

# Thought Leaders Speak Out 2024

ENGAGING CUSTOMERS WITH TECHNOLOGY

## Agenda and Speaker Bios

**A Fireside Chat with Evergy and Oracle Energy and Water**

**TOU Implementation & Customer Education in the 'Show-Me' State**

**February 20, 2024 12:00 – 1:00 pm ET**

### Agenda

Opening Remarks	Adam Cooper, Executive Director, IEI
Moderator	Mary Kipp, President and CEO, Puget Sound Energy
Discussants	Chuck Caisley, Chief Customer Officer & SVP, Public Affairs, Evergy Katie McDonald, Senior Director, Marketing and Public Affairs, Evergy Vanessa Richter, VP, Opower, Oracle Energy and Water

This dialogue is a by-invitation event for electric company executives with customer responsibilities and features a conversation with Evergy and Oracle Energy and Water followed by discussion with all participants. The goals of these dialogues are to share approaches, lessons learned, results, and the key roles that technology and data analytics play in customer engagement.

The February 20 dialogue will focus on steps taken by Evergy to:

- Build customer awareness of time-of-use (TOU) benefits through a multi-channel and multi-tool education campaign.
- Use data and behavioral science to guide customers to the most beneficial rate plan.
- Motivate customers to pre-enroll in preferred TOU rates ahead of default transition.



## Speakers



### **Adam Cooper**

#### **Executive Director, Institute for Electric Innovation**

Adam Cooper is Executive Director of the Institute for Electric Innovation (IEI). In this capacity he collaborates with a Management Committee of more than 25 electric company CEOs and a select group of technology companies to provide thought leadership on current issues, trends, and innovation in the electric power sector. He establishes and oversees IEI's key initiatives, its annual research agenda, and day-to-day activities. Prior to joining IEI, Adam worked at the Center for Automotive Research, the White House Office of Management and Budget, and Regional Economic Models, Inc. Adam received a Master's in Public Policy from the University of Michigan and a B.A. in Economics and History from Brandeis University.



### **Mary Kipp**

#### **President & CEO, Puget Sound Energy and Co-Chair, Institute for Electric Innovation**

Mary E. Kipp was named president of PSE in August 2019 and CEO in January 2020. Under her direction, PSE is leading the way to a clean energy future in partnership with its customers and the communities it serves. Prior to PSE, Mary was El Paso Electric's CEO since 2015 and president since 2014. Mary is Co-Chair of the Institute for Electric Innovation, a member of the Board of Directors of ASE (Alliance to Save Energy), and an immediate past chair of SEPA (Smart Electric Power Alliance). Mary received a Bachelor of Arts degree from Williams College, a Juris Doctor degree from The University of Texas School of Law, and is an alumnus of Exeter College, Oxford University.



### **Chuck Caisley**

#### **Chief Customer Officer & Senior Vice President, Public Affairs, Eversource**

As senior vice president of marketing and public affairs, and chief customer officer, Chuck Caisley leads the energy solutions and public affairs areas with responsibility for the company's small-scale generation projects, energy products and services platform, energy efficiency and demand response portfolio, community and customer strategy and communications, marketing, economic development, governmental affairs, and public relations functions. He joined KCP&L in 2007. Prior to joining KCP&L, he was president of the Missouri Energy Development Association, the trade association for Missouri's investor-owned natural gas, water, and electric utilities. In 2004, Mr. Caisley served as both the chief of staff and top political advisor to Missouri House Speaker Catherine Hanaway -- the first woman Speaker of the Missouri House. Actively involved in the community, Mr. Caisley serves as chairman of the board of directors of the Kansas City Area Development Council (KCADC). He also is the chairman of the Kansas City Zoo board of directors and a member of the Kansas City Missouri Environmental Protection Committee. In addition, Mr. Caisley currently serves as chairman of the board of directors for Missouri Employers Mutual, a workers' compensation mutual insurance company located in Columbia, Mo. He graduated with honors from the University of Illinois in Urbana-Champaign with a bachelor's degree in political science. He has also earned a Juris Doctorate degree from St. Louis University School of Law and a Master of Business Administration from Washington University in St. Louis.



### **Katie McDonald**

#### **Senior Director, Marketing and Public Affairs, Evergy**

Katie McDonald is the Senior Director of Marketing and Public Affairs for Evergy, a leading Midwest investor-owned electric utility headquartered in Kansas City, Missouri. In her role, she is responsible for the departments that oversee the strategy and execution of all marketing and corporate communications functions, including executive and strategic communications, brand management, media relations, digital strategy and digital tools, advertising, and customer communications. Prior to joining the company in 2007, Katie worked for nearly a decade at two national integrated marketing and public relations agencies (Boasberg/Wheeler Communications and Morningstar Communications). She led the development and execution of comprehensive communications and marketing strategies for several local, regional, and national companies. Katie earned a Bachelor of Journalism with honors from the University of Missouri-Columbia and an MBA from the Bloch School of Management at the University of Missouri-Kansas City. She is also a graduate of the University of Idaho's Utility Executive Program.



### **Vanessa Richter**

#### **Vice President, OPower, Oracle Energy and Water**

Vanessa Richter is Vice President, Opower at Oracle Energy and Water. Vanessa is on the executive leadership team for the Opower business and as part of that capacity, she develops and drives the company's go-to-market strategies. Opower brings software solutions to utilities needing to solve customer engagement needs at scale. Opower solutions provide data-driven, personalized experiences to drive at scale program adoption, rates engagement, affordability, customer satisfaction, digital engagement, energy efficiency, demand response, and load shaping. She is also an active member and volunteer with the Peak Load Management Alliance, PLMA. Prior to joining Opower in 2015, Ms. Richter ran implementation programs for North American utilities working at Conservation Services Group. She received a BS in Civil Engineering and worked as a Professional Engineer in Florida and Arizona prior to shifting to the utility industry in 2008. She enjoys spending time with friends and family, reading, hiking and biking.