Reflow™ 2022
Virtual PowerClerk® Conference

Learn More

Register for Reflow

Register for Reflow™ 2022, the PowerClerk Conference

Reflow helps utilities maximize energy program value and their PowerClerk investment. Reflow 2022 sessions will enable our customers to optimize PowerClerk to radically improve workflow efficiency, productivity and records management across all energy programs.

When

April 21 & May 17-19, 2022

Why Reflow?

Reflow attendees will learn how to realize the full potential of PowerClerk to drive efficiency and flexibility in programs across your organization—today and into the future.

Who Should Attend?

Reflow is designed for utility decision makers, executives, planners, DER programs managers, designers and administrators. Whether you're new to PowerClerk or an expert, Reflow will help you more effectively leverage PowerClerk in your utility.

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Agenda

Reflow is designed for people with varying levels of familiarity with PowerClerk. Reflow offers a range of content including introductory sessions, in-depth best practice demonstrations and utility speakers sharing how they leveraged PowerClerk in their utility. Learn how PowerClerk streamlines and automates utility processes in real world applications with utility speakers from Public Service Company New Mexico (PNM), Southern California Edison and more.

Each Reflow session will be one hour in length, including 15 minutes for Q&A. Sessions will be held two parts: Introduction Sessions and Main Sessions.

Introduction Sessions

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

Thursday April 21, 2022

SESSION 1

Automating a Wide Range of Programs & Workflows with PowerClerk

Thursday April 21, 2022 / 9:00 am PDT / 12:00 pm EDT

The energy transformation—often accompanied by rigorous internal and regulatory mandates—is driving innovative program designs and making customer-sited technologies more prevalent than ever. Modern utilities are using digital, self-service systems to handle increased application and project volumes. Digital systems provide transparency and ease-of-use for both customers and trade allies—all while removing the staff drudgery of paper pushing, PDF downloads, email attachment handling and manual reporting.

- Learn how PowerClerk enables program managers and administrators to take control of utility processes
- Discover how PowerClerk streamlines workflows throughout the enterprise, including:
  - Distributed and utility-scale interconnection
  - Renewable energy, transportation electrification, and building electrification programs
  - New and upgraded service connections
  - Pole attachments
  - And much more ...

See how other Clean Power Research solutions work in tandem with PowerClerk to educate and enroll customers while providing insights for utility planning and operations

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SESSION 2

Exploring PowerClerk Fundamentals

Thursday April 21, 2022 / 11:00 am PDT / 2:00 pm EDT

This is an introductory session designed for anyone that is new to PowerClerk. PowerClerk has grown into a comprehensive product with a robust feature set capable of streamlining even the most complex processes across the utility enterprise. Before diving into advanced use cases in later Reflow sessions, let's first make sure that we've covered the basics. In this session:

- Tour PowerClerk to understand its core capabilities, ensuring you get the most out of Reflow
- Distributed and utility-scale interconnection
- See a demo of a typical distributed generation interconnection program
- Understand how the PowerClerk experience varies by user role, such as: applicants, administrators and program designers

Main Sessions

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

Tuesday May 17, 2022

SESSION 3

Using PowerClerk Channels to Streamline Asset Management

Tuesday May 17, 2022 / 8:30 am PDT / 11:30 pm EDT

Utilities are increasingly looking for opportunities to automate asset management across programs and between departments. Using PowerClerk's new "Mark as Related Lookup" Channel Type, explore how the Public Service Company of New Mexico (PNM) now automatically links two separate projects within two separate PowerClerk programs: New Service Delivery (NSD) and Permits.

For PNM NSD projects to be completed, they typically require permits. Once the permit is received, PNM needs to know which permits are associated with which NSD projects to complete inspections. In this session:

- Discover how PNM collaborated with the Professional Services team to create the initial feature request, based on programmatic pain points, and built functionality that solved their use-case
- Explore how the NSD project automatically looks for a permit project in the Permit program using Automations to fire an Action Rule to send Signals to the Channel
- Understand how the new Channel's (automatic) linking functionality eliminates the manual step of PNM personnel looking in the "Permit" program to know what "NSD" project should be related
- Learn how to build the "Mark as Related Lookup" Channel configuration

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SESSION 4

Applying Best Practices to Improve Customer Satisfaction & Delight Trade Allies

Tuesday May 17, 2022 / 10:00 am PDT / 1:00 pm EDT

Gain an appreciation of key program design capabilities every PowerClerk program admin should use. We'll explore in-depth the benefits of combining PowerClerk services such as: Project List Columns, Project Views, Project Summary and User Selector tools. In this session, you'll learn:

- How to optimize "Project Summary" customizations by combining several data fields
- How to use "Project Views" and "Project List Columns" based on "User Roles" to address workload distribution strategies within your department

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SESSION 5

Streamlining EV & EVSE Program Implementation with PowerClerk

Tuesday May 17, 2022 / 11:30 am PDT / 2:30 pm EDT

Even relatively simple utility programs can benefit from workflow management tools as application volumes scale.

This session will highlight several recently launched EV programs that use PowerClerk to efficiently collect and process applications. These programs leverage new PowerClerk features, including curated EV and EVSE lists as well as VersaForm-based application processes. Learn how to minimize application errors and increase application processing speed while collecting useful intelligence on EVSE and EV deployments. In this session, you'll:

- Observe a PowerClerk configuration using a VersaForm-based application process in parallel with a traditional form process to manage residential vs. commercial EVSE applications
- Simplify and automate equipment input by using PowerClerk's curated EVSE and EV lists, speeding entry and increasing accuracy
- Learn how to overcome challenges when introducing PowerClerk to a new department in a way that cultivates savvy PowerClerk users and maximizes the utility's return on its investment in PowerClerk

Wednesday May 18, 2022

SESSION 6

Evolving Your PowerClerk Programs & Workflows: Using the Right Skillset, from Self-paced Learning to Professional Services

Wednesday May 18, 2022 / 8:30 am PDT / 11:30 pm EDT

When changing business goals require updates to PowerClerk, utility administrators can implement program changes in a way that minimizes time and cost by developing an effective Program Update strategy. This session will show you how to ensure continued program excellence leveraging PowerClerk's self-paced Learning Management System (LMS), Support Center and Professional Services offerings. In this session you will learn to:

- Identify which key personnel to align within your team and what resources you'll need to level-up your PowerClerk program
- Maximize your utility's PowerClerk investment by learning how to train internal staff efficiently and effectively via available online resources
- Understand when to engage with Clean Power Research Professional Services team to address specialized configurations, new capabilities and project timeline constraints

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SESSION 7

Harnessing Customer Insights & Actions to Optimize the Customer Journey with PowerClerk & WattPlan

Wednesday May 18, 2022 / 10:00 am PDT / 1:00 pm EDT

Customer awareness and education is key to driving participation and informed decision-making for many programs. Offering utility customers self-service education tools creates a critical opportunity to capture insights and drives actions that will boost program participation and customer satisfaction. By teaming-up PowerClerk and WattPlan, utilities are able to capitalize on this opportunity. Now, key calls-to-action are embedded throughout the WattPlan experience and underlying engagement data is at your fingertips in PowerClerk, ensuring that you have a complete view into the customer journey and can optimize your energy programs accordingly. In this session:

- Learn how PowerClerk provides customer-level insights and how these revelations can be used to drive more engagement across programs
- Understand how you build energy program awareness, boost customer satisfaction and support your customer's journey—from education, through enrollment and beyond
- See how PowerClerk VersaForms are used to offer in-app feedback, capture leads and automate program enrollment

SESSION 8

Protecting Solar Consumers via PowerClerk Access Groups

Wednesday May 18, 2022 / 11:30 am PDT / 2:00 pm EDT

Explore how Southern California Edison (SCE) modified their existing PowerClerk Net Energy Metering 2.0 program to meet California's Solar Consumer Protection mandates (Decision 21-06-026). Working with Clean Power Research Professional services, SCE used PowerClerk's Access Groups feature to enable the California Public Utilities Commission (CPUC) to securely access up-date reports and monitor the program without impacting SCE staff or customer productivity. This allows SCE to fulfill its mandated requirements by allowing the CPUC to review specific interconnection data.

The session walks through relevant PowerClerk role configurations and privileges, highlights how to use automations and data imports to add/remove Access Groups across a group of projects, and provides an overview on how to share Reports with Access Groups (including Multi-Instance Reports). The session also highlights SCE's upgraded integration with the Contractors State License Board (CSLB) to transparently display Home Improvement Salesperson (HIS) registration status.

- Learn how SCE surfaces the HIS data via a new Web Adapter Connection built by Clean Power Research
- Trace SCE's program design upgrades to see how to flag solar contractors whom the CPUC has placed on a "Watch List
- Explore Access Groups that allow third parties to access data and documents in certain workflow statuses with limited permissions

Thursday May 19, 2022

SESSION 9

Establishing Best Practices for the Conversion of FERC Tariffs to PowerClerk Programs

Thursday May 19, 2022 / 8:30 am PDT / 11:30 pm EDT

The Federal Energy Regulatory Commission (FERC) has instituted tariffs governing the interconnection of large generators to the transmission grid. These are often multi-year projects that involve multiple stakeholders inside and outside of the utility, and that require active management of deadlines and communications. PowerClerk is perfectly suited to these projects.

In this session, we'll highlight applied use-case scenarios that provide insights into Deadline Automations and Deadline History Reporting so that mandated deadlines are met. You'll learn how to apply Deadlines and Deadline Automations to meet project timeline metrics measured in active/pending/paused/past due project days, and how to implement Deadline History strategies to communicate project health across teams. This session will demonstrate how to:

- Setup Deadline Automations to create Study Deadlines
- Use Deadline Data Tags effectively to customize communications
- Share project milestones via Project List Columns

SESSION 10

Delivering DER Insights for Utility Planning & Operations Using PowerClerk Analytics

Thursday May 19, 2022 / 10:00 am PDT / 1:00 pm EDT

In this session, Integral Analytics will discuss how the data stored in your PowerClerk interconnection programs can assist with load forecasting, distribution planning and system operation. Your PowerClerk data can be used in conjunction with Clean Power Research SolarAnywhere data to produce DER production estimates for individual systems or aggregates. This data can then be combined with Clean Power Research PV adoption forecasts and Integral Analytics load forecasts to paint a complete picture of future load for use in planning and operations. This session will cover:

- How PowerClerk Analytics can use your stored PowerClerk DER data to generate future PV adoption scenarios
- How your DER data can be combined with SolarAnywhere irradiance and weather data to generate DER production totals
- Integral Analytics load forecasting services and how they can be used with DER production and future adoption estimates in LoadSEER to create the ultimate planning platform

SESSION 11

Engineering What's Next: The PowerClerk Roadmap & Executive Roundtable

Thursday May 19, 2022 / 11:30 am PDT / 2:30 pm EDT

PowerClerk, fully embracing the SaaS model, continues to get better over time. Reflow 2022 sessions demonstrate the platform's momentum automating the most difficult workflow challenges facing utilities today. However, the ongoing energy transformation brings evolving business objectives, regulatory requirements and customer needs. In this closing session, we'll focus on how we, with customers as our co-creators, will continue to evolve the PowerClerk platform.

Join us to learn how PowerClerk is going to solve your organizations' future needs. In this session:

- Learn how our planned features will solve your emerging needs
- Get a sneak peek at mockups, wireframes and prototypes
- Learn how you can provide input, including participating in our product user testing
- ...and ask questions to the Clean Power Research leadership team including our CEO, VP of Sales and Engineering leadership.