
From: Stewart, Kerri - VP & Chief Customer Officer <stewk@jea.com>
Sent: Thursday, March 7, 2019 5:54 PM
To: Zahn, Aaron F. - Managing Director/CEO; Dykes, Melissa H. - President/COO; Hightower, Mike R. - Chief Public & Shareholder Affairs Officer; Romero Aguero, Julio E. (Chief Inno. and Transformation Officer); Goldberg, David M. - Director Customer & Community Engagement; Boyce, Gerri M. - Director Media Relations; Hadden, Michael J. - Mgr Customer and Corporate Communications; Gutos, Joy W. - Manager, Internal Communications; Ham, Melissa L. - Manager Product Marketing; Magee, Jay B. - Manager Digital Communications; Pope, Jordan A - Dir Government Affairs; Kyle, Gina A. - Manager Media Relations
Cc: Maddie Milne; Michael Munz; 'Banks Willis'; Bartley, La'Trece M. - Mgr Executive Administration; Jones, Madricka L. - Executive Assistant; Ivy, M. Lynette
Subject: Agenda for JEA/Dalton Agency Onboarding Meeting - 8 March 2019

All,

Please see the attached agenda for tomorrow's meeting. If you have any questions or concerns, please feel free to reach out to me tonight or in the morning before the meeting. See you all then! k

Kerri Stewart

Vice President/Chief Customer Officer

Direct: (904) 665-4283

Mobile: (904) 962-9425

Fax: (904) 665-4238



From: Banks Willis <bwillis@daltonagency.com>
Sent: Thursday, March 7, 2019 5:40 PM
To: Stewart, Kerri - VP & Chief Customer Officer <stewk@jea.com>
Cc: Maddie Milne <mmilne@daltonagency.com>; Michael Munz <mmunz@daltonagency.com>
Subject: KERRI: Final agenda

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Hi Kerri –

Thanks a million for the informative call this afternoon. Your feedback was immensely helpful!


See attached updated agenda for your final review and distribution. **Note:** I did include the “Status Quo announcement strategy” question under the items for discussion.

Please let me know if I missed anything or if you’ve got questions! Thanks Kerri! See you tomorrow.

Banks



BANKS WILLIS // Vice President Corporate Reputation
w 904.398.5222 c 202.577.5847

 **@ daltonagency**

140 West Monroe // Jacksonville, FL 32202

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JEA + Dalton Agency onboarding

March 8, 2019

11:30am – 3:00pm

Mission: Evolve JEA's brand and reputation from a transactional power producer (rates, bills, outages) to a collaborative energy manager (adaptive, innovative, value-focused)

Location, in-person (lunch will be provided)

JEA headquarters, Conference Room T16 West

**Note: Full list of attendees at bottom of document*

Agenda

1. Introductions
 - Meeting objectives, overview, output expectation
 - Round robin
2. State of the industry
 - Snapshot of power and utilities industry (nationally)
 - New competitors: Threats and opportunities
 - Regulatory landscape (community, state, national): Threats
3. JEA 101
 - Organizational structure and strategic business plan
 - Today: Strategic Framework (four key value), Rating Agency presentation
 - Future (strategy and sequence): Status-Quo presentation, 100 by 50
 - Corporate and business (system) lines, priorities, campaigns, proof points/pilots
 - Energy System
 - Water / Waste Water System
 - Other technology (blockchain, energy management software)
 - Other strengths, challenges, opportunities?
4. Integrated communications: Today and tomorrow
 - External audience segments – current and desired
 - Earned (pro-active community, state, national media relations; podcasts; executive visibility; speaking engagements; content - bylines, op-eds, blogs, etc.)
 - Owned (i.e website strategy; social media strategy and content; etc.)
 - Paid (i.e sponsorships; “community investments”, community and customer education; traditional advertising; social; events; speaking engagements, etc.)
 - Stakeholder relations (i.e. JEA board; community, state, national trade associations and issue advocacy organizations (w/membership fees); “community investment” relationships; coalitions, etc.)
 - Public affairs (city, state, federal legislative and regulatory priorities; City Hall; city, state, federal legislative delegations; city, state, federal regulatory agencies and authorities; rating agencies, etc.)
 - Employee communications
5. Crisis communications

<ul style="list-style-type: none"> o Established crisis and issues management processes, playbook o Potential crises on the horizon
6. Wrap-up, key take-aways, next steps and timeline <ul style="list-style-type: none"> o Ways of working, roles and responsibilities o Cross-functional and organization collaboration and sharing

Questions and items for discussion (*list not exhaustive and may be organically covered during above conversation*)

- What's the strategy for the Status Quo announcement and its timing?
- Potential existing assets or plans?
 - o i.e. calendar of events (JEA sponsored and hosted); paid advertising, social, content plans; organic social content plans; social media strategy or ways of working; media lists; brand and business line narratives/key messages; etc.?
- Potential other external communications/PR/paid consulting partners, new RFPs, campaigns (Capital Assets, Water RFP)?
- Potential existing measurement metrics for benchmarking: Corporate reputation, by campaign, by channel?
- Are any of JEA's supplier partners willing to partner on proactive communications (thought leadership, community partnership)?

Attendees

JEA

Aaron Zahn, Managing Director/Chief Executive Officer
 Melissa Dykes, President/Chief Operating Officer
 Mike Hightower, Chief Public and Shareholder Affairs Officer
 Julio Romero Aguero, Chief Innovation and Transformation Officer
 Kerri Stewart, VP/Chief Customer Officer
 Gerri Boyce, Director Media Relations
 David Goldberg, Director Customer and Community Engagement
 Jordan Pope, Director Government Relations
 Joy Gutos, Manager Internal Communications
 Jay Magee, Manager Digital Communications
 Melissa Ham, Manager Product Marketing – Jags, Arena
 Michael Hadden, Manager Customer and Corporate Communications
 Gina Kyle, Manager Media Relations

Dalton Agency

Michael Munz, President PR/Social Communications Group
 Banks Willis, Vice President Corporate Reputation
 Maddie Milne, Account Supervisor