

Agenda: December 8th & 9th (Thursday & Friday)

Day 1, December 8 th	
8:45 AM	Reservation Required- Indicated in registration link Shuttle bus departure for tour of Alarm.com demo house (Meet in DoubleTree lobby)
10:15 AM	Reservation Required- Indicated in registration link Group tours of Alarm.com headquarters (Meet in DoubleTree lobby)
11:30 – 12:30 PM	Lunch Served
Noon – 12:30	Overview & Introductions
12:30 – 1:30	Keynote: Real Money for Virtual Power Plants – David Nemptow, Senior Advisor, U.S. Department of Energy’s Loan Programs Office
1:30 – 3:00	Utility Member Roundtable: Quick overview per utility on BTM offering and 2023 planning.
3:00 – 3:15	Break
3:15 – 4:15	Panel Discussion: Evolution of BTM Services – BTM services support products such as renewables, EVs & smart homes. What is the role of BTM services, e.g., insurance/warranty, marketplaces, financial, etc., and what does the future hold?
4:15 – 4:45	Annual BTM Customer Survey Findings
4:45 – 5:15	Beyond the Meter: Working for Customers and Working for Competitors – Frank Lacey, Sr. President, Electric Advisors Consulting, LLC
6:00 – 8:00 PM	Cocktail Reception at Maggiano’s Little Italy, Tyson’s Corner
Day 2, December 9 th	
8:00 – 8:15 AM	Recap & Agenda Overview
8:15 – 9:15	Utility Case Studies
9:15 – 10:15	Panel Discussion: All Things BTM Customer: Future of BTM & Customer Support – What is the future CX of BTM customers? What is the customer support model? Marketing?
10:15 – 10:30	Break
10:30 – 11:00	Marketing/Messaging State of Play – Mark Moskovitz, Sr. Client Advisor, Rhode River Partners
11:00 – 11:30	Takeaways Roundtable
11:30 – Noon	Next Steps & 2023 Scope

Featured Speakers



David Nemtsov, Sr. Advisor, U.S. Department of Energy's Loan Programs Office, Presents "Real Money for Virtual Power Plants"

Virtual Power Plants are next on the horizon for clean distributed BTM resources, including PV, storage, efficiency, demand flexibility and EV charging. By aggregating and holistically controlling DERs, VPPs can serve as utility-scale and utility-grade de facto powerplants, with numerous strengths (clean, reliable, affordable, customer-supportive, and more). Certainly, many barriers remain, but with the signing into law by President Biden of the Inflation Reduction Act, some \$100 billion in federal financing may now be available for VPPs. Now that's real money.

David Coordinates the Loan Programs Office's Virtual Power Plant initiative, which provides financing to innovative, large, interconnected projects built on efficiency, demand flexibility, renewables, storage and other clean DERs. Previously he was director of DOE's Building Technologies Office.

David brings decades of experience in the field, including serving as director-general (CEO) of the Department of Energy, Utilities, and Sustainability for New South Wales, Australia; as president of the Alliance to Save Energy, a Washington, D.C.-based association of industry, government, utility, consumer, and environmental executives that promotes investment in energy efficiency; chief policy officer at Ice Energy, Inc., a distributed energy storage startup company; and a senior energy staff member to then-U.S. Rep. (and now Sen.) Ed Markey. David has served on numerous governmental advisory committees and the boards of energy associations and organizations. He publishes and speaks regularly in the field.



Frank Lacey, Sr. President, EAConsulting Presents "Beyond the Meter: Working for Customers and Working for Competitors"

Exploring BTM services offered by utilities and non-utility providers and the competitive regulatory dynamics. Also examining the role, driven in large part by recent FERC Orders, of the utility as a service provider/enabler to non-utility providers.

Frank Lacey has over 20 years of regulatory policy and strategic planning experience in the energy field. He is a recognized industry leader in moving competitive energy markets forward. Prior to forming Electric Advisors Consulting LLC, Frank worked as Senior Vice President for Regulatory and Market Strategy at Comverge Inc./CPower, Director at Direct Energy, the North American affiliate of Centrica, PLC, and in energy and environmental consulting with Arthur Andersen LLP and Putnam, Hayes and Bartlett Inc.

Frank is focused on combining his finance and regulatory backgrounds to produce business strategies that make sense within the current regulatory framework, allowing his clients to extract true value from the markets. Whether your company is attempting to enter an energy market, navigate the regulatory landscape, protect market share, or manage cost and risk in competitive energy procurement, EAConsulting has the access, experience, and business acumen to power your business forward.



Mark Moskovitz, Sr. Client Advisor, Rhode River Partners Presents "Marketing/Messaging State of Play"

Making sense of the complexity of messaging/marketing of the behind the meter landscape. Touching on range of players 2) what's being promoted 3) target markets 4) methods and means 5) putting it all together – observations/concerns/ considerations 6) opportunities.

Mark works exclusively with clients in the energy and utility industry. He has advised and directed engagements across a wide range of energy utility operational and corporate functions customer engagement, digital strategy, and grid modernization. Mark has held executive leadership positions with IBM Global Business Consulting, Arthur Andersen Business Consulting, DNV, and Smart Energy Water.