



The Effective Key Accounts Toolbox

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About the Instructor

Erick Rheam

- West Point Graduate 1995, BS Eng. Mgmt
- Military Police Officer 1995-2000
- Developed first key accounts program at Anderson (IN) Municipal Light & Power 2000
- Developed second key accounts program at Loveland (CO) Water & Power 2002
- APPA Key Accounts Chair and Customer Connections Section Vice Chair
- Key Public Power Acct Exec. Designation in 2004
- Co-authored Key Accounts Field Manual in 2014



Key Accounts Field Manual

A Guide for Public Power Professionals





Course Expectations

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

Interactive

Discuss how to evaluate, select and implement various tools

Discuss 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 your program up 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

A source of motivation and inspiration

Certification Requirements



Complete five APPA sponsored key account courses:

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

Pass (75%) key accounts written test

Submit one Customer Action Plan (CAP)

You have 1 year to complete the requirements after the completion of the course training



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 park all critical information regarding your account:

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

35 key accounts + (3x3x3 rule) = 105 relationships to manage. 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, kids, 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 – Some 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 customers:

- Site data
- Equipment
- Energy usage
- Contacts and interactions
- Business process
- Yours and their competition

What are some departments you can interview?



Other Sources For Information

JAAAs

APPA

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

Record all interaction with the key accounts

- 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

It's mobile with apps in your phone



Choosing a CRM

Keep it simple

There is no utility focused CRM on the market

Beware of connectivity with other departments

- Key accounts is highly specialized
- Increases cost
- Not built for utilities

Multiusers – 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 5 years old

Doesn't get IT overly excited

- Cloud vs. hosted



CRMs on the Market

ACT!

SalesLogix

Salesforce

Outlook

MS Excel

Are there others?



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

The purpose is to get a snapshot on 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

A method to acquire specific KA data or data on a class of KA's

The survey instrument will make or break the data quality

Use a professional



How To Implement a Survey

Bring key insiders into the planning

Look to other public power systems surveys as a starter

Partner with others

The quality of the survey instrument is critical

Be very careful with the structure of the survey questions

Callers/interviewers must be trained, experienced professionals

Data tabulation & adjustment requires special knowledge



Be Ready for Action

Never engage in any type of research unless you plan to take action on the results

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



Survey = Actionable Research

Research should be done to help identify a course of action to:

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

Annual Meeting

A man in a dark suit is seen from behind, gesturing with his right hand towards a large, blurred audience seated in a conference hall. The audience members are wearing various business attire, and some are holding papers. The room has warm, orange-toned lighting, and the background is out of focus, emphasizing the speaker and the scale of the event.



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

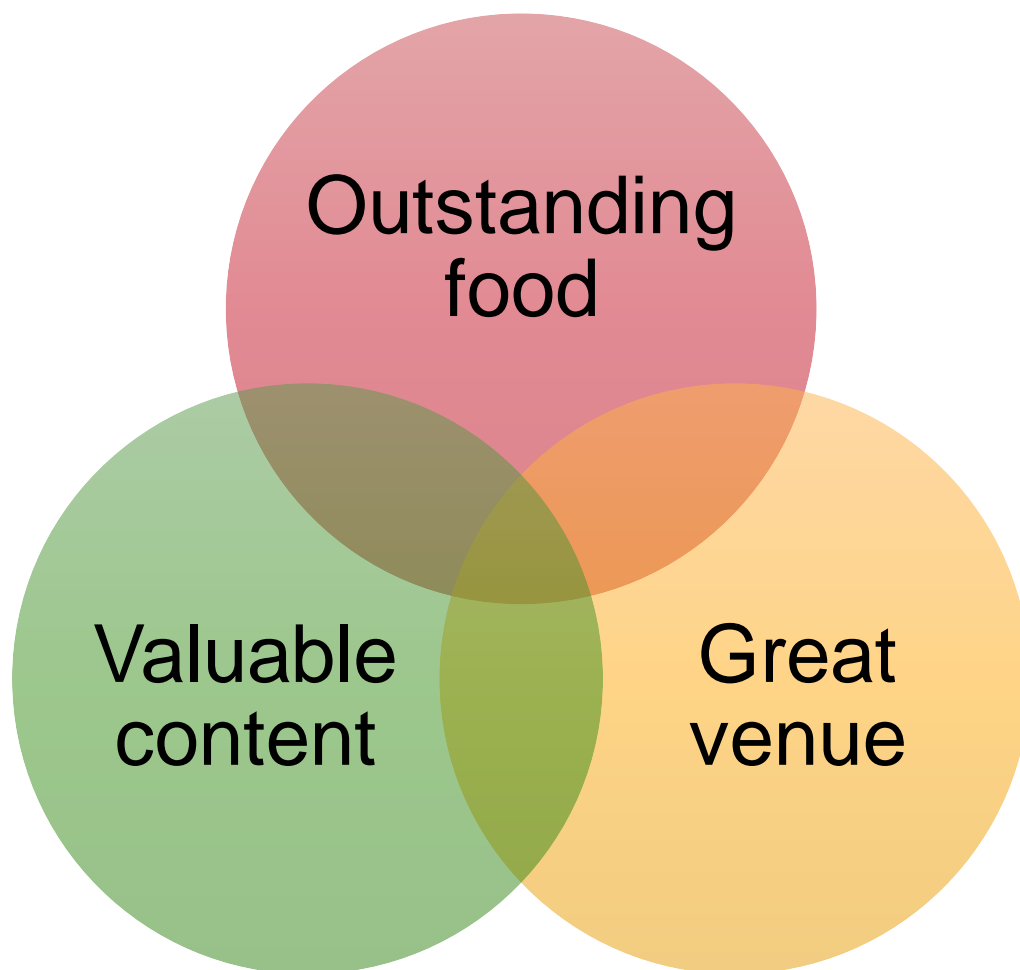


Set
expectations

Assess
mood

Add value

Must have!



Annual Meeting Principles

Length – 60-90 minutes

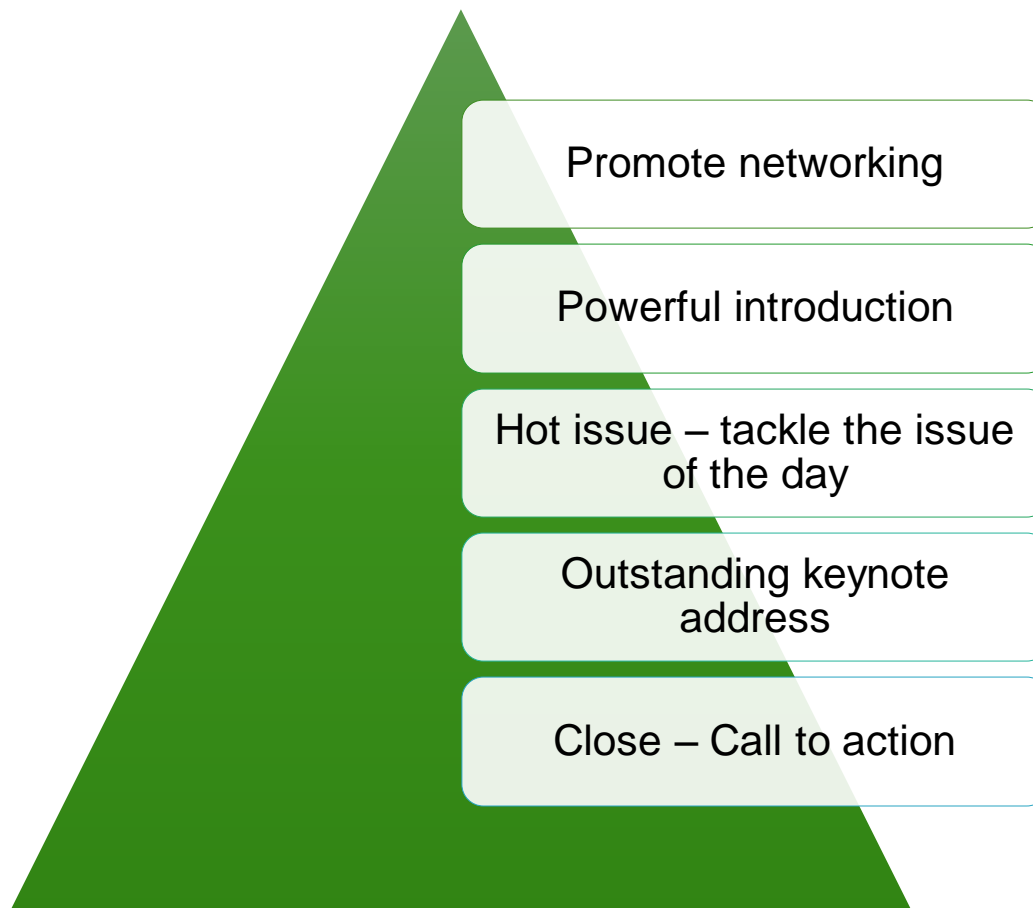
Day – Tuesday or Thursday

Venue – Ask a key account
to host it

Breakfast or lunch (preferably
breakfast)

Solid agenda – be creative

Solid Agenda Principles





Pro Tip #9: Go Beyond Utility

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/open breakfast

8:20 – 8:50 State of 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 bring quality speakers

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





Meeting Packets

Holds the majority of your utility information

Contact info on everyone in attendance

- 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 close-up photograph of a person wearing a white dress shirt and a black necktie. The person's hands are visible, holding a small, white rectangular card in front of their chest. The card has the word "Invitation" written on it in a black, cursive-style font. The background is a plain, light color, possibly a wall or a backdrop.

Invitation

Invitation Process

Expectation e-mail



Follow-up phone call



Follow-up e-mail



Mail formal invitation



Follow-up phone call



Follow-up e-mail



Final call to non-RSVPs

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 & energy management

Motor services

High voltage maintenance



Bill Consolidation

Combining 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 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 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 customer's strategic plans

Work with your KA customers if they are considering DER

It's better to be a partner than an opponent

Stay tuned with what DER options are happening 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 run into the thousands

A great tool for targeting value-added products & 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 disposal of lamps and ballasts may be a good lead in here

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 have better control over the way in which they consume electricity

May lower your costs as well by on peak demand reductions

Often justifies the need for energy savings modifications

May uncover opportunity 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 titled "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 by participating in the value-added service

Rate Analysis & Contract Rates



Rate analysis ensures the customer of the most economical 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

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				

Key Accounts Mastermind



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mastermind1

Utility Organizations



APPA

- Training and workshops
- E-Discussion group and forums
- Committees
- Hometown Connections
- Key Account List Serve
- 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

Sponsorship of 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

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



Summary

Customer Relationship Management (CRM)

Customer survey

Annual meeting

Advocacy

List of other common KA tools

Decision matrix

Networking ideas



Conclusion

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

Key Accounts Mastermind



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Thank you!

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