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Sent: 8/7/2013 5:31:37 PM  
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Subject: Agendas

I took a first crack at writing up the very brief descriptions for the speakers for the agenda. They sound very “aloof” to me. I’d like to add a bit of meat so we don’t sound as though there will be no real substance to these discussions while still remaining brief (ish). Thanks for your help!

### **Strategic Thinking for the Electric Utility Industry**

Joseph Scalise, Partner, Bain & Company

The electric utility industry globally is facing some disruptive challenges and technologies that provide both challenges to and opportunities for utilities and regulators alike. Mr. Scalise will lay out the strategic “signposts” that indicate where changes are coming and the possible future states for the California industry and what each of those states means for the utilities, regulators, energy markets, and customers.

### **Customer-Centric Business Models: Implications of Current and Future Economic and Satisfaction Drivers**

Larry Makovich, Vice President and Senior Advisor for Global Power, IHS CERA

There is no such thing as an average California customer and the rapidly evolving grid with its ever increasing interactive options will only create an even more heterogeneous customer base. Meeting the needs of all customers now and going forward remains at the core of all utility operations. Mr. Makovich will discuss what the customer satisfaction trends and drivers are and what the implications are for the future utility models.

### **The Utility Model and Regulatory Framework of the Future**

Matthew Rogers, Director, McKinsey & Co.

Making deliberative changes to regulatory frameworks takes vision and leadership. Understanding the core competencies and value propositions of each segment of the California electricity sector and applying those values in the states', customers' and utilities best interest will be the regulators and policy makers biggest challenge. Mr. Rogers will provide some insights into approaching this challenge.

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