

CUSTOMER SERVICE MANAGEMENT CERTIFICATE PROGRAM

JANUARY 29 – FEBRUARY 1, 2018
WINTER EDUCATION INSTITUTE
ANAHEIM, CALIFORNIA



AMERICAN
**PUBLIC
POWER**[™]
ASSOCIATION
ACADEMY

Program Requirements

To earn this certificate, participants must complete all requirements within one year of attending their last course in the certificate program curriculum.

Complete the five required courses

- Electric Utility Industry Overview*
- Strategies for Successful Customer Service Operations
- Utility Collections: The Complete Process
- Technology: From Distribution to Meter Reading and Customer Information Systems
- Modeling Customer Service in Your Leadership Style

Pass an online exam

Submit a plan for a customer service assessment or service improvement project

2018 Schedule

The Customer Service Management Certificate Program will be held once a year.

January 29 – February 1, 2018

As part of the Winter Education Institute

Hotel Information

Hilton Anaheim
777 West Convention Way
Anaheim, California 92802

APPA Room Rate

\$229 Single/Double (plus tax)

Room Rate Cut-off Date

January 5, 2018

Reservations

714/750-4321

In-House Training

We can also bring these courses to your location—a convenient and cost-effective option for groups. Contact the Association's Education Department for details (EducationInfo@PublicPower.org).

*Participants who can demonstrate knowledge of the utility industry, through work experience or coursework, may opt-out of this course. Contact EducationInfo@PublicPower.org for more information.



PROGRAM DESCRIPTION

Nurturing customer relationships and meeting customer needs are as critical to your utility's success as keeping the lights on. Customer preferences are evolving, and expectations for instant access to information and support are increasing. As a public power utility, your organization needs the support and goodwill of the communities you serve. APPA's Customer Service Management Certification Program® provides practical training and guidance on how to build and sustain a culture of outstanding customer service involving all stakeholders—utility employees, governing board members, and city officials. This program explores the mainstays of good customer service and how everyone at your organization can uphold them.

Customer service representatives, managers, and supervisors who complete this program's five required courses, pass an online exam, and successfully file a customer service assessment or improvement project plan within one year of completing the coursework will earn a Public Power Customer Service Manager certificate.

Who Should Attend

This program focuses on developing a culture of excellence in customer service among all public power utility employees and governing officials. Therefore, while the course content is designed for customer service managers, supervisors, and representatives, the course is also recommended for utility senior managers with cross-departmental responsibilities, governing board representatives, and senior officials.

What to Bring

Throughout the week, participants will share examples, practices and experiences from their own utilities. Attendees are encouraged to provide digital photos of the customer-facing areas of their operations. This could include: outside signage, entrances, drive-through lanes, and interior photos of payment stations, information kiosks, waiting areas, etc. Attendees will introduce their utility to other participants through these photos, highlighting elements that work well, or not so well. Attendees may also wish to send samples of their utility bills (front and back) and newsletters, in order to share common outbound materials. These will be emailed to the instructor prior to the session.

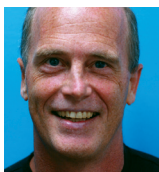
Attendees will receive a copy of APPA's *Customer Service: Building a Strong Infrastructure for Your Utility* publication.

INSTRUCTORS



Steve VanderMeer, Senior Vice President of Planning and Marketing, Hometown Connections

Steve joined Hometown Connections in 1998 and provides consulting, training and facilitation support to public power utilities and their governing boards. He has worked with a wide range of municipal governments and non-profit organizations on strategic planning, governance, organizational assessments, public participation, market research and customer service issues. He is the author of APPA's publication, *Customer Service: Building a Strong Infrastructure for Your Utility*. Previously, Steve worked at Fort Collins Utilities where he was the Director of Marketing and Energy Services.



Pat Corrigan, Principal, Katama Technologies, Inc.

Pat has over 35 years of experience in the utility industry, with the last 10 being focused on public power. He has held many technical and commercial positions with technology immersed businesses, including advanced metering infrastructure, mobile device management, outage management, T&D equipment, distribution automation, demand side management, energy management, and electric/water/gas metering. He has also helped several major corporations with enterprise resource planning, customer relationship management, web services, and new technology investments. Prior to joining KTI, he was the vice president in charge of Elster's consumer-owned utility business.

For detailed course and instructor information, visit www.PublicPower.org/Academy.

COURSEWORK

Courses can be taken individually or as part of the certificate program.

Electric Utility Industry Overview*

Monday, January 29

8:30 a.m.–4:30 p.m.

Recommended CEUs .7/PDHs 6.5

Course Overview

As power supply and delivery are highly technical and complex issues, it is important for public power employees and policymakers to understand basic industry operations. This course provides a broad, non-technical overview of how the components of the electricity system function together to provide reliable and environmentally sustainable service to customers. The course covers generation, transmission, distribution, types of utilities and their supporting organizations, as well as electric utility industry trends and issues.

Course Topics

- Overview of industry participants, including investor-owned utilities, rural electric cooperatives, merchant generators, and public power utilities and their joint action agencies.
- Review of the electric utility regulatory structure, at the federal, state and local levels
- Types of electricity generation, historical usage and new developments
- Electricity transmission system, and the participants/markets for wholesale power supply
- Components of the local distribution system, including substations, transformers, wires and meters
- Issues and challenges impacting today's electric utility industry
- Understanding the public power advantage, including local control, presence and values
- Review of organizations and resources available to help public power utilities foster a culture committed to excellence in customer service

Basic Level. No prerequisites; no advance preparation.

Instructor

Steve VanderMeer

*Participants who can demonstrate knowledge of the utility industry, through work experience or coursework, may opt-out of this course. Contact EducationInfo@PublicPower.org for more information.

Strategies for Successful Customer Service Operations

Tuesday, January 30

8:30 a.m.–4:30 p.m.

Recommended CEUs .7/PDHs 6.5

Course Overview

In a time of unprecedented industry changes and evolving consumer expectations, a utility's most important strategic asset is its relationship with its customers. This course defines good customer service, how to identify and meet the needs of different types of customers, and how to create a culture of commitment to excellence in customer service across all areas of utility management, operations and customer interactions.

Course Topics

- Defining good customer service
- Segmenting customers into categories and identifying their specific requirements: residential, business, commercial and industrial key accounts
- Identifying the utility's internal customers and other stakeholders and why they're important
- Managing your physical facilities to create a safe and welcoming environment
- Operating with the customers' needs in mind when determining service hours, locations, payment policies/options, web-based access to account info, etc.
- The role of utility governing officials, policymakers, and senior managers in creating a culture of customer service excellence

Basic Level. No prerequisites; no advance preparation.

Instructor

Steve VanderMeer

Utility Collections: The Complete Process

Wednesday, January 31

8:30 a.m.–4:30 p.m.

Recommended CEUs .7/PDHs 6.5

Course Overview

Based on the best practices of public power utilities across the United States, this course reviews the policies and procedures that foster an efficient and effective collections process. The instructor will cover a variety of examples from across the industry and use recent Association survey information to examine industry norms and best practices.

Course Topics

- The basics of customer service/call center operations
- What makes a good customer service operation, including fair and consistent collections policies and procedures
- Policies and procedures for setting up new accounts and security deposit requirements
- Meter reading, billing, and payment schedules
- Understanding the basics of utility service costs and ratemaking, for effective response to customer queries
- How to handle overdue accounts, including skip tracking, liens, and credit agencies
- Handling collections in-house vs. outsourcing
- Open discussion on specific issues/challenges and strategies for resolving them

Basic Level. No prerequisites; no advance preparation.

Instructor

Steve VanderMeer

Technology: From Distribution to Meter Reading and Customer Information Systems

Thursday, February 1

8:30 a.m.–Noon

Recommended CEUs .3/PDHs 3.25

Course Overview

Customer service representatives, managers, and supervisors play a key role in the purchase, deployment, and utilization of technologies and information systems that support the functions of their service departments. Customer information systems (CIS), metering technologies, billing systems, telecommunications systems, and cloud-based software applications are just a few of the technology options these stakeholders must understand and evaluate. Hear about the latest utility technology options that are enhancing public power services nationwide.

Course Topics

- Current customer service technologies, including billing, outage management, interactive voice response, advanced metering infrastructure, SCADA, pre-pay metering, work order management, field service automation, automated vehicle location, and cybersecurity
- New technologies/applications and how they can enhance utility operations and customer service
- Preparing a technology plan, including identifying current and future needs, budgeting, vendor selection, interoperability between software platforms, navigating the approvals process, project management, implementation strategies, and product training

Basic Level. No prerequisites; no advance preparation.

Instructor

Pat Corrigan

Modeling Customer Service in Your Leadership Style

Thursday, February 1

1–4:30 p.m.

Recommended CEUs .3/PDHs 3.25

Course Overview

Ensuring that all utility employees and governing officials subscribe to a culture of excellence in customer service requires very specific leadership skills and strategies. Identify the qualities of a good leader and learn the steps to transforming your utility culture to improve performance.

Course Topics

- Differences between good and bad leaders, and between leaders and managers
- Identify the leader's customers
- Fostering a culture of leadership throughout the organization
- Key activities of a customer service leader, including employee recruitment and selection, new employee orientation, ongoing training and education, performance monitoring, setting compensation and rewards, empowering employees, and gathering feedback from customers
- Creating internal and external customer communications programs
- Leading up: getting buy in and adoption from other department heads, utility managers and policymakers

Basic Level. No prerequisites; no advance preparation.

Instructor

Steve VanderMeer

CERTIFICATE COMPLETION REQUIREMENTS

After completing the required coursework, participants must:

1. Pass an online exam

- Consists of 75 multiple choice questions, based on the required coursework.
- You must score at least a 75% to pass the exam. You'll have two opportunities to pass the test.

2. Submit a plan for a customer service department assessment or service improvement project.

- Complete a project that focuses on evaluating and improving the customer service culture and operations of your organization.
- You'll receive plan guidelines that outline what is expected in each section.

Timing

Participants must complete the program requirements within one year of attending their last course in the certificate program curriculum.

ACCREDITATION

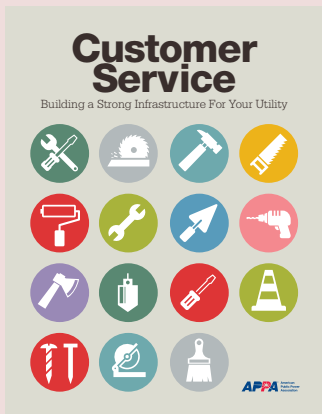
Continuing Education Units



The American Public Power Association is accredited by the International Association for Continuing Education and Training (IACET) and is authorized to issue the IACET CEU.

Professional Development Hours

APPA educational practices are consistent with the criteria for awarding Professional Development Hours (PDHs) as established by the National Council of Examiners for Engineering and Surveying (NCEES). Course eligibility and number of PDHs may vary by state.



Participants will receive a copy of APPA's *Customer Service: Building a Strong Infrastructure for Your Utility* manual.

Enrollment Fees*

Association Members

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| Registration received on or before January 8 | \$2,200 |
| Registration received after January 8 | \$2,450 |

Nonmembers

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| Registration received on or before January 8 | \$4,400 |
| Registration received after January 8 | \$4,650 |

The enrollment fee includes the five courses, cost of study material, exam and post-course project grading.

*For more information and pricing for the Electric Utility Industry Overview course opt-out option, contact EducationInfo@PublicPower.org.

Registration Information

To register, visit www.PublicPower.org/Academy or email EducationInfo@PublicPower.org.



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