



iConnect
San Diego 2017
Client Conference

 **KUBRA**

Welcome!

At this exclusive client-only conference, we'll share industry trends, new customer communication solutions, and real-world case studies from companies like you. Every year participation has increased, and we couldn't be happier. This year, we expect more attendees than ever before, and are anticipating more than 100 attendees from utilities across North America. We're looking forward to joining our clients for two days of camaraderie and collaboration.

Held in San Diego, California, there will be plenty to do - so feel free to bring a guest along with you. Extend your stay and come in over the weekend, then kickstart your conference experience with a brewery tour or a city tour hosted by KUBRA. The conference will officially start Monday evening with our Welcome Dinner.

Location:

The city of San Diego is the perfect spot to get away. The beautiful beaches and scenery call to people all around the globe, and the city's attractions and sights ensure that there is never a loss of things to do. The nearby coast offers both unique and time-proven water recreation and tours, and the city is bursting with history, museums, and art galleries.

For more information on things to do in the area, visit SanDiego.org.



Hotel Accommodations:

KUBRA has reserved a room block for attendees at the Paradise Point Resort & Spa at a special reduced rate of \$219/night. Rooms must be reserved by February 27, 2017 to receive the special rate, but book early to ensure availability.

Paradise Point Resort & Spa
1404 Vacation Road
San Diego, CA 92109

To book, modify, or cancel a reservation online, please visit the Paradise Point Resort & Spa website at ParadisePoint.com.

To book by phone, call **(800)-344-2626** and mention "iConnect 2017" to receive the special rate.

Getting There:

San Diego International Airport is located just 8 miles northwest of the Paradise Point Resort & Spa. Transportation from the airport to the hotel takes about 15 minutes. Taxis, shuttles, and Ubers are all available at the airport for transportation to the resort.

Directions from San Diego International Airport to Paradise Point:

Take North Harbor Dr to Laurel St.
Follow signs to merge onto the I-5 North
Exit onto the I-8 West
Exit on Sports Arena/W Mission Bay Dr.
Turn right onto Ingraham St.
Turn left on W Vacation Rd., into the resort's main entrance

Dress:

All dress for the event is Business Casual. The weather in San Diego is typically beautiful in March with highs in the mid-60's and lows in the mid-50's. We suggest you bring a sweater or light jacket to conference sessions and evening events since temperatures can be unpredictable.

Registration Fees:

Due to the growth of iConnect, including the addition of many training sessions, we will be charging a nominal registration fee for 2017. The registration fee includes early arriver events, conference content, conference meals, and evening events on the agenda. Attendees are also welcome to bring one guest for a flat fee.

Fees:

Standard Registration - \$295

- After December 15, 2016

Guest Registration - \$50



2017 Agenda

Monday, March 27, 2017

- 1:00 p.m. - 4:00 p.m. **Early Arriver Event - Brewery Tour**
San Diego is known for its craft beer, so what better place to take a brewery tour! This tour will include round-trip transportation to two breweries, beer tasting, guided tour at one brewery, and a souvenir glass. If you have registered for this event, please meet the group in front of the Paradise Point Conference Center at 12:45 p.m. for departure.
- 1:00 p.m. - 4:00 p.m. **Early Arriver Event - San Diego Trolley Tour**
Hop onboard a cute orange and green trolley for a private city tour around San Diego. This tour also includes a one-hour stop On Coronado Island for you to explore, shop, stroll on the beach, or grab a pint - it's up to you! If you have registered for this event, please meet the group in front of the Paradise Point Conference Center at 12:45 p.m. for departure.
- 5:30 p.m. - 7:30 p.m. **Welcome Dinner - Paradise Point**
Enjoy the sunset and help us kick off iConnect 2017 at our Welcome Dinner overlooking the picturesque Mission Bay. This casual reception will include drinks and a variety of food stations for you to enjoy as you meet your fellow conference attendees. This event is conveniently located at the Sunset Terrace on the hotel property — perfect for relaxing after a long day of fun or travel.

Tuesday, March 28, 2017

- 7:00 a.m. - 8:00 a.m. **Registration/Continental Breakfast (Paradise Foyer)**
- 8:00 a.m. - 8:15 a.m. Welcome (Pacific/Island)
- 8:15 a.m. - 9:00 a.m. Keynote - Addressing Ongoing Changes in Technology (Pacific/Island)
Phil Wiser, Hearst
As the CTO of Hearst, one of the world's largest private diversified media and information companies, Phil has years of experience to share in the technology sector. In this keynote, he will be addressing how these changes in technology affect customer relations, and how companies can adjust accordingly.
- 9:00 a.m. - 9:45 a.m. Keynote - Improving Customer Experience and Overall Service Delivery
Mark Wyatt, Former VP of Duke Energy (Pacific/Island)
- 9:45 a.m. - 10:15 a.m. **Coffee Break (Paradise Foyer)**

10:15 a.m. - 11:15 a.m.

KUBRA Product Updates (Pacific/Island)

Join us as we review all of the exciting changes in our company, as well as updates we have made to our products and what that means to you. In this presentation, we will cover product updates across all of our solution areas including:

- Billing and Payment Solutions**
- Utility Mapping Solutions**
- Alerts and Preference Management**
- Mobile Solutions**

11:30 a.m. - 12:20 p.m.

Breakout Sessions

iDoxs e-billing Roadmap & Demo (Royal 1-3)

In this presentation, we will lay out the future of our iDoxs e-billing product. This will include an overview of the product and its current capabilities, as well as features we will be adding in the future. We will also be showcasing a demo of the product, which is often helpful to even the most veteran of users.

Utility Mapping Roadmap & Demo (Palm)

Join us as we look to the future of our Utility Mapping products. We will be discussing the current capabilities of Storm Center, IncidentWatch, iShare, and more. We'll also be presenting new features for 2017 and providing a demo to show the map functionalities in real time.

DocWeb - Tracking, Reporting, and Proofing (Royal 4-5)

In this interactive setting, we will be providing training for our DocWeb product, and how to most effectively use its tracking, reporting, and proofing functions. If you are a hands-on learner, please feel free to bring your laptop and follow along.

12:30 p.m. - 1:50 p.m.

KUBRA Client Awards Lunch (Paradise Terrace)

Each year, we celebrate our clients by presenting them with awards such as the Illuminating Innovation Award, Electrifying Delivery Award, and more. You've been doing some great work, and we've noticed!

2:00 p.m. - 2:50 p.m.

Breakout Sessions

iMail Print and Mail Roadmap & Demo (Royal 1-3)

For this roadmap presentation, we will be forecasting the next year for our iMail print and mail services, as well as reviewing current services available. We'll also be showing a demo of DocWeb, and how it can be used to manage your print and mail projects.

Notifi Alerts and Preference Management Roadmap & Demo (Palm)

In this session, we will review the current features of our Notifi alert and preference management product, as well as new features we are looking to add in 2017 and beyond. Our team will walk you through a demo of the product, and how it can be used to proactively reach customers and manage their communication preferences.

Breakout Sessions

iDoxs - Building Email Campaigns and Controlling Templates (Royal 4-5)

During this training session, we will be presenting how to use our iDoxs product, specifically how to use it to build effective email campaigns, and how to design and control templates for easy use. Personal laptops are welcome for an increased interactive experience.

3:00 p.m. - 3:50 p.m.

Breakout Sessions

EZ-PAY On-Demand Roadmap & Demo (Royal 1-3)

Join us as we review our EZ-PAY on-demand product, and how consumers are currently using it to make one-time and recurring payments. We will lay out a roadmap of where we are planning on taking this product in the future, as well as showcase its current capabilities in a live demo.

iMobile Roadmap & Demo (Palm)

In this presentation, we will discuss the future of our comprehensive mobile apps. From billing and payments to outage information and account management, we'll highlight the modules currently offered, as well as new features we are planning to add in 2017. We'll also provide a demo in order to view the product in action.

Notifi Analytics (Royal 4-5)

In this session, we will be providing training on how to access the standard reports available for Notifi implementations. This will also feature a review of our Advanced Reporting offering, which allows for customized reports. If you would like to follow along, please feel free to bring your laptop.

4:00 p.m. - 4:15 p.m.

Closing Remarks - Schedule of Evening Events (Pacific/Island)

4:15 p.m. - 5:15 p.m.

Cocktails & Product Demos (Paradise Foyer)

Join us for cocktails and mingle with our team in a relaxed setting. Learn more about our products by stopping by one of our demo stations, or grab a KUBRA team member for a more one-on-one experience.

6:00 p.m. - 8:00 p.m.

Client Appreciation Dinner

Step onboard Hornblower Cruises' High Spirit yacht for a cruise around San Diego you won't forget. The High Spirit is considered one of the finest antique charter yachts on the West Coast. Enjoy fine foods and cocktails on the water as we celebrate together. If you have registered for this event, please meet the group in front of the Conference Center at 5:45 p.m. for departure.

Wednesday, March 29, 2017

7:00 a.m. - 8:00 a.m.

Continental Breakfast (Paradise Foyer)

8:00 a.m. - 8:15 a.m.

Opening Remarks (Pacific/Island)

8:15 a.m. - 9:00 a.m.

Keynote - Customer Experience (Pacific/Island)

9:15 a.m. - 10:00 a.m.

Breakout Sessions

e-bill Adoption Case Study (Royal 1-3)

Join this session to hear how one client increased their e-Bill adoption. Learn about their goals, strategy and results.

Combining Three Utility Services into One Outage Map - Mathew Wells, Colorado Springs Utilities (Palm)

Join this session to hear how CSU brought their electric, water, and gas services into one outage map. Matthew will discuss the challenges involved, and how CSU was able to overcome them in order to provide a map that was seamless to the customer.

What Challenges Are Utilities Facing Today? (Garden)

Join this freeform discussion and talk about some of your top challenges with other respected utility peers. This is designed to be a collaborative, loosely-structured workshop, with KUBRA as moderators.

iDoxs - Call Center Console Training (Royal 4-5)

In this interactive setting, we will be reviewing how to best utilize your Call Center Console. We'll be answering any questions you have, and sharing some tips and tricks as well. Since this is a real-time training session, personal laptops are recommended for a more immersive experience.

10:00 a.m. - 10:30 a.m.

Coffee Break (Paradise Terrace)

10:30 a.m. - 11:20 a.m.

Breakout Sessions

Bill Redesign Case Study Speaker TBD (Royal 1-3)

In this session, we will be reviewing one of our clients' bill redesign process, and both the successes and lessons learned along the way. We'll take a look at what has worked to increase on-time payments, as well as customer satisfaction.

Keeping in Touch with the Energy Consumer - Izak Botha, CoServ (Palm)

Izak will be talking about CoServ's recent Storm Center and Notifi implementations and their integration with the member/customer portal. We will be looking at the impact these applications and integrations have had on the customer experience and communications at CoServ, as well as future CoServ initiatives to improve the customer experience.

Breakout Sessions

Increasing e-Billing Adoption (Garden)

We'll be looking to hear from you about the strategies and tactics you've been using to increase your e-billing adoption, or about tactics you hope to try. Join this roundtable to discuss what's worked and what hasn't with fellow utility members.

iDoxs - Cash Reconciliation Processes (Royal 4-5)

In this training session, we'll be reviewing how to use iDoxs to handle your cash reconciliation processes, as well as best practices for its implementation. If you are a hands-on learner, please feel free to bring your laptop and follow along.

11:30 a.m. - 12:20 p.m.

Breakout Sessions

e-Bill Growth Through Adding a Secure Mail Channel - Kevin Waid, Duke Energy (Royal 1-3)

Hear how Duke Energy added a new email bill delivery channel. See how a trial period and a non-authenticated enrollment model were used to increase enrollment and reach customers not already enrolled for e-billing. Duke will share their implementation approach and results of the new program along with their continued efforts to boost e-bill adoption.

The Evolution of Pacific Power Mobile Apps - Dante Hill, Pacific Power (Palm)

Pacific Power will be sharing their partnership journey with KUBRA, and take us through the three projects they have successfully launched in three years. Dante will review best practices, lessons learned, and more.

What Are You Sharing with Customers During Outages? (Garden)

In this freeform discussion, join other industry professionals to discuss the types of information you're sharing on your outage maps and best practices for outage communications. Whether you're looking for additional insights for your outage map, or are just interested in other data you can share, this session is sure to be one you don't want to miss.

DocWeb - Building On-Document and In-Envelope Marketing Campaigns (Royal 4-5)

In this interactive session, we'll provide training on our DocWeb platform, and how to use it to build on-document and in-envelope marketing campaigns. If you would like to follow along, bring your laptop and DocWeb credentials.

12:30 p.m. - 1:50 p.m.

Lunch (Paradise Terrace)

2:00 p.m. - 2:50 p.m.

Breakout Sessions

Google Pony Express (Royal 1-3)

In this presentation, Google will share their new paperless billing solution for customers. They will review customer research conclusions that drove their unique solution and its features.

Complying with the TCPA Mark Brennan - Hogan Lovells US LLP (Palm)

Join Mark Brennan as he provides an overview of the newest TCPA rulings and clarifications, and what that means for utilities.

Breakout Sessions

What are you doing to increase program adoption? (Garden)

Have a program adoption campaign that's experiencing great success? Need some tips on how to improve? Join this interactive workshop and discuss the successes and challenge of your program adoption with others in your industry. This is designed to be a collaborative, loosely-structured discussion.

3:00 p.m. - 3:50 p.m.

Breakout Sessions

New Solutions for In-Person Payments Case Study (Royal 1-3)

In this session, we will be reviewing how one client leveraged new technologies to improve their in-person payments. We'll discuss lessons learned and positive outcomes of the implementation.

The Evolution of PSEG Long Island's Municipal Portal - Rob Massaro, PSEG Long Island (Palm)

PSEGLI has been working to increase community engagement and improve operations efficiency. One aspect of this work is the deployment of a Municipal Portal to better collaborate with local stakeholders. This presentation will highlight the current features, results, and lessons learned through this multi-year project that also incorporated a more streamlined MSTC process.

Addressing Compliance Concerns for Outage Communications (Garden)

Join this group discussion to talk about how you and others are addressing the TCPA, CAN-SPAM, and BPU rules and regulations. What are you hearing about in your region? What are your issues and concerns? Come join in this lively discussion.

4:00 p.m. - 4:15 p.m.

Closing Remarks (Pacific/Island)

4:15 p.m. - 5:15 p.m.

Snacks & Product Demos (Paradise Foyer)

*Agenda subject to change