

THE ACADEMY

AMERICAN PUBLIC
POWER ASSOCIATION

The Effective Key Accounts Toolbox

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PublicPower.org/Academy

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Key Accounts Field Manual

A Guide for Public Power Professionals



APAA American
Public Power
Association

Course Expectations

Discover and appreciate the various tools and resources available to the Key Accounts Representative

Participate

Discuss how to evaluate, select, and implement various tools

Learn many ideas and scenarios:

- Not all will be applicable
- Pick the ones that fit

Course Objectives

Understand how to evaluate and leverage tools to set up your program for success

Learn what tools are available to you

Learn how to gain approval for the tools you desire to use in your program

Earn the APPA Key Public Power Account Executive (KPPAE) Designation

Gain a source of motivation and inspiration

Program Requirements

Complete four APPA-sponsored key account courses:

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

Pass key accounts exam (75%)

Submit one Customer Action Plan (CAP) (70% to pass)

Complete the requirements after the completion of the course training within one year

What is a Key Account Tool?

Anything that advances the relationship and adds value to the key account

The CRM



Customer Relationship Management (CRM)

Allows you to store all critical information regarding your account:

- Contact information
- Relationship information
- Facility information
- Utility information

35 key accounts + (3x3x3 rule) = 105 relationships to manage and that doesn't count all your stakeholders

CRM Facility Information

Customer name

Mobility factor

Number and location of utility meters on site

What substation circuit(s)

Customer's future expansion or reduction plans

Utility rate applied to customer

Outage history

Billing and load history

Number of employees

Mission, product line, and competitors

Website and social media sites

Targeted opportunities to serve the customer

What other facility information would you want to capture?

CRM Contact Information

Full Name

Title and level within company: i.e., decision-maker/executive, middle management, employee, or influencer

Office and cell phone numbers

Do they prefer e-mail or texts

When do they prefer to be contacted

Family information — spouse, children, pets

Hobbies/interests

Social media activity

What other contact information would you capture?

Use Internal Data to Populate CRM

Usage (water, gas, and electricity)

Billing and payment history

Hazardous material storage

DSM reports and audits

CIS – Contact names, e-mails, and addresses

Outage history

Power-quality analysis

Permits and zoning requests

Property taxes

Load and power factors

Interview Other Departments

Detailed information on the customer:

- Site data
- Equipment
- Energy usage
- Contacts and interactions
- Business process
- Their competitors

What are some departments you can interview?

Other Sources of Information

Joint Action Agencies

American Public Power Association

Trade associations

Trade publications

The internet

Other utilities with similar customers

Sampling or surveying

The Power of the CRM

Central collection point of all contact interaction and history

A mechanism to track relationships

- Allows you to track the relationship with each contact and how it affects the overall relationship with the account and the community

A mechanism to track projects

- A project is any request from a key account or interaction with a key account that requires action
- Classify each project – power, water, wastewater, misc.
- Misc. projects are important because it's an indicator of the relationship with the account. The more misc. projects the better

Can be accessed via mobile app

Choosing a CRM

Keep it simple

There is no utility-focused CRM on the market

Beware of connectivity with other departments

- Key accounts are highly specialized
- Increases cost

Multi-users – allows for multiple users to access data

Mobile solution

Custom fields

Choosing a CRM Continued

Good reports

Price – expect a low monthly fee

Solid vendor background

- Other utility customers
- At least five years old

Doesn't get IT overly excited

- Cloud vs. hosted

CRMs on the Market

ACT!

SalesLogix

Salesforce

Pipedrive

Hubspot

Outlook

MS Excel

A woman with dark hair, wearing a magenta top and a grey cardigan, is smiling and giving two thumbs up. She is wearing a black headset with a microphone. In front of her is a silver laptop. The background consists of a red brick wall on the left and a window with a view of greenery on the right.

The Customer Survey

The Customer Survey

Be deliberate

Know what you want to identify before you start the research

- This allows a quality survey instrument to be developed
- This will keep you from missing useful data and information

Determine what you will do with the data

Gain approval to implement the survey

The Customer Survey

Two types:

- Basic
- Professional

Do both

- Basic annually and professional every other year

The Basic Survey

Takes a snapshot of the following:

- Mood of the key accounts community
- Gaps in service
- Perception of your program

Types:

- Internet-based like Survey Monkey
- Paper-based questions sent to the customer for response
- Series of questions asked during on-site visits

Professional Survey Principles

Based on a random sample

Statistically accurate and reliable

Acquires specific KA data or data on a class of KAs

Survey instrument makes or breaks the data quality

Use a professional

How To Implement a Survey

Bring key insiders into the planning process

Look to other public power utility surveys as a starter

Partner with others

Ensure the quality of the survey instrument

Use care when structuring the survey questions

Use experienced, professionally trained callers/interviewers

Use professionals to tabulate and adjust the data

Be Ready for Action

Never engage in research unless you plan to act on the results

That means ...never do “Feel Good” research, which is research that asks how many customers “like” you

Survey = Actionable Research

Conduct research to help identify a course of action to:

- Improve a market position
- Improve a satisfaction driver
- Identify potential new product and service offerings
- Resolve specific problems
- Increase sales

Annual Meeting



Common Obstacles

Key account participation

Funds

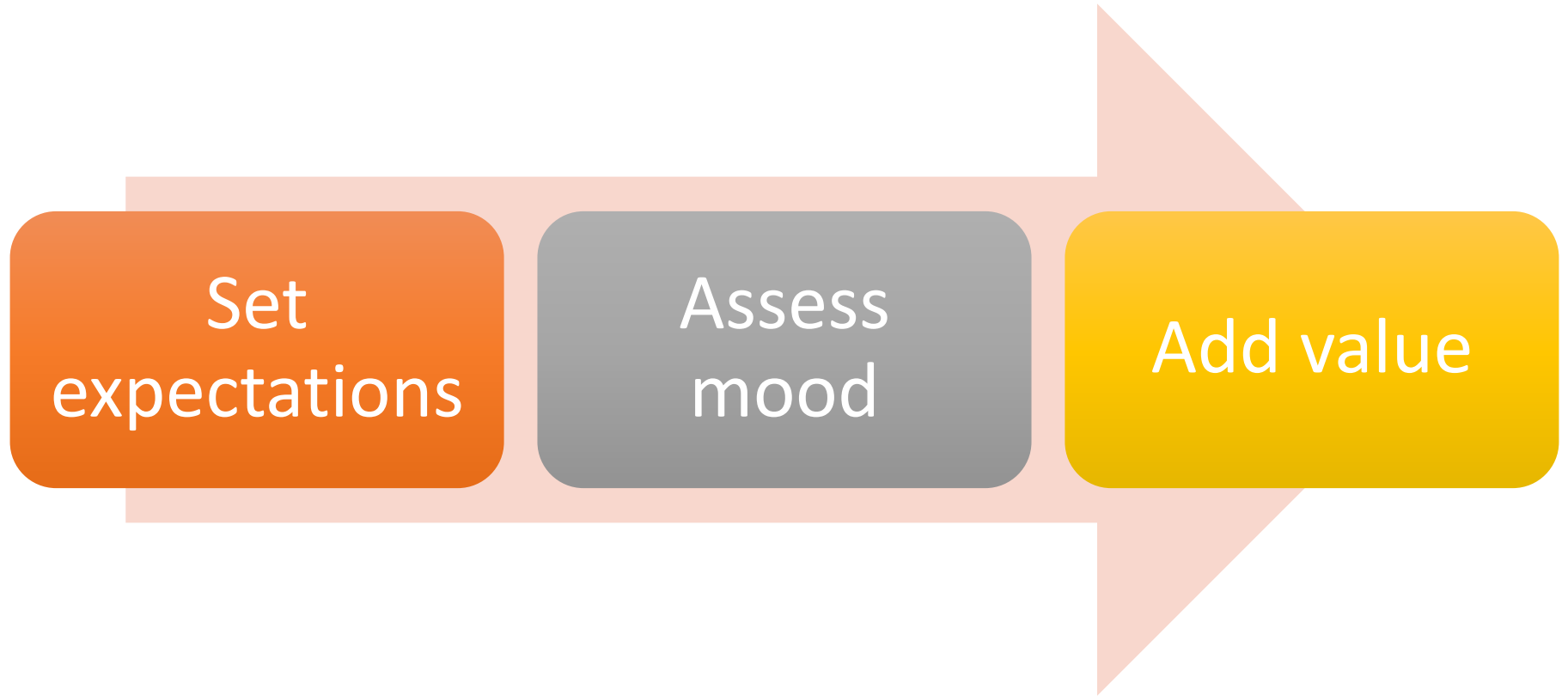
Not sure how to host one

Lack of utility support

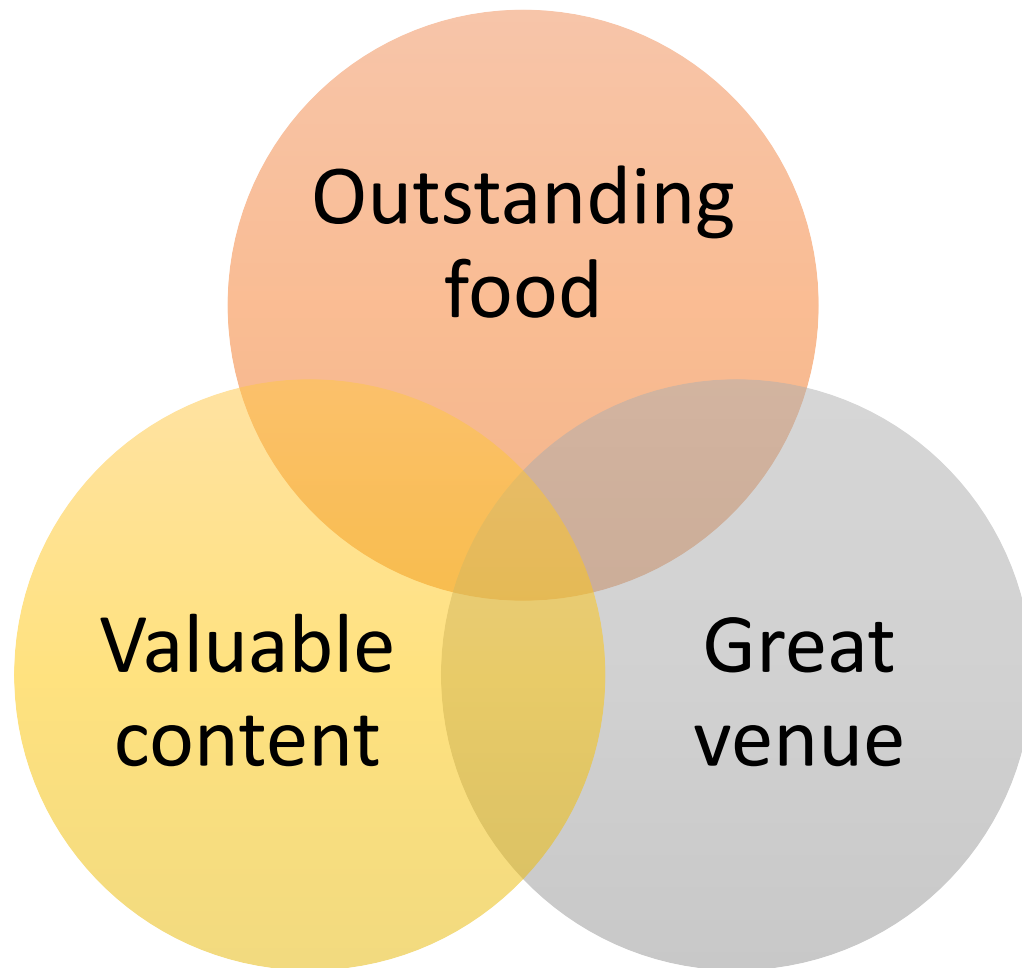
No time

Do you struggle with any of these?

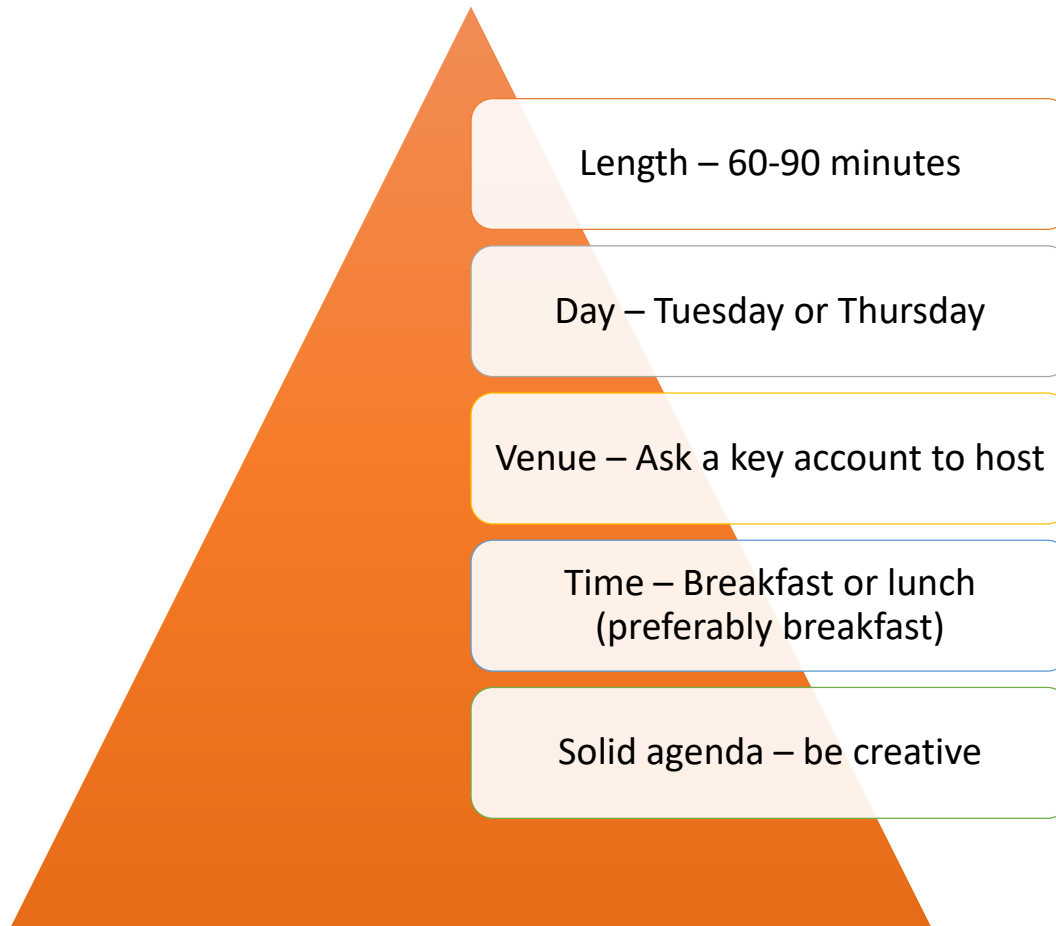
Annual Meeting Goals



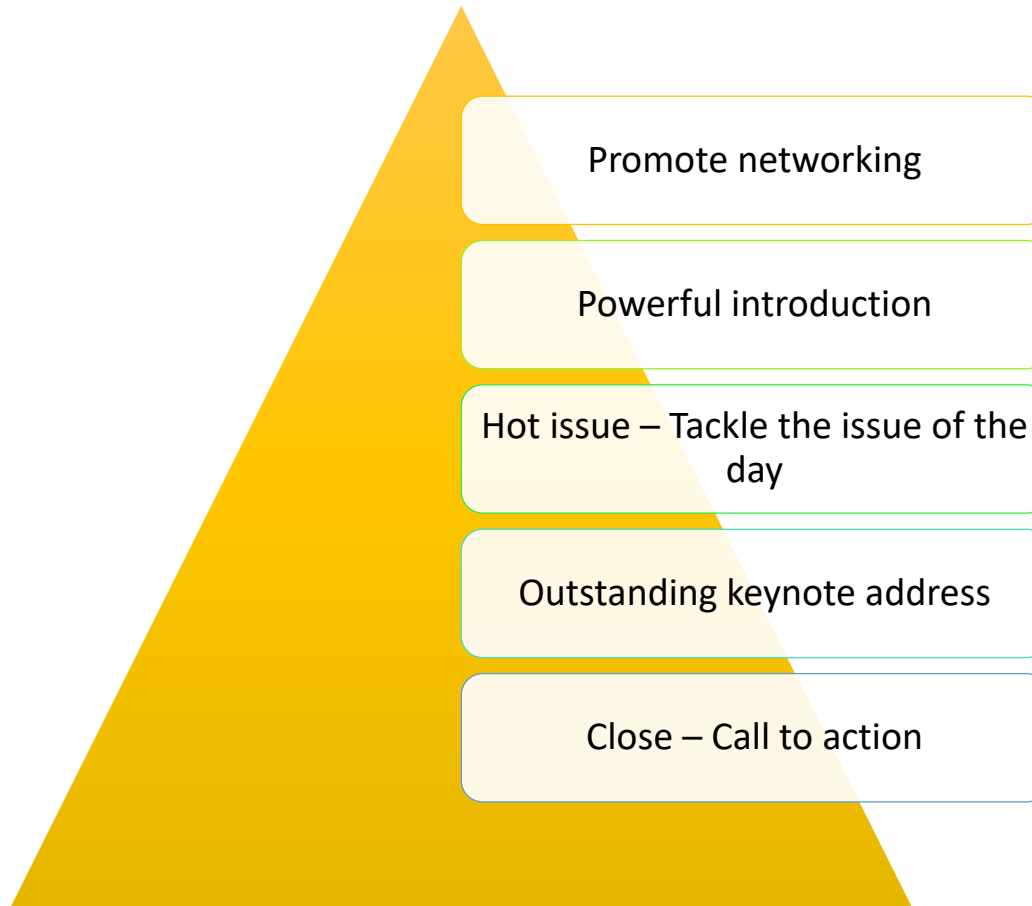
Must have!



Annual Meeting Principles



Solid Agenda Principles



Pro Tip #9 - Go Beyond Utility Issues

Organize presentation topics beyond utility-related issues

Bring in subject matter experts in areas of interest to your audience

Be creative and have fun with your agenda



Sample Agenda

8:00 - 8:10 Welcome/Opening Breakfast

8:10 – 8:50 State of the City

8:50 – 9:00 New Snow Removal Plan

9:00 – 9:25 Customer Testimonials

9:25 – 9:30 Call to Action

Pitfall #9 - Don't Be Boring

Avoid boring speakers!

Protect your audience and make sure you use quality speakers

If you haven't heard them speak, do not put them on your agenda



Meeting Packets

Utility information

Attendee list

- Gain permission from customers first

Program and service information

Survey

Special coupon

Two Key Drivers

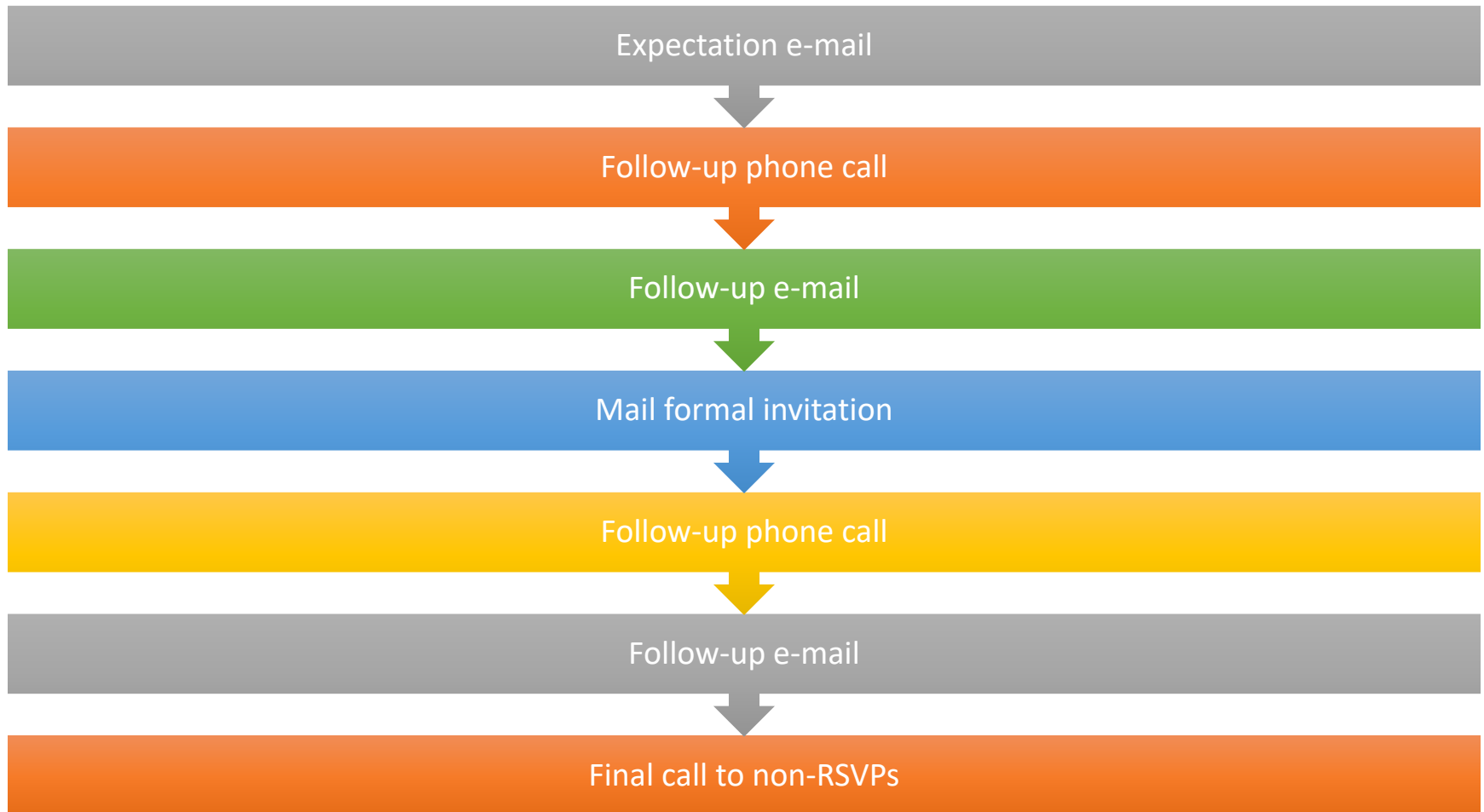
Commitment to follow-up (Pg. 55 of Field Manual)

100% participation

A person wearing a white dress shirt and a black necktie is holding a small, white rectangular card with both hands. The card is centered in the frame and features the word "Invitation" written in a black, casual script font. The person's face is not visible, and the background is a plain, light color.

Invitation

Invitation Process



Advocacy



Advocacy = Trust

How do you know?

Ask!

Miscellaneous projects



Other Common Tools

Common KA Programs/Services

Bill consolidation

Power quality services

Distributed energy resources

Back-up generation

Energy audits

Lighting

Economic development

Load management and energy management

Motor services

High-voltage maintenance

Bill Consolidation

Combines all utility bills for all of their facilities into one comprehensive statement

- Can you do this?
- Are you doing this?

Allows the customer to compare various utilities and facilities with ease

Helps reduce manpower and late charges

Bill Consolidation

Check the billing address for all of your key accounts

If the billing address is different than their corporate headquarters or service address, there is a good chance they are using a services company

Check their records for authorization to send the bill to a third party

Power Quality Services

Today more than ever before, businesses need reliable uninterrupted power

Use audits and equipment recommendations

May need to tap up voltage

May be bound to a premium power rate

How is your utility approaching power quality issues?

Distributed Energy Resources

DER is becoming a major consideration with large commercial and industrial customers

Customer self-generation using solar and wind backed up with batteries will likely be a major factor within the next 10 years in your state and much sooner in states like California, Hawaii, and New York

Distributed Energy Resources

If your rates are over 15¢/kWh you will likely be facing customer self-generation within the next 5 years

Determine what your utility is doing in response to this paradigm shift away from the traditional vertically integrated supply chain

Identify ways to work with the KA if they are considering self-generation

Distributed Energy Resources

Distributed energy resources and self generation are gaining footholds in large C&I customers' strategic plans

Work with your KA customers if they are considering DER

It's better to be a partner than an opponent

Understand DER options being considered in their industry

Back-Up Generation

Can be used as peak capacity in constrained markets

Should have a “standard offer” contract

Some of your customers are required to have back-up generation making this a great starting point

Energy Audits

The customer expects you to do this

For most electric and gas utilities this is the first step in getting to know the customer's business process

Many contract services perform this function

A high-quality energy audit for a C&I customer will cost thousands of dollars

A great tool for targeting value-added products and services

Energy Audits

Look for grants and any federal assistance you can find

Educational institutions may be available for class projects

The first step in making any equipment recommendation

In some markets this is going to be a very important project

Try to take the audit past energy to include process efficiency

Offer financing, if possible, to increase recommendation follow-up

C&I Lighting

This can include indoor and parking lot lighting

Recycling and disposing lamps and ballasts may be a good lead-in

As with any energy retrofit, this can be coupled with end-use pricing scenario or rebates

Economic Development

Target your community's economic development activities to assist your key accounts

Work with them to secure businesses that are a part of their programs

Beware of helping a competitor of the KA into the market

- This includes a company that will compete for the local workforce

Load & Energy Management

How are you using smart meters with KAs?

Allows the customer to better control how they consume electricity

May lower your costs as well by on-peak demand reductions

Often justifies the need for energy-savings modifications

May uncover opportunities for alternative rates

Motor and HVAC Services

Inductive loads are typically the largest consumer of energy at their facility

HVAC systems are large consumers but also key to the customer's comfort level

This, as with any service you provide, must have the same type of response time as electric service

This is covered extensively in the APPA publication "Energy Services That Work"

High-Voltage Maintenance

For direct service/primary metered customer

Requires special training for your crews

Allows the customer to reduce staff or contractors

Ties the customer to you through value-added service

Rate Analysis & Contract Rates

Rate analysis ensures customers receive the best rate for their load profile

Rate pirates will do this if you don't

Contract rates have value – get something for them

You do not need to lower the price to get a contract



The Decision Matrix

Why a Decision Matrix?

Solid Course of Action Analysis

Tangible evidence

Process oriented

Decision Matrix Principles



Screening Criteria

“Go” or “No Go”

Gets the project in the door

Weighted Criteria



Customer Contracts											
A	B	C	D	E	F	G	H	I	J	K	L
Rank	Program	Cost (5)	Time (3)	Customer Focus (1)	Total		Rating	Cost	Time	Customer Focused	
1	Newsletter	20	15	3	38		5	\$0-\$1,000	Low	Mutual	
2	Load Profiling	15	9	5	29		4	\$1001 - \$5,000			
3	Annual Meeting	20	3	5	28		3	\$5,001 - \$10,000	Moderate	Yes	
4	Infrared Imaging	15	3	5	23		2	\$10,001 - \$15,000			
5	Economic Development Rate	5	15	3	23		1	\$15,000 +	High	No	
6	Campus Billing	5	9	3	17						
7	Lighting Rebates	5	3	5	13						
8	Customer Contracts	5	3	3	11						

Utility Organizations

American Public Power Association

- Training and workshops
- E-Discussion group and forums
- Committees
- Key Accounts Listserv
- *Public Power Daily* Newsletter
- *Public Power* Magazine



Utility Organizations

Joint Action Agencies can help with:

- Working groups
- Segment assistance
- Training
- Grants \$\$\$\$
- Collective purchasing

Trade Associations

Join the associations in which your key accounts are members

Participate in their training and information exchanges

Sponsor local events and outings

Technical training

Industry segment publications and data

Energy Services Companies

Are you using an ESCO?

Offer buying power on products and services your key accounts need

Make sure the group you talk to understands key accounts

The money for these folks is in mass markets

Make sure their product portfolio matches your customers' needs

Professional Associations

Technical

- Engineering
- Accounting
- Lighting and motors

Sales

- National Association of Sales Professionals
- Sales Professional Network

Key account reps in other industries

Networking

Civic organizations

Business associates

Friends and acquaintances

Other utility staff who do the same work

- Those you meet at conferences
- Those you meet in courses like this one

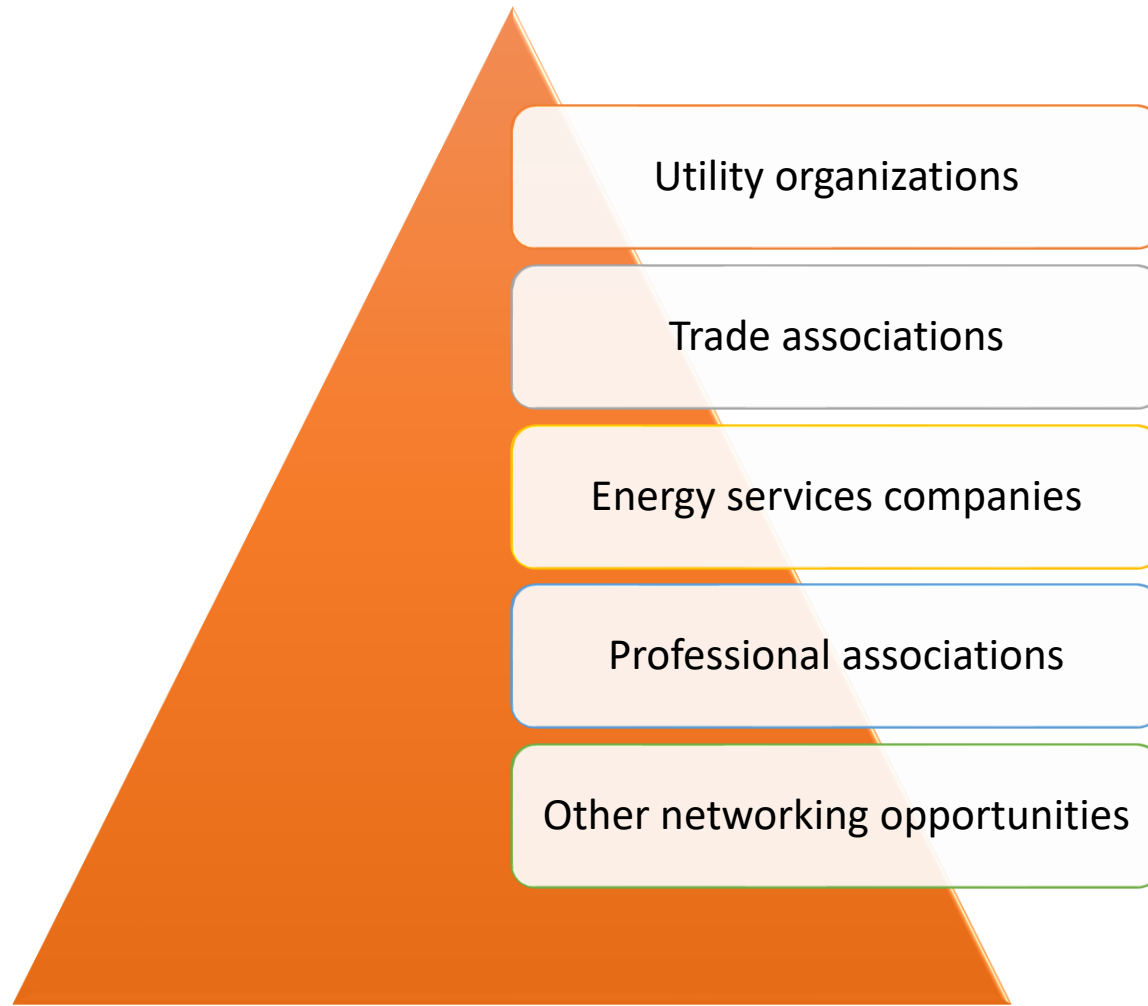
Key Accounts Mastermind



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mastermind1

Summary



Conclusion

Your most effective tool is the relationship you have with your customers. If your relationship is strong, then everything else will work out.

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Thank you!

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The Customer Action Plan Workshop

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Business Plan
Vs.
Customer Action Plan





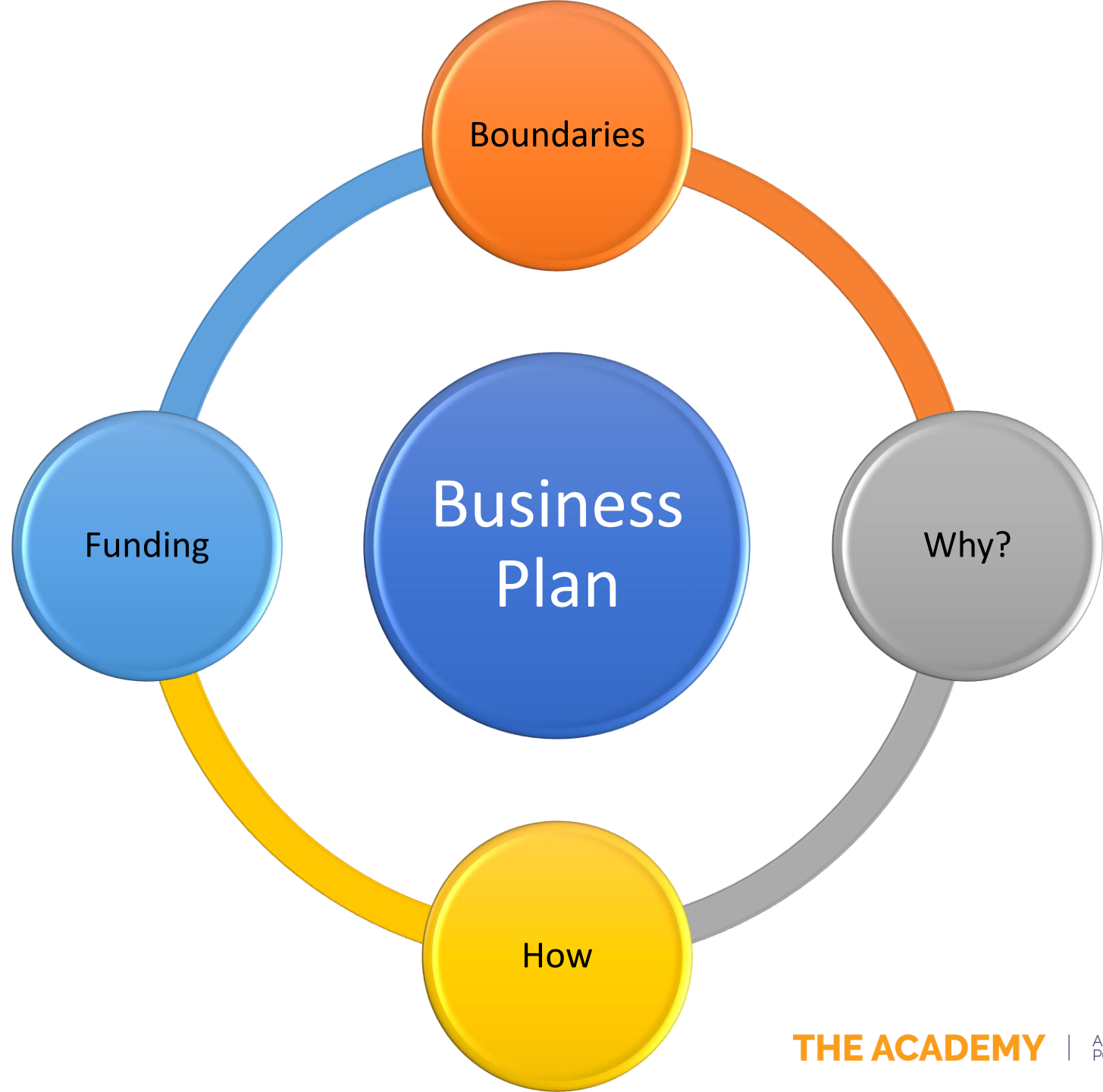
“For the flower to blossom,
you need the right soil as well
as the right seed. The same is
true to cultivate good thinking.”

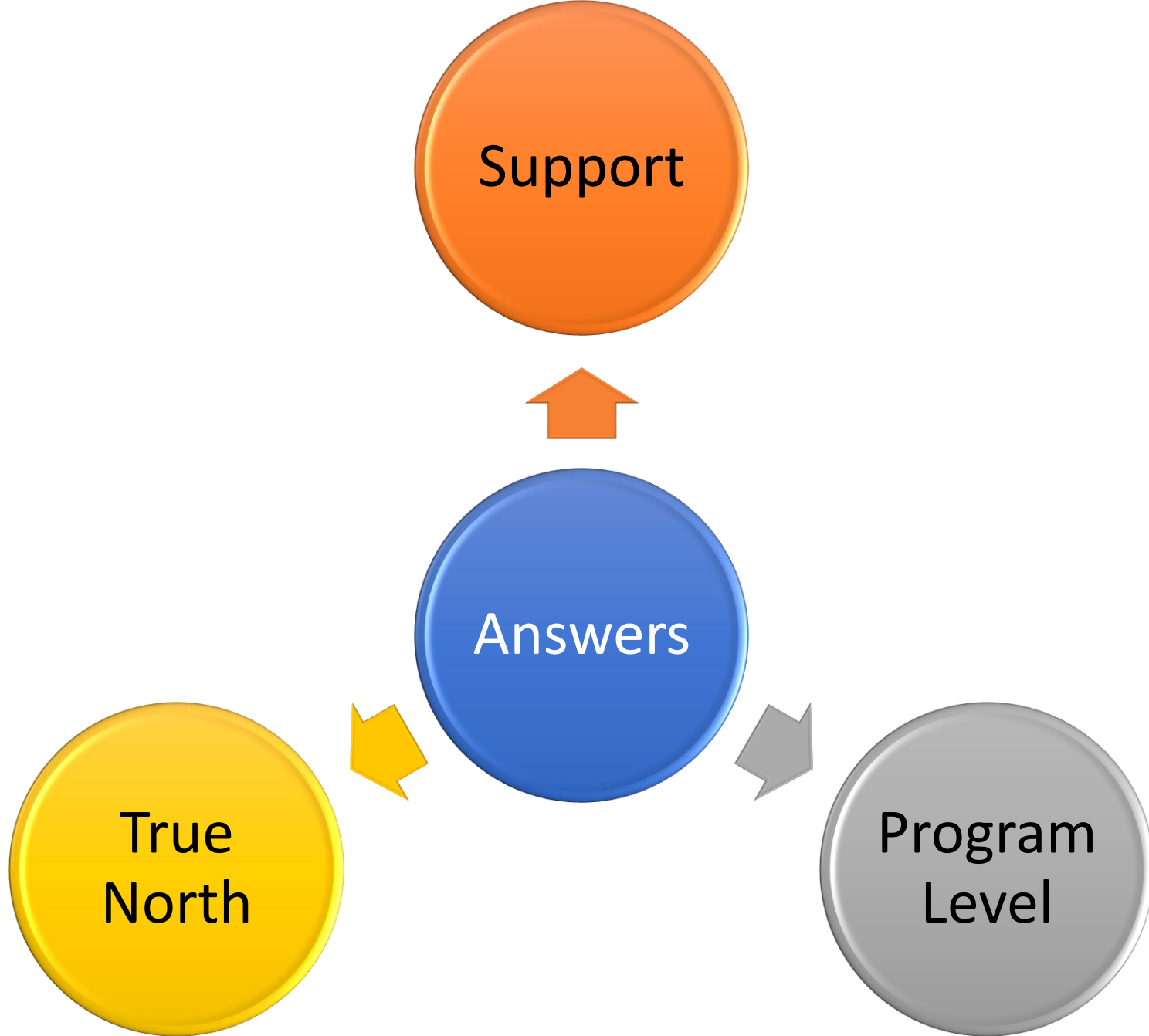
-William Bernbach





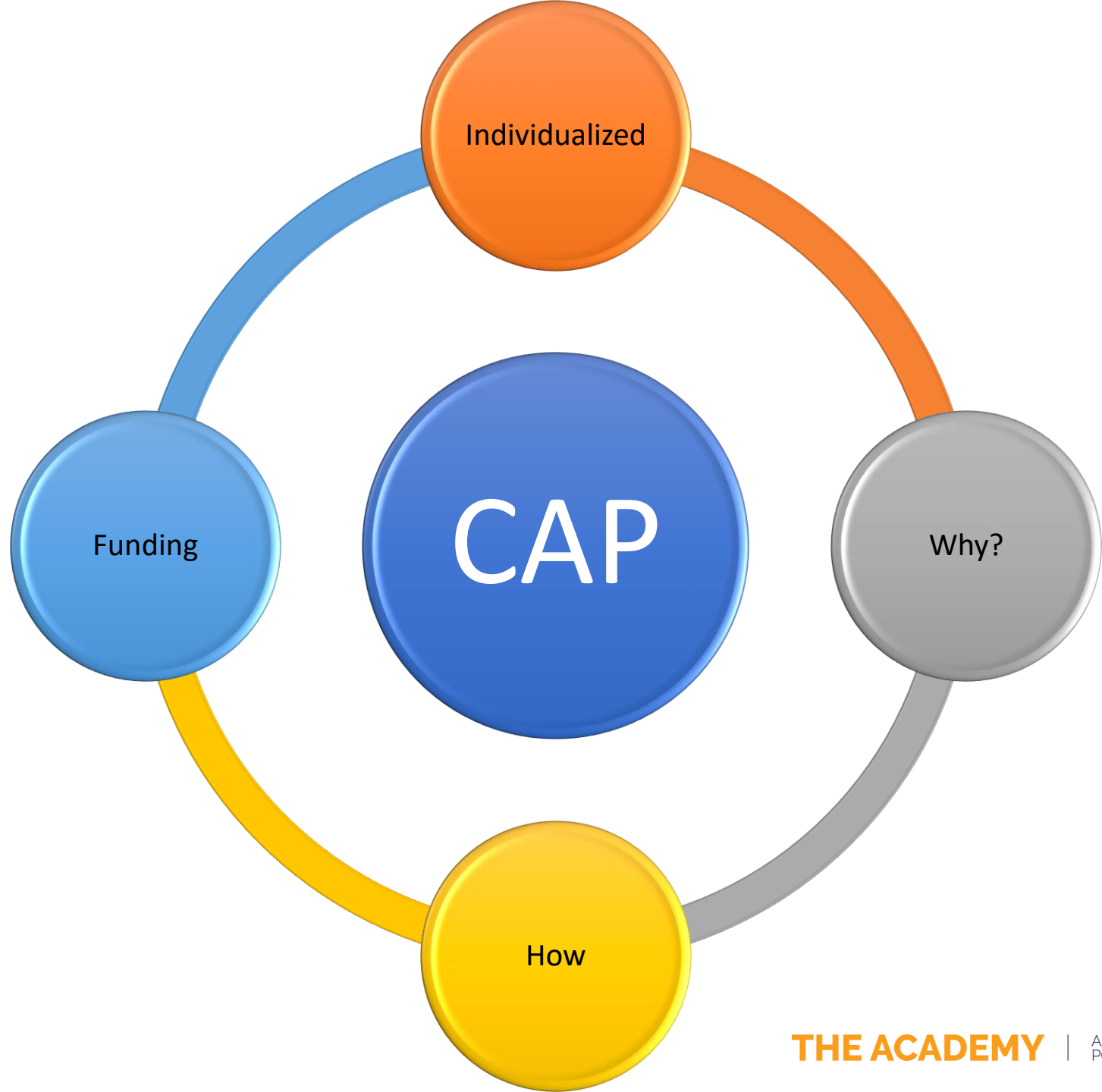
Business Plan

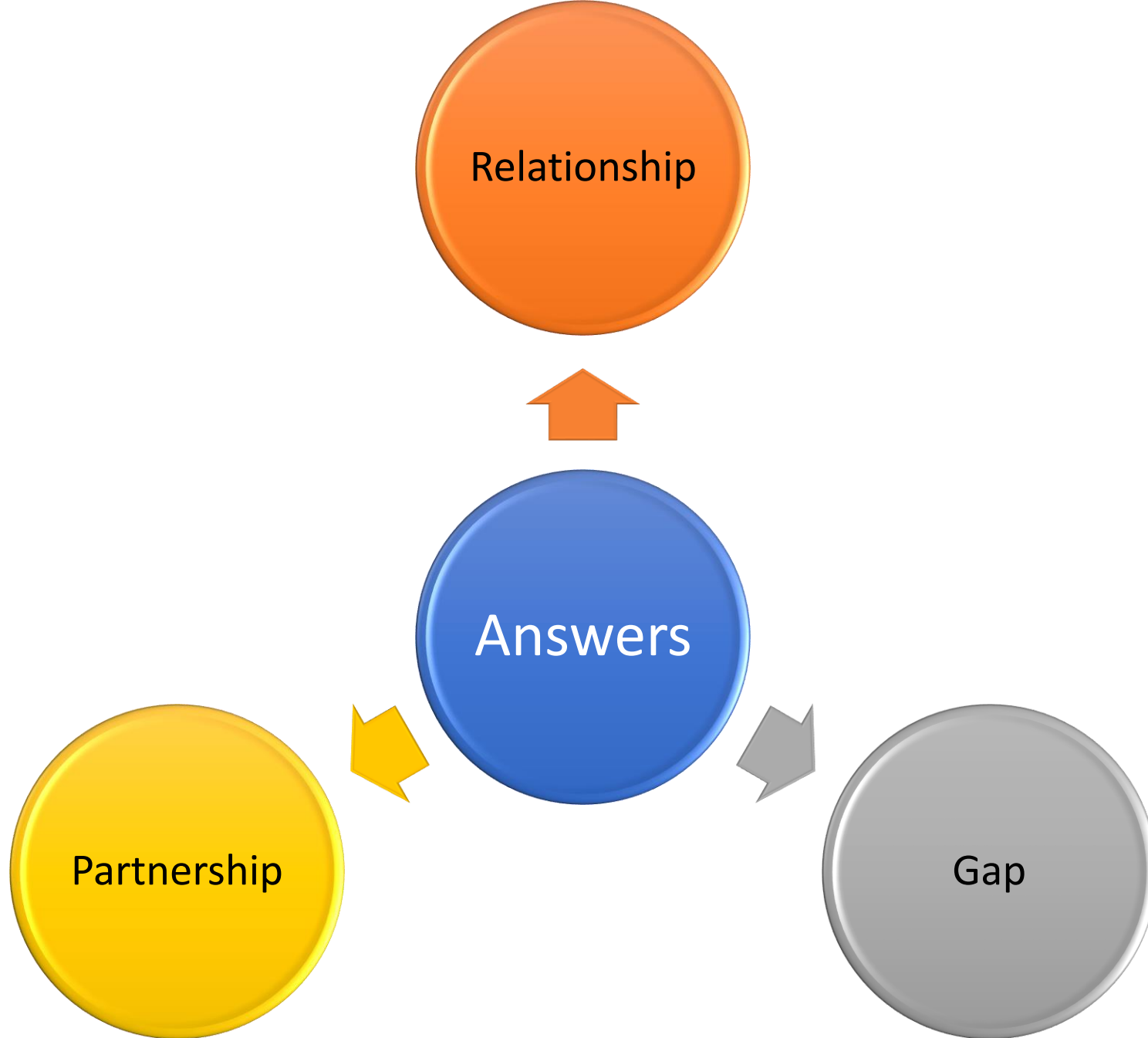




Customer Action Plan









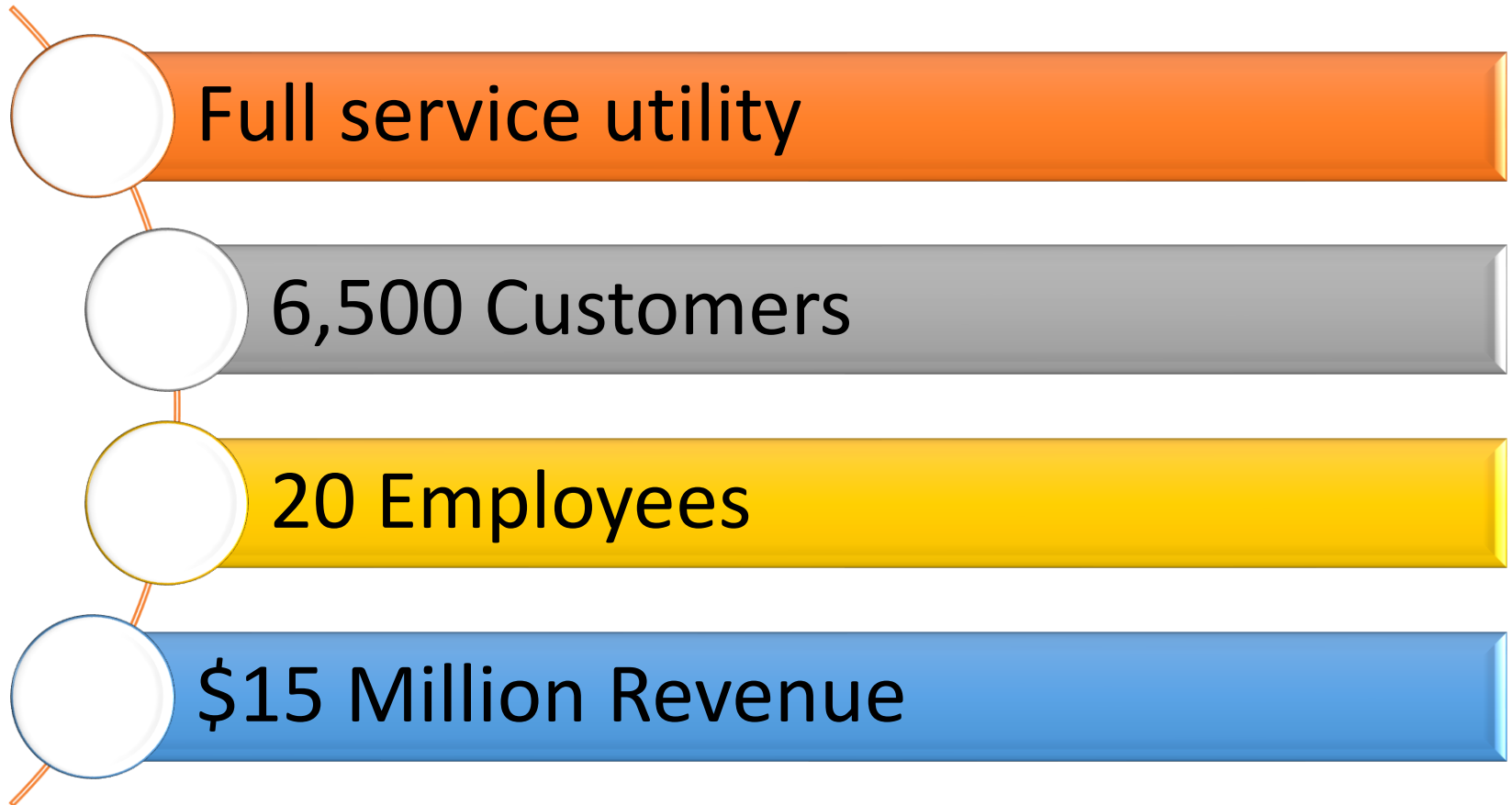


CAP Case Study

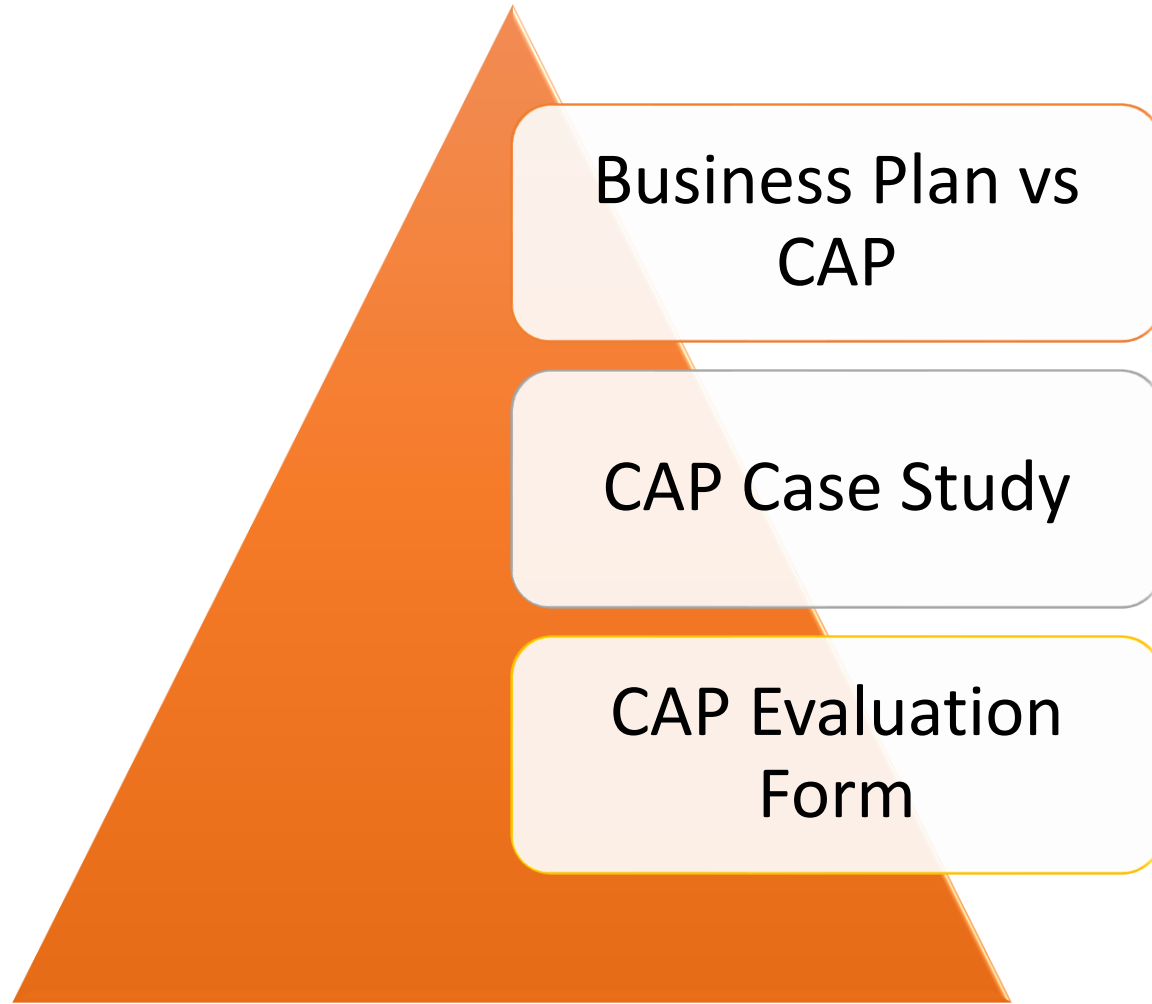
Detroit Lakes, MN



Detroit Lakes



Summary



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Thank you!