



SAMPLE AGENDA

Utilizing Technology to Enhance Customer Service

Recommended CEUs .3/PDHs 3.25/CPEs 3.8

Field of Study: Specialized Knowledge

8:30 a.m. Section One: Creating a Common Language Around Technology

- Course introduction and overview
 - Review of APPA Customer Service Management Certificate Program Requirements
- Discussion of learning objectives
- What is technology?
 - The evolution of technology
 - Technology and the economy
- Public Power's embrace of technology
 - Public power's business model has reinforced a "slow and steady" approach
- Information Technology vs. Operational Technology
 - Implication of grid technologies on customer service
 - Assessing current technology levels at your utility related to customer service
 - Discussion: How is technology impacting your daily operations?

9:30 a.m. Section Two: Customer Service in the Digital Era

- Understanding your customers and their technology needs and expectations
 - Defining customer segments
 - Evolving customer expectations
 - Description of tools and systems available for customer service
 - Discussion: Do you know your customers and their technology needs?

9:50 a.m. Break

10:05 a.m. Section Two: Customer Service in the Digital Era *(continued)*

- Making effective technology decisions to enhance customer service
 - What can go wrong: common technology missteps in public power
 - Forcing solutions to fit into outdated business practices
 - Letting technology dictate practices that are cumbersome to staff and/or customers
 - Identifying your utility's technology needs
 - Establishing a business case or ROI analysis

- Integrating different software solutions
- Discussion: Is technology solving all your issues?

10:30 a.m. Section Three: Technology Roadmap & Workforce Challenges

- Value of a technology roadmap
 - Integration across all utility functions
 - Challenges to creating and implementing a Technology Roadmap
 - Steps to develop a Technology Roadmap
 - Discussion: What would a Technology Roadmap provide to your utility?
 - Exercise: Identify three to five strategic issues the roadmap would address
- How technology is changing the role of the customer service representative
 - Evolving skillsets
 - Recruiting and retention challenges
 - Discussion: What is your utility doing to attract and retain qualified customer service employees?

11:15 a.m. Section Four: The Platform for Tomorrow's Technology

- Urgency related to cybersecurity
- Additional new technologies
 - Hosted services
 - Cloud based services
 - Software as a service
 - Why bitcoin and blockchain for business technologies matter
 - Discussion: The future role of customer service and what is needed to be successful

Noon Course Adjourns



SAMPLE LEARNING OUTCOMES

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

1. Assess the current technology profile for customer service at their utility
2. Explain how information and operational technologies impact the ways in which the utility provides service to customers
3. Recognize the importance of customer segmentation and customer needs and expectations
4. Demonstrate the need for an information technology roadmap
5. Explain today's workforce challenges
6. Explore technology platforms for future service offerings