

Utilities Summit Agenda

Agenda Key

- Networking Opportunities & Session Breaks
- Executive Exchange
- CIO Executive Visions
- CIO Thought-Leadership
- CIO Case Study
- CIO Keynote Presentation

Day 1: Sunday, April 18th

2pm - 5pm

Registration + Greeting to CIO Utilities Summit

4pm -
5.30pm

Executive Think-Tank

**An exclusive invitation only, pre-summit think-tank for CIOs*

6pm

Welcome Reception

Opening Remarks

7pm -
10pm

[Presented by Master of Ceremonies, Warren Causey, Independent Analyst & VP of Strategy, Research and Analysis, Five Point Partners LLC](#)

Keynote Speech + Welcome Gala Dinner

Day 2: Monday, April 19th

7am -
8.05am

Breakfast Networking Reception & Collection of Itinerary

8.10 -
8.50

CIO Keynote Presentation

"Technology Perspectives from an Energy Marketer"

[Presented by Kumud Kalia, CIO, Direct Energy](#)



9.00 -
9.30

Executive Exchange

CIO Thought-Leadership

"Helping Customers Understand the Value of the Smart Grid"

Smart Metering and Smart Grids have won widespread support throughout the utility industry. They promise to make available cost-effective applications, materials, and devices that accelerate the achievement of such long-held goals as better reliability, greater security, and higher levels of efficiency. Outside the utility industry, however, consumers are beginning to question the costs. To them, concepts like efficiency seem abstract. They want concrete answers to the question, "What's in it for ME?"

This presentation will explore ways to help consumers and regulators realize the bottom-line value of Smart Grid implementations. It will focus on utility programs that place the Smart Grid in the context of customers' financial and environmental goals. And it will show how microgrids can tie customer interests more closely to overall utility and community goals.

 [Sponsored by Oracle Utilities](#)



CIO Thought-Leadership

"Energy Optimization - An Integrated Approach to Energy Efficiency, Demand Response and Renewable Portfolios"

Utilities are looking beyond basic Demand Side Management (DSM) and Energy Efficiency (EE) offerings and towards an integrated view of their customers and data. This presentation will discuss how Utilities can leverage IT for "Energy Optimization", the process of continually and systematically improving DSM/EE Portfolios. We will specifically look at the design and use of flexible and open data structures to provide a more robust, timely and integrated EE/DSM reporting.

9.35 -
10.05

**Executive
Exchange**

Areas for discussion will include best practices for:

- Designing, implementing and aggregating EE/DSM portfolio data.
- Devising approaches for enhanced operational and regulatory metrics for reporting and forecasting
- Improving visibility of portfolio goal and budget tracking as a way of enhancing the utility's ability to achieve shareholder incentives and avoid penalties or shortfalls
- avoiding missteps with data design that can lead to reduced data quality and flexibility to handle long-term information management

 [Sponsored by CGI](#)



CIO Thought-Leadership

"Smart Infrastructure, Smart Data, Smart Grid"

The Smart Grid promises more efficient energy utilization and efficient integration of renewable energy sources while increasing the system reliability. Delivering on these promises requires unprecedented integration across the entire electric energy value chain.

10.10 -
10.40

**Executive
Exchange**

Generation, T&D Operations, AMI, DR, DER, DA/FA and market signals all represent necessary data sources and uses to make the Smart Grid function. Efficiency will be driven by smart applications - some of these applications are clear today; innovation will continuously drive even smarter applications. What is absolutely certain is data will drive innovations, data will drive smart applications, and data will drive the smart grid. This talk will discuss the importance of a manageable real time data and event infrastructure for the Smart Grid.

 [Sponsored by OSI soft](#)



10.45 -
11.10

'Wired' Networking Break + Analyst Q&A Session

CIO Thought-Leadership

"20th Century Technology is No Match for 21st Century Threats"

Today's volume of threats can come from any address on the globe and take a multitude of forms to fool users into inappropriate action. The threat industry as a whole has been using technology designed to address threats in a serial manner with easily identifiable characteristics, and get that threat information to a limited set of threatened machines needing protection. Today, threats come in parallel, many different ones at once, with the ability to change quickly to adjust to blocks, from a wide array of global sites that also change on a whim. At the same time, the vast number of devices, systems, software and end users needing protection today requires better methodology that can dynamically adjust to these 21st century threats. This presentation will talk about Trend's adaptive technology that enables 21st century protection to today's myriad of threats.

 [Sponsored by Trend Micro](#)



11.15 -
11.45

Executive Exchange

CIO Thought-Leadership

"Stop Retaining Forever"

Today's information explosion and modern regulatory pressures are forcing organizations to keep more information and for longer periods of time. Ironically, most organizations unknowingly or unwillingly end up retaining most of their information and applications forever. The ramifications of infinite retention include significantly increased cost, reduced application performance, increased risk, and inability to comply with regulations or meet discovery obligations. Come learn how HP Information Management Solutions can help you stop retaining your information and applications forever by establishing an ongoing, best practice information and application retirement methodology that facilitates your information governance strategy while transforming your IT operations. For more information, contact HP at stop.retaining.forever@hp.com.

 [Sponsored by HP Information Management](#)



11.50 -
12.20

Executive Exchange

CIO Thought-Leadership


"The Future of ERP"

What is it all about? The task of predicting IT trends is more or less a fool's errand, but taking a closer look at the future of ERP, what it really means in regards to ROI and justifying the business case is what this panel is all about. Traditional problems that have not been solved for ages now are a top priority on the minds of all executives in every organization, from buyers to sellers; each and every person has to justify every dollar spent. Traditional definitions of ERP will be challenged and realizing the overall benefit of the economic downturn will be explored through extensions of ERP systems as a whole. Key initiatives revolving around CRM, customer billing, effective asset management and some of the various deployment methods associated with these solutions will be discussed. The era of "BIG ERP" has been upended by new age technologies and solving business critical issues at a strategic level through heterogeneous

12.25 -
12.55

Executive Exchange

solutions has been the mantra. Change is the new meaning behind ERP and interoperability is the new solution.

 [Presented by Eugene Park, Senior Director Applications, PG&E](#)

1.00-
2.00

VIP Luncheon + CIO Open Forum Discussion (*Forum, invitation only*)


CIO Thought-Leadership

"Work and Asset Management in a Turbulent Market"

2.05 -
2.35

Executive Exchange

Utilities are asset intensive and represent the third biggest consumer of capital in the U.S. A majority of each utility's spending revolves around asset construction, maintenance and operations. Understanding the relationship between work and spending is often challenging due to the proliferation of independent work management systems that are separate from the accounting systems. This session discusses a number of U.S. utilities, are doing to consolidate and standardize systems and processes to better manage work, spending and schedules. This session will look at what exactly work management is and what is the driving force behind utility companies in considering work management.

 [Presented by Dion Alley, VP of IT Global Infrastructure, AES Corporation](#)




CIO Thought-Leadership

"The Role of Predictive Analytics in Asset Management to Help Reduce Incidents of Condition-Based or Emergency Maintenance in Both Generation and T&D Settings"

2.40 -
3.10

Executive Exchange

While utilities are under pressure to optimize their maintenance regimes. For instance, to help pay for infrastructure upgrades operating costs must be brought down, or to reduce the number of outages for planned or emergency maintenance. The data created by the smart grid enables a utility to be more efficient in their Maintenance, Repair and Overhaul operations. While the smart grid enables utilities to better identify causes of asset failure, predictive analytics helps identify future failures before they occur.

 [Presented by Stuart Ravens, Principal Analyst, Energy & Utilities Technology, Ovum](#)



CIO Thought-Leadership

"Integrating the Smart Grid"

3.15 -
3.45

Executive Exchange

An implication of a true end to end Smart Grid solution encompasses numerous and complex new and legacy systems. The Smart Grid Integration Architecture becomes a critical component in realizing the potential benefits from these systems. Although it is almost universally accepted that Enterprise Service Bus utilizing a Service Oriented Architecture built around standards like the Common Information Model, is the right approach, there have been few "real life" implementations to dates. This presentation will explore potential methods to

accelerate these implementations. We will explore methods to standardize the basic building block for successful integration within the organization's enterprise and between various external vendors/interfaces.

 [Sponsored by Wipro](#)



CIO Thought-Leadership

"Making the Smart Grid Rugged"

Implementation of a Smart Grid requires an integrated power system and communications infrastructure. Therefore, next to the power system, the most critical piece of infrastructure for a successful Smart Grid implementation is communications. Smart Grid communications need to be "Utility Grade" i.e. rugged; capable of performing reliably in harsh environments and addressing the needs of diverse applications from AMI and SCADA to Synchrophasors and Process Bus.

This presentation explores the needs and requirements of the communications infrastructure required for creating a "rugged" smart grid.

 [Sponsored by RuggedCom](#)



CIO Thought-Leadership

"Life after CIP, How to Cost Effectively Manage Compliance"

Utilities have spent the past two years achieving CIP compliance, and now are tasked with managing and staying compliant in these challenging economic conditions. SecureWorks will highlight cost effective measures to manage your CIP compliance efforts. We will answer questions on How, When and What in regards to safely performing Annual Vulnerability Assessment testing of your Critical Assets.

 [Sponsored by SecureWorks](#)



Keynote Session - CIO Executive Visions

The Emerging Smart Grid- "Cutting through the Hype"

The Utilities companies are increasingly looking to demonstrate environmental leadership through the use of smart grids, intelligent utility networks and advanced water management - unfortunately along with the opportunities and potential comes confusion and mixed messaging. Utilities at all stages of these implementations need to measure and be aware of the impact of the smart grid on all areas of the intelligent Utility. This discussion will address how Utilities enterprises need IT infrastructures to support the smart grid movement that can help that can move them forward, not hold them back from achieving a cost-efficient intelligent enterprise in order to embrace innovative business opportunities. Participating executive visionaries will discuss;

- Incorporation of demand response, demand-side resources, and energy efficiency
- The issue of data and infrastructure security and the threat of cyber and physical attacks
- Development of standards for interoperability
- The role of outsourcing in the smart grid roll out
- Lowering of unnecessary barriers to smart grid technologies, practices, and services
- Integration of smart appliances and consumer devices technologies including plug-in

electric vehicles

- Improved use of digital information and control technologies
- Defining the Smart grid strategy for the future

[Moderated by Chris Perdue, Managing Director, Market Research, UtiliPoint International](#) 

[Sponsored by UST Global](#) 

[Sponsored by Elster](#) 

[Sponsored by Wipro](#) 

Panelists:

John Burke, CIO, Ambit Energy

Mark Carpenter, CTO, Oncor Electric

Rick Harris, CTO, DTE Energy

6.00 -
7.00

Cocktail Reception

Gala Dinner Keynote

"Smart Grids and Changed Business Models – Two Inevitabilities"

As policy makers advocate for more renewable energy, energy efficiency, and economic growth, utilities are simultaneously facing new customer demands for information and options. Coupled with rapid advancements in new technology – from distributed generation to more classic information and communication technologies – energy providers are addressing new business model options to maintain or expand their mission and grow their enterprise. These include

7.00 -
9.00

- *Industry model innovation:* Innovating the industry value chain by moving into new industries, redefining existing industries to serve new markets, or creating entirely new industries
- *Enterprise model innovation:* Innovating around the structure of the enterprise and the role it plays in new or existing value chains, with focus on those areas of the business where it has an advantage and delivers value
- *Revenue model innovation:* Innovating how revenue is generated through offering re-configuration (product/service/value mix) and pricing model

[Presented by Allan Schurr, IBM Global Energy & Utilities Industry, Vice President, Strategy and Development](#) 

9.00 -
10.30

Cheese & Wine Tasting

Day 3: Tuesday, April 20th

7.30 -
8.30

Networking Breakfast

CIO Keynote Presentation

"Pioneering Innovation in the Energy Industry through Technology"

8.35 -
9.15

Ambit Energy is innovating a 100 year-old industry, primarily because of its commitment to operate as a data processing company. In 2006 with the company's launch, CIO John Burke's decision to build Ambit Energy's homegrown systems from scratch has set the pace for rapid and award-winning growth the company has experienced during the past three years. In his presentation, Mr. Burke will discuss the company's culture, reasons behind those cutting-edge decisions, how Ambit Energy is poised for the future and the current state of the energy and technology industries as a whole.

 [Presented by John Burke, CIO, Ambit Energy](#)

CIO Thought-Leadership

"The Challenges Facing the 21st Century Utilities CIO"

9.25 -
9.55

Executive Exchange

Utilities CIOs face the most challenging environment in the last 100 years. Despite whatever happens in Congress, generation constraints will make it extremely difficult for them to meet demand in the future with existing base-load generation. These supply constraints, and the financial difficulties that accompany them, require that utilities become much "smarter" in how they do things from generation, through transmission and distribution to delivery to end-use customers. Thus smart grid and intelligent utility ideas are becoming more imperative.

These changes also envision a great deal of new technology, some of which is not yet proven, some of which is still in R&D and some of which is ready for deployment. Thus, it is a fascinating - but tricky - time for CIOs and other technologists as utilities face massive new quantities of data from sources that didn't previously exist, to integration with major systems that haven't yet been deployed.

Causey will discuss some of the specific challenges and the solutions that are evolving/being developed, including charts and graphs from recent industry surveys.

 [Presented by Master of Ceremonies, Warren Causey, Independent Analyst & VP of Strategy, Research and Analysis, Five Point Partners LLC](#)

10.00 -
10.30

Executive Exchange

CIO Executive Visions

"Data Storage and Data Management"

10.35 -
11.05

Executive Exchange

With so much smart meter data being collected, processed and stored, what do utility companies do next? There is a huge focus on the data security, management and utilization challenges of the smart utility revolution. In today's smart utility, these strategic judgments are taken to the boardroom where calculated and composed decisions have to be made to ensure financial dexterity.

Data Management has often been overlooked as an essential aspect of smart meter project success; however it remains one of the greatest challenges facing the creation of the smart meter infrastructure.

But by simply collecting and storing customer data, a utility derives no additional value. Business intelligence tools are vital for the smart utility to become an

intelligent utility. Join this panel of experts who will discuss the employment of selected data to aid both current and future applications that will ultimately benefit both the utility and the customer.

[Moderated by Stuart Ravens, Principal Analyst, Energy & Utilities](#)

[Technology, Ovum](#) 

Panelists:

Michael Harris, CIO, Clark County PUD

Todd Weisrock, Director of Customer Care & Corporate Solutions, Excel Energy

Christian Blais, VP IT, Bermuda Electric Light Company

11.10 -
11.35

'Refresh' VIP Networking Break + Analyst Q&A Briefing

11.40 -
12.10

Executive Exchange

CIO Thought-Leadership

"Critical and Effective Communications for Utilities"

Effective communication is crucial to maintaining service levels and customer satisfaction during regular operations and unplanned events. Utilities face a range of specific communications challenges. During outages, inbound calls spike, agent resources are taxed, and customer satisfaction declines. Reaching customers to confirm appointments, enroll in energy savings programs or curtail energy consumption involves manual calling that is expensive, labor-intensive and provides no reliable audit trail to ensure compliance of demand response customers.

This workshop will explore how interactive automated notifications fulfill the strategic business need for Utilities to deliver cost-effective critical and operational communications without burdening IT resources.

[Sponsored by Varolii](#) 

12.15 -
12.45

Executive Exchange

CIO Thought-Leadership

"Customer Care and Billing"

Customer care and billing is one of the most important aspects for utilities globally to best manage existing customers and win more business. Companies have to provide fast and accurate rating and billing, robust accounts receivable functions, and a user interface that is easy to learn and use, making call centers and back-office operations more efficient. Smart metering functionality requires additional investments in a utility's CIS, from the CRM platforms that support call center agents, through the billing engines and into new presentment technologies. This session looks at current consumer sentiment towards the utility billing process, the impact of smart metering and the importance of managing customers both during and after smart meter deployments.

[Presented by Stuart Ravens, Principal Analyst, Energy & Utilities](#)

[Technology, Ovum](#) 

Closing CIO Keynote Presentation

"Smart Power Grid Security: A Unified Risk Management Approach"

Power grid information security and protection has aspects of both Industrial Control Systems (ICS) as well as Information Technology (IT) Systems. Although both ICS and IT systems require information security services to combat against malicious attacks, the specifics of how these services are used for the power grid depend upon appropriate risk assessment and risk control.

12.50 - 1.25 Distinct types of attacks targeting ICS and IT systems as well as different performance requirements of these systems determine a specific priority order of the security services implemented for each system.

Threat profiles of the power transmission and distribution management functions, where availability precedes all other security services, differ significantly from threat profiles of IT functions such as utility customer billing where confidentiality is a greater concern – hence warranting different security posturing.

[Presented by Partha Datta Ray, Lead IEEE P2030, Smartgrid Standard Committee](#)

Closing Remarks

1.25 - 1.30 [Presented by Master of Ceremonies, Warren Causey, Independent Analyst & VP of Strategy, Research and Analysis, Five Point Partners LLC](#)

1.30 - 2.15 **VIP Luncheon & Networking + CIO Executive Think-Tank**

2.00 - 6.30 **Desert Golf Classic Tournament**

7pm - 9.30 **Southwestern Dinner + Networking**