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Reflow™ 2023

Virtual PowerClerk® Conference

Join us at Reflow 2023, the PowerClerk Conference

Reflow is a virtual conference for utilities and energy agencies seeking to maximize their use of PowerClerk. **Designed for people with varying levels of familiarity with PowerClerk,** this year's event is packed with informative sessions and guest speakers sharing real-world emerging use cases.

From April 26-27 & May 2-4, attendees will discover how PowerClerk can improve workflow efficiency, enhance staff productivity, and streamline the applicant experience. Our agenda includes introductory sessions, skill-building how-to sessions, and emerging use cases that are empowering our utility customers through the energy transformation.

Our **keynote session will be led by SEPA's Lakin Garth and Clean Power Research's CEO, Jeff Ressler,** followed by three introductory sessions that provide an important base understanding of PowerClerk. In the second week of the conference, attendees will gain from two types of sessions: case study sessions with guest speakers covering emerging solution areas and short deep dive skill-building demonstrations where you'll learn new ways to optimize your workflows.

Hear directly from utility speakers at Arizona Public Service (APS), Orange & Rockland (O&R), Pepco and Puget Sound Energy (PSE) as they share real-world applications of how PowerClerk is streamlining and automating their processes.

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Keynote and Introduction Sessions

Designed for utilities not yet using PowerClerk, or for new users at companies currently using PowerClerk.

Wednesday April 26, 2023

SESSION 1

State of the Utility Transformation

How Digitalization Enables Utility Decarbonization Goals

Wednesday April 26, 2023 / 9:00 am PDT / 12:00 pm EDT

Jeff Ressler
CEO
Clean Power Research

Lakin Garth
Director, Research and Industry Strategy
SEPA

A critical piece of the puzzle in driving innovation and collaboration within utilities is leveraging “digitalization” to optimize critical business processes and empower utilities to tackle their goals more efficiently.

In this session, SEPA and Clean Power Research will present research on the state of the Utility Transformation with new data from 2022. We will explain how PowerClerk is built to solve today’s most pressing challenges related to interconnection and customer program management, and how its flexibility helps utilities prepare for what comes next.

In this session you will:

- Gain insight into SEPA’s 2022 Utility Transformation Survey results.
- Learn how workflow automation technology supports meeting utility goals.
- Learn how PowerClerk incorporates best practices from utilities around the country and why it has become the leading program management and automation solution for DERs and beyond.
- Gain insight into the future of PowerClerk and how it can help your organization meet its goals.

SESSION 2

Automating Interconnection and the End-to-End Integration of Renewable Energy

Wednesday April 26, 2023 / 10:00 am PDT / 1:00 pm EDT

Brian Boler
Group Product Manager
Clean Power Research

In an era of explosive growth in customer-owned renewables, utilities require a suite of software solutions that help facilitate customer adoption of renewables, engage diverse population of customers to support their decision-making, and intelligently plan and operate the grid in a data-driven fashion.

In this session you will:

- Learn how PowerClerk automates solar (+storage) interconnection.
- Learn how WattPlan guides customer decisions to purchase or participate in community solar and green pricing programs.
- Learn how PowerClerk Analytics and SolarAnywhere FleetView help fortify long-term distribution system planning and improve operational decision-making in a world of DERs.

Thursday April 27, 2023

SESSION 3

Set your EV Program Management in Cruise Control

Thursday April 27, 2023 / 9:00 am PDT / 12:00 pm EDT

Evan Gray
Product Manager
Clean Power Research

Andrew Price
Business Development Manager, EVs
Clean Power Research

As Electric Vehicle (EV) programs scale, so does the importance of efficiently managing these programs. Whether you're managing a simple charger rebate or a complex commercial make-ready program, PowerClerk automation can help streamline and scale your EV programs. This session will highlight how PowerClerk can automate incentive processing, easily enroll customers in time-of-use rates and streamline the processing of complex commercial make-ready infrastructure projects. We will also discuss how utilities can leverage WattPlan to educate and influence the charging behaviors of residential EV customers.

In this session, you will learn:

- How to manage simple incentive processing, TOU rate enrollment, customer surveys and more with VersaForms
- How to streamline application submissions using PowerClerk's powerful integrations, EV curated lists and incentive calculations
- How to reduce average project lifecycle through PowerClerk's purpose-built workflow automations and integrations, and address bottlenecks in real-time, with PowerClerk dashboards

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SESSION 4

Amplify your power: Leveraging PowerClerk's Flexibility to Solve Emerging Challenges

Thursday April 27, 2023 / 10:00 am PDT / 1:00 pm EDT

Jennifer Gough
Product Manager, PowerClerk
Clean Power Research

You've come to know PowerClerk as the proven solution for managing distributed generation interconnection. You've experienced its flexibility, its automations, and its seamless integrations. In this session we will showcase how utilities are using PowerClerk to manage emerging challenges, like FERC 2222, as well as turning to it as a new approach to solve traditional processes, like New Service Delivery, Joint-Use Management and more.

In this session you will:

- Learn how one utility is reviewing DER aggregation applications under FERC 2222.
- Learn how utilities are using PowerClerk's integrations to manage traditional service connection workflows.
- Learn how utilities are complying with FERC interconnection regulations by harnessing PowerClerk's deadlines and scheduled reports.

Case Study and Skill Building Sessions

Reflow™ 2023
Virtual PowerClerk® Conference

For experienced users and program managers, or those who just want to learn more about PowerClerk.

Tuesday May 2, 2023

SESSION 5

Driving Electric Vehicle Programs to Success with PowerClerk

Tuesday May 2, 2023 / 9:00 am PDT / 12:00 pm EDT

Danielle Kievit
Clean Energy Product Manager
Puget Sound Energy

Scott DeWees
Customer Delivery Manager, Team Lead
Clean Power Research

As electric vehicle (EV) adoption continues to surge, utilities are facing new EV program management challenges. In this session, we'll showcase how PowerClerk is helping utilities streamline residential and commercial EV program management.

We'll demonstrate the breadth of EV programs PowerClerk supports by examining how Puget Sound Energy (PSE) is using PowerClerk to manage multiple residential and commercial EV programs. We'll also highlight recently launched, innovative PowerClerk programs at Rockland Electric (RECO) that support charger data aggregation and enrollment in a time-of-use (TOU) rate program.

We'll also show how PowerClerk's flexibility and purpose-built feature set can support your evolving EV program needs, such as: scaling your EV program management, supporting a third-party Program Manager, or enrolling customers in a managed charging or charger data aggregation program.

In this session, you'll:

- Learn how PowerClerk's built-in flexibility solves EV program management challenges
- View New, real-world EV programs, including PSE's management of multiple programs, and RECO's EVSE data aggregation and TOU enrollment programs
- Learn how PowerClerk supports end-to-end program management and fits into your broader EV program ecosystem

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SESSION 6

Make Sense of Your Data: Utilizing Reports to See What Matters

Tuesday May 2, 2023 / 10:00 am PDT / 1:00 pm EDT

Lane Bozman
Customer Delivery Manager
Clean Power Research

Are you ready to unlock the potential of your PowerClerk reporting capabilities? In this session, we'll showcase the new Report Editor and highlight powerful built-in fields such as status timestamps, deadlines, nearest deadline due, and more.

We'll also explore other ways to access data through PowerClerk, including Excel integration, automated reports, SFTP and PowerBI. By the end of this session, you'll have a comprehensive understanding of PowerClerk reporting and how to best leverage it for your utility's needs.

Join us to learn:

- How the new Report Editor works and how it can streamline your reporting processes
- Best practices for using built-in fields to enhance your reporting capabilities
- How to access data through Excel integration, automated reports, SFTP and PowerBI
- Tips for customizing reports and leveraging the full power of PowerClerk reporting

SESSION 7

Streamline Your Workflows with PowerClerk Automations

Tuesday May 2, 2023 / 10:30 am PDT / 1:30 pm EDT

Scott DeWees
Customer Delivery Manager, Team Lead
Clean Power Research

Do you want to increase efficiency in your PowerClerk workflows? In this session, we'll demonstrate how to utilize various PowerClerk automations to streamline your processes and reduce the risk of missteps.

You'll learn how to automatically update statuses, send notifications and generate documents or reports using different types of project conditions (topical, numerical, logical). You'll also learn how to prevent poor quality or unauthorized application or review form submissions using validation action rules.

Don't miss this opportunity to learn:

- How to choose the right PowerClerk automation to solve different workflow automation needs
- How to set-up automation action rule conditions based on various project criteria
- Tips for when to use "form submittal" versus "status transition" automation triggers -How to use "validation rule" automation actions to further enforce data quality requirements

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SESSION 8

Optimize PowerClerk Integrations to Enhance Workflows and Maximize Data Value

Tuesday May 2, 2023 / 11:00 am PDT / 2:00 pm EDT

Connor Smith
Senior Customer Delivery Manager
Clean Power Research

Join us to explore how to integrate PowerClerk with other utility systems and identify what type of connection to use for specific scenarios. The integrations we'll cover include: SFTP Automatic Data Import, ArcGIS, Customer Validation Web Adapters and PowerClerk's new V2 API.

By the end of the session, you'll have a clear understanding of how to integrate PowerClerk with other systems to create a seamless workflow, keep data in sync, enhance your reporting capabilities and establish project health across teams. Maximize the value of your PowerClerk data to unlock even greater insights and opportunities.

Don't miss this opportunity to learn:

- Best practices for automating the import of a dataset from an external database into PowerClerk
- When to use a web adapter to reflect PowerClerk data on your ArcGIS map to aid internal distribution analyses, or allow a customer to validate themselves, thereby reducing administrative review time
- Tips for syncing your external database to PowerClerk on a nightly basis

Wednesday May 3, 2023

SESSION 9

Empowering Rapid and Flexible Utility Program Management: APS' Success with PowerClerk

Wednesday May 3, 2023 / 9:00 am PDT / 12:00 pm EDT

Rebecca Crawford
Regulatory Contract Advisor
Arizona Public Service

Melissa Days
Senior Customer Delivery Manager
Clean Power Research

Software doesn't need to be frustrating to use. In this session, you'll witness how Arizona Public Service (APS) transitioned their interconnection program to PowerClerk, enabling them to meet new and evolving FERC regulations in record time.

Arizona Public Service (APS) faced a common challenge of limited flexibility and slow software systems that required IT intervention for any changes to their interconnection program. When regulatory changes demanded a more agile solution, APS implemented PowerClerk, enabling rapid, self-serve flexibility without IT intervention. This purpose-built, flexible solution empowered APS to take control of their program, and APS now relies on PowerClerk for five energy programs.

In this session, you'll learn:

- How PowerClerk's built-in flexibility and self-serve features enabled APS to meet new FERC interconnection requirements and handle sudden regulatory changes
- How APS' new interconnection review and agreement processes have been simplified using PowerClerk features such as Deadlines, Communications and Reporting
- How APS is using PowerClerk's no-code, drag-and-drop workflow automation features to streamline their workflows and adapt to diverse program needs beyond interconnection

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SESSION 10

Harness PowerClerk Channels to Efficiently Manage Upcoming Impacts of FERC 2222

Wednesday May 3, 2023 / 10:00 am PDT / 1:00 pm EDT

Aaron Anaya
PE, PMP, DER Ombudsman and Tech Engineering Section Manager at Orange and Rockland Utilities, Inc

Melissa Days
Senior Customer Delivery Manager
Clean Power Research

Emilie Moeller
Customer Delivery Manager
Clean Power Research

Many utilities are preparing to facilitate the aggregated operation of behind-the-meter Distributed Energy Resources (DERs). We invite you to join our session to gain insight into how PowerClerk is helping utilities in managing the upcoming impact of FERC Order 2222, which will require a series of new assessments and analyses for aggregations of customer owned DERs.

We will explore how Orange and Rockland Utilities (ORU) leverages PowerClerk to prepare for their new roles and responsibilities in supporting the New York Independent System Operator (NYISO) process by reviewing DER aggregation applications. We will also discuss the advantages of digitizing interconnection programs for PTO issuance, and how PowerClerk accommodates both asset-level and aggregation-level evaluation processes by streamlining data interfaces and workflows.

The session will explore the following topics:

- The impact of FERC Order 2222 on distribution utilities
- PowerClerk functionalities that assist utilities in evaluating aggregation applications
- ORU's strategy to satisfy its FERC Order 2222 obligations to NYISO

Wednesday May 3, 2023 (continued)

SESSION 11

Our Signature Event: Introducing PowerClerk's V2 eSignature Feature

Wednesday May 3, 2023 / 11:00 am PDT / 2:00 pm EDT

Lauren Gottschalk
Customer Success Manager
Clean Power Research

Mastering new features can sometimes feel like a big lift, but that's not the case with PowerClerk's new, advanced eSignature feature. Join this session to experience the dedicated configuration page for intuitive design, and discover improved functionality, including signatory mapping, customized DocuSign emails, merging, and more!

Learn how PowerClerk's new eSignature integration with DocuSign can enhance customer satisfaction by reducing errors, improving turnaround time and offering clear instructions. We'll cover the path to implementation, including how to get started and best practices for integrating eSignatures into your processes.

In this session, you'll learn:

- What the new V2 eSignature Feature is and the functions it provides
- How to configure an envelope in your program
- How to add signatory mapping and private messaging to each

SESSION 12

Don't Get Lost in Your Inbox: Use Project Inquiries to Communicate with Customers

Wednesday May 3, 2023 / 11:30 am PDT / 2:30 pm EDT

Lane Bozman
Customer Delivery Manager
Clean Power Research

Customer questions can come anytime during a project. PowerClerk Project Inquiries makes it possible to forego email and receive and respond to customer questions anytime from within PowerClerk. When using Project Inquiries, conversations can be associated with specific projects and are easily viewable by all users, helping utilities to stay organized and keeping communications transparent.

In this session, we'll show you how to configure Project Inquiries within PowerClerk, and demonstrate the experience for both utility administrators and customers.

Join us to learn:

- What project inquiries are and how they prevent you from getting lost in your inbox
- How to configure PowerClerk to notify you of incoming questions/responses
- How Project Inquiries work in practice through an interactive demonstration

Thursday May 4, 2024

SESSION 13

How PHI Incorporates DER Insights into Distribution Planning with SolarAnywhere FleetView

Thursday May 4, 2023 / 9:00 am PDT / 12:00 pm EDT

Scott Placide
Manager, Regional Capacity Planning, DERs
Pepco Holdings

Kristen Wagner
Product Manager
Clean Power Research

With the rapid adoption of DERs, utilities are facing new complexities in distribution system planning processes. Conventional distribution planning practices do not fully account for the impact of current and future DER adoption. SolarAnywhere FleetView is a cost-effective, flexible and scalable cloud-based solution that provides estimates of DER production at the customer, circuit and substation levels. With FleetView, utilities can paint the complete picture of gross load at each of these planning tiers without costly investments in production metering infrastructure.

Join us to learn more about SolarAnywhere FleetView and explore how Pepco is forecasting future load requirements in order to anticipate and optimize their distribution network investments.

In this session, you'll learn about:

- SolarAnywhere FleetView capabilities, including generating production estimates for every distributed PV system in a utility's service territory
- The importance of using high fidelity solar resource data for generating accurate PV production estimations
- How PHI is using SolarAnywhere FleetView for more accurate power flow calculations and to gain visibility into DER impact on current and future gross load shapes for use in distribution planning

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SESSION 14

Using the PowerClerk Test Environment for Seamless Program Design Changes and User Training

Thursday May 4, 2023 / 10:00 am PDT / 1:00 pm EDT

Emilie Moeller
Customer Delivery Manager
Clean Power Research

Design changes in PowerClerk programs can be stress free when program designers make use of PowerClerk Test Environments. Test Environments are also ideal for new user training.

Join us to discover the latest best practices and tools for managing test environments and how to maximize their potential for seamless, glitch-free program change rollouts. You'll also gain insights into successful real-world implementations of Test Environments, and strategies for effective new user training. Receive actionable tips and tricks to take your program design and user training to the next level.

In this session, you'll:

- Learn the basic principles and mechanics of PowerClerk Test Environments
- Understand the benefits of using a test environment to simulate program changes and conduct new user training
- Receive actionable tips and tricks to take your program design and user training to the next level

Thursday May 4, 2024 (continued)

SESSION 15

Submit, Review, Correct, Repeat: Mastering a Seamless Review Loop

Thursday May 4, 2023 / 10:30 am PDT / 1:30 pm EDT

Lauren Gottschalk
Customer Success Manager
Clean Power Research

Discover how you can optimize your program's review loop and create a seamless experience for both your admin team and applicants. In this session, you'll learn how to leverage unique form elements and a secret 'set data field' automation to minimize manual resources and streamline your review process.

Our expert speaker will share insights into the latest best practices for designing a user-friendly review process and maximizing efficiency. By the end of this session, you'll be equipped with the knowledge and tools to master a seamless review loop and improve the overall effectiveness of your program's application review process.

In this session, you'll:

- Learn how review loops can be used to improve the applicant and admin experience as they progress through the project workflow
- Learn how to create a review form, including commonly used form elements and submission types, and understand options for setting up a Corrections form
- Gain actionable tips for enhancing communication and collaboration among team members and applicants

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SESSION 16

Optimize Resource Management with PowerClerk Features

Thursday May 4, 2023 / 11:00 am PDT / 2:00 pm EDT

Emilie Moeller
Customer Delivery Manager
Clean Power Research

Explore how to optimize management of your team using PowerClerk. By harnessing the features of PowerClerk, such as Assignee/User Selector fields, Project Views and Project List Columns, you'll learn how to streamline your workflow, assign tasks more efficiently and gain greater visibility into your project status.

Whether you're a project manager, team leader or simply looking to improve your project management skills, this session will provide you with practical tips and techniques for maximizing the benefits of PowerClerk.

In this session, you'll:

- Gain insight into how PowerClerk's resource management features can help you more effectively manage programs with multiple administrators
- Learn best practices for implementing specific features, including User Selector fields, Assignee Field, Project Views and Project List Columns

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Powering the Energy Transformation

Clean Power Research®

Software services from Clean Power Research help solve the energy industry's most challenging problems. Our mission is to power the worldwide energy transformation with trusted, adaptable and efficient solutions.

For more than 20 years, leading utility and energy enterprises have trusted Clean Power Research to deliver innovative solutions that inform, streamline and quantify energy-related decisions and processes. We are proud the top 10 Fortune 500 utilities, as well as many of the world's largest renewable energy companies, are our customers.

PowerClerk®
Energy program digitization, automation and management

WattPlan®
Customer engagement and enrollment, and DER planning

SolarAnywhere®
Solar assessment, forecasting and performance management