

# KEY ACCOUNTS CERTIFICATE PROGRAM

SEPTEMBER 30–OCTOBER 4, 2019  
FALL EDUCATION INSTITUTE  
SAN ANTONIO, TEXAS



AMERICAN  
**PUBLIC  
POWER**<sup>™</sup>  
ASSOCIATION  
ACADEMY

# Program Requirements

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

## Complete the four required courses

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

## Pass an online exam

## Submit a customer action plan

# 2019 Schedule

The Key Accounts Certificate Program will be held once a year.

## September 30–October 4, 2019

As part of the Fall Education Institute

### Hotel Information

Hotel Contessa  
306 West Market Street  
San Antonio, Texas 78205

### APPA Room Rate

\$209 Single/Double (*plus tax*)

### Reservations

(210) 229-9222

### Room Rate Cut-off Date

September 9

# Registration

To register, visit [www.PublicPower.org/Academy](http://www.PublicPower.org/Academy) and click on **Institutes & Certificates**

# 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](mailto:EducationInfo@PublicPower.org)).

\*Participants who can demonstrate knowledge of the utility industry, through work experience or coursework, may opt-out of this course. Alternatively, participants can take a webinar series in place of the in-person course. Contact [EducationInfo@PublicPower.org](mailto:EducationInfo@PublicPower.org) for more information.



## PROGRAM DESCRIPTION

**D**iscover how to support and grow businesses in your community to enhance your reputation and revenue. Your commercial and industrial key accounts need special attention—the Key Accounts Certificate Program is designed to show you how to nurture strategic relationships and build trust and loyalty. Whether you plan to start a utility key accounts program or want to take your current program to the next level, this curriculum provides the skills, knowledge and tools for success.

Join the program to learn from real-world examples, get tools and templates, practice skills, and network with public power peers from across the nation. Participate in the program's four courses and get a free copy of our *Key Accounts Field Manual: A Guide for Public Power Professionals*. Courses can also be taken individually.

### Who Should Attend

This program is designed for public power key account managers and representatives. Other utility staff involved in key accounts, or those looking for professional development credentials, will also benefit.

# INSTRUCTORS

## **Tim Blodgett, President and CEO, Hometown Connections**

For over 16 years, Tim has served as the president and CEO of Hometown Connections, providing consulting, training and facilitation support to hundreds of public power utilities and their governing boards. He has worked with municipal governments and non-profit organizations on strategic planning, governance, organizational assessments, public participation, market research, and customer service. Previously, Tim served as the director of sales for en-able, an affiliate of KN Energy and PacifiCorp, assisting energy distribution companies with their customer care and energy services programs.



## **Erick Rheam, Vice President, Business Development, Automated Energy, Inc.**

Erick is a consultant, speaker and author on key accounts and human dynamics. He co-authored the Association's Key Accounts Field Manual: A Guide for Public Power Professionals. He has been involved in public power for 15 years. He worked as a key accounts manager and customer relations division manager for public power utilities in Indiana and Colorado, managing industrial pretreatment, key accounts, mid-market, conservation, and marketing programs. In partnership with Automated Energy, Inc., Erick offers key accounts consulting and education across the country.



# COURSEWORK

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

## Electric Utility Industry Overview\*

**Monday, September 30**

8:30 a.m.–4:30 p.m.

*Recommended CEUs .7/PDHs 6.5/CPEs 7.8*

*Field of Study: Specialized Knowledge*

### Course Overview

Understand basic power supply and delivery operations. Get a non-technical overview of how system components work together to provide electricity. Learn about industry structure and get up to speed on trends and issues.

### Course Topics

- Industry players — public power, investor-owned, and rural electric cooperative utilities; joint action agencies; merchant generators
- Public power's unique business model and advantages
- Electric utility regulatory structure at the federal, state and local levels
- Generation — historical use and new developments
- Transmission — wholesale electricity markets and participants
- Distribution — substations, transformers, wires, and meter
- Industry issues and challenges

**Basic Level:** No prerequisites; no advance preparation.

### Instructor

Tim Blodgett

\*Participants who can demonstrate knowledge of the utility industry, through work experience or coursework, may opt-out of this course. Alternatively, participants can take a webinar series in place of the in-person course. Contact [EducationInfo@PublicPower.org](mailto:EducationInfo@PublicPower.org) for more information.

# Implementing a Customer-Focused Key Accounts Program

**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

The electric industry is in constant flux and changes are causing many large commercial and industrial customers to modify their operations. Public power utilities need to stay ahead of these decisions and position themselves as customized service providers for key account customers.

Discover how to engage key accounts customers and build programs around their needs, while focusing on the strategic needs of the utility. Learn how to build and implement a successful key accounts program—develop a clear and concise plan of action, assure adequate resources, get leadership and business community support, and procure commitment to maintaining and growing the program.

## Course Topics

- Identify key accounts and their value to the utility
- Determine financial, budget and resource requirements
- Conduct customer research to determine needs and expectations
- Obtain buy-in from management, colleagues, and the business community
- Develop measurable program goals
- Launch a key accounts program
- Apply the four phases of key accounts program development
- Revitalize an existing key accounts program

**Basic Level:** No prerequisites; no advance preparation.

## Instructor

Erick Rheam

# Developing Your Key Accounts Representative

**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

Simply having a key accounts program does not ensure success. As customers become more sophisticated, trained account executives offer the utility a competitive advantage in managing and retaining key accounts. Learn essential account management and customer relationship skills.

## Course Topics

- Identify the characteristics of a successful key accounts representative
- Assemble an effective key accounts team
- Create strong relationships between key account staff and customers
- Establish account-specific goals and strategies
- Develop an action plan to meet with customers and solve operational issues
- Lead an effective on-site customer meeting
- Review communications and follow-up
- Get tips and techniques for focus and organization

**Basic Level:** No prerequisites; no advance preparation.

## Instructor

Erick Rheam

# The Effective Key Accounts Toolbox

**Thursday, October 3 – Friday, October 4**

Thursday: 8:30 a.m. – 4:30 p.m.

Friday: 8:30 a.m. – Noon

*Recommended CEUs 1/PDHs 10.25/CPEs 12.2*

*Field of Study: Specialized Knowledge*

## Course Overview

As public power utilities face increasing competition, it is important to leverage every resource to obtain a competitive advantage. Key account staff must understand the challenges business customers are facing and partner to develop solutions and strategies. Learn about resources and tools you can use to build relationships, provide customized services, and add value for your key accounts.

Complete the post-course exam and work through a template to start building your customer action plan. Bring information on one key account—contact and business information and relevant contact history—to include in your customer action plan.

## Course Topics

- Determine where you stand with the customer
- Use customer relationship management tools and surveys to measure and enhance relationships
- Facilitate a key accounts annual meeting
- Leverage the power of customer advocacy
- Evaluate the latest key accounts programs and tools
- Work with other utility departments and associations, power suppliers, and joint action agencies
- Develop and review your own customer action plan

**Basic Level:** No prerequisites; no advance preparation.

## Instructor

Erick Rheam

## Questions?

Please contact APPA's Education Department at 202/467-2919 or [EducationInfo@PublicPower.org](mailto:EducationInfo@PublicPower.org)



# CERTIFICATE COMPLETION REQUIREMENTS

After completing the required coursework, participants must:

## 1. Pass an online exam

Consists of 100 multiple choice questions, based on the four required courses.

- You must score at least a 75% to pass the exam. You'll have two opportunities to pass the test.

## 2. Submit a customer action plan

Demonstrate how your utility plans to address the needs of a selected account.

- You must score at least a 75% to pass.

## Timing

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

## Enrollment Fees\*

### APPA Members

Registration received on or before September 9      \$2,600

Registration received after September 9      \$2,850

### Nonmembers

Registration received on or before September 9      \$4,800

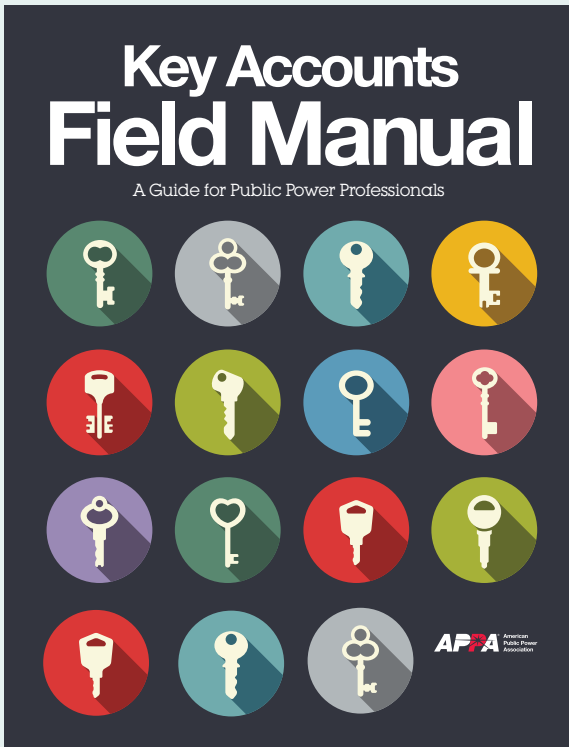
Registration received after September 9      \$5,050

The enrollment fee includes the four courses, cost of study material, exam grading and review of the customer action plan.

\*For more information and pricing for the Electric Utility Industry Overview course opt-out option, contact [EducationInfo@PublicPower.org](mailto:EducationInfo@PublicPower.org).

## REGISTRATION INFORMATION

To register, visit [www.PublicPower.org/Academy](http://www.PublicPower.org/Academy) and click on **Institutes & Certificates**.



Attendees will receive a copy of the Association's *Key Accounts Field Manual* and access to the Key Accounts Bundle, which includes post-course reference items, tools and resources.

# 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. For information regarding certification status, attendance requirements and obtaining attendees transcripts, visit [www.PublicPower.org](http://www.PublicPower.org) or contact [EducationInfo@PublicPower.org](mailto:EducationInfo@PublicPower.org) or 202/467-2919.



## **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.learning-market.org](http://www.learning-market.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](mailto:EducationInfo@PublicPower.org).

## **Professional Development Hours (PDHs)**

The American Public Power Association's 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.



American Public Power Association  
2451 Crystal Drive  
Suite 1000  
Arlington, VA 22202-4804

Standard  
Presorted  
U.S. Postage Paid  
Arlington, VA  
Permit No. 188

Visit us at [www.PublicPower.org/Academy](http://www.PublicPower.org/Academy)