



EUCI Presents a Web Conference on:

# MEETING THE NEEDS OF LARGE BUSINESS CUSTOMERS

## ACCOUNT MANAGEMENT BEST PRACTICES

February 25, 2010



2:30 – 4:00 PM Eastern Time



EUCI is authorized  
by IACET to offer 0.1  
CEU for this program.



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### OVERVIEW

What do large business customers most want from their utility? Knowing the answer to this question is the first step to improving service to this critical customer segment. A utility account management team must align practices with the priorities of its customers.

E Source conducted a large national survey of business customers during the summer of 2009. In this webinar, the researchers will discuss the study findings that illustrate the areas where the utility industry is exceeding or falling short of customers' expectations. Instructors will also outline steps to help utility account managers increase customer satisfaction quickly.

This webinar will also focus on utility account management best practices in the areas of department structure, communications, and strategic planning. Industry-wide benchmarks of account management practices will allow you to compare your department alongside industry peers.

### LEARNING OBJECTIVES

- Discuss the aspects of utilities and utility account representatives that large businesses rate as most important. The focus will be on areas within the control of utility employees with a goal of improving business customer satisfaction.
- Demonstrate where the industry is over and under-performing relative to customer expectations
- Define best practices in structuring your account management department
- Explain ways to incorporate large business customer feedback into strategic plans and account representative performance goals

### AGENDA

The webinar will first discuss the results from recent market research focused on large business customers of electric and natural gas utilities. This will include:

- An overview of the sampling methodology and how responses were obtained from the employee best suited to answer questions about their utility and utility account representative
- A discussion of the issues large business customers rate as most important and how to use that information to improve service
- An examination of the impacts on customer satisfaction that result from various aspects of the performance by account reps and utility initiatives based on the results from a regression analysis
- A review of the areas in which the utility industry succeeded in meeting the needs of large business customers, as well as those areas where there is more work to be done

Having discussed the needs of large business customers, we will use the results of a recent assessment of utility account management department best practices to detail steps leading to improved customer satisfaction. These topics will include:

- A description of department structures that are best aligned with customer needs
- Methods of strategic account planning and customer segmentation
- How to effectively communicate with large business customers
- The most common areas for improvement, based on an industry review of account management departments

### IACET



EUCI has been approved as an

Authorized Provider by the International Association for Continuing Education and Training (IACET), 1760 Old Meadow Road, Suite 500, McLean, VA 22102. In obtaining this approval, EUCI has demonstrated that it complies with the ANSI/IACET Standards which are widely recognized as standards of good practice internationally.

As a result of their Authorized Provider membership status, EUCI is authorized to offer IACET CEUs for its programs that qualify under the ANSI/IACET Standards.

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#### Requirements for completing webinar:

Participants must be logged in to the web conference for its entirety to receive continuing education credit.

#### Methods of Instruction:

Web based PowerPoint presentation and on-line interactive question/answer session.

## INSTRUCTORS

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### **Mike Hildebrand, Director, Business Market Services, E Source**

Mike Hildebrand, leads the business market services at E Source (Managed Accounts Service and Small & Mid-sized Business Service). He has nearly 25 years of experience in the utility industry, with the last ten years of that managing business market strategy at Integrys, a parent company of six mid west utilities including Wisconsin Public Service in Green Bay and Peoples Gas in Chicago. In this capacity he helped create business call centers, reorganize account management organizations, develop products and services for business customers, create and implement a business segmentation model, was active with state and local business associations, and helped shape state led energy efficiency programs for businesses.

### **Chad Garrett, Product Manager, Business Market Service, E Source**

Chad Garrett, product manager of the E Source Business Market Service at E Source, concentrates on improving utility services to business customers. His areas of expertise include marketing and account management, as well as providing businesses with energy-efficiency and demand-response solutions. Garrett has also done extensive research on residential dynamic pricing and has led business and residential market research initiatives.

### **Sarah Weldon, Research Associate, E Source**

Sarah Weldon is a research associate at E Source, focusing primarily on issues related to utility customer care, business account management, the customer-facing side of intelligent grid, and e-business. Weldon researches and responds to Member Inquiries and does research and writing for reports on hot-topic issues in these areas. She has an extensive background in customer service and management.

## LOGGING IN TO THE WEB CONFERENCE

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After registration, each registrant will receive a confirmation of payment or an invoice, depending on method of payment. Each registrant will also receive an e-mail with appropriate login information and more information regarding the event 24 hours prior to the start of the event. To log on, you will need a Windows PC with a broadband connection and audio system.

### **WHAT IS A SINGLE SITE CONNECTION?**

A site connection allows a single connection to the web conference. That connection is open to any number of users in a collaborative setting. Because there are no travel expenses and only a single registration fee is required, each additional participant lowers the cost per participant significantly.

By purchasing a site connection, you can invite as many people as you would like to view and participate in the session from a single location. Set up the session in a conference room and project the presentation and chat on a large screen. You also have rights to distribute copies of the presentation materials to everyone involved. Please note that audio is received via the computer sound system and must be broadcast to your group.

If for any reason a relevant stakeholder cannot co-locate for the session, we encourage you to include that person by purchasing an additional connection at the reduced fee of US \$195 per session. This will ensure that every member of a team receives the same relevant, timely information in the most efficient way.

If you have any technical or purchasing questions, please contact us at (303) 770.8800.

Start Time: 2:30 PM Eastern Time

United States Regional Start Times:

11:30 AM Pacific :: 12:30 PM Mountain :: 1:30 PM Central :: 2:30 PM Eastern

Use the time zone converter (<http://www.timezoneconverter.com/cgi-bin/tzc.tzc>) to find your correct start time.

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### REGISTRATION INFORMATION

Mail or fax this form along with payment. You will receive a confirmation and/or invoice within 48 hours. Make checks payable to EUCI.

**MAIL DIRECTLY TO:**

EUCI  
4643 S. Ulster St., Ste. 350  
Denver, CO 80237, USA

**ONLINE:**

www.euci.com

**FAX TO:**

(303) 741.0849

**PHONE:**

(303) 770.8800

### REFUND / CANCELLATION POLICY

All cancellations received prior to February 12, 2010 will be subject to a US \$50 processing fee per web conference per registrant. Written cancellations received after this date will create a partial credit of the tuition good toward any other EUCI conference, publication or web conference. This credit will be valid for six months. No refunds will be given after February 12, 2010 in any case. In case of conference cancellation, EUCI's liability is limited to refund of the conference registration fee only.

### PLEASE REGISTER THE FOLLOWING

- Meeting the Needs of Large Business Customers: Account Management Best Practices, February 25, 2010, Single Site Connection: US \$345  
**Early Bird on or Before February 24, 2010: US \$295**

- Additional Connection: US \$245,  
**Early Bird on or Before February 24, 2010: US \$195 each**  
Number of additional connections: \_\_\_\_\_

- Web Conference Presentations Available on CD:**  
CDs are available 48 hours after the web conference is complete. The cost per CD is US\$295 [add US\$50 for international shipments]. Upon receipt of order and payment the CD will be shipped to you.

NOTE: All presentation CD sales are final and are non-refundable.

#### ENERGIZE WEEKLY

When you sign up for "Energize Weekly" you will receive a new conference presentation each week via email on a relevant industry topic. The presentations are selected from a massive library of over 1000 current presentations that EUCI has gathered during its 22 years organizing conferences.

- Sign me up for "Energize Weekly"**

How did you hear about this event?  
(Direct email, Colleague, Speaker(s), etc.)

\_\_\_\_\_

Name \_\_\_\_\_ Job Title \_\_\_\_\_

E-Mail \_\_\_\_\_

Company \_\_\_\_\_ Telephone \_\_\_\_\_

Address \_\_\_\_\_ City \_\_\_\_\_ State \_\_\_\_\_ Zip \_\_\_\_\_

### PAYMENT METHOD

Please charge my credit card:  Visa  MC  AMEX  Discover Security Code \_\_\_\_\_

Visa and MC cards have a 3 digit code on the signature panel on the back of the card, following the account number. American Express cards have a 4 digit code on the front of the card, above the card number.

Name on Card \_\_\_\_\_ Signature \_\_\_\_\_

Account Number \_\_\_\_\_ Exp. Date \_\_\_\_\_

Card Holder Phone Number \_\_\_\_\_

Billing Address \_\_\_\_\_ Billing Zip Code \_\_\_\_\_

Or enclosed is a check for \$ \_\_\_\_\_ to cover \_\_\_\_\_ connections.

**W865**