THE ACADEMY

AMERICAN PUBLIC
POWER ASSOCIATION

Developing Your Key Accounts Representative

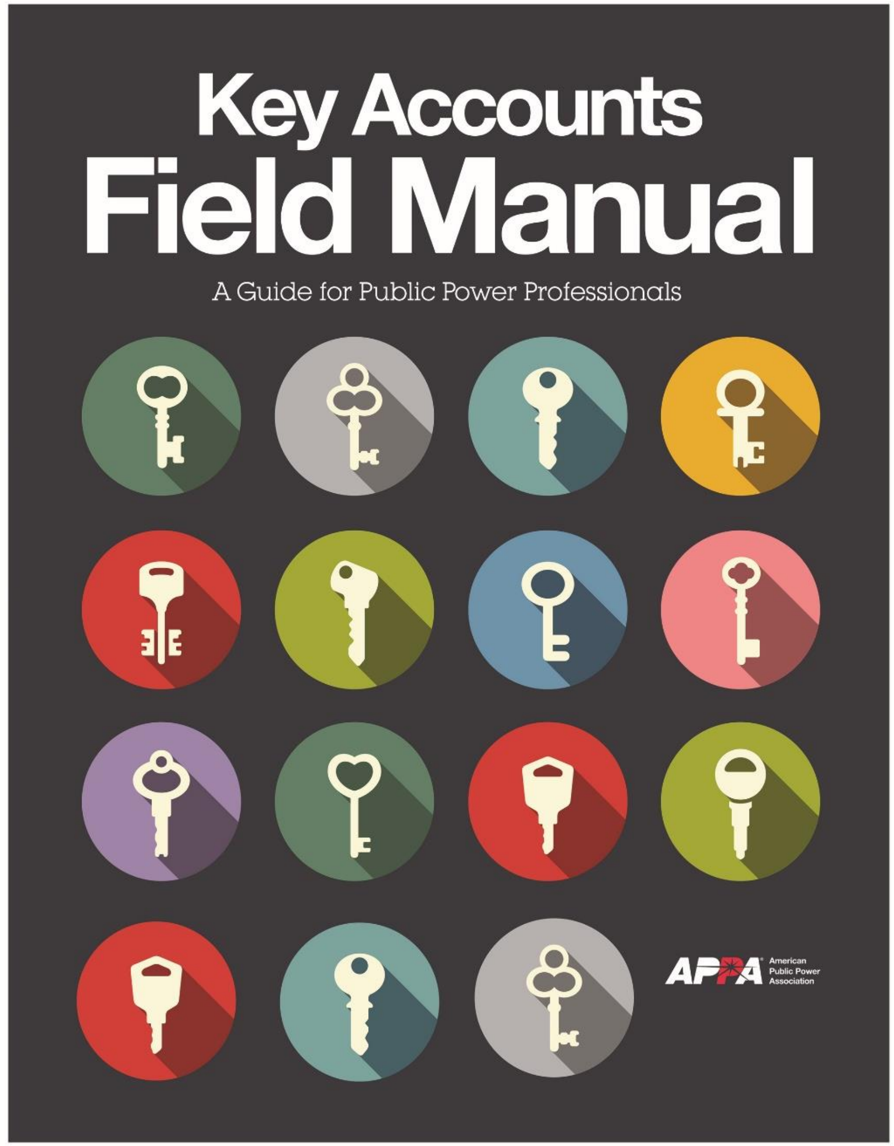
Erick Rheam

President, Team Rheam Productions, Inc.

Erick.Rheam@gmail.com

www.erickrheam.com

AMERICAN PUBLIC POWER ASSOCIATION


Key Accounts
Field Manual
A Guide for Public Power Professionals
APPA
American Public Power Association

Course Expectations

Learn core traits and characteristics of a successful key accounts representative

Participate

Discuss obstacles and challenges facing the key accounts representative

Learn many ideas and scenarios:

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

Course Objectives

- Learn the principles behind successful key accounts representatives
- 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

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

What Makes a Successful Key Accounts Representative?

- Attitude – Must have a spirit of service and cooperation
- Ownership – Willing to accept responsibilities and own problems
- Great communicator – Clear, concise, on-point
- Reports to highest level – CEO or at least VP
- Critical thinker – Identifies problems and crafts solutions
- Executes effectively – Focused, organized, and disciplined
- Creative – Willing to seek alternatives and is open minded

Is Background Important?

Not really

Attitude is king

Hire for attitude and you can train skills later

Relationships Matter

Build relationships with stakeholders first

Build relationships with key accounts after stakeholders are on board

Influencers are the opinion leaders and are the key to a successful program

- Influencers are people whose opinions matter
- How do you find influencers? Ask your colleagues

Who are some influencers in your utility?

Pitfall #7 - Can't Please Everyone

Not everyone will support your program and that's okay, as long as you have the right people onboard

Get support from the formal leadership (i.e. the decision maker)

Get support from at least one influencer or opinion leader

How Do You Get Buy In?

Sacrifice – People respect sacrifice and recognize when someone sacrifices for them. Strong relationships are forged through sacrifices:

- Money – Giving your own funds
- Time – Giving your time for someone
- Ego – Being humble and quick to apologize
  - "If I've offended you, I'm sorry."

Apply the 10:1 relationship rule - you must add value and serve someone 10 times for every time you ask for something in return

Sacrifice Exercise

Provide an example of when someone sacrificed for you and how it made you feel?

Communication is Paramount

- Single point-of-contact = Value
- E-mail (primary)
- Phone (necessary)
- Personal note (classy)
- One-on-one interaction (nuanced)

E-mail

This will be your primary means of communication with most of your stakeholders and key accounts

Subject line matters:

- Keep it short
- Don’t use all caps or characters

Don’t get lazy with your grammar

Keep e-mail text simple and concise

Respond in a timely manner

Don’t forward a lot of messages

What other etiquette blunders bother you on e-mail?

Bad E-Mail Subject Lines

- Urgent!
- I NEED TO TALK WITH YOU ABOUT OUR MEETING NEXT WEEK
- FW: Information on Latest Energy Efficiency Legislation
- Check this out
- Follow-up
- Do you have any examples?

Good E-Mail Subject Lines

- Follow-up regarding our new energy prices
- Let's chat regarding energy efficiency meeting
- Information: Key Accounts Annual Meeting next month
- Invitation to a Key Accounts Demand-Side Management focus group

Sample E-Mail

Hi John,

I wanted to follow-up from my voicemail about our new electric rates proposal that will go to City Council for approval next month.

I have the following times open to meet with you. Do any of these work for you?

Tuesday, July 12th -	8:30 am or 2:00 pm;
Thursday, July 14th -	11:00 am or 3:30 pm;
Wednesday, July 20th –	1:30 pm.

I look forward to the discussion,

Erick Rheam
Key Accounts
970.555.7207

Phone

The phone is a necessary tool to build depth in a relationship

Call your customers to follow-up on action items and to add value. Never call "just to catch up."

Leave short voicemails:

- Leave your name and number
- Why you called

Always follow-up phone calls and voicemails with an e-mail outlining what you discussed

- E-mail is the "digital paper trail" of what you've discussed with an account

See example in Field Manual on page 57

Pitfall #8 - Have An Objective

Always have an objective for every call, e-mail, or visit with your customer

Your objective should be specific and easy to communicate

Don’t waste your customer’s time with frivolous communication

Personal Notes

A hand-written note sets you apart from the "noise" of the world

A personal note sends a message of "sacrifice" because it takes extra time to craft a hand written note

It also sends a message that the relationship matters to you

Pro Tip #7 – Handwritten Notes

Send personal handwritten notes to your customers after you meet with them

Take the time to write a personal note to your customers; it signals that you care about the relationship

Body Language Techniques

Body language is 55% of the communication between two people

The handshake is a predictor of a meeting:

- Palm down – The person is closed off to you
- Palm up – The person is open to your ideas
- Neutral – The person sees you as an equal

Crossed arms is a negative

Eye contact is important and a sign of respect

For more information visit www.erickrheam.com/bodylanguage

Master the Power Question

Conflict management is an important component in building relationships

Key account reps must be good at identifying obstacles in a relationship and then clearing those obstacles in order to advance the relationships

Most people won't reveal the real obstacle to you with their first answer

Ask this question, "Besides that, is there anything else?"

Continue to ask that question until the answer is "no." Usually the second or third answer is the true obstacle or objection

Handling Objections Exercise

Break into groups of three and run through the objection exercise

One person is the customer, another is key account rep, and the third person is the observer

The observer will provide feedback on the interaction

On-site Key Accounts Meeting

Purpose – develop relationships

Relationship defined – three meaningful interactions:

- Examples of meaningful interactions:
  - Meet at an event and learn about each other
  - Phone call interaction
  - E-mail interaction
- Note: Cannot build strong, long-term relationships via e-mail

Use on-site meeting checklist (see handout)

On-site Meeting Principles

- Show up early
- Be prepared
- Look sharp
- Bring the experts:
  - Set the expectation ahead of time with the people you bring with you
  - Make it clear that you will lead the discussion
- Identify action items and follow-up on them

Pro-Tip #8 - Edification

Your customers are proud of their work, so be respectful and actively listen

Ask good questions, but most of all, take notes

Write down points you can highlight in your follow-up letter

The Art of the Continuous Follow-up

Having a Customer Action Plan (CAP) is important

You should always have a “next action” for each account

- If not, then you have work to do

Remember – Action items don’t have to be utility-related

- Help the account solve problems, even when they don’t have anything to do with your utility

Magic move – Book the follow-up meeting

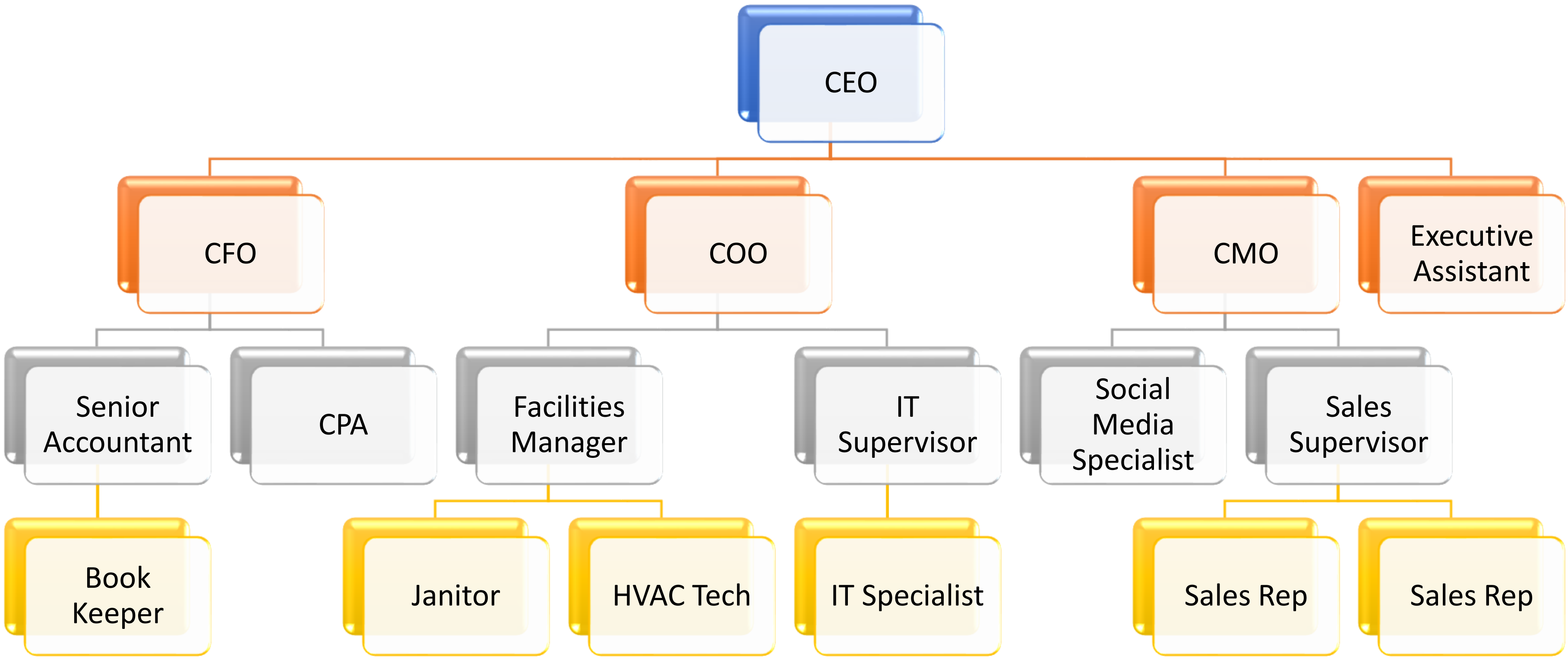
The 3x3x3 Relationship Rule

The 3x3x3 rule states that you should strive to have three solid relationships with at least 3 individuals within each key account

The goal is to have the relationships spread out:

- One relationship at different levels of the organization (i.e. executive level, middle management, front line employee)
- One relationship in different departments (i.e. sales, finance, operations, maintenance etc.)

The 3x3x3 Relationship Rule Example



The Biggest Issue Facing KA Reps

Being focused and organized

86% surveyed said they struggle with being focused and organized

You can do anything, but not everything

Common Frustrations

- Being underutilized
- Lack of support
- No vision from leadership
- Overwhelmed
- Pesky coworker
- What are some other frustrations?

The Perfect Day

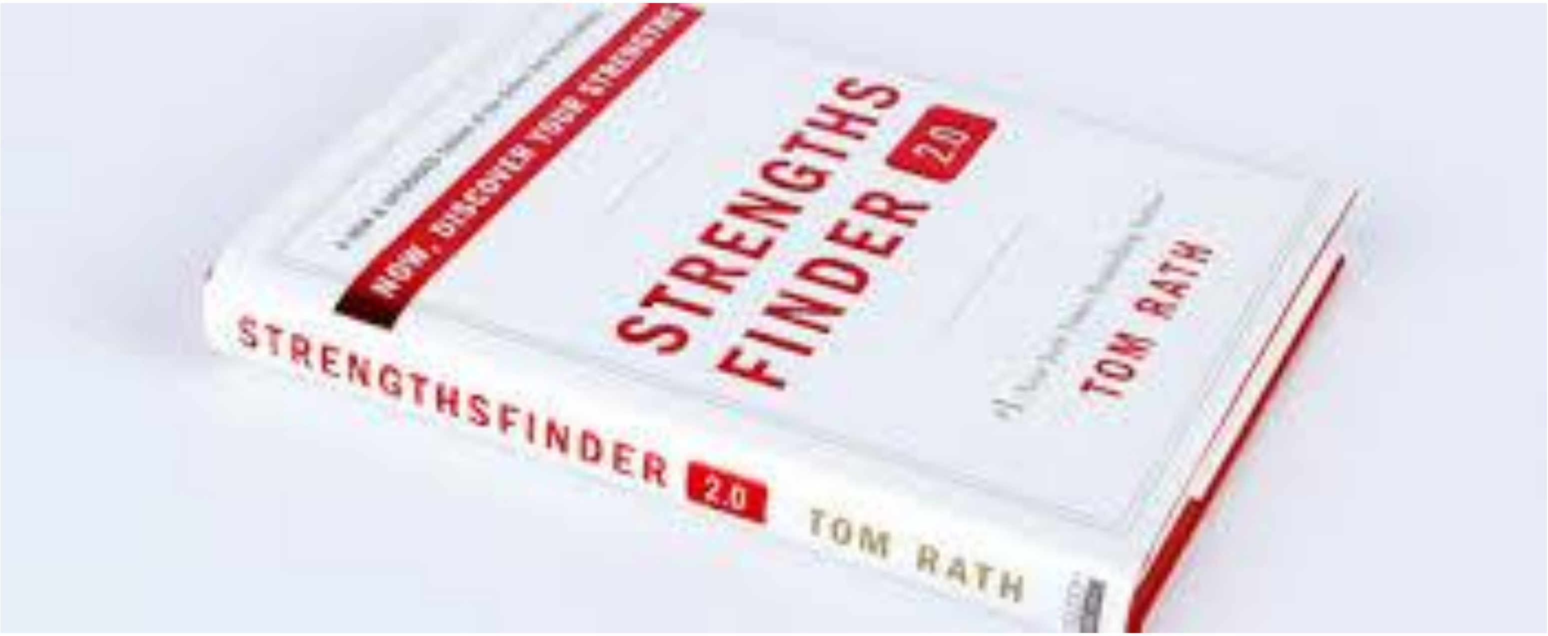
What is your perfect day feeling?

- Energized
- Accomplished
- Productive
- Validated
- Appreciated
- Satisfied
- Which one do you relate to most?

Elements of a Perfect Day

1. **Work within your STRENGTHS**
2. **Work with CLARITY**
3. **Manage your PRIORITIES**
4. **Manage your ENERGY**
5. **Manage EXPECTATIONS**
6. **Assemble the RIGHT TEAM**
7. **Develop a SYSTEM**

1 Strength Zone


NOW, DISCOVER YOUR STRENGTHS
STRENGTHS FINDER 2.0
TOM RATH
STRENGTHSFINDER 2.0
TOM RATH

Take the Assessment

- Forget your weaknesses
- Discover your five themes
- Spend the rest of your life turning those themes into strengths
- Happiness = when your work + strengths are aligned

Example - My Themes

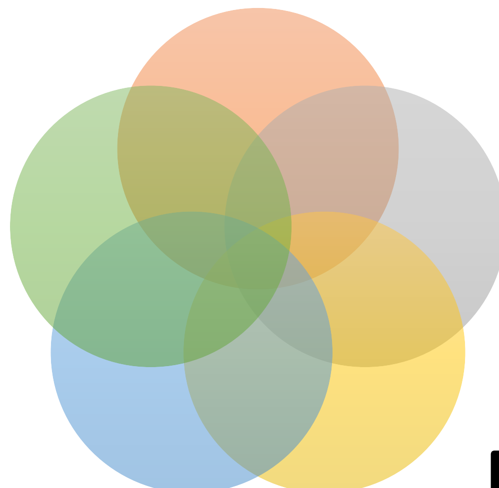
- WOO – I became a conference ninja
- Communication – I pursued public speaking
- Activator – I adjusted my career to allow me to consult more
- Futuristic – I pursue projects that allow me to provide input and direction
- Competition – I develop systems that allow me to compete with myself

2 Clarify

Clarify…

Vision

Reality



Mission

Value

Purpose

What if?

Shape Your Reality

Shape Your Reality

Identify the problems/obstacles

Bring solutions

Ease burden of others

Be patient, but persistent

Bring value

Don’t have an entitled attitude

Examples of Value/Ease Burden

- When I first arrived at my new utility I headed the Core Values Committee for my boss
- I helped my coworkers move furniture at their homes
- I drove coworkers to the airport
- I lobbied for a coworker to get a new work vehicle
- I gave others credit
- What are some other examples of adding value and easing burdens at work?


1. 80-100%
2. 60-80%
3. 40-60%
Three Priorities

Priorities Matter Big Time!

Establish clear annual goals

Focus on improving and pursuing your annual goals with a quarterly focus

Drill down on the "what's next?" of each of your goals and focus on that until it's done

- Do this in a weekly planning session and update the list daily

The Force Multiplier

The One Thing or Push Goal

- "What's the ONE thing you can do to make everything else easier or unnecessary?"
- Study the book *The One Thing*
- Figure out your "one thing"
- Do that one thing everyday

The One Thing Example

When I developed and managed my key accounts program, my one thing was simple

- I developed a very strong relationship with my General Manager
- I focused on it everyday and my program became strong as a result

Now – Marketing my speaking business

- One hour/day contact prospective event planners

The One Thing Exercise

Brainstorm all the tasks and daily activities you focus on to accomplish your work

Now drill it down to your top three

Circle the one thing in the top three that if you accomplished it everyday, it would make your work life much easier

Principles to Follow

Protect time – Make appointments with yourself

Implement themes in your days

Work in blocks of 30 minutes

Capture everything in one place

- Digital = Evernote (www.evernote.com)
- Paper = Paper Tiger (www.thepapertiger.com)

Top 10 Life Hacks

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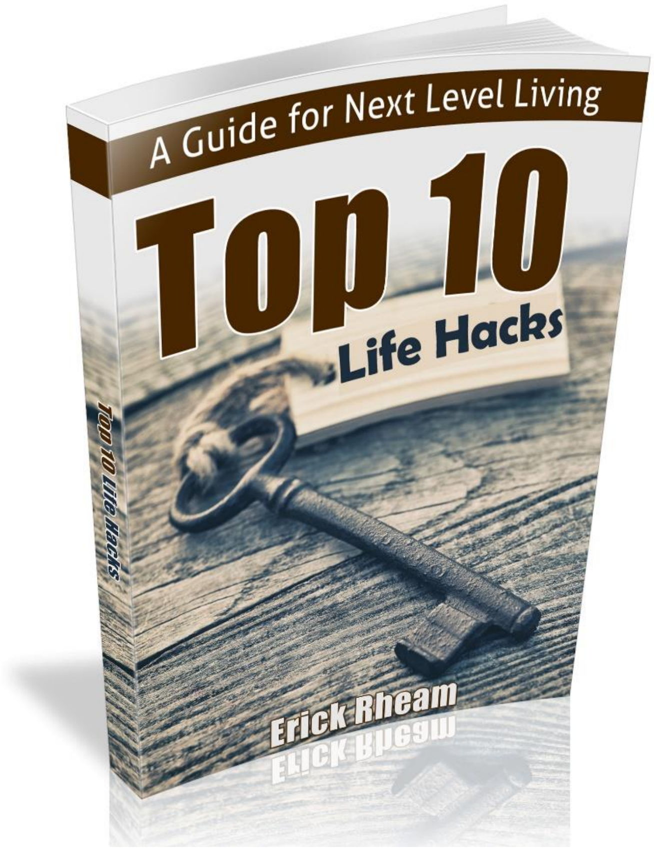
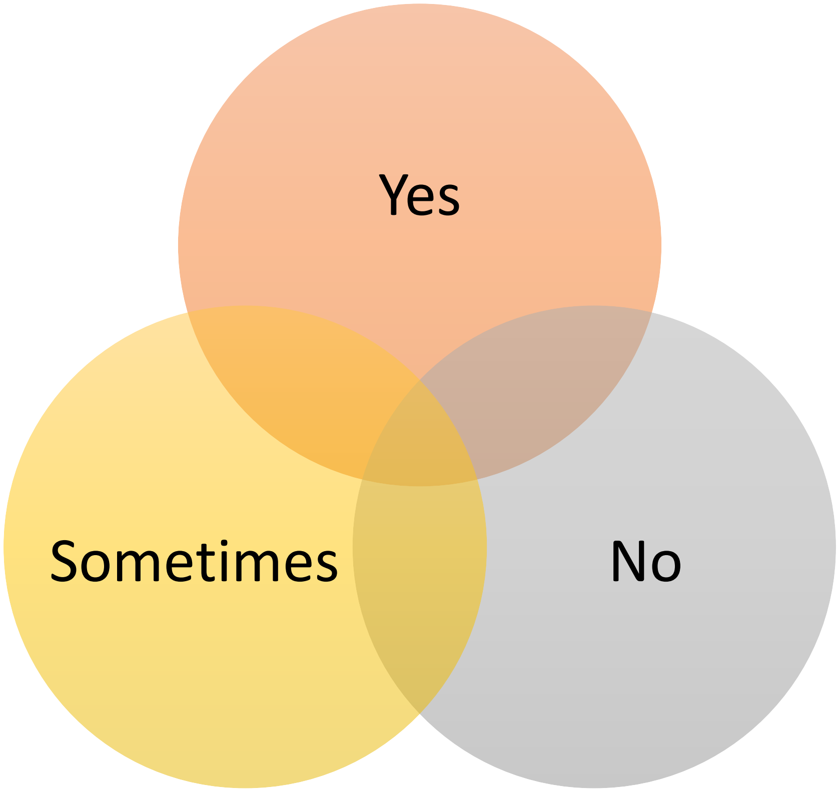
life-hacks



4 Energy

Do You Lack Energy?



Energy Management 101

- Get sleep
- Work within your natural rhythms
- Take naps (20-30 mins)
- Exercise
- Drink water
- Work within your strengths
- Which one do you struggle with the most?

Exercise

- We are going to take a break as a group for 20 minutes with the lights off
- Rest your eyes
- Breath deeply
- Relax

How do you feel?

5 Expectations

Expectation Management

- Be proactive
- Be clear
- Build over time
- Start with the most respected person

Exercise

Approach an influencer (played by instructor) and lay out expectations of your key accounts program

6 Build a Team

Team Principles

- Start with YOU – be the person people want to work with on a consistent basis
- Get influencers – opinion leaders
- Get champions – cheerleaders
- Get difference-makers – specialists
- Get decision-makers – budget authority

How to Manage Your Team

Get the right people in the right seat on your bus:

- Want to be there = Willing
- Qualified = Necessary skills
- Work within strengths = Natural talents

Don’t be entitled – Earn your place

Make a business case

Remember – Emotion trumps logic

Right People in the Right Seat

- Want to be there
- Qualified
- Work within strengths
- Missing #1 – Get them off the bus
- Missing #2 – Adjust job description or fill the gap with training/certification
- Missing #3 – Put them in a different seat

Make a Business Case

- Problem = Risk assessment
- Solution = Key accounts program
- Outcome = Solid business community
- Why you? = Your strengths
- Why them? = Explain why you brought them on board and highlight their strengths

Boomerang Principle

What you do for or to others will come back to you. THERE ARE NO EXCEPTIONS.

Remember

Add value

Sacrifice – time, money, or ego

Ease their burden

Emotions trump logic


7 System

Principles of System Development

Delegate:

- Things you’re not good at and others can do better
- Things that drain you

Automate recurring tasks

Ping critical areas

Measure key areas of program

Record progress

Delegation Examples

Delegate:

- Editing documents
- Account rate audits
- Event planning
- Research – I used Questline's "Ask the Expert"

What are other examples of delegation?

Delegation Exercise

Brainstorm your daily, weekly, monthly, quarterly, and annual tasks

Identify all the tasks you could delegate

Identify to whom you could delegate

Automation Examples

15-minute interval data .CSV MS Excel monthly reports – I used Automated Energy

Monthly informational newsletter – I used Questline

Exception reports based on abnormal consumption use – I used Automated Energy

What other examples are there for automation?

Ping Examples

- E-mail drip campaigns – I use Aweber
- Call on sample key accounts and stakeholders to check satisfaction
- Catch-up with influencers
- Attend professional growth training
- What other examples are there?

Measure Examples

- Annual key accounts survey
- CRM projects completed
- Number of key account complaint calls to General Manager
- How I spend my time

What I Measure Example

Work categories

- 233 AEI revenue blocks
- 216 Planning blocks
- 190 Speaking blocks
- 138 Writing blocks
- 129 AEI general work
- 74 Career growth work

Record Progress Examples

- Customer Relationship Management (CRM) – I use ACT!
- Evernote
- Outlook e-mail folders
- Journal – I use Moleskine
- Excel spreadsheet
- What other examples are there?

The Exit Interview

“You made it your own.”


Bonus!

What To Brief At Staff Meetings

Come prepared with useful information to your staff meetings

Projects:

- Open
- New
- Completed

Meetings – Which key accounts have you met with lately?

Feedback – What are the key accounts telling you?

Industry gossip – What are the rumors? Who's planning to expand or downsize? Change in leadership?

Time – How did you spend your time?

Recognize support – Utility staff that's been helpful to you

What informational items could you report?


Do's
&
Don'ts

DON'T

Complain!

Present a problem with no solution

DO

Be a resource that your leadership cannot live without

DON'T

Get discouraged

DO

Get key accounts on board

DO

Get a budget = Makes your program real!!!!

If you don't have a key accounts budget, you don't have a program

Summary

Key Account Rep Success Principles

The Power of Effective Communication

Mastering the On-Site Meeting

The Art of the Continuous Follow-Up

The Perfect Day – Leveraging Focus

Conclusion

Winning begins with you. You must win the battle from within if you want to have a chance at developing a successful key accounts program.

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Erick.Rheam@gmail.com
EducationInfo@PublicPower.org

Thank you!