



AGENDA

Utility Collections: Trends & Challenges

Recommended CEUs .7/PDHs 6.5/CPEs 7.8

Field of Study: Specialized Knowledge

Wednesday

8:30 a.m. Section One

- Course Introduction and Overview
- Discussion of Learning Objectives
- The Basics of Customer Service/Call Center Operations
 - Personnel
 - Software/Technology
 - Issues Handled
- What Makes a Good Customer Service Operation
 - Value of Fair and Consistent Collections Policies and Procedures

10:00 a.m. Break

10:15 a.m. Section Two

- Understanding Meter Reading, Billing, and Payment Schedules
- Understanding Basics of Utility Service Costs and Ratemaking, for Effective Response to Customer Queries
- Best Practices in Public Power for Policies and Procedures for Setting Up New Accounts, and Security Deposit Requirements
- Exercise: Break into groups to discuss how students are addressing New account issues at their utilities—report highlights back to class for further discussion.

Noon Lunch *(on your own)*

1:00 p.m. Section Three

- Best Practices in Public Power on How to Handle Payment Schedules and Overdue Accounts (skip tracking, liens, and credit agencies)
- Handling Collections In-House vs. Outsourcing

(over)

- Exercise: Break into groups to discuss how students are addressing payment schedules and overdue account issues at their utilities— report highlights back to class for further discussion.

3:00 p.m. Break

3:15 p.m. Section Four

- Open Discussion with Students About Issues at Their Own Utilities and Sharing Strategies for Resolving Them
- Brainstorm topics for special project students must complete in one year for APPA Certification. Each project combines an assessment of and a plan for improving one of the following topics:
 - Customer Service Culture Across the Organization
 - Payment & Non-Payment Policies and Procedures
 - Improving Operations of the Customer Service Office/Call Center
 - Customer Service Communications & Technologies
 - Topics for Student to Propose

4:30 p.m. Adjourn for the Day



LEARNING OUTCOMES

Utility Collections: Trends & Challenges

Recommended CEUs .7/PDHs 6.5/CPEs 7.8

Field of Study: Specialized Knowledge

Upon completion of this course, participants will be able to successfully:

1. Identify the roles of meter reading, billing, and payment schedules in the collections process.
2. Define the basics of utility service costs and ratemaking, for addressing customer inquiries.
3. Recognize the consequences of inconsistent or unclear collections procedures as well as the benefits of clear, published, and consistent policies.
4. Describe the role of technology and information systems in the collections process.
5. Explain the issues surrounding keeping the collections process in house or outsourcing it to an external company.
6. Apply public power best practices when setting up new accounts.
7. Utilize public power best practices for payment schedules and overdue accounts.
8. Design a plan for assessing and improving a customer service policy or procedure, as required for APPA's Customer Service Management Certificate.