

Steve Brophy (Chartwell) - Chartwell

My name is Steve Brophy (Chartwell). Hello and welcome to the Directors Strategic Council for May. I'm the senior consultant with Chartwell. We also have helping us out today: Steve Waters, senior research manager; Jennie King, principal consultant; along with certainly our regular Chartwell supporters, like Scott Johnson, our Vice President; Russ Henderson, director of research and councils; and of course, Suzanne Haggerty, director of customer engagement and insights.

Note that we are recording this session and that the recording transcripts and materials will be available to all the participants at after this meeting. So today we're going to talk about and focus on deploying technology in support of our business. This has been one of the topics that I think the group had indicated interest in as the as the new Directors Council launched last fall.

And so today, we're going to spend some time on that topic. Yeah, I think just to set the stage a little bit, we know that the utility industry's evolving with the transition to clean energy solutions, you know the offerings to customers more and more, whether it be distributed energy resource offerings, electrification, EV's and other products and services that our customers are demanding, and their expectations are increasing around technology and how we interact with them.

And so, we want to spend a little bit of time thinking about and talking about how does your existing technology support these new expectations? What are we doing as an industry to adapt to all the new offerings and new things that are out there, what new technology platforms are needed and how do you support those technologies going forward? So, these are some of the questions that utilities are working through today and that's kind of the focus for our conversation. So, looking forward to getting started.

So very briefly, just a quick note, I think most of you have been involved with Chartwell over the years, but as always, Chartwell's mission has been connecting the utility industry to solutions really through collaboration, through the leadership councils, certainly the events such as PowerUp [Chartwell's Outage Conference] that is upcoming, and of course EMACS [Chartwell's Energy Marketing & Customer Service conference], the research data available through the Insight Center and of course the new Transact [customer outage] survey, as well as other resources and consulting services.

We're also pleased to share that the Directors Council, which just launched last fall, now includes 17 Member utilities, which offers a great range of strategic perspectives. So, we're very proud to have really built a great organization to support this. I wanted to take a minute to welcome any new participants in the Directors Council meeting. So, what I'd like to do is just if you, if this is your first time attending our Directors Council meeting, please come off mute and on camera and introduce yourself very briefly if you would.

Sure, Bradley.

Bradley Wasson (NB Power)

Hey, everyone. Brad Wasson. I'm the chief digital innovation officer at NB Power. And excited to hear what you guys are all about. My first meeting, as you said there and I looked at the agenda, looks really good. So, thank you.

Steve Brophy (Chartwell)

Fantastic, welcome. Anyone else please?

Cory Ramsel (Entergy)

Yeah. Hey, guys. This is Corey Ramsel I'm with Entergy. Been a member for many years. I'm new to the organization. So, this is the first meeting I've been able to actually attend due to conflicts before, but certainly look forward to engaging and hearing from others my current role. I'm the VP of marketing sales and customer research for Entergy Corporation.

Steve Brophy (Chartwell)

Great, welcome. Thank you. Anyone else? I believe we were expecting a few new Members from National Grid and maybe Hawaiian Electric or that we may have a few that are still new to the group.

Courtney Colon (National Grid)

Hey, Steve, this is Courtney Cologne from National Grid.

So yeah, thank you for the inclusion today. I am sitting in for Nicole Jezykowski, who's the director of Marketing and Communications for National Grid. I am the customer experience management manager for the company. So, I'm really looking forward to learning and engaging today.

Steve Brophy (Chartwell)

Great. Thank you. Appreciate it. Anyone else?

Alright, well I appreciate that. It's always great to have new members chime in and certainly adding to the perspectives of the group so much appreciated and welcome. So real briefly. I'm just gonna touch on our agenda today and then we'll move forward. We do have a little bit of recap from the March meeting, in particular, Steve Waters (Chartwell) is going to touch on our portal as well as we've got a demonstration from Duquesne Light.

And then a little bit of a Technology Strategy exercise and we'll describe that when we get to that stage, we'll it's really to kind of consider where everybody is in terms of speed to market for new technologies and various solutions that you consider. Then we're going to look at, you know, how do we maximize the benefits of existing technologies that you have in place or maybe that you have had in place for a number of years. We'll take a break somewhere in that time frame. We may adjust that depending on where we're at.

Steve Brophy (Chartwell)

And then we'll then we'll delve into deploying new and innovative technologies, just really good open discussion of where everybody's at with that. We'll talk a little bit about how we do that or how we support it, whether it's through outsourcing or internal support. A little bit around the architecture of the technologies and then we'll wrap up from there.

So, with that, I'm going to turn it over to Steve Waters. He's gonna talk a little bit about the member portal. Thanks.

Steve Waters (Chartwell)

Thank you, Steve. And hello everybody.

So, by way of a quick recap of our last extended meeting in March, I wanna remind you that you can find an abundance of Council materials in our Member portal. For the sake of brevity, I'll just show screenshots, but if you go to our website you can log in or create an account as necessary.

And then once inside the portal. You will see the tabs across the top will indicate all the memberships that you have at Chartwell, so including the Directors Council on the dashboard there you'll find the member directory of which we've got a screenshot on the right. So, you see that that's now searchable.

On the left you'll see keywords that include functional areas of responsibility, challenges, initiatives that you're working on, which are also in the description, there's a link to each Member's email. So, if, you haven't yet completed your onboarding survey, that brief questionnaire will help identify the challenges that you have, the initiatives that you are pursuing, the topics of interest to you and your experience in the industry or other industries.

Let us know and if yours is not complete, we'll make sure that you have a link to complete that and then you can look for one another to find folks who have already gone where you want to go on a certain initiative or have similar challenges or said something interesting in the call that you want to follow up with. Again, this is your peer network, and we want you to be able to connect with one another in between these meetings as well.

Then clicking on Resources or scrolling down you will see again a cornucopia of resources from the last meeting in March including the slides and all the videos of the customer Centricity Workshop that was hosted by Neil Dempster.

The recording and the notes from each of the four breakout teams are available so you can go back and look at your own or one of the other teams' breakouts, but two things I would specifically call out in that top middle box are the consolidated breakout notes from each of the four teams. So, if you don't have a

couple of hours to go through all the videos, that's a concise set of notes from each group's discussion of customer centricity.

Then that bottom middle tile is the consolidated results of the “more, better, different, less” exercise than Neil took us through again, looking at things that we wanna do differently, better, more or less so again, encourage everybody to go to the portal to connect with one another or to find past resources.

Steve Waters (Chartwell)

One of the things that we talked about and that's kind of a bridge from customer centricity to today's discussion of technology is the employee app that Duquesne Light Company has just deployed and EJ Shuck, their director of customer Affordability and innovation, is gonna just do a little show and tell for a few minutes on that employee app, which he and his colleague Jen Neiswonger both mentioned during that workshop last time, and how the app facilitates employee discussion with customers as well as promoting services and collecting customer feedback. So, EJ, the floor is yours, you can tell us about the app and field any questions.

Jennifer Neiswonger (Duquesne Light)

Hey, Steve, it's Jen Neiswonger. I'm actually gonna take the lead on this one.

Steve Waters (Chartwell)

OK. Thanks Jen.

Jennifer Neiswonger (Duquesne Light)

Sure.

Yeah. So, we just want to take a few minutes to share with you some info about our employee app. I think the last time we were together, we were preparing to launch it. So since then, we have been able to launch it, the go live was April 11th. So, we have a little over a month under our belt here. You can see some, some visuals of that app. We really went live with kind of a minimally viable product and hope to expand it by building out a road map for it.

But you'll see along the bottom it's a little hard to see, but there are two tabs along the bottom, so there's a home tab and a “here for you” Tab. The Home tab is really a partnership with our corporate communications team, and you don't see it displayed here, but it's really kind of like a scrolling news feed to share internal communications with our employees. We also have push notification capabilities with the app.

So, with Geo-targeting. So, it allows us to send Geo relevant messages to employees depending on where they're located, but primarily what we wanted to share with this group was the “here for you” tab, which is highlighted here and the intention here was really to serve as a customer service tool for

anybody in the Duquesne Light organization. So as part of our customer centricity strategy where we're trying to convey that anybody in the company is in customer service, this app is really the tool that allows them to do that. So, no matter who you are in the company, if you're out and about with family, friends or even a complete stranger happens to see your Duquesne Light apparel on you and says, "Hey, I've been trying to get ahold of them or I have an issue that's unresolved," any employee in the company can step in and help in that scenario. So, it's a really quick process.

You see here that that's really all that's involved in submitting a "here for you." So, the only thing that you're really providing is the topic of what you're submitting for. So, is it vegetation management? Is it related to your bill? Is it pricing?

You know, trying to get kind of a category for that submission and open text box to tell a little bit more about what you're experiencing. And one of those options in that drop down is a kudos option because we want our employees to know it doesn't just have to be problems that we're trying to fix. It can also be recognizing employees for great work that they've done. We have the ability to upload an image, and this has come in handy a few times already since go live.

I was just scanning some of the submissions yesterday and saw that somebody submitted a picture of our pole and showed it leaning at the top and wanted to submit it to see, you know if there were plans to get that corrected, we have some emoticons. They judge kind of how the customer's feeling in the moment and then who's submitting this. So, in all cases, it should be a Duquesne Light employee that is submitting. And we wanna know who is submitting this on behalf of the customer.

My team then works to contact the customer directly: we give a promise of two to three business days that we'll be in contact. And really there's no further action needed by our employee so many times our employees might come into interaction with a customer, and they just don't know who to refer it to. This makes it easy for them because they just submit it. And then my team works on assigning it for resolution depending on what the topic is, you'll see there's a check box there that the employee's acknowledging this is not an emergency situation, we've been very clear that this, this these submissions are not for emergency purposes. It shouldn't be anything related to your power, your electricity service. Those should be followed like typical emergency situations, either calling our contact Center for immediate resolution or 911 depending on the type of emergency that it is.

So with that, just thought I would share some quick high-level stats of what we've seen so far. We have almost 800 downloads so far we have about 1600 employees, so we're about 50% of our employees with this app on their phone. Some of those could be company devices or they could be personal devices depending on the employee preference and whether they have a company issued device or not. We've had 12. This is a little bit dated. I think it's a week old, so we're probably rounding out 15 or so submissions so far.

Jennifer Neiswonger (Duquesne Light)

We weren't sure what to expect from a volume standpoint and I think as folks become aware of it, that volume will ramp up. But our favorite part about that stat is that the submissions have been from all over the company and for topics all over the place, so it's not just customer service employees that are submitting these. We've seen submissions from affordability, from legal, from engineering, from energy efficiency, and even IT. So, we're getting some broad-based usage of it on a variety of topics. And then we have some stats that help us see usage of the app and visit. So, we've had about 770 users just going in and looking at the app, which coincides with our download, right? They're spending about 2 minutes in the app. That's submission process is really quick and was intended to be so. And then we have about 20 active users. So, when we launched, we were averaging about 100 active users a day. That's really trailed off over time and we kind of expected that to happen.

But we're working closely with our communications team to evaluate or continue to find opportunities to push the "here for you" app in our communications out to our employees. So, keep it fresh in their mind. And one thing that we've started recently is a storytelling project. So, we're asking folks to share quick videos, selfie type videos of their experiences with the "here for you" app. And we plan to push that out to our employees to try to encourage more usage of it.

And with that, I think I saw a hand up.

Jennie King (Chartwell)(Chartwell)

Well, hey, Jen, this is Jennie King. I had all these questions I was gonna ask you, but you answered them all, which was great. First of all, thank you. I've been looking so forward to learning more about this. I love this idea. And I think the real question I have is I know you did a full-scale launch to all you said 1600 employees. What kind of education process and how did you teach them how to use this and how did you get them in to buy into this?

Jennifer Neiswonger (Duquesne Light)

Yeah. So, we launched it with full executive support. We started at the top with our communications efforts. We had our Chief customer officer as well as our Vice President of communications kind of co-announce it to the company. So, we did a communication from them. I also did kind of a Roadshow, I guess you could say where I visited each of the executive leaders, everybody from our executive leadership team, I joined their staff meetings to tell them about it and we've been looking for other opportunities to kind of join team meetings and share the word. But what we've asked folks is when you're meeting with your teams, try to finish that meeting 5 minutes early and tell folks, you know, we're finishing up five minutes early. But what I'm asking you to do is go back and take five minutes and download this app.

We provided a job aid to walk them through step by step, how to download it because as you can imagine, since this is an employee facing app, it's not public, so it's not in the Apple Store or the Google Play store. They have to take some steps internally to access this app, but we haven't had any complaints about accessibility or user issues and if somebody does have a company issue device, we did

take the step to we were able to figure out a way to automatically push it to their device. So, if they have a company device it rolled out shortly after go-live that it was automatically downloaded to their phone.

Jennie King (Chartwell)

That's great. And then I have just one more question, if you don't mind. I know it's new and you're just really getting started, but do you have any plans to start capturing these submissions of as you receive them and track them and analyze them and see what's going on so that you can do some take some corrective action if needed if you see some gaps?

Jennifer Neiswonger (Duquesne Light)

Yeah, absolutely. So, we are tracking by category of like the category of the submission.

We've been doing this for a while now because we have another survey that we do with our customers called experience recovery where we track the types of issues that are coming through. And we look at where those are trending and what those biggest categories are so that we can try to eliminate those over time or at least significantly reduce them. We plan to track the issues submitted and this similar to how we track experience recovery. And so, if we see a vast majority coming through are related to streetlights, as an example, I'll just pick something random, then we can work directly with that team to say, hey, why are we seeing all these issues and what's the root cause and how can we eliminate that moving forward?

Jennie King (Chartwell)

That's fine and congratulations. I just think this is terrific.

Jennifer Neiswonger (Duquesne Light)

Thank you.

Steve Waters (Chartwell)

Yeah. Thank you, Jen. Yeah, I love it as well. And we asked you to share this because we had some instant feedback during the last call that there were others who were looking to do something similar. So again, some of your colleagues may be reaching out to you for more. But again, I think it's great.

Everybody in the company is part of customer centricity and I love the two-way aspect of both getting that information from employees but also being able to distribute information to folks in the field who might not otherwise be logging in to read an email. Or maybe your executives can send short video messages that they would be more likely to consume.

Again, if you have a question for Jen or at any point, uh, do you want to make a point or raise a question, you can certainly raise your hand and we'll call on you. You can chat into the chat, or you can

just come off mute and speak up again. Thanks, Jen and EJ, and congratulations to the folks at Duquesne Light.

Steve Waters (Chartwell)

We sent out a survey before the meeting and thanks to those of you who were able to finish it, you know, we know how constrained folks are for time. So, we're going to be able to address everything that was in the survey here today, but a couple of the questions that we asked were about speed to market.

How quickly do you try to get new technology solutions deployed? Uh, do you take more of a wait and see mode or are you more of an earlier adopter? And then we also asked, "what is your preference for proven utility industry solutions versus do you look outside the industry to other solutions in the marketplace from other industries?" And then we have some of the responses that we already plotted here.

So, in a moment I'm going to open up the whiteboard for this meeting and we're going to ask you if your utility's response isn't plotted to go ahead and drag and drop, but so you'll see here again left to right on a one to four scale, one being risk averse. Do you wait for other utilities or other companies to sort of prove a solution before you adopt it or are you more on the early adoption scale would be a four on that X axis going left to right.

And then going top to bottom to top, one to four, you look just at proven industry solutions, or are you looking outside the utility industry? So, I'm going to go ahead and share the whiteboard for this meeting, and so you should be seeing that same chart. First, I want to note down on the bottom right you can click fit to screen. You can also zoom in, zoom out as necessary and so you see we've got everyone's logo there.

We've got everyone's logo there, so again you know, first ask yourself what is your utility's appetite for being an early adopter for new technologies versus waiting for other utilities to establish proven solutions. So, think are you going to be a 1234 there and you'll see the guiding numbers there. Again, they look a little small if you don't zoom in but left to right one through 4 and then drag it up or down for what is your preference?

4 industry, proven utility industry solutions versus solutions from other industries out there in the marketplace. So again, you can find your logo, the A through Ms are on the left, the Ns through S are on the right and again you can just drag it. You don't have to be too precise about the numbers, but just try to get it into the quadrant and you'll see that we've got a couple of logos for each utility.

Feel free to grab one and drag it where you would. If you have a colleague from your utility that disagrees, that's fine. You can just have different perspectives on your Technology Strategy. Uh, feel free to have your company logo in two different quadrants that may be assigned that you have an opportunity to further align around what your strategy is. Or again, you may have different approaches in different parts of the organization.

Steve Waters (Chartwell)

But everybody should be able to go in and drag and drop their logo. Let us know if you're having problems. Also, if you want to chat with your colleague from your fellow utility in the chat to sort of reconcile where you think your logo might belong. You can do that. The other thing to emphasize is, you know, there's not a right or wrong answer. There's no one quadrant that is preferred. There's just different philosophies on where you are today.

Jenny's got her hand up.

Jennie King (Chartwell)

Steve, we're getting some messages from the folks out there that they are not able to. I'm not sure if they can see it or they just can't do anything, they can't activate it. I'm not sure.

Steve Waters (Chartwell)

OK, you can tell us a quad you can give us numbers or tell us a quadrant.

Steve Brophy (Chartwell)

Yeah, it appears that it's limited to just the Chartwell.

Steve Waters (Chartwell)

OK, alright. Well, here's what we're gonna do. You can put your answers in the chat, or after the meeting you can go complete the short survey again. This would be just two of the questions we'll get everybody plotted.

Again, we wanted this to complete this to have it available to you so that you can look and see: are there folks in my quadrant that have the same philosophy and maybe we can share ideas, or If maybe I want to be a little more agile and increase our speed to market if there's somebody in a quadrant to the right of me, maybe I can reach out to them.

Or if you want to embrace, look for technologies outside the utility industry, there's somebody in a higher quadrant than you that you want to reach out to, but there might be 2 folks and I'll go back to the previous slide just to show what we have. But I think Ameren and Black Hills are a couple of folks that I might call on to just kind of discuss what's happening at their utility. You see that they're in two different quadrants.

So, Kristy Lovett. Ameren has a lot going on. You've got a lot of projects. So, the fact that you're in the risk averse and industry solutions quadrant is certainly not a bad thing. You've got a lot going on. Maybe you can tell us a little bit about your strategy and your thinking, and then I want Jeff from Black Hills to be ready to tell us what puts you in that quadrant for a little more agile, a little faster to market and looking at solutions outside the industry.

Kristy Lovett (Ameren Missouri)

Yeah. Thanks.

Umm, so we are pretty risk averse and Ameren still very conservative company, and we're putting a few things in like visual IVR that not all utilities have or either in all companies, but for the most part, whenever we bring up something that we would like to implement, we do a lot of research to determine if it's being done by other utilities, especially with something regulatory.

And if it isn't, you know what's the closest like utility that's doing it. When it comes to things just on the normal everyday serving our customers and putting out to new products and I guess if you think about account products, things that we're not very advanced in the early adopter, now we do have one small segment of our revenue generating team that is trying to look at doing some things differently, but some of the things that even they have come up with are things that other utilities have done. I don't think there's anything that we're just like out of the gate just like the first. We don't like to be the first on anything except JD Power, so I'll say.

Steve Waters (Chartwell)

There you go. Yeah. Thanks. Thanks, Kristy. So, yeah, Kim, I understand Jeff stepped out. If you want to speak on behalf of Black Hills, that's OK. Or if we wanna wait for Jeff. Uh, maybe we can hear from Brad at New Brunswick Power or Angela or Kimberly from Nisource who are in that top left quadrant where again, a little cautious in terms or methodical in terms of speed to market, but willing to embrace those solutions from outside. So, Kim, do you wanna go ahead, or shall we see what Nisource or New Brunswick have to say.

Kimberly Schneider (Black Hills Energy)

I can go ahead and probably jump in. I didn't complete the survey, so my apologies and I guess I may differ a little bit from what maybe Jeff perspective is. I probably see us more in the same quadrant as Nisource, I think.

We are not the first to jump in. I would say we do like to see you know that the technology you know has been vetted out and maybe the bugs have been worked out. But over the recent years, we have been pretty aggressive, I would say in customer self-service technology really ramping up our website right now. We're going through an upgrade of our IVR system. We utilize Genesis and we're moving to the cloud, which is pretty exciting.

It's kind of our first attempt at the cloud, and with that upgrade it opens doors for us for sure for more quickly deploying some new technology for our customers like chat. So, we're just dipping our toes into chat functionality with this project. Chat bots will be part of that as well. And going to more natural language IVR. So, we do definitely focus on technology and opportunities for really enhancing some of the older technology that we have in place now, like we're on an old CIS system but, again it probably

depends on who you ask and what project we're looking at or what technology we're looking at on whether we're kind of early adopters or are a little bit more conservative.

Steve Waters (Chartwell)

Thanks Kim. So, we do have Angela Sanchez from NiSource, I believe, who also did not get to introduce herself as a new member at the beginning of the call. So uh, Angela, would you like to introduce yourself and just tell us a little bit about you're thinking and plotting Nisource there in the uh, open to solutions, but still methodical in terms of speed to market. And then I'll ask Brad from New Brunswick to weigh in.

OK, I thought I thought we had Angela. If Kimberly from Nisource is on, she can speak up or Brad from New Brunswick, and then we can turn to what are the existing technologies that we're trying to maximize?

Kimberly Burdine (NiSource)

And Steve Kimberly is on the call. Just wanted to and full disclosure. I've been with the company 60 days, so I don't really want to speak too much into it, but I can tell you in this last 60 days, we are in the midst of implementing and deploying the new IVR system. So that has been one of the things that has made me smile that I know our customers definitely need in terms of customer systems. We're on the CIS DIS model.

Steve Waters (Chartwell)

Hi, Kimberly.

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Kimberly Burdine (NiSource)

And just based on what I've been able to gather is that that is a system that we're looking at and hopefully can enhance, because it definitely will enhance the overall customer experience. But outside of that, I wouldn't be able to speak with certainty about other things that the company has been doing.

Steve Waters (Chartwell)

Thank you, Kimberly. And yeah, Angela did respond to the survey. So, we appreciate that.

OK, I think we can transition a little bit. We want to make sure that we get sufficient time to talk about, how are you maximizing the technology that you've already got. And Jennie King's gonna lead that discussion and then Steve Brophy will take over after a break to talk about new sources of technology and some of the age old questions of internal development versus external resources. So, I'm gonna pass the mic over to Jenny.

Jennie King (Chartwell)

Great. Thanks Steve.

Jennie King (Chartwell)

So, thanks everybody for that discussion. Sorry that the technology piece, how ironic didn't work the way we had thought it was. So, you know, hey, we're all in a learning together, but we wanted to continue this discussion because technology has many, there are many ways we use it at our various utilities, the technology we currently have and technology were looking to acquire.

My part right now for the next 15 plus minutes or so is talking about let's talk about the technology you have in house right now that maybe you've had for like legacy systems from maybe several decades versus a newer technology you've recently acquired within the last five years or so. I'll bet you that how you use those technologies are vastly different from each other. But what you see on the screen here are just some key points to help us in this discussion. And I'll go through these quickly and then I'm going to really open it up to everyone to share with each other what you're doing with what you have.

Right now, so I think the first thing that's really important is that whatever technology you do have, how are you using it to support the changing expectations of your customers and are you using this technology, existing technology to help you develop new products and services or just enhance what you already provide? Another big topic that I could be a meeting in and of itself and it might be down the road and that is how are you all utilizing your internal IT resources versus outsourcing, we all are very aware that many of us and I include myself and this is have been long time utility professionals for most of our lives, and we're leaving. We're retiring. So, a lot of that intellectual knowledge that we've had for decades is walking out your door. Yeah. You're bringing in new people, young people, a lot of very bright people, but they don't have those years of experience to build on. So how are you capturing that so you don't lose it?

And specifically, when it comes to it, because when we're talking about how to utilize your technology to further your CX journey and your CX initiatives, it's not just IT, it's also a partnership with your business partners, your business folks as well your business organizations. They need to work together to build the right application systems, tools, products, services to serve those customers and those changing expectations and how are you using what you have right now to develop your internal data analytics data mining, data modeling, visualization dashboards. We talked about dashboards at I think it was one of the first meetings. I would love to learn more about that. What are you doing with what you have in place? Yes, you can buy new things. But what are you doing, if anything right now?

And as I mentioned, just a general understanding of taking what you have understanding its possibilities to help you push those CX initiatives going forward. So, for those of you that were able to complete the survey, thank you for that. I'd like to, if you don't mind, call on a few of you, Kim Schneider from Black Hills. I think you're still on the line. I see your name there, if you don't mind. One of the things I think, Jeff shared with us is that you are using your legacy in-house CIS system and but I'd like to a little bit more. Can you explain a little bit how are you using that to move your CX journey along? What are you doing?

Kimberly Schneider (Black Hills Energy)

Well, with that system we own that system and have for years. So, the benefits of that are we can customize the heck out of it which is great, but you know, and it eventually probably will be a downfall. But yeah, so you know, because of that ability, we have really been able to simplify and automate some processes and things for thinking better contact center. Specifically. The area that I'm over, we'd been able to really simplify, simplify processes and entry of orders and things for them. And then of course, you know that system, we can set it up to connect, of course with the website and in our IVR system from a self-service perspective.

Jennie King (Chartwell)

So how old is your system, your CIS?

Kimberly Schneider (Black Hills Energy)

Oh my gosh. Well, it's old. I know that. I hear that it will be supported through 2050, but then we're gonna have to do something else. I'm thinking like the 90s. It's old. Yeah, it's. I think we're one of maybe 2, maybe three utilities still on. It's called CIS plus.

Jennie King (Chartwell)

That's a long time.

Uh-huh. Alright, so I understand that. Yes, there are some benefits because you have total control over it completely and you can manipulate it really anything you want to downsize is that it's totally customized by you. So, if you ever wanna consider an outside solution, you're extremely limited.

Kimberly Schneider (Black Hills Energy)

Right. Yeah. And another challenge that we're facing is because it's all technology and I am not it. So, I'm not gonna be able to use the right terms, but it's difficult to find developers that know the language or have experience in the language or even want to work in the language.

Jennie King (Chartwell)

That's definitely an issue.

Kimberly Schneider (Black Hills Energy)

So that's another challenge that we've been working through definitely that's the main thing, cause a lot of our developers are retiring.

Jennie King (Chartwell)

That's that goes to my point.

Kimberly Schneider (Black Hills Energy)  
20 Year Knowledge is leaving, yeah.

Jennie King (Chartwell)  
That's right. It's a so and the younger folks coming in, that's they don't they don't talk the same language.

Kimberly Schneider (Black Hills Energy)  
Right.

Jennie King (Chartwell)  
Got it. Got it. So, there's definitely a challenge there. Uh, thank you for that, Jen. Uh, from Duquesne. You were talking about how you reimplemented Oracle, CCB, your customer care and billing wouldn't say reimplemented. Can you explain what you mean by that? Because this is almost the opposite of what Kim just said about you want to reduce customizations.

Is Jen still on the call? And if she's not, we will skip over.

00:59:16.390 --> 00:59:18.220

Jennie King  
All right. I'm gonna skip over for now.

We'll come back for that, but I will ask Kristy Lovett again from Ameren, if you don't mind. Kristy, you're so kind to give us more about from this survey you're talking about changes to your web platform to modernize. So, can you explain what that looked like and how you're using that to your advantage?

Kristy Lovett (Ameren Missouri)  
Yeah. So, our web platform, we use Sitecore as our content management system and we recently upgraded that so that we can do more personalization with the customer. So, it's implemented, we're just starting to add the personalization to it and then of course, we added Google Analytics to do a little bit more.

And we've also been adding an additional data layer, so we don't have to dip into the CSS system all the time, but we can dip in the things that are most important to knowing who the customer is to be able to personalize with them.

And so it's been a probably 2 and 1/2 three-year journey and we're just on the tail end of actually starting to use all those things we put in.

Jennie King (Chartwell)

It is. It's a constant. It feels like it's a never-ending process.

Kristy Lovett (Ameren Missouri)

That's right.

Jennie King (Chartwell)

The project that never ends.

So, I understand that, but thank you for that. We appreciate that. I'd like to open up the floor where we'd like to just ask any of you to share with us looking at what the slide you have in front of you is, can you talk a little bit about what you're doing with what you have right now to maximize whatever best benefits you're looking for in terms of CX or customer centricity?

Uh. Or reducing pain points, whatever that might be.

I'm gonna ask if it's OK. Cyndy Nance from SnoPud. I think you may if you're able to talk a little bit about your IVR. I think you have some improvements there. If you could share what you've done with what your current with your current IVR?

Cyndy Nance (SnoPud)

Yes. So, what we were kind of behind on our IVR a little bit and for Spanish speaking options to be able to make payment arrangements and such through our IVR. So, we just did a recent upgrade with that.

In regards to customer experience, we've had a customer experience initiative that we began a couple years ago right before COVID and of course that kind of put us behind when COVID hit, but more to come on that and the near future, I hope that we're really looking at creating a customer experience initiative district wide for Snohomish County PUD and not as you stated in one of the earlier slides about customer service and that and the mobile app for the employees. I love that as well.

But we're really starting an initiative to do roadshows and team meetings for customer experience, sharing out stories and getting the linemen and our tree trimmers all to realize that customer experience doesn't just happen within customer service at they're the ones that are out in the field, you know, in front of people's houses and interacting with people our meter readers and getting that customer experience amongst all of our employees and to share stories in team meetings about the customer experience. We also launched what's called a "near miss" within customer experience like you know, what did you find was a near miss. We talked about near misses with safety culture. You know there was a near miss and somebody almost got hurt.

Cyndy Nance (SnoPud)

But what are some near misses and customer experience and how what do we do to make sure it didn't doesn't happen again?

Jennie King (Chartwell)

And are you using your technology in some way to support that?

Cyndy Nance (SnoPud)

We aren't currently, it's more just a I have a customer experience team that would be doing those roadshows and then we are we have our strategic initiatives that we are having customer experience via a part of each of those. So, when you need a department throughout our district decides that they want to start a new project, we get invited into their meetings, their brainstorming sessions early on to make sure that they understand that you know every step of the way. We got to think about the effect on the customer. It may be, you know, a department that doesn't normally deal with customers, but there's always that trickle-down effect. And we're making sure that we're invited, like I said early on into these meetings, we don't have to have a big part in it, but at least be in that room to make sure that we're represented with the customers' viewpoint.

Jennie King (Chartwell)

Mm-hmm. Right. That's great. Thank you. Thank you very much for sharing that with us. I hope you don't mind. But Courtney, I know you're stepping in for Nicole, but if you don't mind, I believe that you all are doing a lot of work with your platform for digital self-service to promote more customer self-service. If you're familiar with that, would you able to share a bit a little bit about that with everybody?

Courtney Colon (National Grid)

Yeah. I'm actually not well versed on that leg of our it's part of our ZBR Project 0 based redesign project. You know to help the company save money while simultaneously improving the customer experience. So, I don't have a lot in there besides the fact that introducing a chat bot is part of that. I was on which Chartwell sessions was it last month. I think it was the quarterly meeting and that was shared just some information about success with various chats and utility shared lessons learned about, we are gonna try it again. We did do a pilot a few years ago, and it didn't really go well, but we we're trying to push that technology nonetheless as a self-service tool, we had a lot of learnings now and we learned from the other Members in Chartwell as well. So, we are making improvements to the IVR.

I don't have detailed information about what those are, but we're really trying to look across channels right across any self-service channels to really increase that in the name of like I said, CX improvements, but also helping the company save money. So that's about the extent of the detail I have on that at this point.

Jennie King (Chartwell)

Absolutely. Well, that's great. No, that was you did a great job. Thank you for that. I know anytime any of you have something like Duquesne did today that you would be willing to share with the team here. I think everybody would really appreciate it because we're all learning from each other. So, Steve, you have a question?

Steve Waters (Chartwell)

Yeah. I just wanted to note a couple of items in the chat. Jen, I will get with you about the information on chat bots. It may not have been in a webinar. It may have been the CX Council.

So, I will look into that, but Jenny uh Brad from NB Power was also talking about the work they're doing on building a new corporate data governance model. So maybe he can tell us more about that.

Jennie King (Chartwell)

Yeah. Thank you. I think I wasn't watching the chat like I should have. So ,thank you for that, Steve. Brad, please. The floor is yours. We'd love to learn more about that.

Bradley Wasson (NB Power)

Sure. I and I didn't fill out the survey with someone else [Berit Watson] at NB Power so, but it was everything seems good at the survey, but I just listening to the discussion we absolutely are interested in completely evolving the customer experience and maybe just kind of a nuanced thing I mentioned at the introduction there, I'm the Chief Digital Innovation Officer at NB Power. I've been in this role for four years now and it was created by our Board of Directors.

You know, as we do this type of work that's being discussed here, it's great to have, you know, at the highest-level support for trying to move forward a number of these initiatives. And I consider all this stuff we're talking about part you know it's really related to the digital transformation of utilities that we're seeing all over the board in different phases of the life cycle of doing that. One of the things that we have encountered that is problematic for doing a lot of work, you can work through it, but it's lots of extra steps and things you have to consider, but our data governance model is really an ad hoc one, the one that we've had, it's probably you know been developed over a 20-year period and it's quite outdated.

So just let me give you an example of what I mean by that. We are an SAP based organization. We were one of the I think we were the First Utility in North America to implement SAP's utility solution. It was over 25 years ago. It is a 100% customized implementation of SAP. So, you guys mentioned this is not too long ago, you can imagine the difficulty of moving anything in and out of a platform like that to enable and really embrace data integration requirements for connecting different parts of the company together. You know I use just here's an example. Imagine that you would like to have a new capability of proactively detecting faults on field equipment that could feed into a proactive reach out to a customer

about a potential impending outage that they made experience. You know that's a data integration problem from SCADA that may be in the field, real time data integration and connection.

Feeding it out into the customer organization or through an app or an interface, all that kind of stuff. A very practical, useful thing to be able to do. Very customer focused or customer centric, but trying to architect that to pull it together and deploy that in your corporation is that just a nightmare and for a lot of US utilities, you know 100 years old with a lot of legacy environment.

Not only is the instrumentation of the technology environment to support it problematic, but one of the challenges that we have is that just freeing up data and the culture around the unwillingness to share data across the corporation, kind of the idea, well that's my SCADA data and what exactly are you planning to do with that? Because I don't think you should be able to even see that or on the customer side is that's our customer data and we don't think that you should be able to see them.

In another part of the company, and even, you know, even though it seems obvious that this should be, you know, a classic case of the democratization of data inside a corporation, so that anybody should be able to have access to data with the correct constraints for privacy and, you know, all those regulated things you have to do to protect information. But generally, how can we move forward for a lot of what we're talking about today without really unlocking data so that it can flow back and forth? It can be integrated.

The data models for the etcetera. This is a big data governance problem. So, what we are doing, so that's kind of the context, what we're doing is we're completely revamping our data governance model at NB Power and we're starting kind of literally at the executive level on topics such as where should data decision rights exist in the corporation and on what basis would you make decisions about those rights. And these are kind of really fundamental concepts that you've got to get established and it has to be talked down.

So, if you're going to say, you know every group in the company should be able to access data that they need in order to unlock a potential new capability or customer relationship or field operation. If you really believe in that stuff, then you've got to get that data governance piece established, documented, endorsed by the executive communicated, etcetera. So, we're starting and building a new governance model.

There's three tiers to it. There's kind of executive level endorsement of principles, policies. Things like decision making, rights, etcetera. There's a mid-tier which is kind of at the director manager level which is looking at like how do you make decisions when things start happening in the business, who's responsible for that, what kind of committees do you need to come together, who is on those committees, who is implementing the policies that have been signed at the executive level and so forth? And then there's a level below that which is the day-to-day issues around data from data collection, storage, integration, modeling.

Bradley Wasson (NB Power)

All those things, that's a different tier of people, if you can imagine. So, I guess my whole point with this is that what we are feeling and me and in my role at the utility is we've gotta get this data governance, piece in place to avoid all that infighting that will go on when we have an ad hoc data, governance model that doesn't allow this end-to-end discussion, technology deployment, implementation etcetera to happen. So, we're tackling that right at the moment. I think it's going to be very, very useful. I think there's violent agreement with us doing that, if you know what I mean, like I think people are saying, yeah, this is time for us to tackle this one.

And if we can successfully tackle it, I think it will unlock a floodgate of what is a lot of the discussion that's happening today, so I just thought I point that out. That's kind of where we are with a lot of this thinking. And I think this governance piece is going to be critical to allowing us to go faster because at the end of the day, boy, your customers are moving, your vendors are moving. If you can't move in lockstep with them, then you've got other problems to deal with. And you got to get this really on this fundamental data piece. Kind of sealed up if you will.

Jennie King (Chartwell)

Wow. Well, Brad, that was fabulous. Thank you. You know, it sounds like you're on the right path there. Would you be willing, Brad, at some point in the future when you have your data governance model figured out, would you be willing to share with everyone here? I think that would be a great learning opportunity for everyone.

If that would be something you could do, that'd be great.

Bradley Wasson (NB Power)

Yeah, absolutely. And I think you know, that's one of the beauties. What you guys are doing here and you know as utilities, you know we are you know we're quite a small village if you will. And our village is becoming more global like kind of from the pandemic we're becoming a global village and about health issues that you guys see might say a beauty of this utility space is we are very open to sharing with each other a lot of this stuff and it boy it can expedite people going through a lot of pain. The more we share. So, kudos for you guys for running this.

Jennie King (Chartwell)

Yeah. Absolutely.

Bradley Wasson (NB Power)

This particular mechanism for bringing us together. So yeah, we'll be happy to share that. And when we get it ready, we'll do that.

Jennie King (Chartwell)

Well, thank you.

Fantastic. Well, I think we are pretty much out of time for this part of the discussion. This was great. Thanks to everybody who participated and please if we have other questions or things you'd like to share, please use the chat. We'd love to hear from you.

Steve Waters (Chartwell)

Yeah. And so, Jenny, I think we're ready for a 10-minute break and then we're gonna come back and Steve Brophy is gonna lead discussion on new technology, how you're deploying that. And are you using internal or external resources? What is your overarching architecture plan? And again, Brad, thank you. And it was Berit Watson who completed the survey for NB Power and in new technology she talked about your coming deployment of contact center as a service, so maybe you'll get a chance to talk about that after a 10-minute break. It's the top of the hour. We'll see you at 10 minutes after.

Steve Brophy (Chartwell)

All right, everyone, I've got 10 after the hour, so hopefully everybody had a chance to take a quick break, grab something to drink. We're gonna continue on with some good discussion. First of all, great discussion in the first segment, lot of a lot of good sharing there and a lot of great information sharing and appreciate that definitely want to keep that going. So, you know, I think at the beginning we talked a lot about how technology supports the changes that are taking place in our industry, the evolution of the utility industry and how our technology needs to support that, Jenny spent some time talking about how existing our existing and sometimes legacy technologies are used to support our new business models. And we know the challenges around that, which obviously leads to in some cases we've got a really implement some new technologies.

And so we're gonna spend some time talking about that deploying new and innovative technologies to support our business and what it takes to do that, what are some things that people are working on now to support new products and services or new customer expectations. And then how do we do it?

How do we get the skill sets that we need, whether it be internal resources or through outsourcing or other means. So, I think as we look at the slide, you know a couple of things just to consider, again looking at either outside or inside the industry for innovations you know certainly when you look at other industries and there's a lot of innovation out there in the marketplace, right, that our customers are accustomed to seeing.

So, what are what are some of the things that we as a utility industry have leveraged or will or thinking of leveraging for those uh, expectations, whether it be channels or technology trends? What are some of the technologies that are being used by member utilities that we talked a little bit earlier in the earlier segment about opening up new channels such as chat or chat bots, other technologies like that.

Steve Brophy (Chartwell)

Speed to market. I think that's another question. Certainly, our customers' expectations around speed to market for technologies they see what other industries are doing and you know they would likely expect us to keep pace. And how do we do that, right?

One of the things I think that's interesting is if you do go external implementing out of the box applications as opposed to customization, I think we heard the word customize solutions quite a bit in that first segment. There's pros and cons to that, right? Certainly, pros being you can control everything.

You've got ownership of that, whereas the cons might be if you've got an application out of the box, but you customize it, then you may not get the updates from whatever provider you have. So, I wanna pause there, we'll start maybe with some discussion around that.

Through the pre meeting survey we did, we did get some feedback from some of you on some new technologies. I think NB Power submitted that they were considering a new telephone and contact center as a service platform. It would be interested in. Maybe we could start with that. I don't know if Berit Watson is on, or maybe Brad, if you would jump back in maybe touch on that briefly that would be great.

Bradley Wasson (NB Power)

So that is a Berit initiative and to be honest with you, the scope of it, I'm just getting up to speed with so. But I have another thought for you or if you're open to me taking it in a slightly different direction.

Steve Brophy (Chartwell)

Sure. Absolutely.

Bradley Wasson (NB Power)

I'll just throw out a couple of things that we are doing with new technologies that kind of like on the second bullet there. Then I'll just give you a bit of a landscape of what we're doing again. So, when my role was created, I had a kind of a two-part directive to fulfill for one was to build an innovation capability inside the corporation. When I say that literally formal process is for do innovative type work.

Because that was one part of it. And I also had full responsibility for the IT organization. So just to give you guys, you know, a feel for what this is, the IT organizations is 180 people. We have about a \$40 million budget and our innovation budget we've built up to, you know \$8 million or something like that.

We've got about 20 full time people working on innovation related products and services at the moment, so we have this kind of divided in a few different areas and I'll just mention what they are just to give you some idea about that. One of the first one that's kind of maybe interesting and a little bit

surprising for people. We actually have a group that's doing gaming related work and we're doing this for two reasons. So, it is about environmental health and safety training that we are doing this, but we're using two platforms, one is called Unity, which is done for a lot of gaming development, but we're using it actually for health, health and safety simulation. So, we've actually built a simulation that takes you through 30 plus incidents that you may encounter when working in an office environment. Actually, doing a field visit to resolve an incident in the field and actually visiting a plant environment. And as you walk through this simulated environment, things happen and you have to respond and raise flags and reports about what you're seeing and what's happening.

We've actually got that pretty much finished now. Pretty interesting experience going through that and but it affords a new way of helping people experience safety incidents inside the utility. That's kind of if you think a little bit more modern than sitting in the classroom and just talking about it. So now you can, you know go through a simulation that's interactive, it's gaming based etcetera. So that's a new thing.

Second thing we've done is we've actually built a model of our grid system in Minecraft. So, for those of you who might have even used Minecraft, you have kids that using Minecraft it's a development environment for gaming that you can build your own worlds inside. We actually have it so you can explore through our grid system. Now you can visit plants and field operations. We give them gaming things that they have to work through to, for example, fix a problem in a plant and that kind of thing. So that's a world that we have that we've been exploiting.

So that's in the gaming one, another one that we have been at for probably about three years now is using augmented virtual reality techniques, so we're actually, you know, using headsets and things like that. We've gone a few different directions with this. One is for doing field mentoring. So that kind of real time idea where you might have a person that's fixing something in the field that they haven't seen in a long time. They can put the glasses on, they can do a real time connection back to a mentor, which could be anywhere in our province and get you know, real time help for fixing a problem that they may have even seen. There's pros and cons with doing that. There's some issues technologically with, for example, telecommunications speeds and things like that, but it basically works.

One area that we've gone with augmented virtual reality is for building simulations for environments that we can use in training, and one that we've done is we've captured for example, 360-degree video footage of our substations, a number of them and we've now embedded that into an augmented virtually reality environment. So, you can put a headset on, and you can walk around the substation and actually see the bits and pieces of it. And now we're adding gamification to that. One we're working on now is you can deploy a mobile switch, and you can actually walk into a scene and actually press buttons and, you know, deal with a hot stick and so forth and actually deploy a mobile switch for solving an incident when a car is running to a pole and knocked a pole over. One of our ideas and where we're kind of headed with that is we would like to decrease the amount of time it takes to make a PLT (Power Line Technician) fully certified in the field.

And one of the challenges with, you know, getting power line technicians certified at least here in Canada is the number of situations that they need to experience before they can get that certification.

And so, we're focusing on things that maybe are a little bit more difficult because you don't encounter them as often as you might, you know, other ones and build simulations around that to get that experience, experiential element running.

So that's an area that we've done quite a bit of work now and we have our team working on the last one I'll mention and there's a few others like this, but we've got into the world of robotics. We actually started by leasing a couple of robots from Boston Dynamics a couple years ago now. And what we're using these robots for primary and plant operations, we're using them for doing inspections, we actually had at one point we had a boiler that had a steam pipe that was a connected to it that we knew it had a weakness in it.

There was a threat of actually shutting down the plant to do an inspection and repair, and it's a, you know, very high-pressure vessel and we actually found a way to use a robot that could actually monitor it with real time video feeds that allowed that us to get through and actually avoid an outage because we were able to do an inspection with a robot with cameras and so forth on it. So that was kind of one application of that.

And another one is we actually owned a nuclear facility and, in the nuclear world, there's just constant need for minimizing situations where you are exposing employees to radiation and one thing that we're you know we're studying now and starting to work on use cases around is could we use robots to go in and investigate things on the nuclear side of the plant in order to minimize human radiation situations. So that kind of second bullet about new technologies being used by member utilities, we're quite far down the path with this now. We've been at it for a number of years.

And we're starting to see there's a bit of a mind shift that has to take place. It's not natural for, in my experience, not natural for utility people particularly, you know, our older workforce to think of using innovative technology solutions to solve problems. So, when they have a problem that they encounter, we tend to think in traditional ways of solving that problem. Like, you know, let's get a bunch of experts, SMEs around the table and let's talk about. And there's of course of value to doing that. But one thing that we're trying to break through is to bring forward these innovative technology [solutions] and say, "hey, there's a different way that we can think about this problem. Let us show you the art of the possible," and we're starting to build up an inventory of these capabilities that we can bring to these problems spaces. And, you know, again, I'm, I'm very thankful to Wendy Power and predict the executive Board kind of level support for us going in this direction.

These are very difficult grassroots kind of initiatives to launch. But with that kind of support and you know, we're happy to share our stories and even do demos or things like that. If there's, member companies here that're interested in going down these pipelines with us and hear what we've done. But those are kind of tops of the trees and issues we have that are very related to your second bullet on that list there.

Steve Brophy (Chartwell)

Yeah, that's really good. I really like the discussion around simulations and some of the VR learning opportunities and use in the field. I know that some of that that in my days at Ameren had been under consideration still feels like the industry is, you know, at the beginning of that. So, you guys look like you're really making some good headway in that in that space. So that's really interesting. So, appreciate that.

Yeah, that's good innovation. I mean, there's no question about it and you think about some of the ability to enhance a person's training, especially on demand on, you know, in other industries and have done that right. So that's great. That's great learning. So, let's focus a little bit on maybe the customer side of things and we talked about enhancing speed to market for new technologies. You know one of the things I thought about a lot is the again new products and services that were beginning to offer customers, right, whether it be electrification opportunities or other you know solar subscription and kind of things different products..

You know, how do we how do we deploy those in a number of utilities in the survey mentioned, you know, deploying CRM systems, Black Hills, I know we had a discussion with them on Salesforce and we might ask Kim. Maybe jump in and talk a little bit about your deployment with us with the CRM system and what its purpose is. How do you think about it from the benefit from the purpose of benefiting the customer so?

Kimberly Schneider (Black Hills Energy)

Yeah, I can. And talk to that a little bit. Um. In customer service, we're at the very beginning of exploring the CRM and kind of mapping out, you know how we would move forward with that project. I know our business development team does have a CRM place. I don't have as much knowledge on you know, just how they're using that. But our goal is to really make sure that the CRM is kind of the main hub that our agents use and again we have an old CIS systems so kind of pulling out some of the data and information and functionality out of that old system in using the CRM as kind of the one stop shop for the agents and hopefully you know adding efficiencies to their day, their experience and then that of course you know bleeds over into the customers experience as well.

Yeah. So again, really, really early stages, we're this year. We're really digging in and exploring and then deciding where that fits on our road map.

Steve Brophy (Chartwell)

Yeah. Thank you. And I might ask Kristy Lovett or Amanda Brittingham from Ameren to speak about their deployment. And Kristy, I think you mentioned something earlier about the and I don't recall the name of the group, but you know the group that's marketing some of these new products and services to customers. Are they using Salesforce for that, or can you speak to that?

Kristy Lovett (Ameren Missouri)

Yeah, they are not at the moment using Salesforce, Steve. Our key accounts, as you know in Missouri uses Salesforce. But right now, they're actually just working on creating what a new marketing tool would look like for a true marketing tool versus you know just sending out the way we send communications today doesn't have all of the marketing capabilities. And so that's the first step.

I don't know if you remember, but we're trying to get the CRM rolled out to the advisors by the end of next year or end to 24, a little bit. So that's kind of been our primary look. I think once the marketing technology gets in, they may adopt it. But right now, they're not.

Steve Brophy (Chartwell)

Got it. Thank you. Anyone else out there? You know, in terms of leveraging new technologies to really serve customers and in particular, you know new really to market new products or services, is anyone else have any stories or examples that they would like to share?

Steve Brophy (Chartwell)

I did see Idaho Power looking at number of features for chat or, chat bots, those kind of things.

So maybe, maybe just switching gears a little bit, you know, as you deploy new technologies, let's talk a little bit about you know, are you using customized solutions or are you buying off the shelf products out of the box you know would be interested in hearing some perspective on that.

We've certainly seen when you talk about the vendor side of the world, you know more and more of the core products are moving to the cloud and you know what are some of the risks with that you know is everyone feeling pretty comfortable that that's where the digital marketing is going is in the cloud or you know data whether it be data or applications so we'd like to hear some conversation about your journey, especially you think about the last five years, how you've made decisions around adopting those technologies.

Jennie King (Chartwell)

Hey, Steve. While you were talking, it made me think of something I can remember in the not that far distant past that utilities generally were very averse to using cloud solutions, that they were very concerned about the PII and customers' data getting outside of their firewalls. And it was that was a big no-no. And it seems like there's been a huge shift to move to cloud solutions, which means we are moving very confidential information out into a cloud solutions.

Why the shift? What happened? Why are we OK with it now that we weren't OK with it five and six years ago? So, I'll be curious to hear from others who who've gone through this and what was your thought process? How did you convince your security people, that this was the right move?

Jeff Drahota (Black Hills Energy)

So this is Jeff from Black Hills. I had to step away for a moment earlier, but I can tell you it was not about PII; we're comfortable with our encryption and everything. It was 100% about capitalization. You could capitalize on-prem projects, you know, if you're buying a Click system for 10-20 million and you can host that on site as opposed to cloud and capitalize it or spend O&M, you know which direction we're going, but recently there's been a shift I think across the country that Cloud can now be capitalized for projects, not the ongoing fees and things, but that's the reason we're doing it. That and it just, that's where everything is going. So. we wanted to go there five years ago, but just didn't make financial sense.

Steve Brophy (Chartwell)

Yeah, I think the financial side of that is important and I know that was certainly the big consideration on the projects I've been involved with in the past.

Jennie King (Chartwell)

The other thing I'd like to add to that is that my thought is that any new vendor solution you're thinking about considering going forward aren't they almost always going to be cloud solutions? So, if you don't open up to that as viable option, you basically are not able to take advantage of those opportunities.

Steve Brophy (Chartwell)

Yeah, I mean, certainly CRM systems generally are of that nature and many others tend to be moving that direction. It seems like that's where that industry is going. So, the choices may be limited if you want it on premise in the future, right. I think that kind of leads us to the next topic and that is regardless of which direction you go there, whether it be you know in the cloud or on premise, how do you think about keeping those systems up and running for the future? If you're gonna invest in a new CRM or a new work management system or whatever, you know, web technology, mobile apps, all the different things that we know we need to support our customers, then the question becomes, well, how do we keep it all running and how do we keep it current? How do we keep it, you know, relevant to the market and do you look at internally developing those skills versus outsourcing and certainly a lot of the vendor solutions in the cloud, you may not have a lot of choice there depends on what they will allow.

And then of course, as Jenny mentioned earlier, with our legacy systems, the knowledge drain and the skills that you need to keep old systems running, that's one thing, but then on the new systems, you know developing or bringing in the skills that you need to keep them going is a totally different thing.

Would love to hear some perspective on that with where individuals are. So, I see one hand, Kristy.

Kristy Lovett (Ameren Missouri)

Yeah. So, what we're finding, Steve, is that the people that can work on these items, you know, we have, even if it's in the cloud and then we wanna bring that skill set in house. So, we can continue to get updates, they're changing jobs so quickly that we have to have a really good mix of people that know

the business and then people that know the technology that will come in from outside and they don't stay for long, they come in, they get a better offer and they're gone. And so, I think it's the market is making us do changes that we probably wouldn't have done as fast, but because the turnover is so great.

The CRM team for instance, we had probably every three months we lose 5 to 10 people from IT going to another group and keep having to bring people in, so they know Salesforce and you just have to partner on what that business person that knows the business.

Steve Brophy (Chartwell)

Yeah, that competition out there, seems to have really enhanced over the overtime and especially you know I guess with the more remote work options that have kind of you know become, you know, more common out of the pandemic. Maybe that puts additional pressure for this for this as well.

Any other thoughts? What's your experience with your resources for keeping these systems running? So, anyone else I have any best practices or you know possible solutions?

Steve Brophy (Chartwell)

And if you do rely on a vendor, how do you think about how you select them, right. Uh, Cory, go ahead.

Cory Ramsel (Entergy)

Yeah, I just was going to share. We've made a pretty substantial investment in Salesforce marketing cloud and service cloud Community cloud sits under the contact Center and under our marketing platform. And so, some of the conversation earlier was right on with what we're doing, you know, moving, it's all in the cloud. I agree. In my experience in the past everything was about rate basing data centers and equipment versus cloud security. So, everything I see now having come to Entergy and my background just for anyone's benefit, I was at NextEra 16 years prior at FPL.

Everything I see here is going cloud based. I mean it seems much more open but the marketing team it's all about sophisticated campaigns. Attribution analytics. I think the IT challenges are real. We've lost a lot of people as well, marketing operations and actually finding folks with certifications within Salesforce that can go in and build journeys and execute campaigns and deliver the quality assurance we need. It has been very challenging. And continues to be and the people I have found cost me a lot and they want more.

This whole job market has put us in tight bind because as a utility we don't tend to want to pay what California is willing to pay these guys and that's who I'm competing with more so today than ever before. So, it's getting expensive.

Steve Waters (Chartwell)

Yeah, Cory, Jennifer Gary had talked to us previously about the challenge of working with an outside Salesforce partner and building that in House expertise. Have you found that right balance, have you found the expertise?

Cory Ramsel (Entergy)

Yeah. I mean we're working with multiple agencies to try and get these guys in and keeping them here. So no, we've still been basically utilizing agency vendor partners as training wheels. My goal was by this point to have kind of shed that necessity, but I guess fortunately the vendor that we work with has been willing to stick with us and continue to provide those services, even though we really hire a digital agency to provide creative and copy and content not operation services. But you know they've got those skills in a much bigger global sense than we do. So, they're flexing to help us and continue to do so. But the goal is to get off of that.

Steve Waters (Chartwell)

Yeah, I had that same experience at a prior utility where you know we relied on that outside expertise and in partnership we built up some internally. We found some good internal resources, built them up, but you know transitioning out of that outside support was difficult.

Cory Ramsel (Entergy)

Yeah. And they've been really supportive. I was shocked that they were supportive of it. I would have thought as kind of the incumbent, they'd be slow rolling, mediate and sort of helped me make the transformation. But the reality is that they don't. That's not their core business. That's not where they make their money. That's not what they want to be doing necessarily. So yeah, that's been the biggest challenge. It's not been getting into the cloud. It's been, how do we exploit it and really create an Omni channel experience using the investments we've made to date. And it's really coming down to talent and talent is very difficult to get and retain.

Steve Brophy (Chartwell)

And then it really puts pressure on the business side too because you know, as you have that revolving door you've got to have the business resources with the knowledge of the customer journeys that you're trying to accomplish and it takes you know, a lot of dedicated time and resources of business people working with the digital side to make it all go the way you want, right. So, you're it probably puts additional strain on your business organization just to support it.

Cory Ramsel (Entergy)

Yeah. And there's, I mean, there's just so many business side, you know sort of competing needs, right. And so, the IT department on our side on their side, the cloud apps group and the actual technical team that they've got 7 different groups that are trying to get contacts in our screens modified next best actions implemented, IVR updates, marketing cloud changes, transactional notice is getting up to. I mean, there's stuff coming out from every angle. And so, it's also one of those that once everyone

realizes how powerful it can be and how effective it is as a tool, these resources are, everyone wants more, and it's, you know, they're having the staffing, same staffing challenges we are and it's you know it's an impact on both the business side and certain technical IT departments.

Steve Brophy (Chartwell)

Yeah. We want more. We want it now. Great, appreciate that. Thank you. Cory, any other thoughts?

Cory Ramsel (Entergy)

That's right.

Steve Brophy (Chartwell)

Alright. Yeah, definitely some, definitely some good conversation. And you know that's a huge challenge that you just talked about the resource side whether it's internal or external. But just the marketplace that we're in today. So, we shift gears just a little bit and I think we touched on this slightly earlier, but one of the things I think that's especially when we talk about legacy systems and the difficulty of managing the data or you know really accessing the data in an older legacy system and how you know what's the solution for that, especially if you're trying to build new products and services.

And I think I think a couple of people have mentioned this before, but you know the difficulties of getting persistent data or timely data out of your legacy systems can be a challenge, you know, due to the difficulty of extracting it or just resources that it takes to manage that. A lot of companies are moving more towards building new data architectures on top of the legacy systems to make that data more visible to the newer applications. So, it might be your CRM or whatever. And so, I think one of the questions I think we've talked about in the pre meeting poll was "Where are you in terms of a data architecture plane or you are you? Are you planning for a new data architecture or structure around your CICS system or on top of your CIS system?" And so, we did get a few responses prior to the meeting, but I believe Steve's gonna launch a poll here and we'll just kind of get maybe a little wider experience or a little wider response from the group here. And so, the question is, "do you have an overarching architecture plan and process for adopting new technologies?"

And so your choices are "yes, no. We are working on it or not sure, don't know." So, we'd appreciate. Take a minute here to respond and then maybe we can get a couple of examples. Have some conversation around that so.

So, we'll give it just a minute. Looks like uh. Yeah, three responses so far working on it so.

Yeah. And I would wonder if anyone has completed that exercise yet. I know it's always a work in progress.

We had a little bit of this conversation with Black Hills earlier couple weeks ago as they were considering the CRM and maybe one of you could jump on, talk about what you're considering there as you consider your CRM system, how would you manage the data that flows back and forth from your CRM so Jeff or Kim, if you jump on maybe just talk about that for a second.?

Kimberly Schneider (Black Hills Energy)

Jeff had to drop off, so how would we manage the data? Is that the question, Steve? I don't know that I can.

Steve Brophy (Chartwell)

Yeah, I think you know. Yeah, I think the question is, you know, do you have a particular data architecture that you're putting together to support your CRM system, your CRM project?

Kimberly Schneider (Black Hills Energy)

Yeah, I mean that is we are again in the really, really early stages. We're actually meeting with other utilities to discuss how they have put that together, how they've deployed so we're being very intentional around making sure we identify the best process, but so early no decisions or anything like that have been made. So, I'm not sure I have much to share.

Steve Brophy (Chartwell)

No, that's fine. Appreciate it. Anyone else, I know Kristy, that had been a big topic at Ameren, correct?

Kristy Lovett (Ameren Missouri)

Yes, it has. I mean I you know we're working on it, but I think that we have a pretty good road map on adopting these new technologies and upgrading and getting current. I think it's helped that we've brought people in from outside, you know to kind of help create those maps.

Umm, you know, for instance, our senior director, Sam Rajan, he came from, I believe it was Blue Cross. Sorry Anthem and the amount of information that he's brought to us that we didn't have to make some differences on the web and mobile app and CRM have been amazing so if we hadn't started bringing people in from the outside, I don't know if we'd be where we are.

Steve Brophy (Chartwell)

Yeah. Yeah, it's having that that out outside perspective, right. Alright, anyone else?

I know Entergy has been working on CRM and you know I don't know if they would be willing to talk or Jenny, I see you got your hand up. Go ahead.

Jennie King (Chartwell)

Yeah. Just really quick, as you were talking, I was thinking about the exercise we were trying to do earlier today where we were on the grid asking everyone to do a self-assessment as a you know how risk averse or versus early adopter. And are you looking at industry solutions more versus market solutions? I think those are really important questions to include. This is just my suggestion to include as you're building this architecture.

Those are key questions you need to be asking yourself as you're developing this architecture. So, I just wanted to make that point.

Steve Waters (Chartwell)

Yeah. And so, Jenny, what we'll do, we've gone ahead and created a poll that we can go ahead and the folks that are still on the call can go ahead and complete this now. So, we're gonna post the questions again. We'll capture the data and then we'll go back, and we'll fill in the chart. So again, from the standpoint on early adoption of technology on a scale of one to four, one being the most risk averse, four being the earliest adoption, where would you plot yourself on the speed to market with which you adopt new technology?

And if we get multiple people from the same utility, that's fine. We'll, uh, we'll merge your responses.

So, we'll give you a minute for this one. OK. So again. We've got one, one and 1/3 thus far.

Now we'll go ahead and ask the second question then. And that was what is your preference for utility industry solutions versus marketplace solutions?

On a one to four, where one is proven utility industry Solutions 4 is solutions like some of those that Brad talked about from other industries.

Right there at a 2. Again, tendency leaning towards industry solutions, so again, we'll plot these. And in the materials that you'll get after the call, we will include the results of all those polls.

Steve, Jennie, back to you. Unless Steve, do you have final thoughts on technology, or shall we go ahead and look towards the next call?

Steve Brophy (Chartwell)

Yeah, I think we can go ahead. I do wanna thank everyone for participating. I think we had really good conversation, and you know a lot of a lot of challenges as we think about all the industry movement and into a lot of new spaces and technology is certainly a big part of that. A lot of people share similar

challenges. I think the conversation around data governance and certainly around knowledgeable resources is a challenge that we all face. So yeah, great conversation appreciate it. So, I'll turn it back to you, Steve.

Steve Waters (Chartwell)

OK. And Steve, go ahead and just take us to essentially the last slide. What's next looking ahead again, we thank everybody for their participation today and engagement, including some new folks. So, we meet for two hours every two months. So, the next call will be July 21st, Thursday, July 21st. Standing members should have that placeholder on their calendar. If you're new, you may not have that yet. We'll make sure that we get that on your calendar.

You are driving the agenda for these calls, and we want to continuously assess what your most urgent needs and concerns are. So, again if when you took the onboarding survey we identified your favorite topics to discuss. We had about 10 different topics.

We're now focusing in on the three that are about at the top now from our most recent polls. You know something that has been on the radar since the beginning is employee engagement and development and some of what Kristy was talking about earlier, sort of this workforce volatility. And Cory the challenge of finding people with the right skills, that is something that I think we can easily spend 2 hours on.

Something that has risen in the last call or two was business case development and project prioritization. So, we talked about some good technology opportunities today. If you wanna pursue some of those ideas that Brad was talking about, how do you build that business case? How do you prioritize projects? Is another one and then a third that was not on our original list explicitly, but which some member utilities have expressed a keen interest in a very broad topic around sustainability, electrification, electric vehicles, ESG, and this may be one again where we can bring in some outside expertise or some other folks in the industry who are not on the Council.

So, we want to pick one of these for the July call, and so I'm going to launch a poll so those of you on this call will have the opportunity to cast your vote. And again, we can reach out to others not on the call. And so, we wanna focus the next couple of meetings on the topics of most urgent interest to you. So, among these three, we're going to ask you to pick just one.

And so, we will shortly announce what the topic will be for July. Very likely that we'll look at another one of these topics in the following meeting in September on our usual schedule. Then November would be our third meeting from now. We may accelerate that if there's an opportunity to have a face-to-face meeting adjacent to our October EMACS conference, that's something we're considering. We need to make that decision relatively soon so that you can make your travel arrangements, but this will help us set the agenda for the next couple of meetings, so let's just take a quick peek. OK, alright, this looks good. Among a small sample here we've got some interest in all of them. As to be expected. So, we will

look at the other feedback that we've gotten from you maybe do a little bit more outreach, we'll set the agenda for July 21st, this same time slot 2 hours again.

So then we'll get that agenda to you. But even before that, you will get a one-page summary of the takeaways from this meeting. We'll also give you access to the recording and to the slides. We will include the final chart with which quadrant you find yourself in and your Technology Strategy. Again, encourage folks to go out to the portal, look in the member directory continue establishing those relationships and those contacts so that you can reach out to a colleague on the Council who has similar challenges or maybe have gone someplace that you would like to go.

So, does anyone have any final questions, thoughts, requests before we adjourn for today? OK, finally. Again, this is the Chartwell team supporting you. You have our email addresses. If you do have further questions, you can reach out to us. You can reply to me from the email invitation. So next week again, you'll be getting a summary, a link to the resources which will include the recording, the slides and the Technology Strategy four quadrants graph. So again, thank you everyone for spending time with us today. Hope you have a good remainder of the week, and we look forward to seeing you again in July.

Steve Brophy (Chartwell)

Thanks everyone.