

September 30 – October 4
2019

THE ACADEMY
Fall Education
Institute

San Antonio, Texas



Customer Service
Management
Certificate Program

PublicPower.org

AMERICAN
PUBLIC POWER
ASSOCIATION
Powering Strong
Communities

Program Requirements

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

Complete the five required courses

- Electric Utility Industry Overview*
- Utilizing Technology to Enhance Customer Service
- Strategies for Successful Customer Service Operations
- Utility Collections: Trends & Challenges
- Modeling Customer Service in Your Leadership Style

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.

September 30-October 3, 2019

As part of the Fall Education Institute

Hotel Information

Hotel Contessa
306 West Market Street
San Antonio, TX 78205

Reservations

210-229-9222

Room Rate Cut-off Date

September 5, 2019

APPA Room Rate

\$209 Single/Double (plus tax)

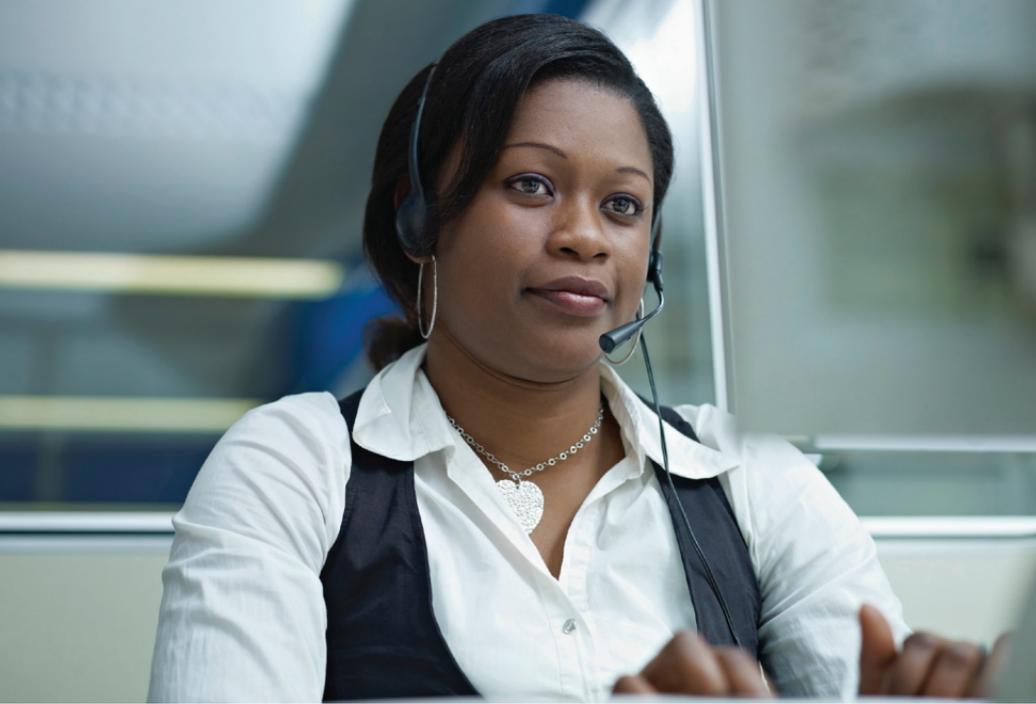
Registration

To register, visit www.PublicPower.org/Academy under **Institutes & Certificates**.

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.

Those who complete the 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

Participants will have the opportunity to introduce their customer service operations through photos and discussion. Attendees will be asked to provide 5-10 digital photos showing the exterior and interior of their customer service/billing operations, if possible. Additionally, the class will compare different bill styles, websites, and communications tools. Participants can provide sample utility bills, newsletters, bill stuffers or links to online resources in advance of the class.

What You'll Receive

Attendees will receive a copy of the Association's *Customer Service: Building a Strong Infrastructure for Your Utility* publication and the latest Public Power Customer Service Policies Survey Report. As part of the leadership class, participants will also receive a personalized report and develop an action plan based on the results from their Birkman Method workplace assessment, which will be completed in advance of the course.

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, September 30

8:30 a.m. – Noon

Recommended CEUs .3/PDHs 3.25/CPEs 3.8

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, and public power utilities and their joint action agencies
- Review of the electric utility regulatory structure
- Electricity transmission system, types of electricity generation, and new developments
- 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
- Review of organizations and resources available to help utilities foster a culture of excellence in customer service

Course Level

Basic. 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.

Utilizing Technology to Enhance Customer Service

Monday, September 30

1:30 – 5 p.m.

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

Course Level

Basic. No prerequisites; no advance preparation.

Instructors

Patty Cruz & Steve VanderMeer

Strategies for Successful Customer Service Operations

Tuesday, October 1

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

Course Level

Basic. No prerequisites; no advance preparation.

Instructors

Patty Cruz & Steve VanderMeer

Utility Collections: Trends and Challenges

Wednesday, October 2

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

Course Level

Basic. No prerequisites; no advance preparation.

Instructors

Patty Cruz & Steve VanderMeer

Modeling Customer Service in Your Leadership

Thursday, October 3

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. Everyone has the ability to lead effectively in a variety of circumstances. To thrive as a leader, it is important to understand and know how to leverage our strengths, expectations and interests.

Participants will complete the online Birkman Method workplace and personality assessment tool (in advance of the course) and receive a personalized report to help understand and enhance your leadership style and communication, collaboration, teambuilding, and conflict resolution skills. Learn how to apply these findings to real-life situations and develop a personal action plan to put to work immediately.

Course Topics

- Differences between good and bad leaders, and between leaders and managers
- The components of evolving leadership: leading-self, leading others and leadership at work
- Your leadership style and how it impacts your work
- The elements of Emotional Intelligence and how they impact leadership effectiveness
- How to lead during times of change and effectively manage conflict
- How to foster a culture of leadership and excellence in customer service

Course Level

Basic. 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 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.

Questions?

Contact EducationInfo@PublicPower.org or 202/467-2919.

Enrollment Fees*

APPA Members

Registration received on or before Sept. 9 \$2,500

Registration received after Sept. 9 \$2,700

Nonmembers

Registration received on or before Sept. 9 \$5,000

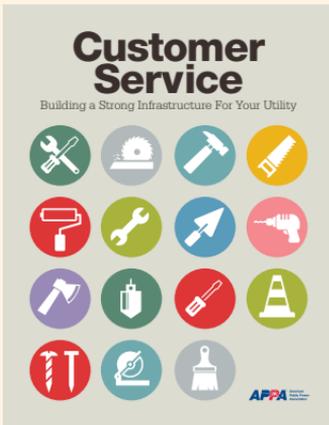
Registration received after Sept. 9 \$5,200

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 under Institutes & Certificates.



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

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. For information regarding certification status, attendance requirements and obtaining attendees transcripts, visit www.PublicPower.org or contact EducationInfo@PublicPower.org or 202/467-2919.

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.



Continuing Professional Education Credits

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.



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