ADVANCED
UTILITY SYSTEMS

HCTC 2024

Harris Customer Training Conference

October 7-10, 2024
Marriot Marquis, Atlanta, GA

Harris Customer Training Conference
Welcome to HCTC 2024

If this is your first time attending HCTC, thank you for being a part of this exciting event. If you're a returning attendee, thank you for joining us again for this fantastic learning opportunity. We can't wait to share the latest tips, tricks, industry news, and product information with you.

As in years past, the Harris and AUS teams have assembled an **energetic collection of speakers, sessions, and events** that will surely be a hit with you and your team members. And we've put together this program to ensure you get to all the best events.

So get ready to learn, and let us know how we can make your time here the best yet. Just look for the AUS team members in blue and gray.

Have a fantastic time at HCTC 2024,
The AUS Team

Harris Customer Training Conference

Pre-conference Agenda

Monday, October 7, 2024				
Time	**Track 1**	**Track 2**	**Track 3**	**Track 4**
7:00 -9:00 AM	Registration			
8:00-9:00 AM	Breakfast			
Session 1 9:00-10:00 AM	Optimizing the Infinity Billing Process	CIS Infinity Standard and Custom Reports	The AUS Knowledge Base	Empty
10:00-10:30 AM	Break			
Session 2 10:30-12:00PM	Optimizing the Infinity Billing Process cont.	CIS Infinity Standard and Custom Reports cont.	The AUS Knowledge Base cont.	
12:00-1:00 PM	Lunch			
Session 3 1:00-2:30 PM	Optimizing the Infinity Collections Process	Infinity Scripting	Day-in-the-Life of a CSR	
2:30-3:00 PM	Break			CLC Meeting
Session 4 3:00-4:30 PM	Optimizing the Collections Process cont.	Infinity Scripting cont.	Day-in-the-Life of a CSR cont.	

Pre-Conference Sessions

The AUS Knowledge Base

Unlock the power of collective knowledge in CIS with our comprehensive training session. Designed to equip you with essential tools for efficiently managing CIS, this course offers practical techniques and processes to enhance your capabilities. Seize this opportunity to unleash your potential and revolutionize the way you approach organizational requirements.

Day-in-the-Life of a CSR

The day-to-day realities of a CSR require the ability to multitask and retrieve important information quickly. Let us walk you through several key features within Account View and other areas in the system that allow CSRs to complete everyday tasks more efficiently.

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Pre-Conference Sessions Cont.

CIS Infinity Standard and Custom Reports

Unleash the Power of Your CIS Data! In this deep dive, we will show you how to navigate CIS. Master filter creation, conquer table joins, and craft custom reports that extract the exact data you need. We'll even unveil Power BI visualization to bring your insights to life. This session is designed for both CIS-reporting newbies and seasoned veterans seeking to up their game.

Infinity Scripting

PowerShell scripting is a powerful tool for creating interfaces in CIS. Our experts will guide you through the process of developing interfaces, troubleshooting and reviewing error logs, and integrating with internal and external APIs.

Optimize the Infinity Billing Process

This session delves into the exploration and optimization of CIS Utility Billing. Participants will uncover practical strategies to streamline billing processes, reduce errors, enhance operational efficiency, and ultimately elevate customer satisfaction. Join us as we uncover the transformative potential of CIS utility billing optimization, empowering your organization to achieve greater efficiency and effectiveness.

Optimize the Infinity Collections Process

Enhancing the collections process does not mean breaking the train track!   Explore how enhanced techniques, system automation, and tighter reins on meter-to-cash will assist in improved cash flow. Every interaction, with system assurance, will give the end user the power to handle the customer's inquiries and resolutions.
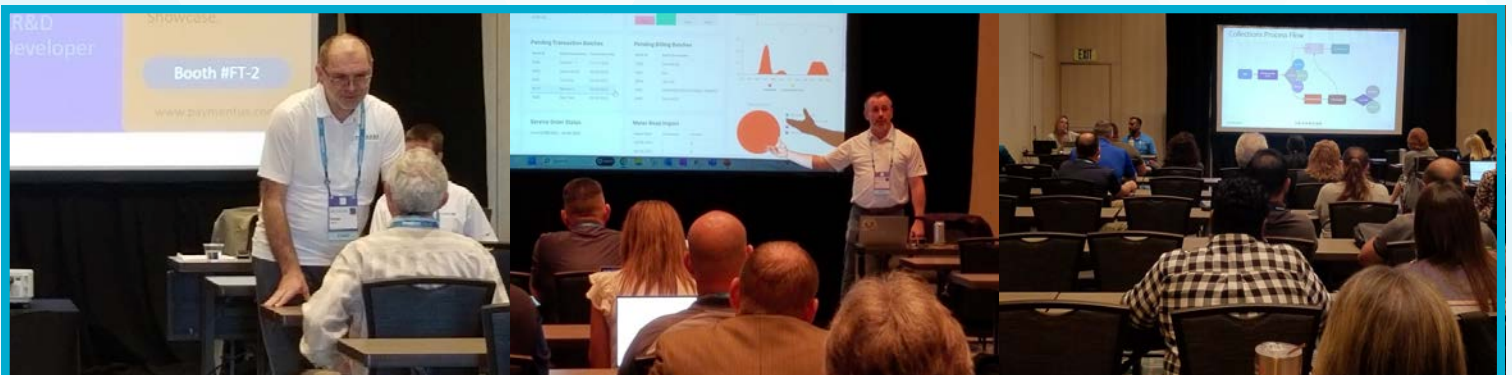
Recharge in our Support Room

Have tickets you need resolved?
Need to recharge your phone?
Want a place to sit and enjoy a few snacks?
Have a meeting scheduled with a team member?

Stop by our Support Room on Tuesday or Wednesday, and you could win an iPad!

There are lots of ways to win, but you have to stop by our support room and you must be present at the AUS Customer Appreciation Award Ceremony to win.

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Conference Agenda

Session	Time	Tuesday, October 8, 2024 Conference		
	7:00-8:15 AM	Breakfast and Registration		
	8:20-9:50 AM	Opening Address		
	10:00-10:55 AM	Vertical Opening Address		
	11:00-11:30 AM	AM Break/Exhibitors		
	11:30AM-12:25 PM	Advanced Opening Address		
	12:30-1:25 PM	Lunch		
Session 1	1:30-2:25 PM	Datavoice: Customer Experience Success	Preparing for an Infinity Upgrade	Getting the Most From Your CIS Reports and Reporting
Session 2	2:30-3:25 PM	Making the Most of Your Customer Communication	Digitization of Work Order Process Town of Queen Creek, AZ	Actions and Automations in CIS Infinity
	3:30-4:00 PM	Break/Exhibitors		
Session 3	4:00-4:55 PM	Partners': What's My Line?	Solar Billing CWLP, Springfield, IL	Tips and Tricks
Session 4	5:00-5:55 PM	Customer Experience Journey	Transforming Metering With AMI City of Edmond, OK	CIS Infinity Data Archiving and Purging
	6:30-8:30 PM	Reception		
Time		Wednesday, October 9, 2024 Conference		
	7:00-8:25 AM	Breakfast		
Session 5	8:30-9:25 AM	Improving the Service Order Process	Obtaining Upper Management Buy-in City of San Jose, CA	CIS Infinity Billing
Session 6	9:30-10:25 AM	Personalized Communication for Every Step of the Customer Journey	Moving to the Cloud City of Boulder, CO	Tips and Tricks (repeat)
	10:30-11:20 AM	AM Break/Exhibitors		
Session 7	11:30-12:30 PM	Getting the Most From Customer Notifications	Leadership Council Panel Discussion	Optimizing the CIS Infinity Collections Process
	12:30-1:30 PM	Lunch		
Session 8	1:30-2:25 PM	Accelerate Customer Engagement with Ready-to-Use Templates and Content	Understanding CIS Infinity's Rest API Mount Pleasant Waterworks, SC	CIS Infinity Error Messages and How to Decode Them
Session 9	2:30-3:25 PM	Instant Insight: Redefining Utility Analytics with AI-Driven Innovation	CIS Infinity Collections Process Columbus Water Works, GA	CIS Infinity Scheduler
	3:25-4:00 PM	PM Breaker/Exhibitors		
Session 10	4:00-5:00 PM	PerfectApps	Successful Workflows Santa Margarita Water District, CA	CIS Infinity New Enhancements
	6:00-9:00 PM	Banquet		
Time		Thursday, October 10, 2024 Conference		
	7:30-8:25 AM	Breakfast		
Session 11	8:30-9:25 AM	Round Table Discussion		
Session 12	9:30-10:25 AM	2025 User Group Planning		
	10:30-11:00 AM	AM Break		
Session 13	11:00-11:55 AM	Customer Appreciation Awards and Closing		

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Conference Sessions

Accelerate Engagement with Content & Templates

Embark on a transformative journey with Questline Digital, where innovative digital solutions converge with a commitment to conservation and sustainability. Discover how our tailored strategies not only drive engagement and enhance customer experiences but also champion energy efficiency and conservation initiatives. Join us to unlock the power of data-driven insights and revolutionize how utilities connect with their customers while fostering a greener future for all.

Actions and Automations in CIS Infinity

Learn how to automate tasks and workflows with CIS Actions. With the power of PowerShell and the CIS API, Utilities can create just about any custom solution tailored to their specific needs. The possibilities are only limited to your imagination!

AUS Customer Appreciation Awards and Closing

The first portion of this event will be drum roll, please, the Third-Annual AUS Customer Appreciation Awards! Winners will be announced in the following categories: Customer Service Excellence, Digital Utility Transformation, and 10-year Milestone Customer. After the awards ceremony, you can give your feedback about HCTC and ask our team any questions you might have. This session will close with a message from our executive leadership team with key takeaways and highlights from HCTC 2024.

AUS Opening Address

Our Executive Leadership Team Mark Wilkinson will welcome everyone to HCTC and share his goals for HCTC. Our executive leadership team will also outline our achievements in 2024 and discuss our plans for 2025.

AUS Round Table Discussion

Our Round Table Discussion will discuss several topics like conservation, backflow management, customer experiences, collections, and so much more. You'll select a topic, share your knowledge with your peers, and gain their insights. These discussions will be lively, and we're sure you'll learn something new about your topic of choice. This session is a must-attend event; you don't want to miss it.

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Conference Sessions

AUS User Group Planning

Our User Group Meetings were a huge success this year, and we want to hear what you think to make them even better in 2025. We'll discuss what you want to see in next year's sessions, where you'd like them to be held, and when you want them to be. Get in on the ground floor of next year's User Group Meeting planning; you'll be glad you did.

CIS Infinity Data Archiving and Purging

Join us for an informative Data Cleanup and Maintenance session, where you'll learn how to keep your data clean, organized, and up-to-date. Our experts will cover best practices for ongoing data maintenance. You'll gain insights into data management techniques and tools that can help you improve overall data quality, optimize resources, and allow the data to perform at its best ability.

CIS Infinity Billing

Join us for an informative Data Cleanup and Maintenance session, where you'll learn how to keep your data clean, organized, and up-to-date. Our experts will cover best practices for ongoing data maintenance. You'll gain insights into data management techniques and tools that can help you improve overall data quality, optimize resources, and allow the data to perform at its best ability.

CIS Infinity Collections Process

Join us for an informative session on the Collection process flow, Penalties, Notice Processing, Collection Processing, Write Offs, and Bankruptcies. Our expert speakers will provide a high-level overview of the collection process and share valuable insights on each stage, from penalty assessments to bankruptcy proceedings.

CIS Infinity New Enhancements

During this session, you'll be among the first to see the latest CIS Infinity enhancements we have for 2024. These new features will make your workday more productive and keep you using the latest functions that CIS Infinity has to offer. You don't want to miss this session!

CIS Infinity Scheduler

Join us for an insightful session on optimizing your utility's customer service and billing operations using the Infinity CIS Scheduler. Our expert speakers will guide you through scheduling and automating every batch and repetitive customer service or billing function, helping you save time and increase productivity.

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Infinity V5

Invest in Your Future
Web-based Intuitive Design

Empower Your Utility
Streamline Operations, Maximize Efficiency

Secure Your Data
Modern Technology and APIs

The Advanced implementation methodology includes an iterative approach to testing which led us to building familiarity and comfort with Infnity CIS so that we could identify any potential problems, but it also gave us lots of time to build competency with the product.
Kristy Web, Utility Billing Manager, City of Lawrence

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Conference Sessions Cont.

CIS Infinity Solar Billing

Join us for an informative session dedicated to Billing. You will gain practical insights and actionable strategies to optimize your CIS utility billing processes. From understanding essential functionalities to implementing best practices for efficiency and customer satisfaction, this session promises to equip you with the tools and knowledge needed to excel in utility billing operations.

CIS Infinity Tips and Tricks

Join us for an informative session on the latest Tips and Tricks to help you maximize the benefits of Infinity CIS. Our expert speakers will guide you through some cool tips and tricks to enhance your experience and increase your productivity with Infinity CIS.

Customer Experience Journey

Join us for an exciting session on the Customer Experience Journey, where you'll gain insights into creating exceptional customer experiences at every touchpoint. Our experts will guide you through the various stages of the customer journey and show you how to leverage customer insights and feedback to improve your approach continuously.

Customer Leadership Council Panel Discussion

Our Customer Leadership Council will discuss important industry topics and how community leaders and super users are handling them in their communities. They will also show you how they are solving some of the toughest issues facing the utility industry today.

DataVoice: Customer Experience Success

Learn how to make the most of every customer experience with our partner, DataVoice. From Interactive Voice Response, Outage Management, and Leak Notification, you can inform your community to increase customer satisfaction.

Digitization of the Work Order Process

Are you tired of cryptic notes on work orders? Does it drive you crazy if one of them gets lost or misplaced? And are you looking for ways to streamline your work order process? Presented by the Town of Queen Creek, Lisa Maealiuaki and Lacy Heiney will show you how they digitized their work order process to streamline operations, improve communication between field and office staff, and enhance customer experiences.

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Conference Sessions Cont.

Getting the Most from Customer Notifications

Customer communication has never been easier with 2-way texting and automated call notifications. Join Ivrnet to learn how to use these new Harris partner products to perform outage alerts, payment reminders, severe weather incident management alerts, and so much more. You'll learn how Ivrnet can play an essential role in streamlining your call center's communications and operations.

Getting the Most from Your AUS Reports

Boost Your CIS Reporting Skills: New Features and Best Practices! Dive into the latest advancements in CIS reporting in this informative session. We will equip you with filter finesse to pinpoint the data you crave and unveil best practices that elevate your reports. Get a sneak peek at our all-new reporting visual—it'll take your insights to the next level! This session caters to both CIS-reporting newbies and seasoned veterans alike.

How to Decode CIS Infinity Error Messages

Become an expert at deciphering error messages. Error messages can annoy the lay user, but you can become a guru at troubleshooting and resolving issues with the right knowledge.

Improving the Service Order Process

When an outage happens, a customer needs assistance, or a leak occurs, your team needs to communicate effectively to keep your community happy. If you're using paper service orders or an outdated mobile workforce management solution, chances are your team is not as efficient as it could be. Join Wendall Welborn from Service-Link to learn how to increase field service efficiency with their internet-based mobile communication and field service dispatching solution.

Making the Most of Customer Communication

For utilities, customer communication is more than a phone call or an email. Today, customers want to be served where and when convenient on their chosen device. With so many communication channels, deciding which suits your community may be challenging. In this session, we will explore the best communication solutions that will improve customer experiences and help you reach your customers where they are online.

Moving to the Cloud

Are you considering moving your CIS to the cloud? The City of Boulder, CO, will lead this session and explain the process they went through as they transitioned to the cloud. They will share lessons learned and best practices so that you will have all the information you need to make an informed decision about moving to the cloud.

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Conference Sessions Cont.

Obtaining Upper Management Buy-in

Articulating your perspectives to upper management can be challenging due to gaps in technical understanding and a focus on high-level goals and financial outcomes. Capturing their attention amid competing priorities and limited time requires concise, compelling, data-backed proposals. Resistance to change due to existing investments and fear of disruption must be addressed with solid evidence and clear communication. Navigating organizational politics and differing leadership viewpoints adds complexity, necessitating strategic preparation and the ability to translate technical details into strategic benefits. To overcome these challenges, we will present strategies for aligning proposals with organizational goals, developing detailed business cases, and engaging stakeholders early. Using pilot programs, case studies, and benchmarking data will help your arguments, while clear communication, ongoing updates, and open dialogue will ensure that upper management gets the buy-in.

Optimizing CIS Infinity's Collection Process

Join us for an informative session on the Collection process flow, Penalties, Notice Processing, Collection Processing, Write Offs, and Bankruptcies. Our expert speakers will provide a high-level overview of the collection process and share valuable insights on each stage, from penalty assessments to bankruptcy proceedings.

Preparing for an Infinity Upgrade

Are you considering upgrading or already committed to moving to CIS Infinity V5? Then, this is the session for you. You'll learn why you should upgrade, how to prepare your staff for this project, and what a project plan and timeline look like. We'll also discuss resourcing and how it impacts timelines, lessons learned, and best practices that will ensure that you have the best possible upgrade experience.

Personalizing the Customer Journey

Join us for an immersive workshop on SmartVX, where we'll delve into the power of personalized video experiences tailored for the municipal, county, and utility industry. Discover how to craft accessible and inclusive communications that resonate with diverse audiences, strengthening brand-customer bonds at every touchpoint. Learn to streamline customer experiences by delivering timely and relevant calls to action, ensuring engagement at every step of the customer journey.

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Conference Sessions Cont.

Redefining Analytics with AI Innovation

Join us to explore Instant Insight, a patented AI solution revolutionizing utility analytics. Dive into the world of AI-driven utility analytics and discover how Instant Insight empowers utilities with its intuitive interface and advanced capabilities. Learn how this secure, user-friendly platform facilitates efficient data analysis, enhances customer service, and drives strategic decision-making in utility management.

Successful Workflows With CIS Infinity

Join our session with Santa Margarita Water District as they showcase some of their current process workflows. Gain insights into advanced methodologies that enhance daily operations, from boosting internal efficiencies to elevating customer engagement. Our discussion will highlight best practices, innovative tools, and real-world applications contributing to streamlined processes and improved service delivery. Don't miss this opportunity to learn and apply these enhancements to your organization.

Transforming Metering with AMI

Join our insightful session with the City of Edmond to explore their journey in implementing Advanced Metering Infrastructure (AMI).   Discover how their processes adapted to accommodate transformative changes in overall metering solutions and uncover best practices that have enhanced operational efficiency.   Learn about the tangible advantages of switching to AMI, including improved customer service, optimized resource management, and enhanced data accuracy. This session offers a unique opportunity to comprehensively understand AMI deployment and its impact on modern utility systems.   Don't miss this chance to learn from real-world experiences and elevate your approach to advanced metering solutions.

Understanding CIS Infinity's REST API

Learn about real-time data exchange with CIS Infinity utilizing the comprehensive, secure, and documented CIS Infinity RESTful API. This session will provide valuable insights into CIS Infinity's layered architecture, critical elements of the RESTful API like HTTP requests, HTTP responses, JSON, and endpoints, and why all this is fundamentally important. As part of the session, we will develop an integration with CIS to

What's My Line?

Join us for What's My Line, where you'll have short, information-packed, quick sessions with our ecosystem partners. You'll have fun learning about what problems their products solve, have a chance to score some fantastic goodies, and could even be the grand prize winner.

![Advanced Utility Systems logo]

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Meet Our Team

Mohannad Bakkar
Team Lead
Technical Services
Professional Services

Mahmoud Barati Mosleh
Senior Software Developer
R&D

Dan Barry
Regional Sales Director, East
CLC Advisor
Sales & Marketing

David Batterman
Director of Business Development
Sales & Marketing

Jared Brandon
Vice President
Sales & Marketing

Kathy DeGlandon
Marketing & Communications Manager
Sales & Marketing

Afsar Hassanalli
Team Lead, Trainers
Professional Services

Renee Howell
Technical Consultant
Professional Services

Yusuf Jiwajee
Vice President
Customer Success

Raj Karmali
Manager, Customer Success
Client Services

Karen Kelly
Technical Consultant
Professional Services

Stanley Lawrence
Vice President
Professional Services

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Meet Our Team

Maureen Lenehan
Implementation
Manager
Professional Services

Beth Lollis
Team Lead, Customer
Success
Client Support

Paven Sekhon
Director, Sales Western
USA
Sales & Marketing

Melanie Sundy
Implementation
Manager
Professional Services

Sean Sykes
Senior Vice President
Business Development &
Customer Success

Cesar Teodoro
Director of Customer
Support
Client Support

Jason Wilcox
Vice President
R&D

Mark Wilkinson
Executive Vice President

Darryl Zaldin
Senior Technical Analyst
Client Support

Cara Zipperer
AMS Consultant
Client Services

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∞
INFINITY
CIS

Infinity is a modern, browser-based customer information and billing software platform that will transform your interactions with customers. From meter to cash, office to field, move-in to move-out, and every interaction in between, Infinity empowers you to serve your community.

Secured community data

Quick access to needed informmation

Improved first-call resolutions
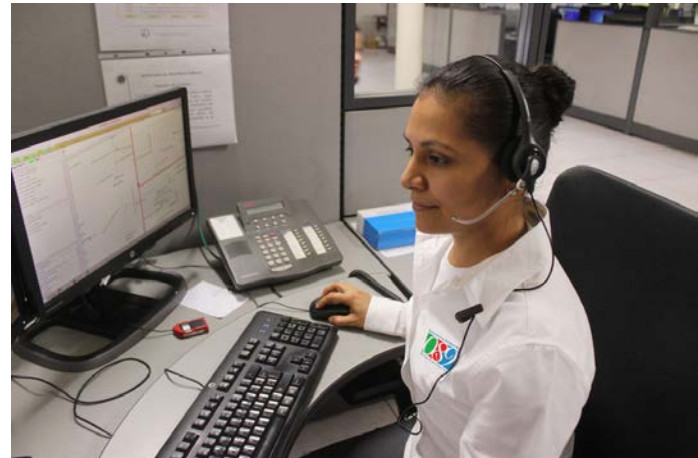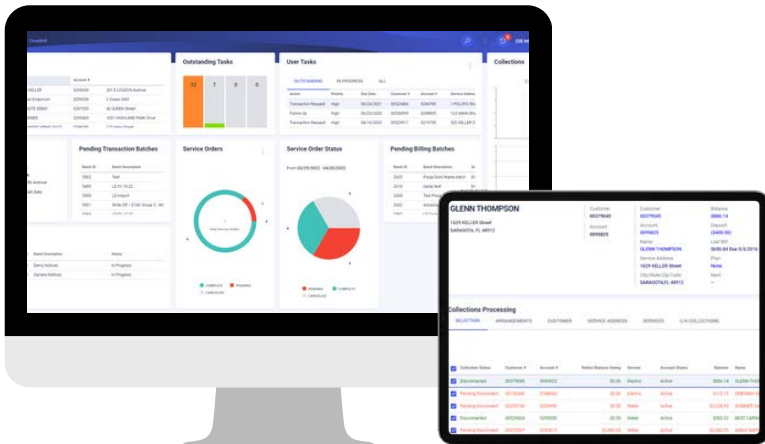
Anywhere Access: users can access Infinity anytime, anywhere, and on any device.

Configurable: users can customize dashboard tiles to access role-based essential information.

Automation: robust automation and workflow engine improves business processes.

Real-time: data and self-service capabilities are available in real-time.

Efficiency: processes are streamlined to reduce OPEX.

Latest Technology: 100% C#, .NET 6, and modern web technologies.

Ecosystem Integration: Integrations with REST API are simple and reliable.

Scripting Control: PowerShell eliminates the cost of customization and add-ons.

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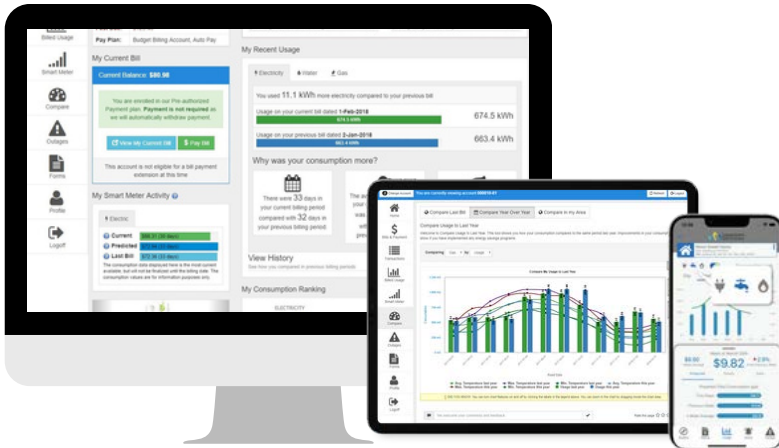

mymeter

silverblaze™

Customer Experience Portals

With Infinity CIS and an integrated online portal like MyMeter or SilverBlaze, your customers can take charge of their accounts to view and pay bills, review account history, and manage consumption. Give your customers the convenience they're looking for anytime, anywhere, and on any device with a fully integrated online self-serve portal.

Anytime, anywhere, any device

Self-serve account info. & payments

Manage usage and consumption

MyMeter

Accelerated Innovations' MyMeter Platform connects seamlessly with Infinity CIS and provides a secure, easy-to-use interface for consumers to manage their utility accounts. With MyMeter, customers can understand and manage their usage, conveniently make payments, and conserve money and resources.

SilverBlaze

SilverBlaze customer engagement solution helps utilities improve financial performance, operational efficiency, and customer engagement. SilverBlaze and Infinity CIS will seamlessly connect your customers to your services to reduce call volume, shorten your revenue cycle, influence customer behavior, and increase customer satisfaction.

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Service-Link

Mobile Workforce Management

Service-Link Mobile Workforce Management software offers real-time communication and collaboration between your office and field staff. Eliminate paper work orders and keep your field staff moving from one service call to the next with Service-link and a mobile device. You'll improve customer experiences with increased visibility, keeping customers informed as work is completed. Service-Link and Infinity CIS--a winning combination.

Intelligent scheduling and routing

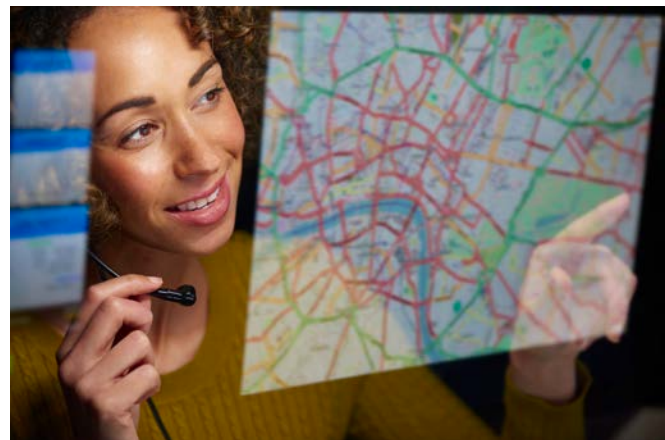**Configurable workflows**

Secure, encrypted data

Key Features

- Real-time scheduling, optimization, routing, and dispatching
- Image recognition, barcode scanning, and photo attachments
- Reporting, inventory, dashboarding, and workflow management
- Automatic Vehicle Location (AVL) and tracking
- GIS integration, mapping, and mobile communications

Benefits

- Enhance deployment, control, and visibility of mobile workers
- Increase daily work completion and minimize missed opportunities
- Fulfill more customer commitments and improve service response times.
- Reduce overtime hours and contract staffing requirements
- Enable real-time status updates, rescheduling, and rerouting

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·ı|ı| DataVoice

Clarity during crisis.

Leak Notification and Outage Management

When the power goes out or your team expects a leak, you need a way to notify your customers. With Infinity CIS and DataVoice's leak notification and outage management system, you'll have the tools to notify your customers to get the water flowing and the lights back on.

Outage management workflows

Real-time outage mapping

Automated customer notifications

Outage Management

Utilities across North America use DataVoice Manage to identify outages quickly and disseminate accurate information to customers, managers, crews, and social media outlets. DataVoice Manage handles multiple services—Electricity, Water, Fiber, and Gas—all in one system.

OMS integrates with the utilities' meters, mapping, and SCADA/ONT to assemble a complete outage picture. With the mobile application WorkPal, crews get instant, accurate information, and timely updates are reported back to the main system.

The DataVoice OMS offers multiple ways for customers to interact: IVR, text, app, or website. With DataVoice, communication is two-way, and customers are kept updated when an outage's status changes. DataVoice and Infinity CIS: Clarity During a Crisis.

SWIFT COMPLY

Backflow

SwiftComply gives your team instant access to industry-leading data management and customer engagement solutions designed by water professionals. With Swift Comply and Infinity CIS, you won't get bogged down in manual data entry and spreadsheets. SwiftComply's backflow portal helps water utilities proactively manage and improve compliance.

Proactively manage your program

Boost compliance rates

Reduce operational costs

With SwiftComply You Can:

- send test-due reminders
- receive test reports
- survey and inspect assemblies
- generate annual state reports and operational reports
- synch data between Infinity and the backflow database to update contacts, addresses, and accounts

Features

- Database management includes locations, assemblies, water customer and tester contacts
- Notification center with compliance notices and automated reminders to testers by email or mail
- customizable forms, including file and picture attachments
- online submission by utility staff or authorized third-party tester

Our Team: Implementation and Service Excellence

Over the past 25 years, Advanced has become a reliable and proven Customer Information System provider for water, wastewater, electric, gas, and sanitation utilities. Today, Advanced has over 175 successful customer implementations across North America, Central America, South America, and the Caribbean, providing in-depth experience in delivering a marketing-leading solution.

The Advanced team is comprised of industry veterans who bring deep technical and business expertise to our implementations. Our skilled service staff is committed to working with your project team to enhance your ongoing business practices, developing methods for streamlining operations, and ensuring that all your staff is well-trained and able to exploit the power of our software solution.

Modern Technology and Infrastructure

Application

Infrastructure

Access

Corporate Data Security and Governance

Advanced's comprehensive corporate information security program uses a standards-based approach for all customers, including those with extensive compliance and legislative requirements.