Los Angeles, CA

Creating Customer Partnerships

Day 1 – Wednesday, September 28

- 8:00 – 8:45 Conference Sign In/Networking Breakfast
John Ferraro Building, Room 1514
- 8:45 – 9:00 Chair Opening Remarks
Sharon Grove, Assistant General Manager – Customer Service Division, LADWP
- 9:00 – 9:30 Welcome
David Wright, General Manager, LADWP
- 9:30 – 10:15 LA 311 – Using Technology to Improve the Customer Experience
Donna Arrechea, 311 Director, City of Los Angeles
- 10:15 – 10:30 Morning Break
- 10:30 – 11:15 CMUA Legislative Update
Gil Topete, Director for Energy, CMUA
Danielle Blacet, Director for Water, CMUA
- 11:15 – 12:00 Defining Customer Partnerships Exercise
Bryan Schweickert, Operations Manager Customer Contact Center, LADWP
- 12:00 – 1:15 Lunch
John Ferraro Building, A-Level Cafeteria
- 1:15 – 2:00 E is for Empathy
Sue Tan Toyofuku, Design Research & Strategy Partner, MO Studio
- 2:00 – 3:00 Panel Discussion: Customer-Focused Pilot Projects
Leslie Martin, Supervisor, Residential Services Unit, LADWP
Amy McNulty, Water Efficiency Manager, Irvine Ranch Water District
Adrienne Rogers, Senior Energy Services Specialist, Colton Electric
- 3:00 – 3:15 Afternoon Break



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- 3:15 – 4:00 Empowering Customers: True Home Energy Management
Emmett Romine, SVP Business Development, Powerley
Luis Salas, Manager of Energy Management Tools, DTE
- 4:00 – 4:30 First Day – Closing Remarks/Dinner Logistics
Sharon Grove, Assistant General Manager – Customer Service Division, LADWP
- 6:00 – 9:00 Dinner
Los Angeles City Hall – Tom Bradley Room, 26th Floor

Day 2 – Thursday, September 29

- 7:30 – 8:15 Breakfast
John Ferraro Building, Room 1514
- 8:15 – 9:30 The Effortless Experience: Conquering the New Battleground for Customer Loyalty
Matthew Dixon Ph. D., Group Leader – Financial Services and Customer Contact Practices, CEB
- 9:30 – 10:15 The Surprising State of Utility Customer Experience: Insights from the 2016 ESource Utility CX Survey
Eryc Eyl, Sr. Analyst, CCXP, Prosci Certified Change Practitioner, ESource
- 10:15 – 10:30 Morning Break
- 10:30 – 11:15 Understanding Customer Preferences: E-Bill Adoption at Edison
Ajá René Clark, Digital Engagement & Customer Interaction Project Manager, SCE
- 11:15 – 11:30 Close of Meeting
Introduction of new Chairperson
Election of new Committee Vice-Chair
- 11:30 – 12:00 Lunch
John Ferraro Building, A-Level Cafeteria
- 12:00 Escort to B-Level to Board Vans to Dodger Stadium
- 12:30 – 2:00 Dodger Stadium VIP Tour
- 2:00 Board Vans and Return to John Ferraro Building

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Speakers in Order of Appearance

Sharon Grove / Director of Customer Experience, LADWP

Sharon Grove, Director of Customer Experience, joined the Los Angeles Department of Water and Power (LADWP) in May 2012. Ms. Grove brings 30 years of utility and customer service management experience to LADWP. Previously, she held several executive positions at Exelon Corporation, and NICOR Corporation, both large investor-owned utilities located in northern Illinois.

Ms. Grove is responsible for leading the Customer Service Division operations, directing and positioning customer experience strategies, aligning business processes, understanding marketing and customer insights, deploying customer contact strategies, and managing customer complaint resolution. Transforming the customer experience from performing transactions to building relationships is the cornerstone of LADWP's customer engagement model.

She holds a Bachelor's Degree in Business and Economics from Lehigh University, and a Master's Degree in Business Administration from Northwestern University Kellogg School of Management.

Michael Bell / Interim Executive Director, CMUA

Mike Bell is the acting executive director of the California Municipal Utilities Association while the organization conducts a nationwide search for its new executive director. Mike brings over 35 years of senior managerial and technical experience to CMUA in the utility industry including 20 years in executive management positions for electric power, water, and telecommunications industries. In addition, Mike managed the engineering, design and management consulting services for a nationally recognized consulting engineering company serving the electric, water, wastewater, and solid waste industries in California. In 2005, Mike formed Michael Bell Management Consulting, Inc. which provides a wide variety of specialized financial and management services to publicly-owned and local government agencies.

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David Wright / General Manager, LADWP

David H. Wright is the General Manager of the LADWP, appointed by the Board of Water and Power Commissioner to the post on August 16, 2016 and confirmed by the City Council September 6, 2016. Mr. Wright provides leadership for the utility in providing reliable and competitively priced water and electricity while continuing to maintain and implement environmentally conscious policies and priorities.

Mr. Wright came to LADWP to serve as the Senior Assistant General Manager of the LADWP's Power System in February 2015. Shortly thereafter, he became the Chief Operating Officer, overseeing the Water and Power Systems, and operations of the Information Technology Services, Supply Chain Services, Human Resources, Fleet Services, Equal Employment Opportunity Services, the Communications and Marketing and Community Affairs Division, Project Management Division, and Customer Service Division.

Prior to joining LADWP, Mr. Wright worked at the Las Vegas Valley Water District as Deputy General Manager and Chief Financial Officer from September 2013. He has a broad-based knowledge of both water and electric utility operations and worked for the City of Riverside, California for approximately 25 years, most recently as the Public Utilities General Manager, a position he earned after being Deputy Public Utilities Director and Public Utilities Chief Financial Officer for nearly 12 years. He joined the City of Riverside in 1988 and held a number of positions within the finance department, including serving as the City Controller.

He holds both a Bachelor's and Master's Degree in Business Administration, conferred upon him by California State University, Fullerton.

Mr. Wright has been a part of and has long-standing relationships with the leaders of various utility-related organizations such as the Southern California Public Power Authority (SCPPA). He was also SCPPA president in 2008; was president and is a long-standing member of the California Municipal Utilities Association (CMUA). He has also been on various committees of the Riverside Chamber of Commerce from 1998 to 2013.

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Donna Arrechea / 311 Director, City of Los Angeles

Donna Arrechea has 35 years of experience in the Contact Center business, beginning as a telecommunications technician, then as a technical support engineer, providing customer training and consulting services, and ultimately moving to managing Contact Centers. Donna moved to the public sector in 2005 with the City of Riverside. There, she helped build and lead a 311 Call Center that achieved 97% customer satisfaction ratings during her eight years before coming to the City of Los Angeles in 2013. Donna has participated in many technology projects relating to Contact Centers including three CRM system implementations and various Call Center Management (ACD) and Quality Monitoring systems. Her focus has always been on customer satisfaction and improving the "Customer Experience".

Gil Topete / Director for Energy, CMUA

Gil Topete joined CMUA in 2012 as the Director for Energy. He is responsible for a wide range of energy-related legislation including policies that affect greenhouse gas emissions, cap and trade policies, and electric vehicles. Prior to joining CMUA, Gil worked for former State Senator Christine Kehoe (San Diego) and was a consultant on the Senate Energy, Utilities and Commerce Committee as well as chief consultant for the Senate Select Committee on Alternative Energy Strategies, a committee that focused on issues pertaining to alternative fueled vehicles and the implementation of AB 32, the Global Warming Solutions Act.

Danielle Blacet / Director for Water, CMUA

Danielle Blacet joined CMUA in November 2014 as Director for Water and represents CMUA's water member agencies before the legislature and regulatory agencies on a multitude of issues including drinking water, drought, water conservation/water use-efficiency, and the water-energy nexus. She has nearly 15 years of experience working with California public water agencies and in multi-member associations including the Association of California Water Agencies and Western Growers Association. While at Western Growers she helped establish and then manage an extremely successful multi-state charitable foundation program providing grants and other materials for water-efficient gardens in K-12 educational institutions. Danielle also has worked in political consulting and public affairs for both statewide and national clients. She holds a Bachelor's Degree in International Relations and Political Science from the University of California at Davis and a Certificate of Achievement in Computer Information Science from American River College.

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Bryan Schweickert / Operations Manager, Customer Contact Center, LADWP

Bryan Schweickert is a utility professional with over 24 years of experience in environmental and energy policy. Mr. Schweickert has worked at LADWP for over 16 years and has served in a wide range of roles. He has been an Operations Manager in the Customer Contact Center (CCC) for the last year and a half, during which average call wait times were reduced from over twenty minutes to less than two minutes. Prior to the CCC, he served as Manager of the Customer Service Division's Office of Safety and Training, where he established LADWP's first Customer Service Training Academy which quadrupled the training throughput of new customer service representatives within a 12-month period.

Mr. Schweickert also worked in LADWP's Legislative Affairs Division and Environmental Affairs Division on a wide range of environmental, water and energy policy and compliance issues. Prior to joining LADWP, Mr. Schweickert served as Special Assistant to the Executive Officer of the Los Angeles Regional Water Quality Control Board and as a Public Information Specialist at the California Air Resources Board's mobile source division advocating for Low Emission Vehicle and Zero Emission Vehicles.

Mr. Schweickert earned a Bachelor's Degree in Environmental Studies and Economics from University of California, Santa Cruz and is presently earning a Master's Degree in Business Administration from the University of Southern California.

Sue Tan Toyofuku / Design Research & Strategy Partner, MOstudio

Sue Tan Toyofuku is a seasoned design-thinker and innovation consultant, having spent seven years at IDEO, the world's leading design firm, as a senior strategist, researcher and project leader. Her passion is translating people's needs, behaviors and drivers into meaningful designs and smart solutions across start-up, corporate, and institutional contexts. She has collaborated with a diverse range of clients across the healthcare, technology, real estate, consumer electronics/goods, hospitality, food and beverage, sports and entertainment, transportation, and public sector. She is a partner at MOstudio, a LA-based innovation and strategy consultancy, and also co-author of, "The Tao of Innovation: Nine Questions Every Innovator Must Answer". She holds a Master's Degree in Innovation and Entrepreneurship (NTU, Singapore) and a Bachelor's Degree in Industrial Design (University of Washington).

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Leslie Martin / Supervisor, Residential Services Unit, LADWP

Leslie Martin is the Supervisor of the Residential Services Unit at LADWP. Leslie has worked for the City of Los Angeles since 1997. In her current capacity she manages many of the Department's energy efficiency programs that serve its 1.4 million residential customers. Programs such as the Residential Lighting Program, Refrigerator Exchange Program, Refrigerator Recycling Program, and the Air Conditioner Optimization Program are all under her purview. Most recently she successfully transitioned the Efficient Product Marketplace from a four-month pilot to a full-scale program.

Leslie earned her Master's Degree in Business Administration from Pepperdine University

Amy McNulty / Water Efficiency Manager, Irvine Ranch Water District

Amy McNulty is the Water Efficiency Manager at the Irvine Ranch Water District (IRWD), which provides water, wastewater, and recycled water services to a 181 square-mile service area within Orange County, California. She has over ten years of combined experience in water conservation, industrial wastewater and on-site stormwater management. Since joining IRWD in 2007, Amy has developed numerous customer incentive programs, helped transition several adjacent customer areas onto budget based rates, and contributed to shaping state water policy. She currently oversees implementation of the district's Water Efficiency Business Plan and Drought Action Plan. Amy is active in water resource policy issues, engaged in partnership opportunities with local energy providers, and has pioneered many of IRWD's innovative pilot studies and programs. Amy holds a Master's Degree in Environment and Community from Antioch University, Seattle, and a Bachelor's Degree in Social Science from California State University, San Bernardino.

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Adrienne Rogers / Senior Energy Services Specialist, Colton

Adrienne Rogers has worked for the City of Colton Electric Utility since 2008. She is the Senior Energy Services Specialist, responsible for advocating Energy Efficiency (EE) and assisting all customer classes with achieving measurable efficiency goals. Ms. Rogers is the Key Accounts Representative for the utility and works directly with the Industrial customers on Demand Side Management, Rate Analysis, Efficiency Rebates, Billing, and Outage Management. She manages all EE programs for the utility and processes coordinating rebates. As the Senior Energy Services Specialist she is also responsible for the Utility's Photovoltaic program and assists customers with evaluating their solar needs, provides rebate approval, and guides customers through interconnection. Additionally, she is a part of the marketing team and plans special events for the utility.

Ms. Rogers is the 2016 Chair of the Public Benefits Committee for SCPA and the Co-Chair for the Customer Service working group and represents the City of Colton Electric Utility in the Key Account, and Community Solar working groups. She is also a new member to the Planning Committee for the Utility Energy Forum, and a member of the Association of Women in Water, Energy, and the Environment. Ms. Rogers has a Master's Degree in Communication Studies from California State University, San Bernardino.

Bryan Cope / Director of Program Development, SCPA

Bryan Cope has more than 30 years of electric utility experience focused on integrated resource planning and economics working previously in the private sector, for an investor owned utility and currently for publicly owned utilities. In his current position, Mr. Cope is responsible for assisting Member Utilities of the Southern California Public Power Authority Joint Powers Agency develop many diverse programs to support the needs of the communities that Members serve, including: energy efficiency, customer service, key accounts, transportation electrification, and rate design.

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Emmett Romine / SVP Business Development, Powerley

Emmett Romine leads the sales and delivery functions within Powerley and focuses on customer acquisition, Powerley growth and customer delivery of the Powerley platform. Emmett has almost 20 years of experience in the utilities industry, spending over 12 years working at DTE Energy in Detroit, Michigan. Emmett spent roughly half of that time focused on architecting and building DTE's energy efficiency business and was deeply involved with the development of DTE Insight, the precursor to Powerley. Emmett has served as the Chairman of the Midwest Energy Efficiency Alliance and holds three degrees, including a Bachelor's Degree in Physics from William Jewell College, a Bachelor's Degree in Mechanical Engineering from Washington University in St. Louis, and a Master's Degree from the Olin School of Business at Washington University.

Luis Salas / Manager of Energy Management Tools, DTE

Luis is Manager of the Energy Management Tools team which includes both the DTE Insight app team and the Demand Response team. In this role he oversees the development, promotion and rollout of new technology and programs. Before that he worked in Energy Efficiency for five years in both Strategy and Operations roles. Luis has also spent five years working in the Treasury and Controller departments at DTE Energy. Prior to joining DTE, Luis worked in the banking industry in both operations and sales roles and in the computer manufacturing industry as a Treasury consultant.

Luis earned his Bachelor's Degree in Finance from Baruch College and a Master's Degree in Business from the Ross School of Business with focus on Strategy and Finance.

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Matthew Dixon, Ph.D. / Group Leader, Financial Services and Customer Contact Practices, CEB

Matt Dixon is Group Leader of the Financial Services and Customer Contact Practices of CEB in Arlington, Virginia. In addition to his management responsibilities at CEB, Matt is a noted business writer. His first book, *The Challenger Sale: Taking Control of the Customer Conversation*, was #1 on Amazon as well as a Wall Street Journal bestseller. He's been published numerous times in the Harvard Business Review with articles such as "Dismantling the Sales Machine," "The End of Solution Sales" and "Stop Trying to Delight Your Customers". His two most recent books are *The Effortless Experience: Conquering the New Battleground for Customer Loyalty*, and *The Challenger Customer: Selling to the Hidden Influencer Who Can Multiply Your Results*.

Matt holds a Doctorate of Philosophy from the Graduate School of Public and International Affairs at the University of Pittsburgh as well as a Bachelor's Degree in International Studies from Mount Saint Mary's University.

Eryc Eyl / Senior Analyst, CCXP Prosci Certified Change Practitioner, ESource

Eryc Eyl, a senior analyst in the Customer Experience Practice at ESource, focuses on the power of customer experience, organizational effectiveness, change management, employee engagement, and culture to optimize utility operations. His expertise in leveraging the connections between employee experience and customer experience comes from nearly two decades of experience in high tech, telecommunications, and consumer packaged goods as well as from coaching and consulting with clients in a variety of industries. He holds a Master's Degree from the University of Colorado, a Bachelor's Degree from Vassar College, and a Certified Customer Experience Professional designation from the Customer Experience Professionals Association. He is also a Prosci Certified Change Practitioner.

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Ajá Reneé Clarke / Digital Engagement & Customer Interaction Project Manager, SCE

Ajá Reneé Clarke is the Digital Engagement & Customer Interaction Project Manager at Southern California Edison (SCE). As part of the Customer Experience & Insights group at SCE, Ajá is responsible for optimizing offline and online content. She manages transactional emails through sce.com and extends content across multiple channels with a focus on customer satisfaction. Ajá holds a Master's and Bachelor's Degree in Creative Writing. She is a former marketing and communications professional with Kofax, a Lexmark Company and PADI, the Professional Association of Diving Instructors. She has 10+ combined years of experience in customer experience strategies and digital marketing.

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Saida Beckum / Senior Administrative Clerk, LADWP

Saida Beckum began her career with the City of Los Angeles in 2007, working with General Services and the Los Angeles Police Department before joining LADWP in 2013. She worked as a Clerk Typist and a Customer Service Representative before bringing her organizational skills to the Customer Service Division. She currently works in the Executive Office, providing support to the Assistant General Manager, the Director of Customer Operations, and the Assistant Directors of Customer Service. Ms. Beckum is currently completing her Bachelor's Degree in Business at the University of Redlands.

Christine Chapman / Event and Membership Manager, CMUA

As the event and membership manager, Christine oversees the planning, organization, and execution of the association's conferences, workshops, and meetings, and directs the implementation of the membership recruitment and retention objectives, procedures, and strategies related to meetings and membership.

Christine joined CMUA in 2016 with over 20 years of experience in operations management for non-profits, associations and Joint Powers Authorities representing public water agencies (ACWA), public healthcare districts (ACHD) and workers' compensation self-funded pools/JPA's (ALPHA Fund). She possesses a strong background in developing and implementing program strategies focused on member recruitment/retention, business development, partnership/sponsorship fulfillment programs, and continuing education programming. Christine has served as designer and manager for a wide range of public and private sector events, conferences, and industry trade shows. She is a graduate of the Culinary Institute of America with a Bachelor's Degree in both Culinary Arts Management and Culinary Science and received her Certified Meeting Professional (CMP) designation through the Convention Industry Council. In her spare time, she does graphic and web design for community-based non-profits and teaches mixed-media art.

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Jonathan Changus / Member Services & Regulatory Affairs, NCPA

Jonathan Changus serves as Member Services Manager & Regulatory Affairs with the Northern California Power Agency (NCPA). In this capacity, he supports NCPA's member utilities in developing and administering customer programs, including energy efficiency and distributed solar programs. Prior to joining NCPA in 2012, Jonathan spent over five years working in the California State Legislature as policy director to the Honorable Sam Blakeslee. He also worked previously for the California Independent System Operator, and as a deputy director in the Schwarzenegger Administration.

Jonathan has a Master's Degree in Public Policy and a Bachelor's Degree in Social Sciences from California State Polytechnic, San Luis Obispo.

Medo Eldin / Director for Communications, CMUA

Medo Eldin joined CMUA in 2016 with over 19 years of experience in marketing and communications with a track record of success in achieving goals within variable and complex operating environments. Within the energy industry, Medo successfully planned and implemented three multi-million dollar energy efficiency programs on behalf of Pacific Gas and Electric Company and Southern California Edison, the key to which was authoring a new engineering work paper which maximized recognized efficiency gains from T-8 lighting retrofits and which was approved by the California Public Utilities Commission. Medo holds a Master's Degree in Design from Harvard University and a Master's Degree in Business Administration from California State University, Sacramento.

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Ravi Patel / Senior Strategic Planner, SMUD

Ravi Patel is a Senior Strategic Planner for Sacramento Municipal Utility District (SMUD). He has been with SMUD for over six years, where he designs many types of programs and services for residential and commercial customers which include Energy Efficiency, Demand Response, and Electric Vehicles. Prior to SMUD, Ravi planned and managed several programs at Pacific Gas & Electric Company. Ravi has a Bachelor's Degree in Mechanical Engineering from University of California, Davis.

Tulia Vázquez-Montes / Supervisor of Customer Communications & Interim Webmaster, LADWP

Tulia Vázquez Montes is the Supervisor of Customer Communications and Interim Webmaster for the Customer Services Division (CSD) of the Los Angeles Department Water and Power (LADWP). Tulia began her City of Los Angeles career at the LADWP in 2002. In her current capacity she manages the Customer Engagement Lab at the La Kretz Innovation Campus, supervises the content team for www.ladwp.com, and leads customer research and benchmarking efforts for the CSD. Tulia received both her Bachelor's Degree in International Business and her Master's Degree in Marketing and Management from Loyola Marymount University.