THE ACADEMY

AMERICAN PUBLIC
POWER ASSOCIATION

Implementing A Customer-Focused Key Accounts Program

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PUBLIC POWER
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About the Instructor

Erick Rheam

- West Point Graduate 1995, BS Eng. Mgmt
- Military Police Officer 1995-2000
- Developed first key accounts program at Anderson (IN) Municipal Light & Power 2000
- Developed second key accounts program at Loveland (CO) Water & Power 2002
- APPA Key Accounts Chair and Customer Connections Section Vice Chair
- Key Public Power Acct Exec. Designation in 2004
- Co-authored Key Accounts Field Manual in 2014

Introductions

Your name

How long you've been with utility

Title – Responsibilities

Expectations of the course

Little known fact about you

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Course Expectations

Learn core principles of key account program development

Participate

Discuss obstacles and offer solutions that we develop together

Learn many ideas and scenarios

- Not all will be applicable
- Pick the ones that fit.

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Course Objectives

Understand and gain an appreciation of the four phases of key accounts program development

Understand the human dynamics of key accounts program development

Learn efficiency and organization techniques

Earn the APPA Key Public Power Account Executive (KPPAE) Designation

Gain a source of motivation and inspiration

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Program Requirements

Complete four APPA-sponsored key account courses:

- Electric Industry Overview Webinar
- Implementing a Customer-Focused Key Accounts Program
- Developing Your Key Accounts Representative
- The Effective Key Accounts Toolbox

Pass key accounts exam (75%)

Submit one Customer Action Plan (CAP) (70% to pass)

Complete the requirements after the completion of the course training within one year

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What is a Key Account?

Any person, company, organization or office that can have significant impact on your community:

- Large-load customers
- Developers
- Industry leaders
- Chain or national accounts
- Community and political leaders

Why Key Accounts?

Someone of influence within your community asked for it

Business leaders demanded it

Match a neighboring utility's efforts

Attract or retain an important industry in the community

What was your reason?

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Define Success

Five pillars of success:

- Clear and concise action plan
- Adequate resources:
  - Time
  - Money
- Leadership support
- Business community support
- Commitment to follow-up

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Pitfall #1 - Simplify

Don't complicate your definition of success

Keep it simple and achievable

Tweak the program later if necessary

Define Success Example

My boss defined key accounts program success by three things:

- No "complaint" phone calls – He said "That's why I hired you. You should take those calls and fix the issues."

- Annual survey with high marks in customer service

- On-site meetings – He wanted to attend some of those meetings and wanted to hear positive feedback at those meetings.

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Pro-Tip #1 - The Community

> A successful program is more than a utility effort

> A successful program is a community-wide effort. Get support from:

- Police Chief
- Fire Chief
- Public Works
- Water/Waste
- Economic Development
- Other city departments and leadership

Choose Program Level

Be realistic

Be intentional

Gain agreement from leadership

Start small then grow the program

Basic Level (Reactive)

Clear mission and vision

Assigned key accounts representative with 10-25% of work time available to run the program

Defined key accounts list

Commitment to serve and respond to key account customer needs

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Standard Level (Proactive)

Clear mission and vision

Business plan

Customer action plans

An assigned key accounts representative with 26-50% of work time available to run the program

Defined key accounts list

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Standard Level (Proactive)

Commitment to serve and respond to key account customer needs

Allocated program budget

Annual key accounts meeting

Survey mechanism

Established relationship with each key account customer

35 or fewer key accounts per rep

Master's Level (All-In)

Clear mission and vision

Business plan

Customer action plan

A dedicated key accounts representative who reports directly to the general manager/superintendent with 51-100% of work time available to run the program

Defined key accounts list

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Master's Level (All-In)

Commitment to serve and respond to key account customer needs

Allocated program budget

Regular key account meetings

Survey mechanism

Established relationship with each key account customer that includes at least one decision-maker from the executive team

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Why is defined time needed per level?

Sets Expectations

Tangible Evidence

Pitfall #2 - Expectations

Failing to set expectations with key stakeholders as you build your program is a BIG mistake. Set expectations with:

- Key account teams
- Utility leaders
- Community leaders
- Utility staff
- Other municipal staff you will work with regularly

Why Programs Stall

Five reasons programs stall:

- The last key account representative left and no one took over the program
- Lack of interest or support from the business community
- Lack of interest or support from the utility and community leadership
- Lack of time and money to sustain a program
- Lack of clarity on the purpose and vision of the program

Which of the five do you struggle with the most?

Pro Tip #2 - Authenticity

Show contrition with your key accounts as you reintroduce your key accounts program

They need to know you are "for real"

Be authentic

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Re-Energize a Stalled Program

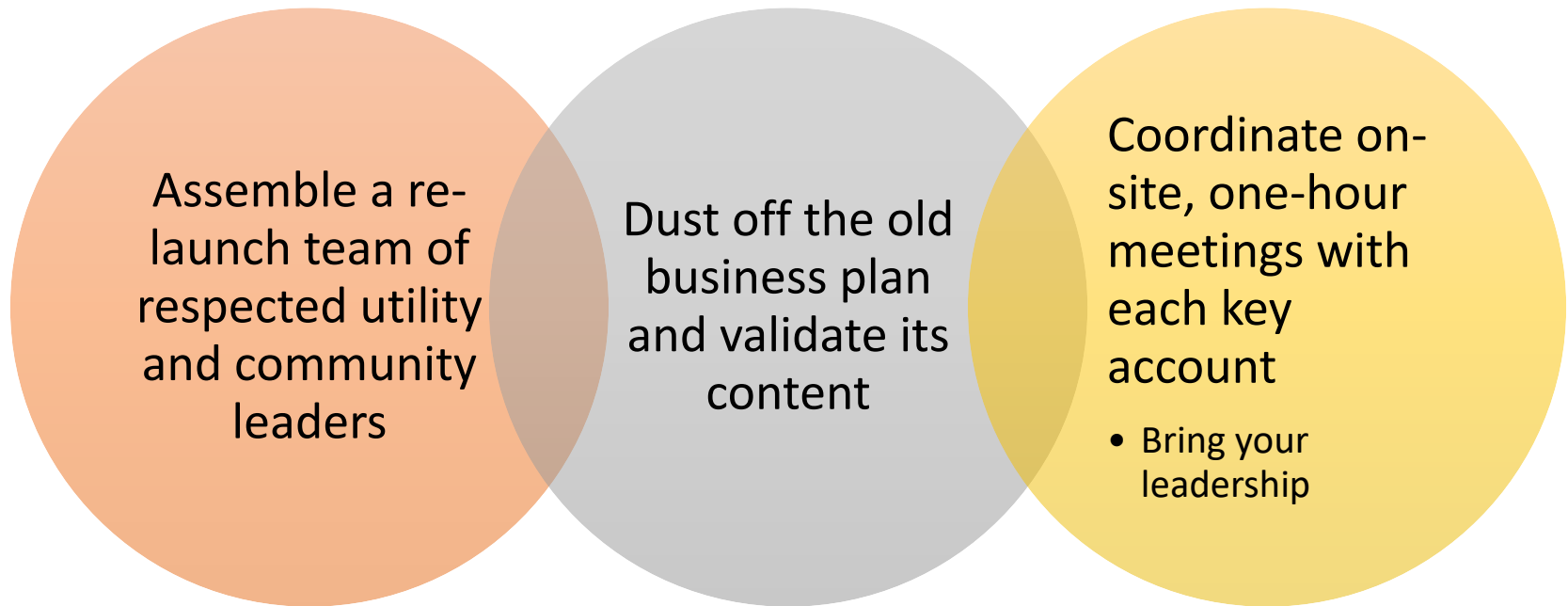Primary goal is to re-establish the customer relationships that might have been damaged

Re-establish your "why." Why is a key accounts program important to your community?

• Clarify your vision and mission

Get your leadership team onboard

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Re-Energize a Stalled Program

Assemble a re-launch team of respected utility and community leaders

Dust off the old business plan and validate its content

Coordinate on-site, one-hour meetings with each key account

- Bring your leadership

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On-site Key Accounts Meeting

Discuss the following topics:

- Desire to re-launch key accounts program
- Issues the customer may have with your utility or municipality that need immediate attention
- Long-term needs that you can address with your resources
- Customer expectations of the key accounts program
- A long-term customer-support plan

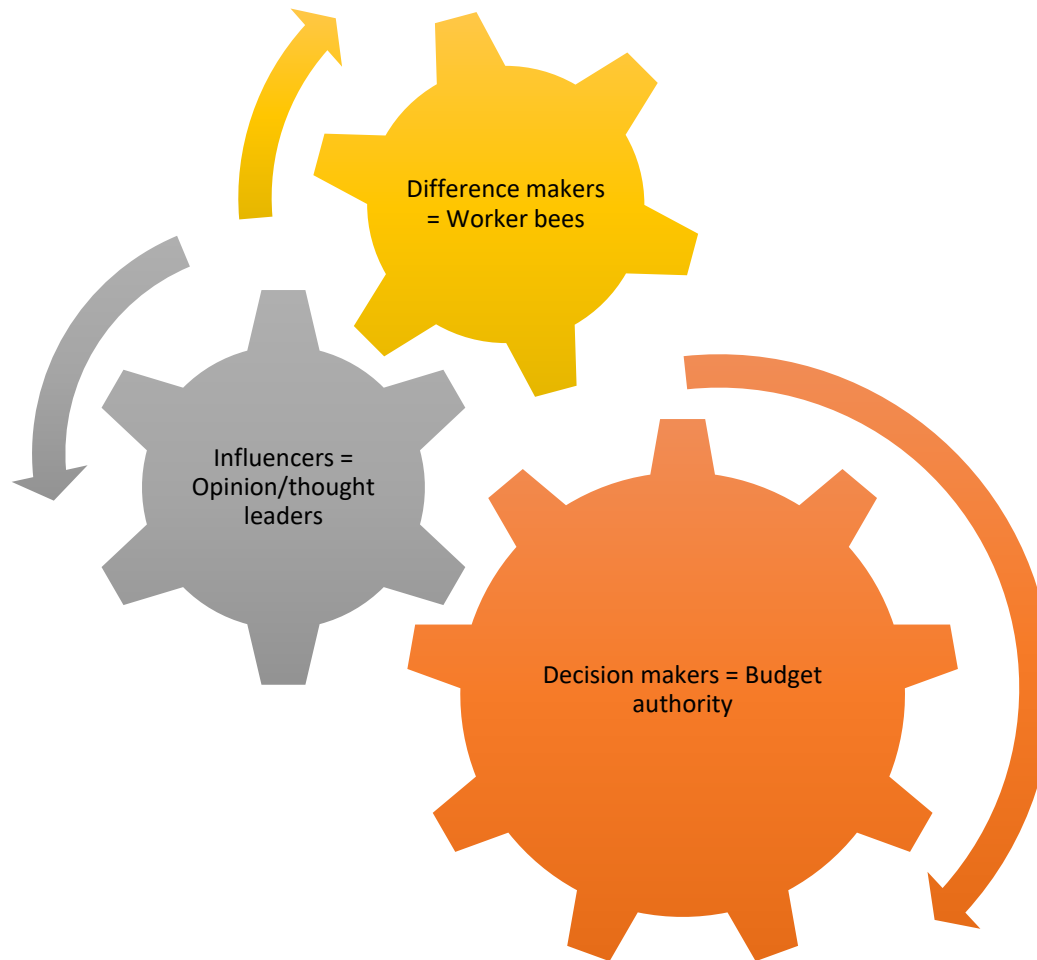**THE ACADEMY** | AMERICAN PUBLIC POWER ASSOCIATION

Pit Crews

You cannot achieve anything of significance without the help of others

Must develop a team to achieve success in your key accounts programs

There are three types of pit crews:

- Launch team
- Review board
- Rapid response team

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Three Types of Teammates

Difference makers = Worker bees

Influencers = Opinion/thought leaders

Decision makers = Budget authority

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Pro Tip #3 - Key Players

Get the blessing and support from key influencers early in the development process

People respect the opinions of influencers

- The more influencers you get on your team the easier the process will be for you

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Launch Team

They will help you brainstorm and work through each phase of the development process

This is your core group

Made up of influencers and difference makers

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Launch Team Example

Conservation specialist - Influencer

Industrial pre-treatment specialist – Difference maker

Administrative assistant – Difference maker

Review Board Example

Water and Power Director – Decision maker

Electric Utility Manager – Decision maker

Water Utility Manager – Decision maker

Office Manager - Influencer

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Pitfall #3 - Stay On Track

Don't allow your meetings to get off-topic or run overtime

- Have a clear agenda and stick to it
- Stay focused
- Be organized
- Start on time
- End on time

Rapid Response Team

This group will assist you in response to key account issues and offer solutions in real time

This group is formed after the program is developed and ready to launch

Made up of decision makers, influencers, and difference makers

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Rapid Response Team Example

Conservation specialist - Influencer

Utility services coordinator – Difference maker

Water manager - Influencer

Electric utility services coordinator – Difference maker

Utility billing manager – Decision maker

Electric operations manager - Influencer

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Exercise

Break into small groups and identify candidates, at your utility, for the following pit crews:

- Launch team
- Review board

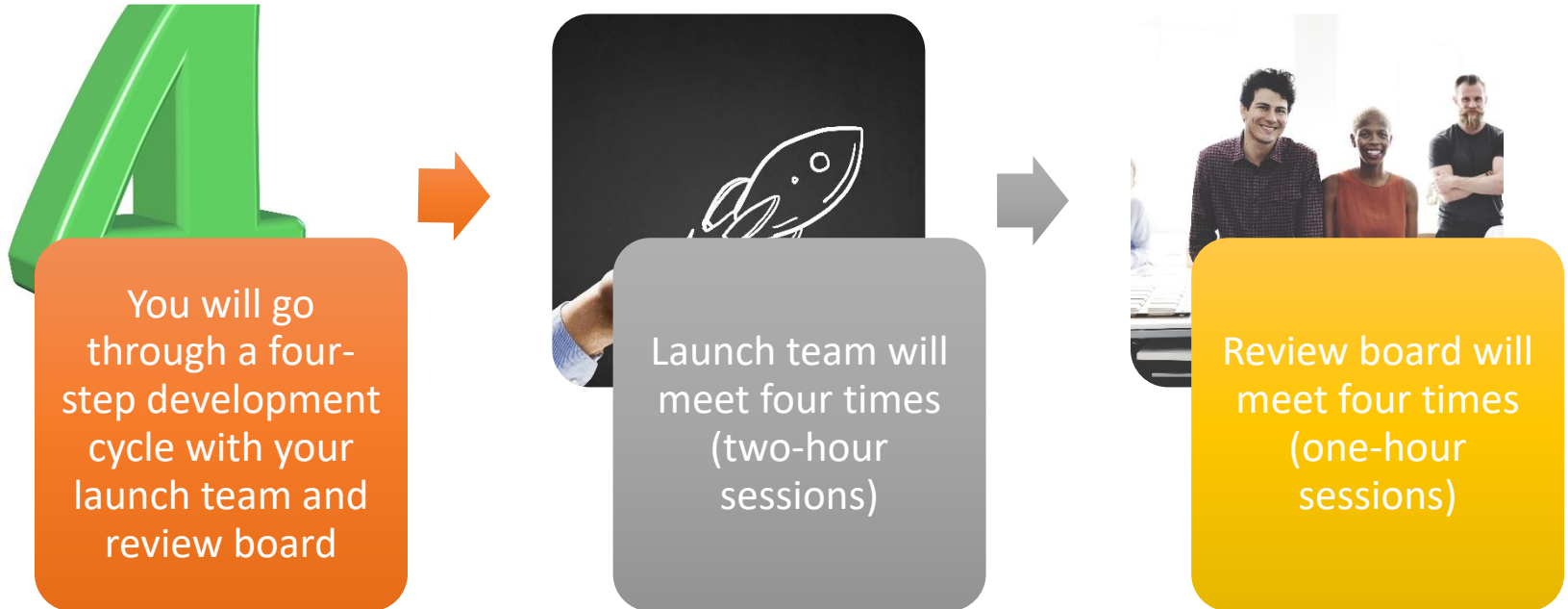**THE ACADEMY** | AMERICAN PUBLIC
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3 - 6 Months

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Take Ownership!

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Development Cycle

You will go through a four-step development cycle with your launch team and review board

Launch team will meet four times (two-hour sessions)

Review board will meet four times (one-hour sessions)

Development Cycle

Step #1 – Brainstorm with launch team and flesh out overarching principles during each phase

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Development Cycle

Step #2 – Review the results from your launch team session and curate the information into meaningful information that will eventually become the basis of your business plan (do this alone)
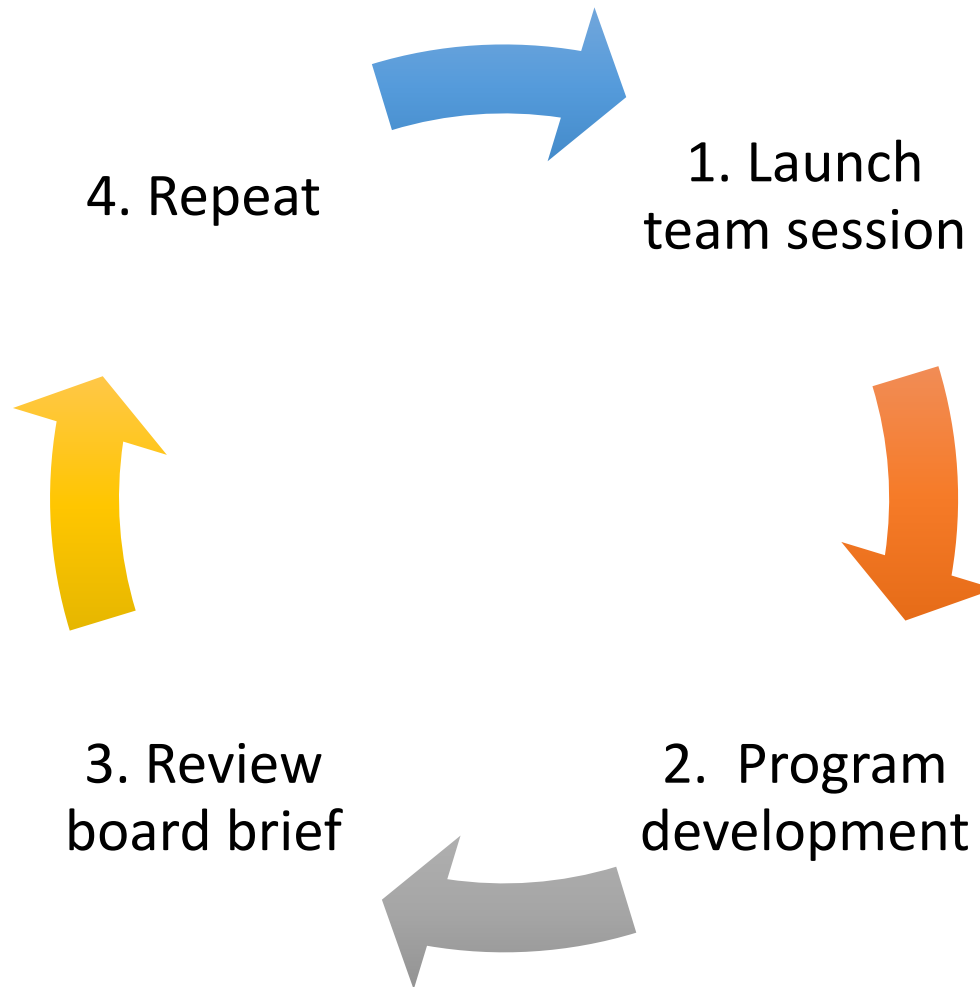
Development Cycle

Step #3 – Brief the review board on the results and get the board's feedback and guidance on your progress

Development Cycle

Step #4 – Go back to Step #1 and repeat until you've completed all four phases

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Four-Part Cycle Process

4. Repeat

1. Launch team session

2. Program development

3. Review board brief

Pro Tip #4 - Have Fun!

Keep each launch team session under two hours and have plenty of food/snacks and knick-knacks to play with:

- Building blocks
- Slinkies
- Silly putty
- Squeeze toys

1

Identity

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Principles of Phase I

Identify key accounts

Conduct an at-risk-analysis

Identify stakeholders

Research needs/gaps

Determine core values

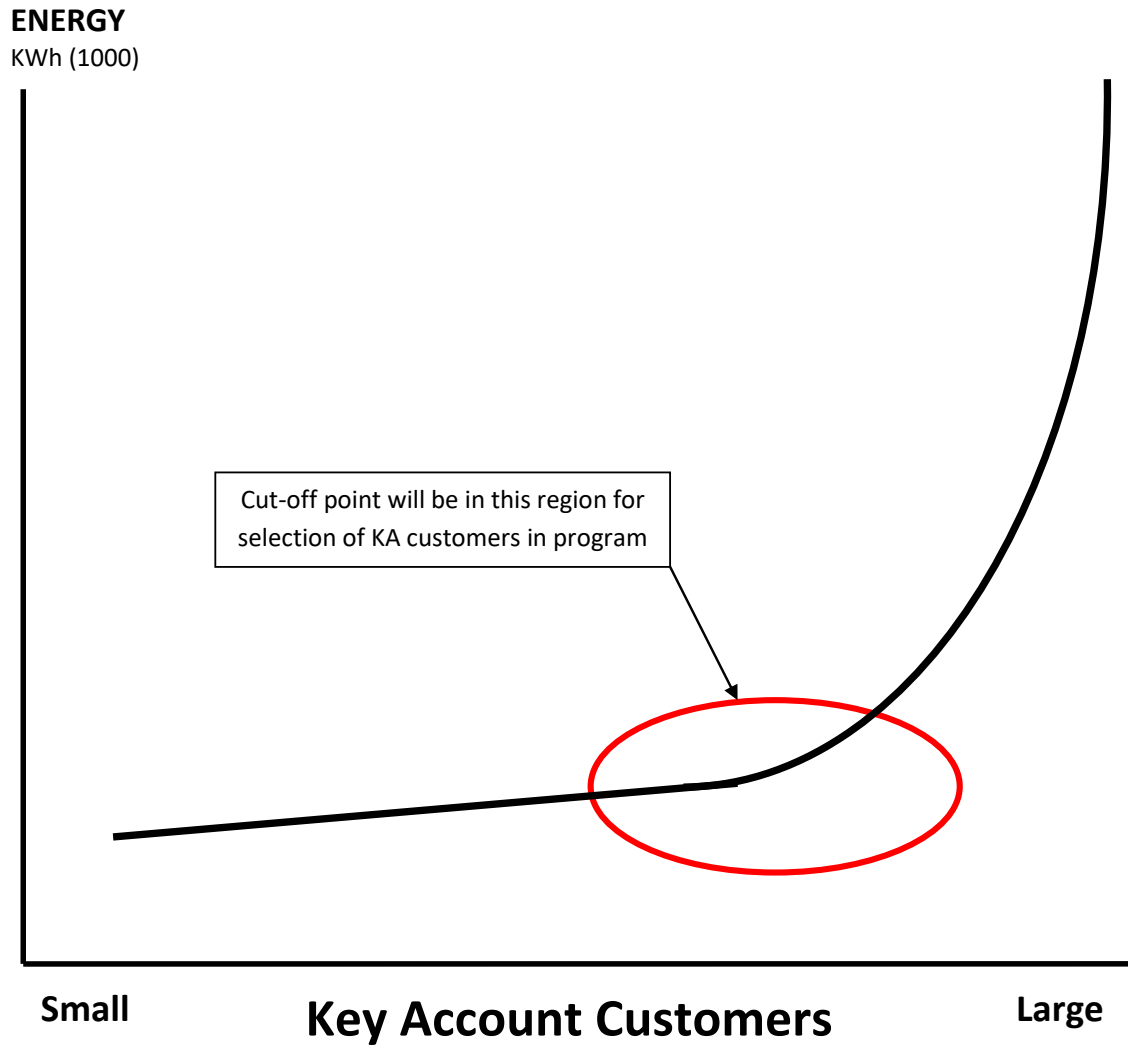Develop vision statement

Develop mission statement

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Identify Key Accounts

Size by energy or demand

Size by revenue

Strategic influence

Political influence

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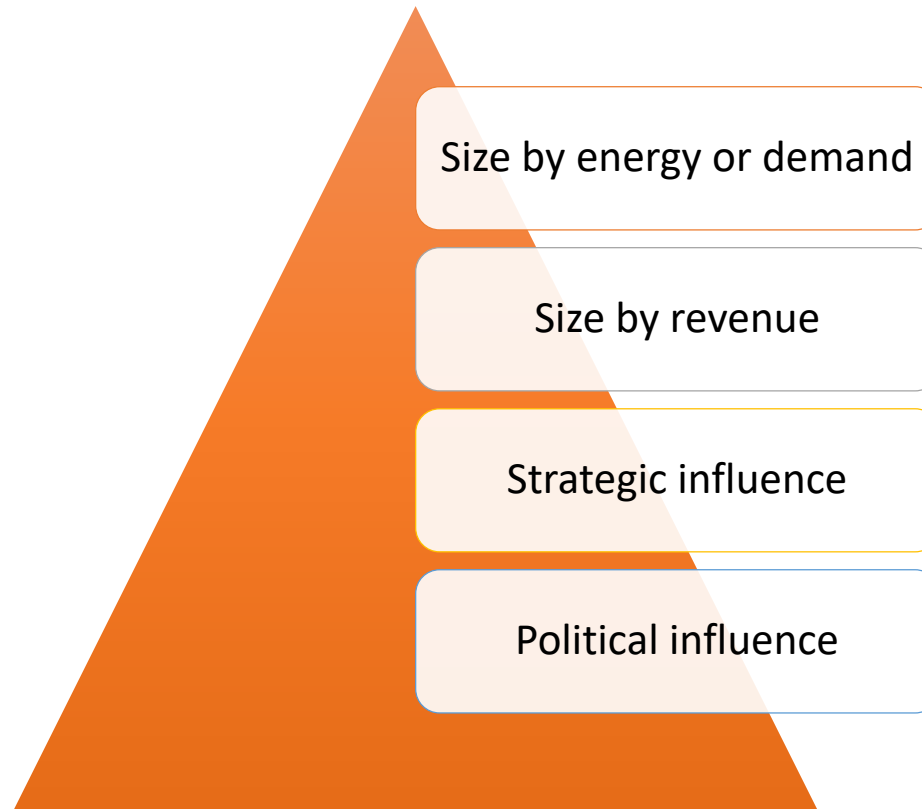
Graph I
Energy per Key Account Customer
Ranked small to large

ENERGY
KWh (1000)

Cut-off point will be in this region for selection of KA customers in program

Small   **Key Account Customers**   Large

Graph II
Demand per Key Account Customer
Ranked large to small

Cut-off point will be in this region for selection of KA customers in program

DEMAND
KW

Key Account Customers

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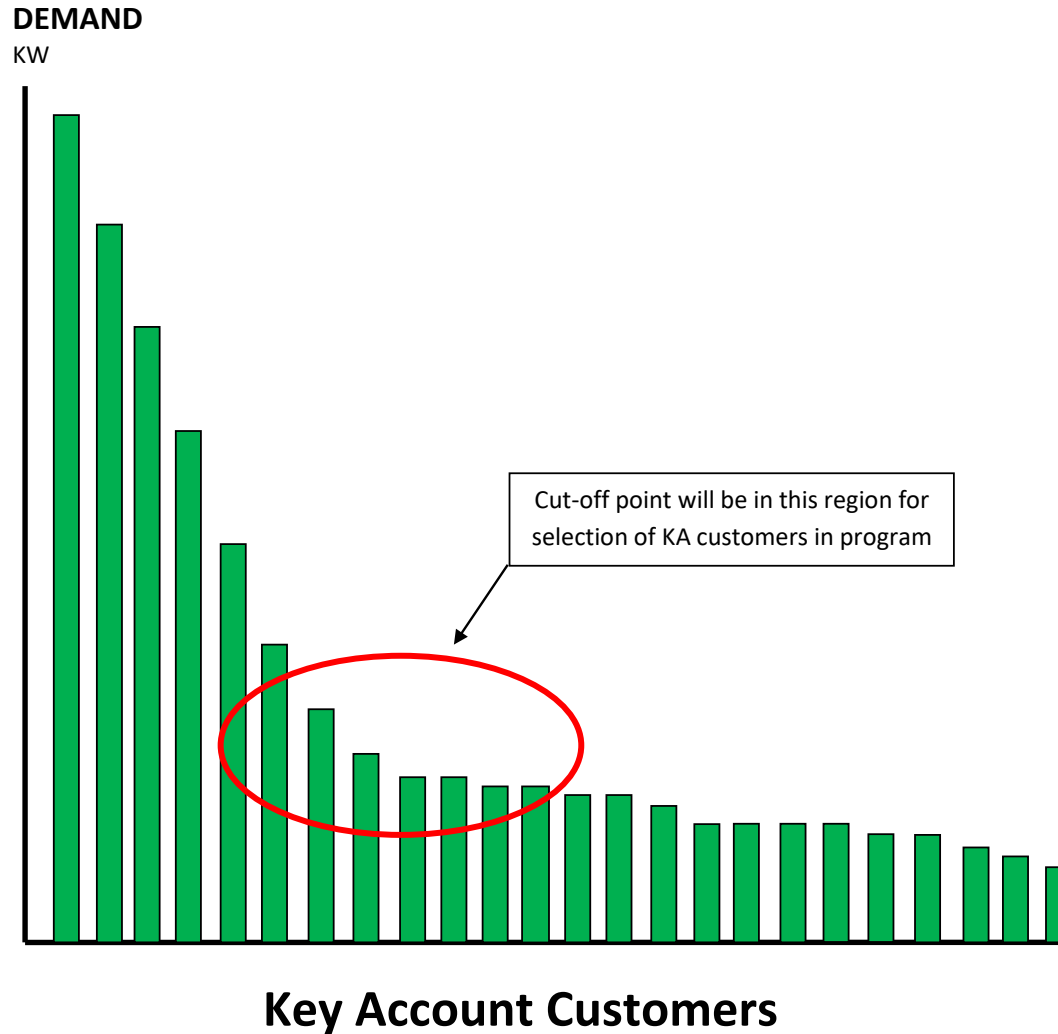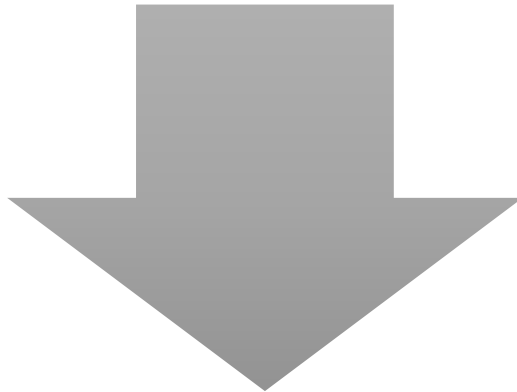
Acid Test

How much would it hurt if an account left the community?

How much pain and suffering could an account, organization, or individual cause me and the utility if there was conflict?

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Pitfall #4 - Think Small

A key account representative cannot handle more than 35 key accounts

Taking on more accounts than one can handle is a recipe for disaster

Taking on too many accounts will dilute your ability to build long-lasting, sustainable relationships
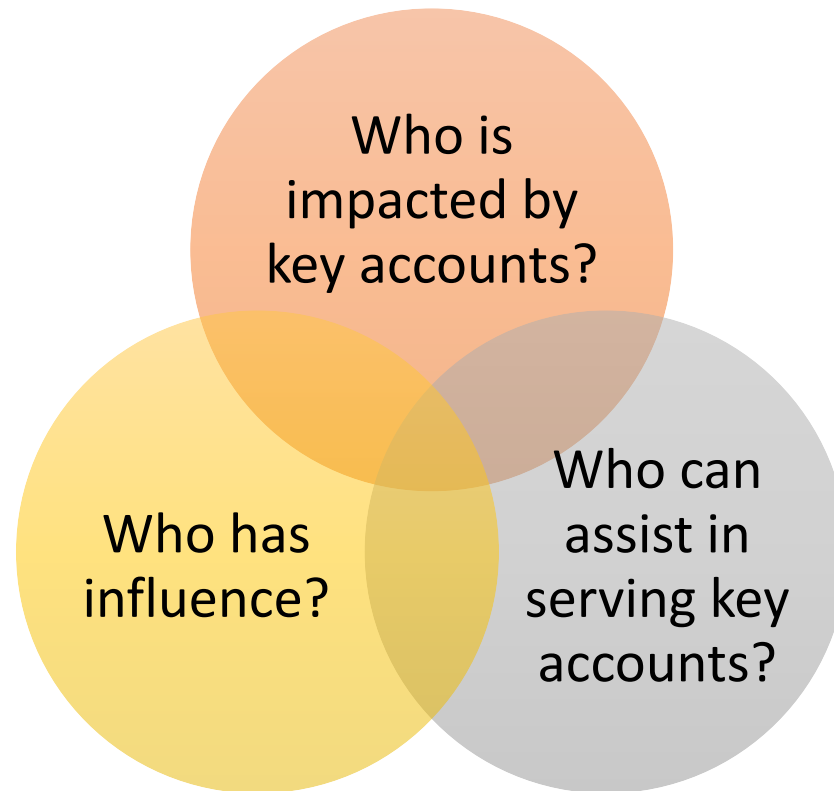
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At-Risk Analysis

Prioritizes support

Justifies key accounts program

Appendix E, Page 51, KA Field Manual

Rank	Power Rank	Water Rank	Customer	Annual Revenue	Fuel Costs	Net Revenue	Mobility Factor	At-Risk Revenue
1	1	3	Industrial	$2,061,186.99	$1,752,008.94	$309,178.05	0.6	$185,506.83
2	2	6	Commercial	$1,045,122.24	$783,841.68	$261,280.56	0.5	$130,640.28
3	3	4	Industrial	$1,032,683.03	$774,512.27	$258,170.76	0.5	$129,085.38
4	5	8	Industrial	$620,728.14	$465,546.11	$155,182.04	0.5	$77,591.02
5	4	1	Institutional	$819,533.76	$614,650.32	$204,883.44	0.25	$51,220.86
6	7	12	Industrial	$355,579.95	$266,684.96	$88,894.99	0.5	$44,447.49
7	6	7	Industrial	$545,879.13	$409,409.35	$136,469.78	0.3	$40,940.93
8	8	N/A		$342,503.84	$256,877.88	$85,625.96	0.27	$23,119.01
9	11	N/A	Commercial	$156,843.60	$117,632.70	$39,210.90	0.3	$11,763.27
10	14	15	Institutional	$103,306.96	$77,480.22	$25,826.74	0.4	$10,330.70
11	9	2	Commercial	$307,790.68	$230,843.01	$76,947.67	0.11	$8,464.24
12	15	N/A	Institutional	$88,789.20	$66,591.90	$22,197.30	0.3	$6,659.19
13		N/A	Industrial	$130,874.74	$98,156.06	$32,718.69	0.2	$6,543.74
14	19	9	Commercial	$48,926.53	$36,694.90	$12,231.63	0.5	$6,115.82
15	12	5	Institutional	$145,136.63	$108,852.47	$36,284.16	0.15	$5,442.62
16	18	10	Commercial	$63,488.88	$47,616.66	$15,872.22	0.21	$3,333.17
17	17	11	Commercial	$76,958.03	$57,718.52	$19,239.51	0.15	$2,885.93
18	16	14	Commercial	$79,159.54	$59,369.66	$19,789.89	0.1	$1,978.99
19	10	13	Institutional	$181,946.95	$136,460.21	$45,486.74	0.01	$454.87
20	20	16	Commercial	$23,084.75	$17,313.56	$5,771.19	0.01	$57.71
21	N/A	N/A	Commercial	$0.00	$0.00	$0.00	0.4	$0.00
			TOTAL	$8,229,523.57	$6,378,261.38	$1,851,262.19		$746,582.04

Identify Stakeholders

Who is impacted by key accounts?

Who has influence?

Who can assist in serving key accounts?

Exercise

Brainstorm all possible stakeholders to your key accounts program

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Research Customer Needs

Customer Information System (CIS)

Billing and rates

Operations

Surveys

Other municipal departments

Internet

Interviews

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Determine Core Values

What is most important to your community when it comes to relating to your business customers?

What is nonnegotiable?

What can your community not survive without?

What is acceptable and unacceptable when relating to a key account?

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Value Statement Example

We, at Loveland Water and Power, Key Accounts Division, dedicate ourselves to the following core values:

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Values Example

Build a long-term, professional relationship with the customer that:

- Places the customer first
- Strives to lower customer and utility costs
- Respond promptly to customer issues
- Respect customers' concerns
- Provides individualized service and solutions

Values Example

Provide leadership:

- Offer solid, useful solutions
- Set the example for excellent customer service

Values Example

Serve with fairness, integrity, and honesty at all times:

- Provide accurate information
- Resolve issues in ways that are equitable for the customer, utility, and community

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Values Example

Maintain environmental responsibility:

- Seek solutions that promote efficiency and conservation
- Protect our natural resources

Vision Statement

Where do you want to go?

What is the human value in your vision?

What do your stakeholders value most about your program?

What will motivate others to follow?

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Vision Statement Example

To provide individualized services that help our key accounts achieve their goals

Mission Statement

Provides clarity and is easy to remember

Why do you have a key accounts program?

Who are your customers?

What is your desired image?

What level of service will you provide?

What kind of relationship do you desire with your customers?

How are you different?

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Mission Statement Example

To facilitate outstanding customer service and build long-term relationship with our key account customers

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Principles of Phase I

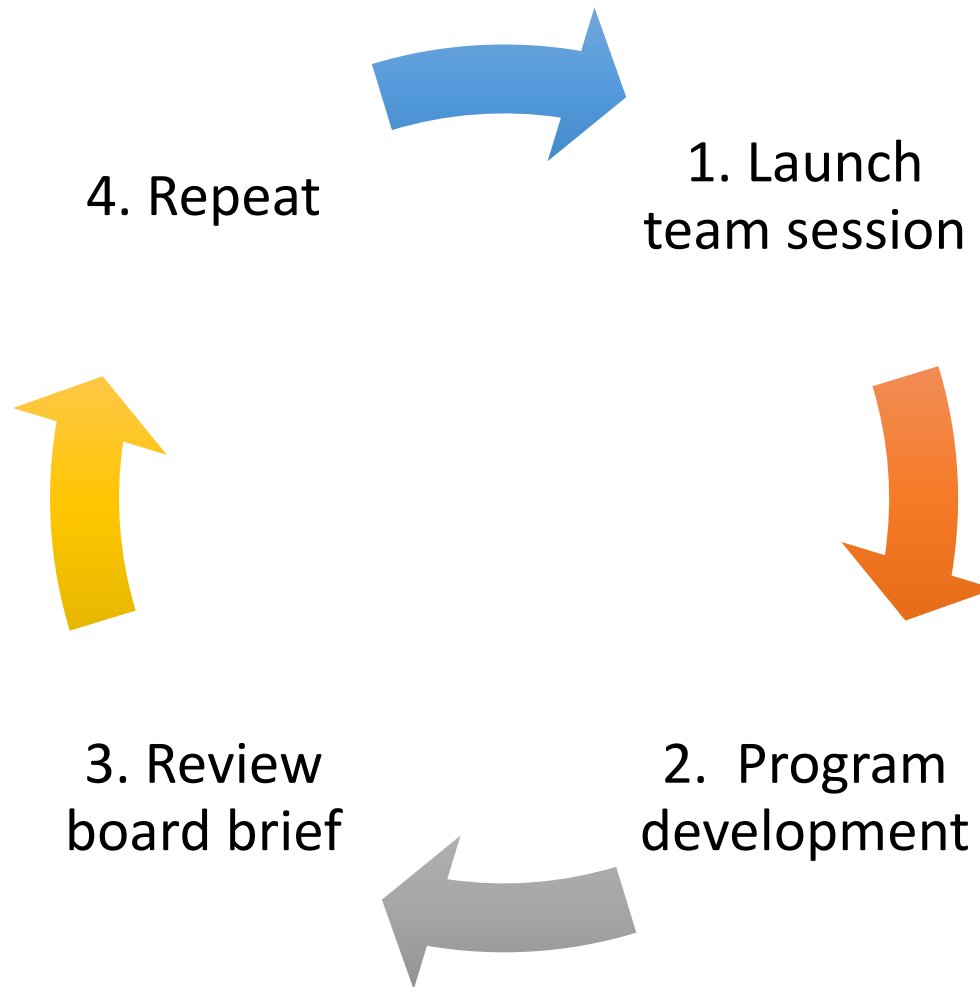Identify key accounts

Conduct an at-risk analysis

Identify stakeholders

Research needs/gaps

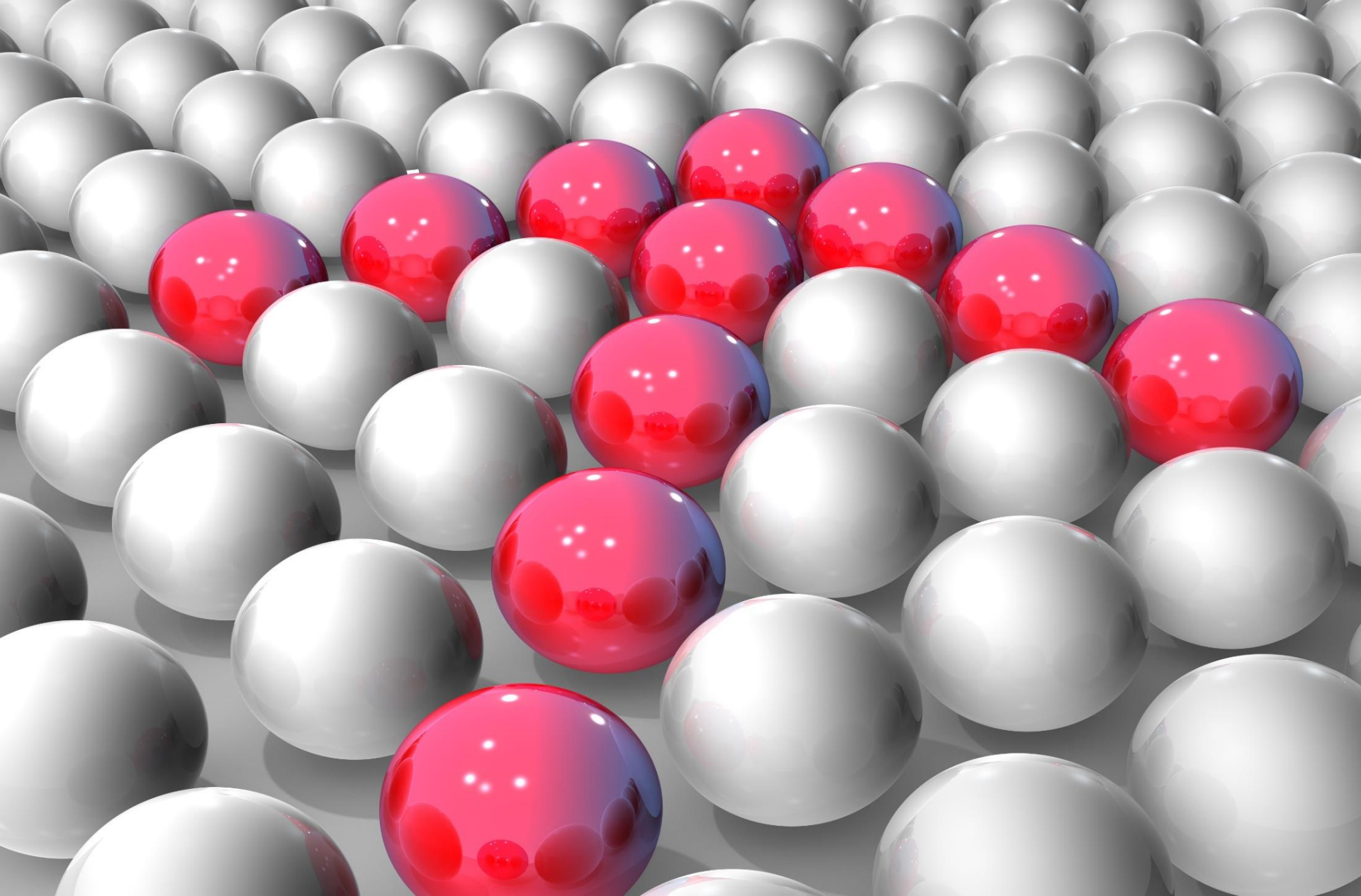Determine core values

Develop vision statement

Develop mission statement

Four-Part Cycle Process

1. Launch team session

2. Program development

3. Review board brief

4. Repeat

2

Clarity

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Phase II Principles

Research political and policy landscape

Clarify and determine strategic direction

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Political and Policy Landscape

National

Regional

State

Local

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Strategy Session

What are my resources?

Strengths?

Weaknesses?

What are my primary obstacles?

Course of action analysis

Eliminate options and clarify

Reassess your expectations

Outline your program

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Strategy Exercise

Brainstorm:

- Resources
- Strengths
- Weaknesses
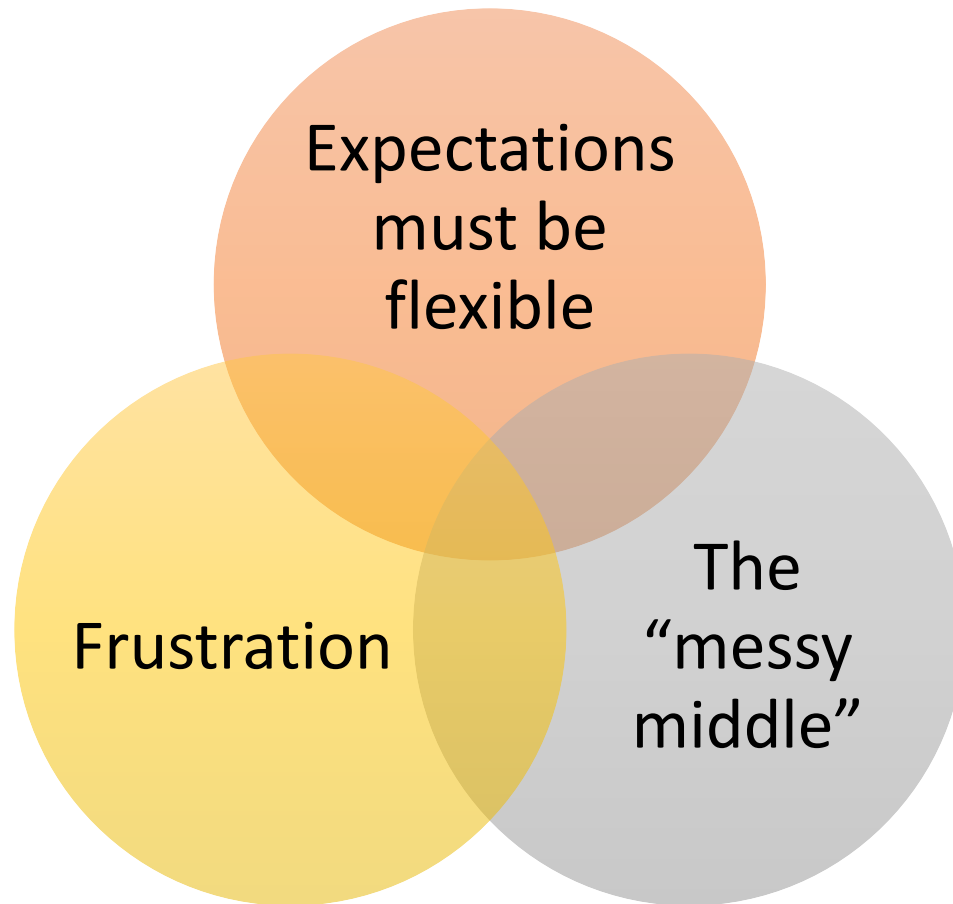- Obstacles

COA – The Force Multiplier

Develop a deliberate and well-prepared course of action analysis to your leadership

Present obstacles

Present no more than three courses of actions to clear the obstacles

Recommend a course of action and explain why you chose it

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Be Prepared

Expectations must be flexible

Frustration

The "messy middle"

Key Account

Strategic Outlook

Current Services

- Single-point-of-contact

- Power quality solutions

- Informational and educational seminars

- Data management

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Future Services

- Single-point-of-contact
- Power quality solutions
- Research and educate on industry and technology trends
- Regular educational and informational seminars
- Electronic outage notification system
- KeyMeter
- Data management:
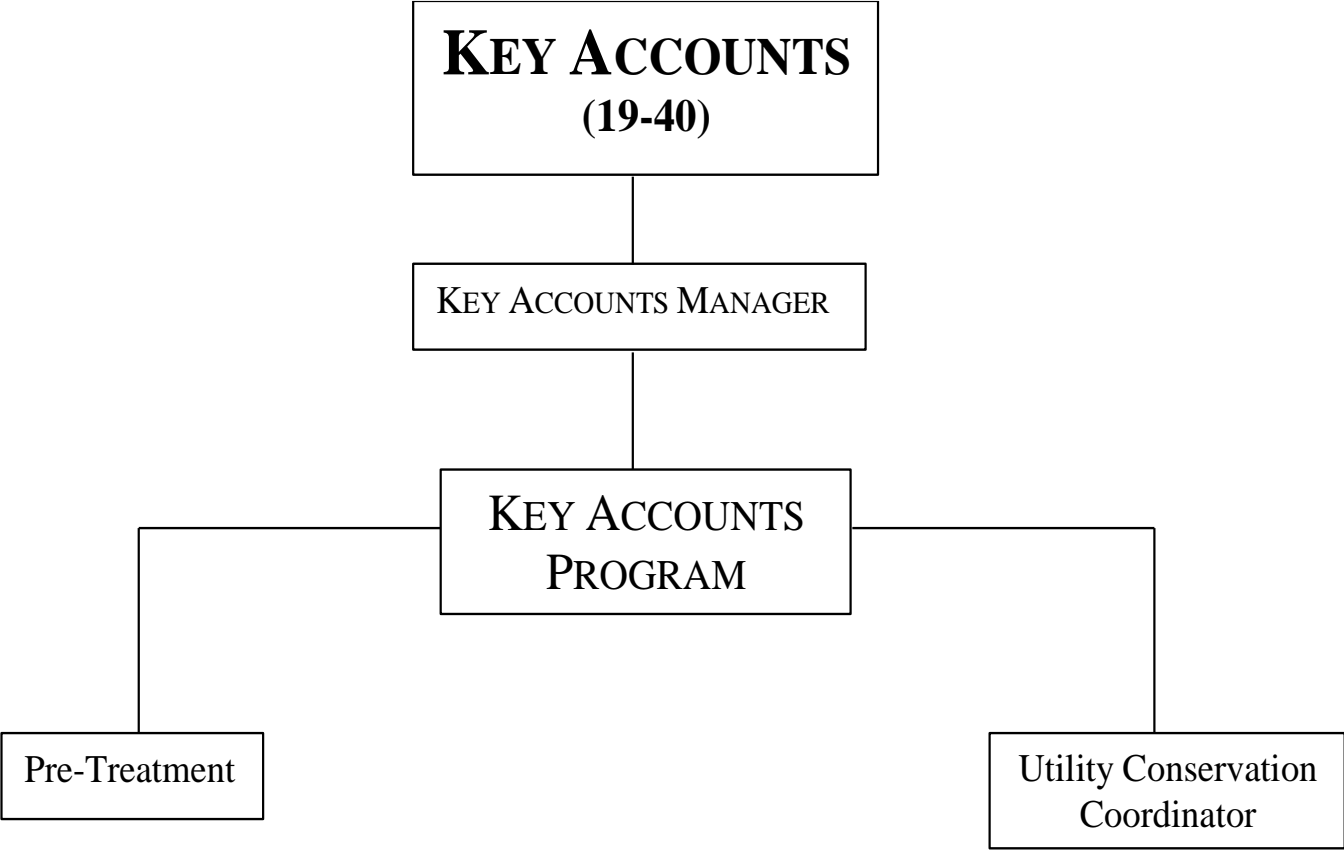 - Accurate company profiles on each account
  - "Expert" on each account

Budget Items

- Utility Services Coordinator
- KeyMeter (Pilot Program)
- Electronic Notification System (Pilot Program)
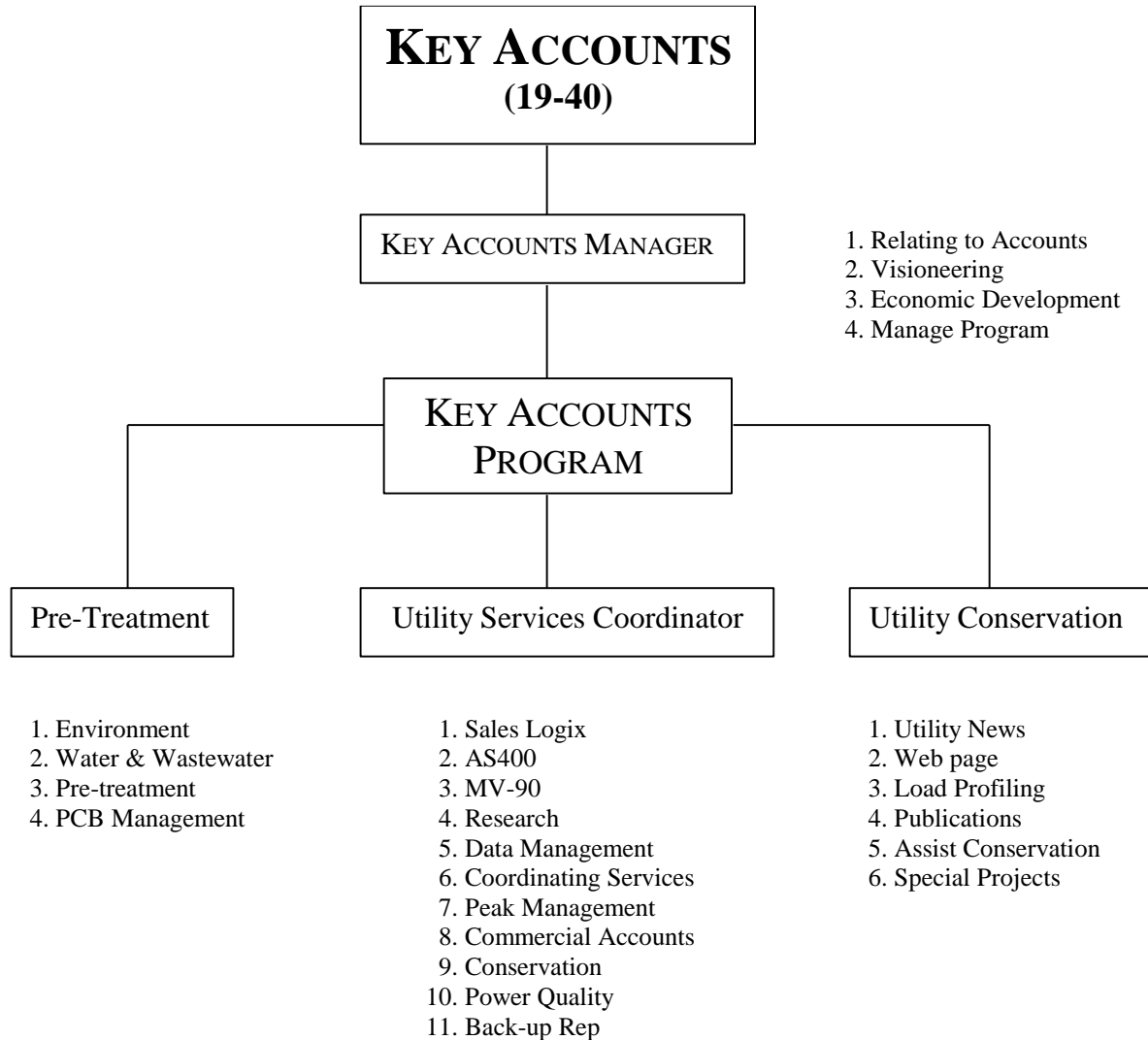- Subscriptions
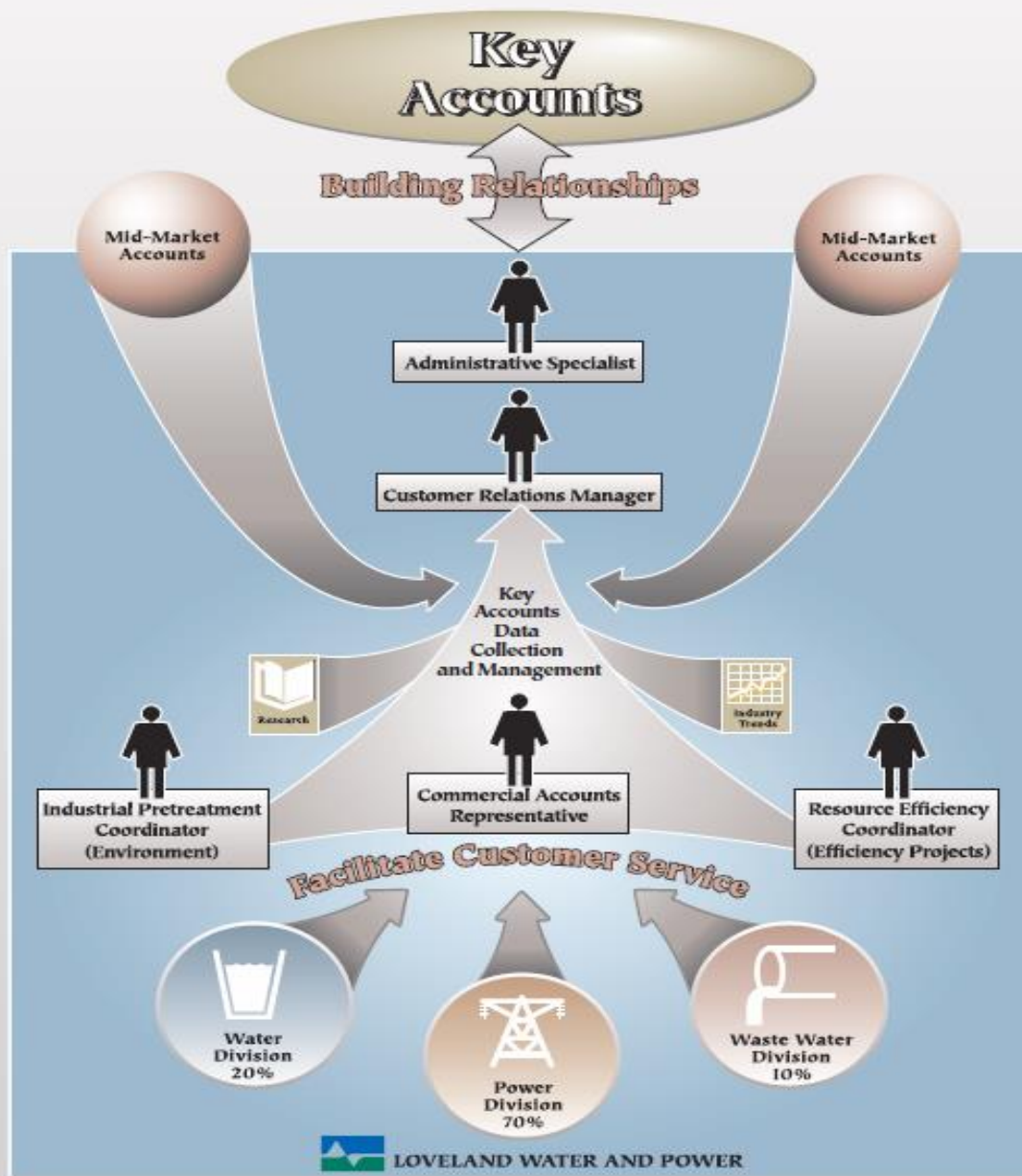- Training/Conferences

Strategic Direction

- Official key accounts kick-off in October 2002
- 19 key accounts
- 40 – 45 key accounts in 2003-2004 (mistake)
- 50 – 60 key accounts in 2007-2012 (mistake)
- Assist non-key account commercial customers
- Provide key account service with all city departments
- Key part of Economic Development Team

Current Structure

Proposed Structure

KEY ACCOUNTS
(19-40)

KEY ACCOUNTS MANAGER

1. Relating to Accounts
2. Visioneering
3. Economic Development
4. Manage Program

KEY ACCOUNTS PROGRAM

Pre-Treatment

1. Environment
2. Water & Wastewater
3. Pre-treatment
4. PCB Management

Utility Services Coordinator

1. Sales Logix
2. AS400
3. MV-90
4. Research
5. Data Management
6. Coordinating Services
7. Peak Management
8. Commercial Accounts
9. Conservation
10. Power Quality
11. Back-up Rep

Utility Conservation

1. Utility News
2. Web page
3. Load Profiling
4. Publications
5. Assist Conservation
6. Special Projects

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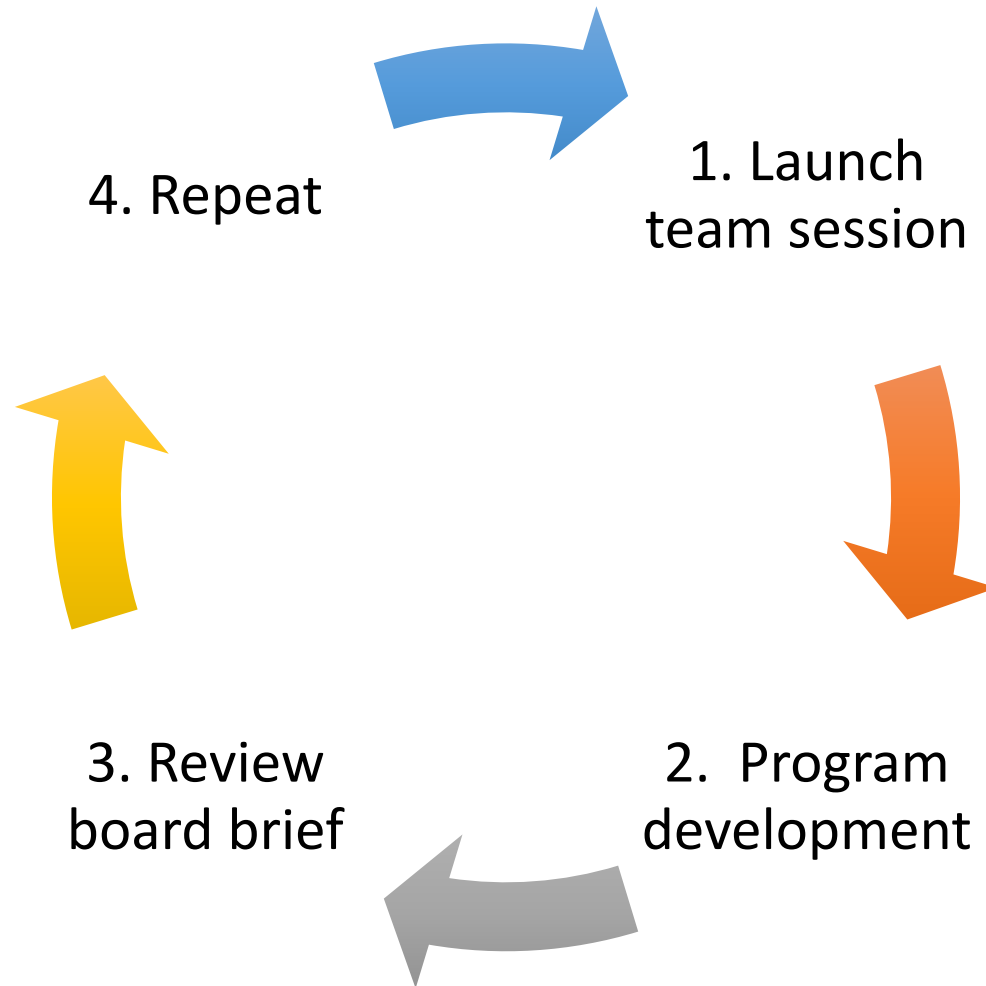# Phase II Principles

Research political and policy landscape

Clarify and determine strategic direction

Four-Part Cycle Process

4. Repeat

1. Launch team session

3. Review board brief

2. Program development

3

Roadmap

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Why is This Important?

Roadmap

Compass

Validates process

Primary communication tool with leadership

Tangible

Get resources approved

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Traditional Method

- Goal – Overarching principle to guide decisions:
  - Objective – Specific step to achieve goals:
    - Performance measure – measure success to achieving objectives

Traditional Method

S.M.A.R.T Goals:

Specific

Measurable

Actionable

Realistic

Timely

Traditional Method Example

- Goal: Strengthen relationships with each account by end of third quarter:
  - Objective #1 – Identify primary, secondary, and alternate contacts for each key account by first quarter:
    - Measure: Number of contacts identified
  - Objective #2 – Conduct initial meetings with designated contacts by second quarter
    - Measure: Number of initial meetings completed

Program Goal Examples

Revenue:

- Increase commercial and industrial revenues by 42% of weather normalized total annual revenues by 2020

Load Factor:

- Increase C&I sector load factor by 8% by year end 2017

Efficiency and Conservation:

- Identify at least 10 projects with a total demand reduction potential of 200 MW and energy reduction of 100,000 MWh by year end 2020

Power Supply:

- Provide our power supplier with 15 MW of distributed generation potential by 2020

Relationship:

- Develop a relationship by setting up three meaningful interactions with at least one decision with each key account by 4th quarter

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Unacceptable Program Goals

Conduct a seminar for all key accounts

Have lunch with KAs each month

Strengthen relationship with key accounts

Play golf with KAs often

Program Goals Exercise

Develop one program goal with supporting objectives and performance measures

Assume you have a mature program:

- This means you are developing goals to benefit the utility – not creation goals

Make sure they are S.M.A.R.T.

Interdepartmental Goals

Engineering:

- The engineering department will respond to a key accounts' request for information within one working day

Billing/Customer Accounting/Rates:

- All key account bills will be reviewed for accuracy before mailing with a target 99% of the bills going out correctly

Key Accounts/Customer Services:

- By the end of 2nd quarter, develop customer profiles for the top 15 key accounts based on the at-risk analysis

Interdepartmental Goal Exercise

Make a list of three departments you feel will be most critical to your success

Write one S.M.A.R.T goal for each of these departments

Develop at least one objective per goal that will outline how you will get these goals accepted in your system

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Reality Check

You don't have a key accounts program if you don't have a budget assigned to it

Having a key accounts budget forces decision-makers to support it

A well-defined budget is the result of a deliberate and successful planning process

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Determine the Preliminary KA Program Budget

The objectives and the availability of funds will drive the budget

Review each objective and ask, "what resources are needed to complete this objective?"

Some objectives will not require additional resources, but some will

Are the resources going to be available?

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The Budget

Things you may forget:

- Car expenses
- Travel to out-of-area accounts
- Travel for conferences
- Training
- Meals and entertainment
- Promotional materials
- Count widgets – Ask yourself: How much for each contact? Then summarize
- The CAP will influence your budget

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	2009	Logic Model
4551	Budget	
SUPPLIES		
02-11 Office Supplies	$ 400	
02-12 Office Furniture/Equip Under $500	$ -	
02-14 Books & Periodicals	$ 100	
02-15 Computer Supply/Software	$ 500	
02-21 Food - Boards/Commissions/Council	$ -	
02-22 Food - Special Events	$ 600	(1) C.1.1.b
02-23 Food - Performance Recognition	$ -	
02-24 Food - Consult/Negotiations/Business Meals	$ 1,200	(1) D.1.1.b, (5) F.1.1.a
02-25 Food - Staff meetings	$ 300	(2) D.1.1.a
409-02-25 Clothing	$ 1,000	(1) D.1.1.b,(1) B.1.1.a
02-32 Parts & Supplies	$ 6,350	(1) D.1.1.b
02-33 Tools/Equip Under $500 Each		
TOTAL SUPPLIES	$ 10,450	
PURCHASED SERVICES		
03-11 Postage	$ 100	
03-18 Communication Service	$ 50	
03-21 Printing	$ 2,500	(5) F.1.1
03-33 Subscriptions	$ 500	
03-35 Membership Fees & Dues	$ -	
03-37 Advertising	$ 1,000	(5) F.1.1
03-45 Telephone	$ 2,000	
03-50 Professional Services	$ 10,000	(6) C.1.1.a
03-65 Mileage Reimbursement	$ 400	(1) D.1.1.b
03-69 Repair & Maintenance	$ -	
03-95 Non-Monetary Awards	$ -	
03-99 Other Services	$ 27,600	(5) F.1.1
TOTAL PURCHASED SERVICES	$ 44,150	
FIXED CHARGES		
05-39 Equipment Rental		
TOTAL FIXED CHARGES	$ -	
GRAND TOTAL 4551	$ 54,600	

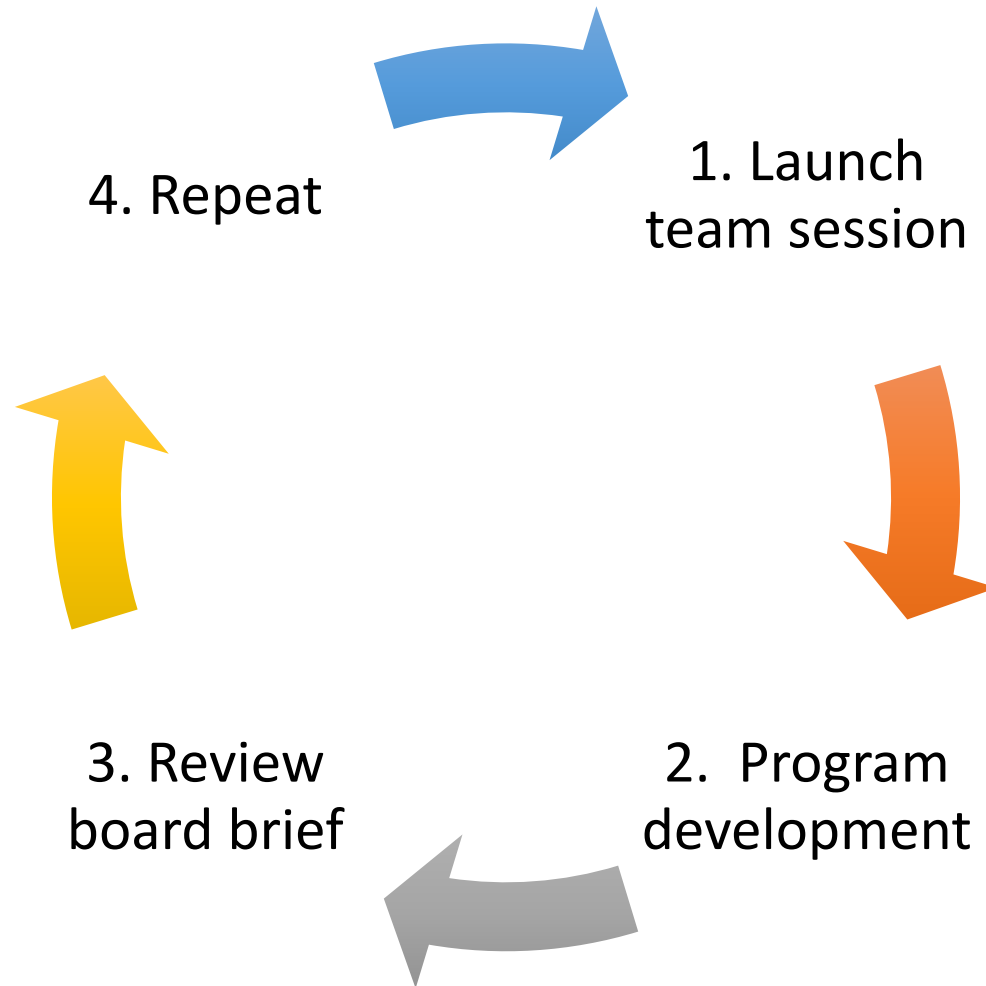| SUPPLIES					
ITEM				PROJECT COST	
02-11 Office Supplies				$400	
02-14 Books and Periodicals				$100	
02-15 Computer Supply & Software				$500	
Food				$2,100	
02-25 Clothing				$1,000	
02-32 Parts & Supplies				$6,350	
	ALPS			$2,000	
	Relationship Building			$3,000	
	LBSC			$1,000	
	Misc			$350	
	PURCHASED SERVICES				
ITEM				PROJECT COST	
03-11 Postage				$100	
03-18 Communication Service		$12.50 Pager QTR		$50	
03-21 Printing	(ALPS and LBSC Brochures)			$2,500	
03-35 Membership Fees & Dues				$0	
03-33 Subscriptions				$500	
03-31 Advertising				$1,000	
03-45 Telephone				$2,000	
03-50 Profesional Services				$10,000	
	CRM Consultant			$5,100	
	Process Consultant			$2,900	
	Misc			$2,000	
03-65 Mileage Reimbursment				$400	
03-69 Repair & Maintenance				$0	
03-99 Other Services				$27,600	
	ALPS			$13,200	
	E-Newsletter			$3,400	
	ALPS Expansion			$10,000	
	Miscellaneous			$1,000	
	GRAND TOTAL			$54,600	

Example Perspective

- 33,000 electric customers
- $45 million in total revenues
- 100 water and power employees
- 20 key accounts
- $8 million in key account revenue
- 4.5 FTEs in key accounts division
- $54,000 in key accounts budget

4.5 FTEs

- Key accounts – 20 ($54k)

- Mid-market accounts – 3,000 ($7k)

- Conservation – all customers ($49k)

- Industrial pretreatment – 3,000 ($31k)

Four-Part Cycle Process

4. Repeat

1. Launch team session

2. Program development

3. Review board brief

4 Validation

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"**Plans** are worthless, but **planning** is everything."
– Dwight D. Eisenhower

Business Plan Purpose

Forces you to make choices

Validates program

Gets funding

Business Plan Guide

Section 1 – Executive Summary (1 Page)

Section 2 – Background (1-2 Pages)

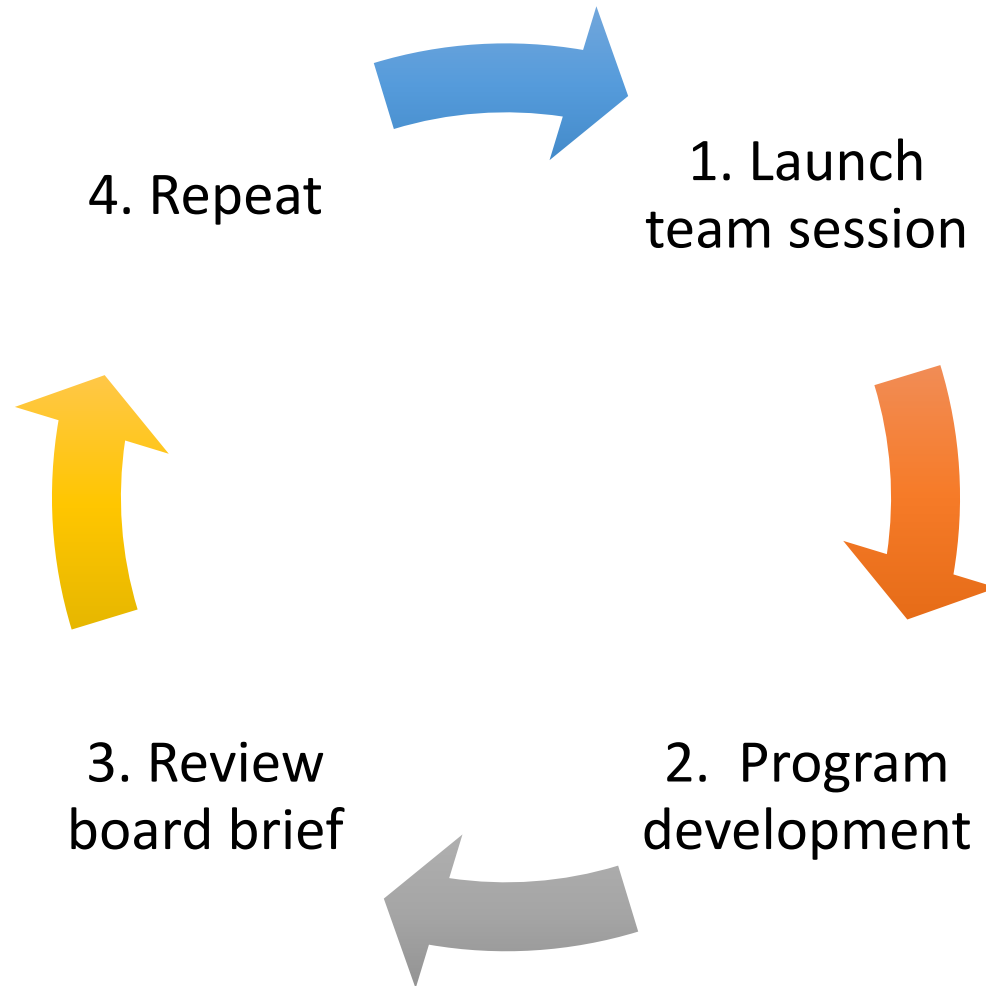Section 3 – Segment Research (3-4 Pages plus lists)

Section 4 – Competitive Analysis (2-3 Pages)

Section 5 – Program Objectives and Goals (1-2 Pgs)

Section 6 – Organizational Analysis (2-3 Pages)

Section 7 – Financials (1-2 Pages)

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Four-Part Cycle Process

4. Repeat

1. Launch
team session

2. Program
development

3. Review
board brief

3 - 6 Months

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Take Ownership!

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Time to Launch!

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What You Need

Completed all four phases (Basic phase I)

Alignment with your leadership

Commitment to follow-up
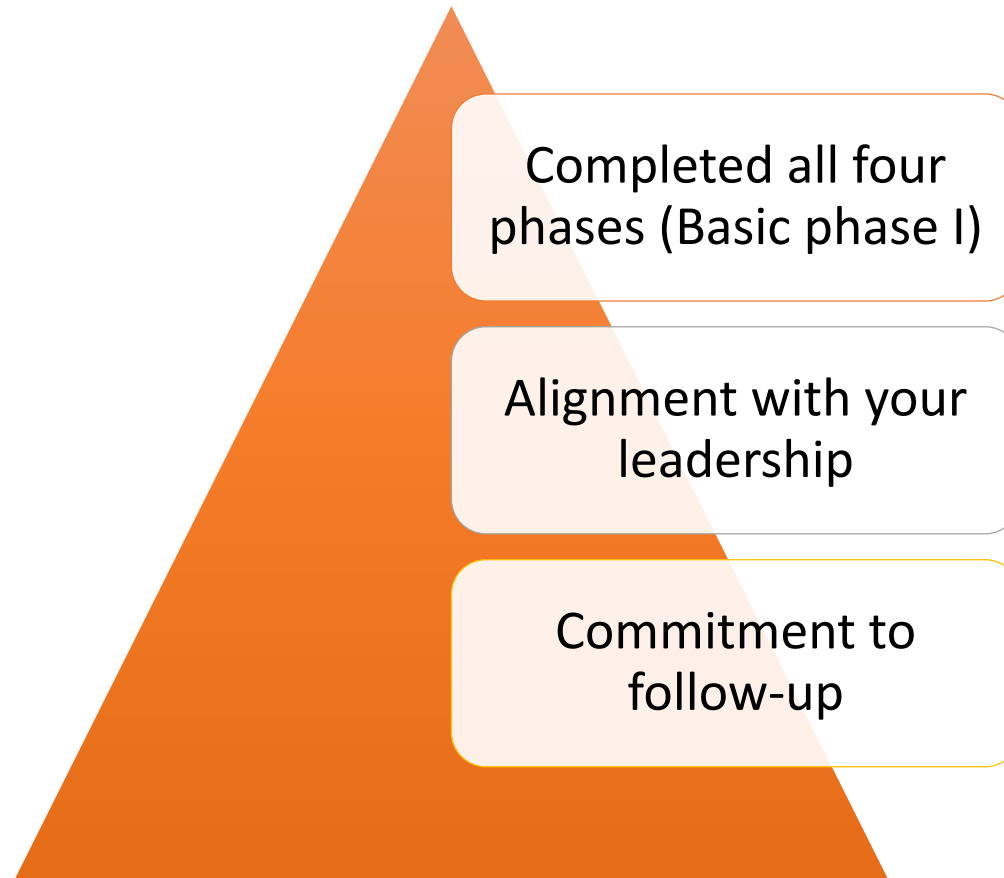
Launch Your Program

Send an introductory letter (KA Field Manual, page 53)

Go through the three-tiered kick-off

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Three-Tiered Kick-Off

Colleague kick-off

Leadership kick-off

Key accounts kick-off

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Must have!

Outstanding food

Valuable content

Great venue
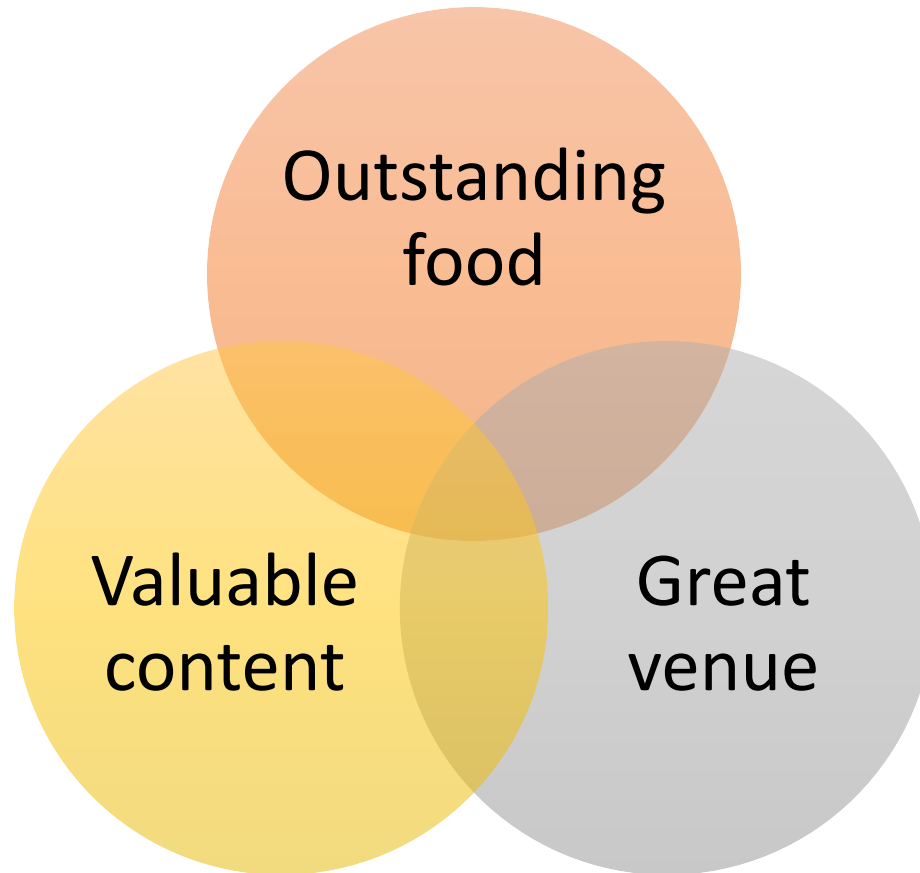
Colleague Kick-Off

30 Minutes

Acknowledge the colleagues who helped you

Why key accounts – Vision

How – Mission

Who – Key accounts list

What to expect – Next 90 days

Obstacle – Create more work

Colleague Call to Action

Ask for support

Take applications for Rapid Response Team

Leadership Kick-Off

Optional for standard program

15 minutes

Acknowledge colleagues who helped you

Why key accounts – Vision

How – Mission

Who – Key accounts list

What to expect

Obstacle – Your key accounts list

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Pitfall #5 - Equality

All accounts are not created equally

Not every business merits key accounts service

Don't get caught in the "all-inclusive" trap

Some accounts simply won't make the key accounts list and that's OK

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Leadership Call to Action

Ask for support

Ask to be placed on a future agenda to update on key accounts progress

Key Accounts Kick-Off

One hour

Acknowledge your colleagues AND leadership

Why, how, who

What to expect:

- Goals and Objectives
- Partnership
- Highlight the community support

Obstacle – don't want to be a key account

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Sample Agenda

8:00 - 8:10   Welcome GM

8:10 – 8:40   Key Account Program Brief

8:40 – 8:55   Value Add Brief

8:55 – 9:00   Call to Action

Pitfall #6 - Filter Information

Don't try to tell your key accounts every small detail of your program

Brief the highlights only

Keep it short, sweet, and simple

Key Accounts Call to Action

Ask for support

Follow-up meetings

Pro Tip #5 - Good Food

Always serve quality food and snacks

Full stomachs = happy people

Never skimp on food in any meeting you host

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100% Participation Goal

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Invitation Process

Intro letter

↓

Follow-up phone call

↓

Follow-up e-mail

↓

Mail formal invitation

↓

Follow-up phone call

↓

Follow-up e-mail

↓

Final call to non-RSVPs

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Customer Action Plan Purpose

Forces you to engage with each account

Forces you to determine how to serve and add value with each account

Outlines a path for individualized success with each account

Helps you avoid generalizing your key account services

Complete a CAP for EACH account!

Must complete one CAP to get certified

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Customer Action Plan Guide

Section 1 – Executive Summary (1 Page)

Section 2 – Key Accounts Contact Profile (1 Page/contact)

Section 3 – Key Account Business Profile (1 Page)

Section 4 – kWh Use and Key Account Equipment Description (1-2 Pages)

Section 5 – Relationship Analysis (1-2 Pages)

Section 6 – Communication Strategies for Key Account (1-2 Pages)

Section 7 – Goals for Account (2-3 Pages)

Section 8 – Financial and Budget Requirements (2-3 Pages)

Section 9 – Barriers to Success with Key Account (1-2 Pages)

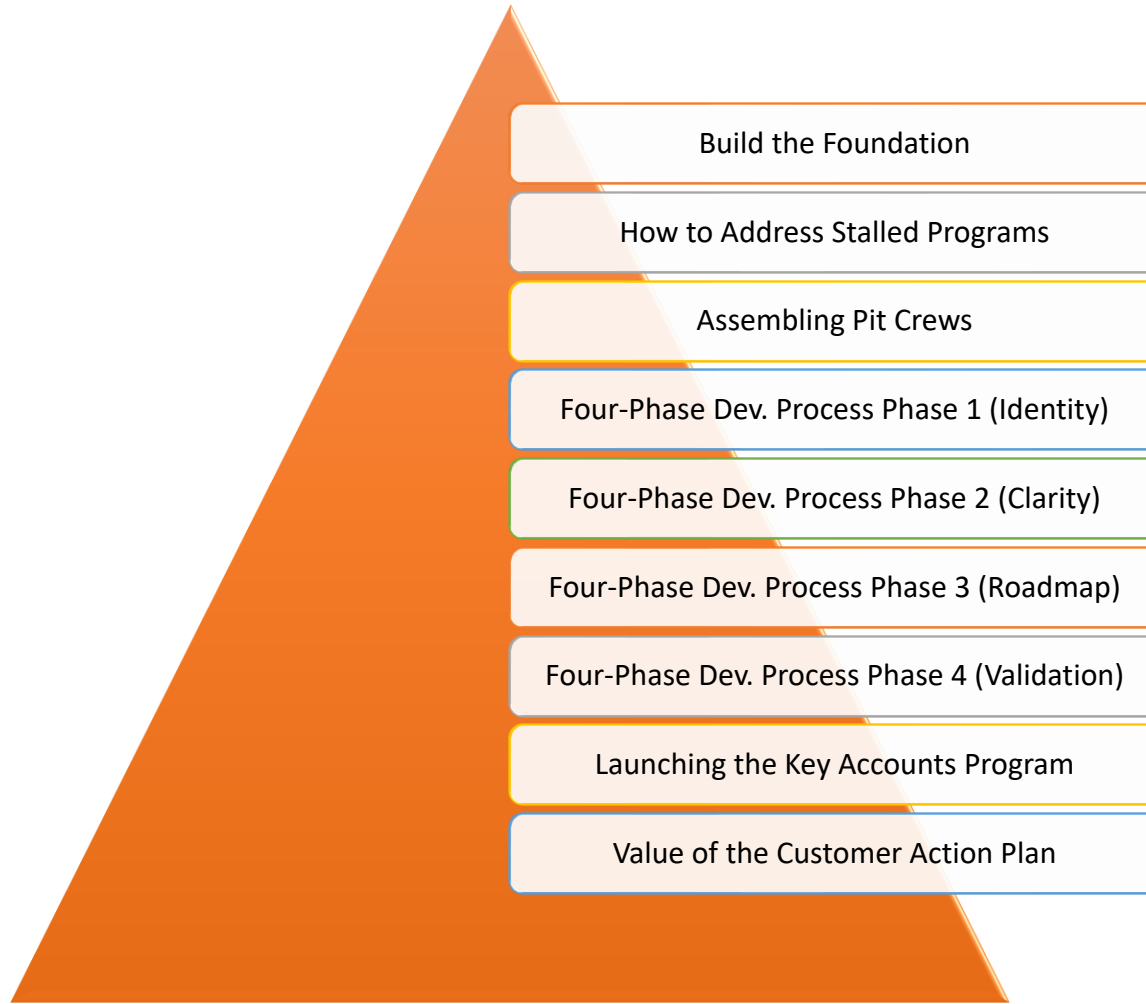**THE ACADEMY** | AMERICAN PUBLIC POWER ASSOCIATION

Customer Action Plans

Drive your program

Take six to twelve months to complete

Make them meaningful

Update them annually

Summary

- Build the Foundation
- How to Address Stalled Programs
- Assembling Pit Crews
- Four-Phase Dev. Process Phase 1 (Identity)
- Four-Phase Dev. Process Phase 2 (Clarity)
- Four-Phase Dev. Process Phase 3 (Roadmap)
- Four-Phase Dev. Process Phase 4 (Validation)
- Launching the Key Accounts Program
- Value of the Customer Action Plan

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Conclusion

Going through a deliberate program development process will ensure you cover all your bases and include all necessary elements for a successful program, and will garner favor and support from your leadership and coworkers.

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Thank you!

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