

CUSTOMER SERVICE MANAGEMENT CERTIFICATE PROGRAM

FEBRUARY 4-8, 2019
WINTER EDUCATION INSTITUTE
NASHVILLE, TENNESSEE



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

Program Requirements

To earn this certificate, participants must complete all requirements within one year:

Complete the five required courses

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

Pass an online exam

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

2019 Schedule

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

February 4-7, 2019

As part of the Winter Education Institute

Hotel Information

Sheraton Grand Nashville Downtown
623 Union Street
Nashville, TN 37219

APPA Room Rate

\$225 Single/Double (plus tax)

Room Rate Cut-off Date

January 8, 2019

Reservations

615-259-2000

Registration

To register, visit www.PublicPower.org/Academy and click on the **Winter Education Institute**.

In-House Training

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 share samples of their utility bills and newsletters.

Attendees will receive a copy of APPA's *Customer Service: Building a Strong Infrastructure for Your Utility* publication and the latest Public Power Customer Service Policies Survey Report.

INSTRUCTORS



Patricia Cruz, Vice President of Consulting & Training, Hometown Connections

For nearly 20 years, Patty has helped utilities set a strategic destination for the future and then direct operations towards that vision. Her areas of expertise include achieving organizational effectiveness, strategic planning, change management, communications, stakeholder engagement, process improvement, and customer satisfaction. Her focus is on improving the performance of public power's corporate culture, workforce issues, customer service, and community relations.



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 the Association's *Customer Service: Building a Strong Infrastructure for Your Utility* publication. Previously, Steve worked at Fort Collins Utilities where he was the Director of Marketing and Energy Services.

COURSEWORK

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

Electric Utility Industry Overview*

Monday, February 4

8:30 a.m. – 4:30 p.m.

Recommended CEUs .7/PDHs 6.5/CPEs 7.8

Field of Study: Specialized Knowledge

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. You'll receive a broad, non-technical overview of how the components of the electricity system function together to provide reliable and environmentally sustainable service to customers. Learn about 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
- Rate challenges: recovering the costs of delivering power
- 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.

Instructors

Patty Cruz

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, February 5

8:30 a.m. – 4:30 p.m.

Recommended CEUs .7/PDHs 6.5/CPEs 7.8

Field of Study: Specialized Knowledge

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.

Instructors

Patty Cruz

Steve VanderMeer

Utility Collections: Trends and Challenges

Wednesday, February 6

8:30 a.m. – 4:30 p.m.

Recommended CEUs .7/PDHs 6.5/CPEs 7.8

Field of Study: Specialized Knowledge

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.

Instructors

Patty Cruz

Steve VanderMeer

Modeling Customer Service in Your Leadership

Thursday, February 7

8:30 a.m. – 4:30 p.m.

Recommended CEUs .7/PDHs 6.5/CPEs 7.8

Field of Study: Specialized Knowledge

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
- Leading during times of change and times of crisis
- 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

Basic Level: No prerequisites; no advance preparation.

Instructors

Patty Cruz

Steve VanderMeer

Technology: From Distribution to Meter Reading and Customer Information Systems

Friday, February 8

8:30 a.m. – Noon

Recommended CEUs .3/PDHs 3.25/CPEs 3.8

Field of Study: Specialized Knowledge

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
- Cybersecurity and the critical role it plays in business continuity

Basic Level: No prerequisites; no advance preparation.

Instructors

Patty Cruz

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 (CEUs)



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.

Continuing Professional Education Credits (CPEs)



The American Public Power Association is registered with the National Association of State Boards of Accountancy (NASBA) as a sponsor of continuing professional education on the National Registry of CPE Sponsors. State boards of accountancy have final authority on the acceptance of individual courses for CPE credit. Complaints regarding registered sponsors may be submitted to the National Registry of CPE Sponsors through its website: www.learningmarket.org. There are no prerequisites for the courses offered; no advance preparation is required for any courses. All courses are group-live offerings. Credit hours and areas of study for the courses are listed in this brochure. For more information regarding administrative policies, such as clarification of requirements, complaints, and refunds, please contact EducationInfo@PublicPower.org.

Professional Development Hours (PDHs)

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.

Enrollment Fees*

Members

Registration received on or before January 14	\$2,200
Registration received after January 14	\$2,450

Nonmembers

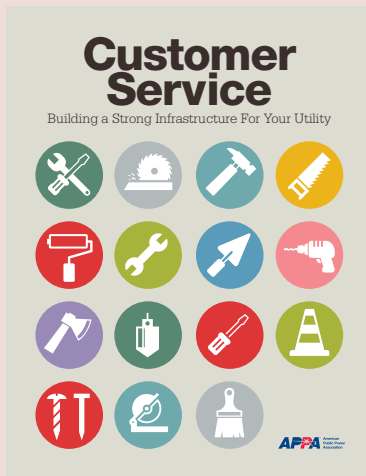
Registration received on or before January 14	\$4,400
Registration received after January 14	\$4,650

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 and click on the **Winter Education Institute**.



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



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