

Thought Leaders Speak Out 2021

ENGAGING CUSTOMERS WITH TECHNOLOGY

Agenda and Speaker Bios

Fireside Chat with E Source and PGE

Using Data Science to Rethink Customer Programs: PGE Peak Time Rebate Program

June 2, 2021, 1:00 – 2:00 pm EDT

Agenda

- Opening Remarks Lisa Wood, Executive Director, Institute for Electric Innovation
- Moderator Bob Rowe, CEO, NorthWestern Energy
- Discussants John McFarland, Chief Customer Officer, Portland General Electric
Ted Schultz, President, E Source Data Science
- Closing Remarks Mary Kipp, President and CEO, Puget Sound Energy

This dialogue with E Source and PGE will focus on applying data science on individual customers to enhance engagement with PGE's Peak Time Rebate program, including:

- Using data science to develop micro-personas for each customer.
- Finding and engaging the best customers across PGE's demand reduction portfolio.
- Changing the definition of program success.
- What's next on the horizon?



Speakers



Lisa Wood

**Executive Director, Institute for Electric Innovation
Vice President, Customer Solutions, Edison Electric Institute**

As Executive Director of IEI, Lisa collaborates with a Management Committee of electric company CEOs and provides thought leadership on current issues, trends, and innovation in the electric power industry. As Vice President of Customer Solutions, she oversees electric transportation, corporate customer sustainability solutions, and other customer solutions. Lisa holds a Ph.D. in Public Policy and Management from the University of Pennsylvania, and M.A. from the University of Pennsylvania, and a B.A. from Rutgers College.



Bob Rowe

CEO, NorthWestern Energy

Bob has been CEO of NorthWestern since August 2008. He is Co-Chair of the Institute for Electric Innovation and a member of the EEI Board of Directors Executive Committee. Bob's focus is working with other employees to build a strong company, focused on providing essential infrastructure and service that will be a long-term partner to the customers and communities they serve. He holds a BA from Lewis and Clark College in Portland, Oregon, a JD from the University of Oregon, completed the Kennedy School Senior Executives' Program, and has been active in various professional organizations.



John McFarland

Chief Customer Officer, Portland General Electric

John McFarland is the Chief Customer Officer of Portland General Electric and is excited to help lead a company dedicated to the transformation to a clean, carbon-free, energy future. From leading the largest voluntary renewable energy program in the country, to the first wind/solar/battery storage facility of its kind, McFarland is passionate about enabling PGE to serve customer's emerging energy needs. Before joining PGE, McFarland spent more than 16 years in general management, marketing, product innovation, and digital transformation at General Motors and Procter & Gamble. McFarland holds a BS from Miami University, MBA from Northwestern University, and is currently pursuing an MS in Analytics from Duke University.



Ted Schultz

President, E Source Data Science

Mr. Schultz is a seasoned leader in the utility industry with more than 35 years of experience driving "what's next" with a relentless focus on providing value to customers. His pragmatic approach to applying new technology and leading industry change have delivered a highly successful regulated energy services business and two successful business exits, following his early work leading the distributed computing movement and the transformation of IT.



Mary Kipp

President and CEO, Puget Sound Energy

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 alumna of Exeter College, Oxford University.