



## WEBINARS (CONTINUED)

### Serving Internal Customers — Working Together for Service Success

July 12 (1 to 2:30 p.m. Central Time)

To serve external customers (the end users of products and services), employees must work together in an atmosphere of mutual trust and support. Of the three dimensions of quality service — human, business and hidden — the latter might be the most important. The hidden dimension includes all those things that go on behind the scenes that the customers don't see. These include the policies, procedures, rules, regulations, work flow and most importantly, the relationships among employees. If the hidden dimension is not in good working order, service to the external customers always suffers.

#### KEY TOPICS:

- ▶ Dimensions of service — human, business and hidden
- ▶ Importance of internal customer service
- ▶ Key issues in achieving good internal service
- ▶ Building blocks of collaborative working relationships

INSTRUCTOR: Debra Ballard



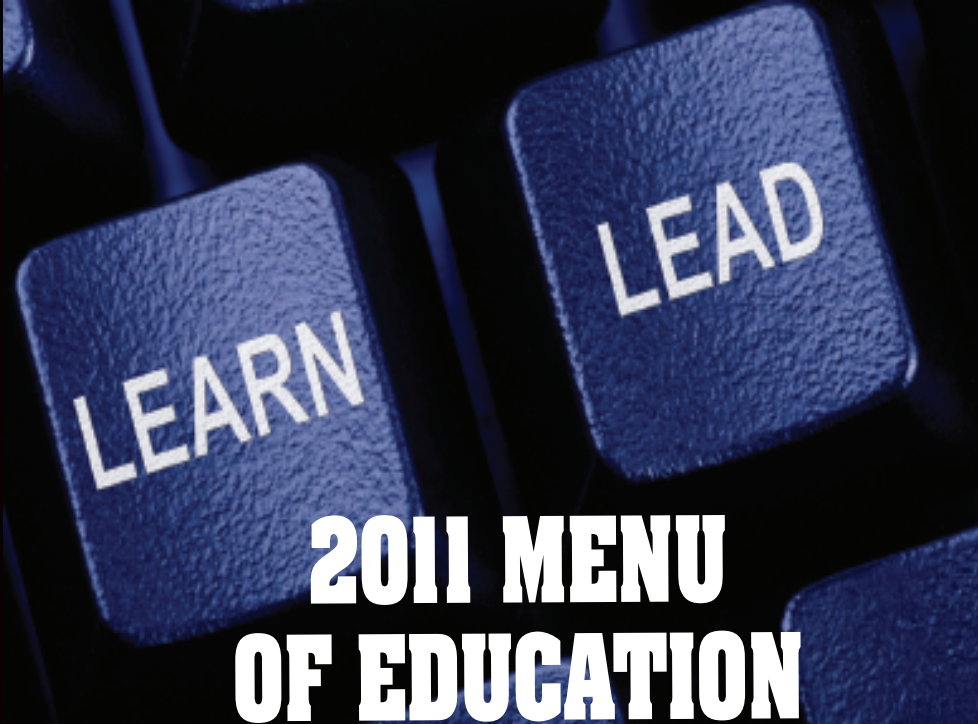
\*For the most up-to-date information, please visit the NDAREC Web site at [www.ndarec.com](http://www.ndarec.com).

\*\*NDAREC will distribute specific seminar and registration information four to six weeks in advance of each live classroom program.

**NDARECs**

North Dakota Association of Rural Electric Cooperatives

A Touchstone Energy® Cooperative 



# 2011 MENU OF EDUCATION PROGRAMS

Professional development services provided by the North Dakota Association of Rural Electric Cooperatives (NDAREC)

**NDARECs**

North Dakota Association of Rural Electric Cooperatives



## LIVE CLASSROOM PROGRAMS

### Understanding the Electric Business

NRECA #2610.1

January 11 — Mandan

This course is designed to help directors understand the electric utility industry is an evolving high-tech system that must be designed and engineered to meet regulatory and consumer standards for reliability, quality and safety. This in turn requires an appropriate investment on a planned and ongoing basis. This course provides directors with an understanding of the key components of the electric utility industry.

#### KEY TOPICS:

- ▶ Basic functions and cost components of generation, transmission and distribution
- ▶ Current and emerging technologies that are impacting utility operations and policies
- ▶ Issues related to distributed generation the board may need to address
- ▶ Environmental issues and national policies that impact the cooperative
- ▶ The board's role to ensure a safe working environment

#### INSTRUCTOR: Wallace Barron

Wallace Barron has nearly 40 years of experience in the electric utility industry, 15 of which have been associated with cooperative systems. He is currently president of the consulting firm, Barron & Associates, Atlanta, which specializes in consulting to the energy industry in the areas of strategic planning, marketing, rates and customer service, both domestic and international.

Barron previously worked as the vice president of marketing, customer service and distribution technology at Florida Power Corporation in St. Petersburg, Fla. His responsibilities included rates, competitive marketing, market research, key and national accounts, customer service, economic development, demand-side management, load management, new technology and load research as well as distribution engineering functions. Barron received his Master of Science degree in electrical engineering from Mississippi State University and is a registered professional engineer in Florida.

### Strategic Planning

NRECA #2630.1

January 12 — Mandan

Boards have ultimate responsibility for ensuring and evaluating the long-term health of the organization. They help fulfill this duty by identifying goals through strategic planning and by authorizing the appropriate allocation of resources through the adoption of financial policies, budget review and approval. This course teaches directors how to participate effectively in a strategic planning process.

#### KEY TOPICS:

- ▶ Understanding the purpose, value and components of strategic planning
- ▶ Preparing for a strategic planning session
- ▶ Understanding the components of a strategic plan
- ▶ Using a "SWOT" analysis to assess strengths, weaknesses, opportunities and threats
- ▶ Translating board guidance into operational plans by staff
- ▶ Recognizing how the board should plan its monthly agendas around the strategic plan
- ▶ Evaluating the cooperative's accomplishment of the strategic plan as the foundation for the CEO's performance appraisal

#### INSTRUCTOR: Wallace Barron

### Social Media Marketing for Business

January 18 — Bismarck

*This seminar is co-sponsored by the N.D. REC Member Services Association (NDMSA), and will be held in conjunction with the NDMSA winter meeting.*

Corey Perlman, author of "eBoot Camp: Proven Internet Marketing Techniques to Grow Your Business," will provide the techniques to maximize your cooperative's exposure on the Internet. Learn whether and how to use Web sites, blogs, Twitter and other social networking sites, press releases and video. Perlman will give many



practical tips to get your co-op noticed. Most importantly, participants will learn the maintenance required for each Web medium to achieve benefits and avoid negative results.

#### KEY TOPICS:

- ▶ How to successfully promote your business with Facebook
- ▶ How to use LinkedIn and Twitter to grow your business
- ▶ How to use blogs, articles, press releases and e-newsletters to stay connected with your customers and build your brand
- ▶ Why video is the quickest and easiest way to get your message out to the masses

#### INSTRUCTOR: Corey Perlman

Corey Perlman is the author of the social media and Internet marketing book, "eBoot Camp: Proven Internet Marketing Techniques to Grow Your Business," which became an Amazon.com bestseller and is in major bookstores worldwide. Perlman is also the co-founder of Urbane Camp, which is a social-media marketing company that builds and manages online marketing campaigns for businesses.

His true passion is teaching and in 2010 alone, Perlman conducted his critically acclaimed eBoot Camp workshop at more than 25 conferences and events in cities across North America. This past year, he and his wife were blessed with a new baby girl, and yes, she's already tweeted, posted a YouTube video, and has a Facebook page. To learn more, visit [www.TheEbootCamp.com](http://www.TheEbootCamp.com)

### Engineering & Operations Conference

February 16 and 17 — Fargo

The N.D. REC Engineering and Operations Association collaborates with NDAREC every year to provide technical training locally, for engineers, construction and operations personnel.

This year's conference will feature an opening keynote presentation by Jason Makansi, author of "Lights Out: The Electricity Crisis, the Global Economy and What It Means to You."

#### KEY CONFERENCE TOPICS:

- ▶ Alternative energy interconnection
- ▶ Right-of-way management
- ▶ Substation integration and automation
- ▶ Oil spill cleanup
- ▶ FEMA hazard-mitigation programs

#### KEYNOTE SPEAKER: Jason Makansi

A prolific author, respected industry thought leader and seasoned communicator, Jason Makansi has been analyzing the technological, business and regulatory issues in electricity production and delivery for more than 25 years. His experience includes serving as director of Power Generation for Myplant.com, a division of Honeywell, and as editor-in-chief of *Power* and *Electric Power International* magazines. During his 18-year tenure with the McGraw Hill Companies, Makansi researched and analyzed every aspect of electricity generation — visiting power plants around the globe.

### Challenging Financial Management

August 16 — Brainerd, Minn.

*NOTE: This course will be offered as a pre-conference session for the Finance Managers Quad-State Conference, August 17 to 19.*

This seminar will give participants the opportunity to actually calculate about 150 key ratios, using their system's last three years of year-end Form 7s. A working knowledge of Excel and how to make changes to formulas is recommended. Participants are asked to bring a laptop computer, the last three years of Form 7 with the Excel spreadsheet filled out, and a calculator.

#### KEY TOPICS:

- ▶ Formulas to calculate your system's Borrower Statistical Profile and CFC's Key Ratio Trend Analysis
- ▶ Analysis of system's optimum equity
- ▶ Data management



## LIVE CLASSROOM PROGRAMS (continued)

### INSTRUCTOR: Kim Mikkelsen

Kim Mikkelsen is president of KW Consulting, a firm based in Yakima, Wash. For more than 30 years, she has served as a consultant and trainer across the United States in the areas of public power finance and accounting issues.

As a consultant, Mikkelsen conducts customer accounting training; on-site training of Federal Energy Regulatory Commission and Rural Utilities Service office personnel; conversion of computerized systems; development and delivery of courses on rates, accounting and work orders; financial forecasts; and work order procedures.

A native of Montana, she graduated from Montana State University with a Bachelor of Arts degree in business education. Before joining the management staff at a Montana cooperative, Mikkelsen taught in a public high school. In addition to her other professional activities, she continues to work at a small public utility district as its chief financial officer.

### Effective Boards: Why Some Succeed and Some Fail

#### NRECA #938.1

October 5 — Mandan

Boards of electric cooperatives and other corporations are composed of community and business leaders who want to do a good job. But as demonstrated in recent corporate scandals, boards can fall into habits and modes of behavior that lead to failure. This course is for experienced directors who will work in small groups to analyze actual case studies in corporate governance. The groups will review news articles and governance documents, involving real corporate boards received a great deal of public scrutiny and lawsuits brought by owners and investigations by committees of Congress.

#### KEY TOPICS:

- ▶ Relevant facts in the case that are significant from a board perspective
- ▶ Critical governance issues
- ▶ Board actions that caused it to get into trouble
- ▶ Actions to decrease risk of lawsuits or investigations by legislative or regulatory bodies

### INSTRUCTOR: Monica Schmidt

Monica Schmidt leads NRECA's National Consulting Group in delivering value to its membership in the areas of governance, strategic planning, utilities management, executive search, safety and human resources process improvement. She has more than 20 years of broad-based strategic leadership experience in the electric utility industry, specializing in corporate and non-profit governance and the emerging trends likely to impact the cooperative sector.

Schmidt has trained under John and Miriam Carver at the Policy Governance Academy and holds a certificate in Corporate Governance from Tulane University Law School. She earned her Master of Science degree from the University of Baltimore and her Bachelor of Science degree from Towson State University.

### Bills, Bucks and Business

November TBA — Mandan

This workshop is based on the premise that every co-op employee and every task performed at the utility has an impact on the ultimate bill sent to the member-owner. Participants will learn how the impact of their jobs can be measured and evaluated, and how to improve favorable outcomes and minimize those that are not as favorable. Participants need to bring the cooperative's last two year-end financial statements and a calculator.

#### KEY TOPICS:

- ▶ Analysis of the financial report
- ▶ Review of key ratios
- ▶ Accounts turnover ratio, write-offs, over 90-day accounts
- ▶ Inventory turnover ratio, inventory as a percentage of total plant and acceptable inventory variances
- ▶ Engineering and operations: construction work, pole replacement, depreciation, idle services, overtime ratio, contributions in aid of construction and continuing property records
- ▶ Financial management: equity changes, capital credits, TIER, general funds, cash management and cost-of-service study
- ▶ Member Services: marketing and communications

### INSTRUCTOR: Kim Mikkelsen

### Rate Strategies for 21st Century Challenges

#### NRECA #974.1

November 8 — Mandan

"21st Century Rate Strategies for 21st Century Challenges," a publication developed jointly by the National Rural Electric Cooperative Association and the National Rural Utilities Cooperative Finance Corporation (CFC), is featured in this course. Cooperative directors will discuss the complex issues they must balance when they consider business plans, financial policies, alternative rate philosophies and strategies, and the current focus on energy efficiency and conservation. They will gain an understanding of how current rates methodologies affect rising power costs. Case studies will be used to analyze and discuss issues such as equity goals, long-range revenue requirements, achieving fairness for multiple rate classes, and dealing with proposed rate increases.

#### KEY TOPICS:

- ▶ Components of a rate philosophy
- ▶ Key steps in the rate-making process
- ▶ Integration of rates with the business plan
- ▶ Effective rate design that will support financial and other strategic goals

**NOTE:** This course is recommended for all directors and managers, including those directors who have completed Advanced Rate Decisions for Experienced Directors, NRECA #968.1. This course replaces NRECA #968.1, which is no longer offered. Directors who completed #968.1 have earned one credit toward their Board Leadership Certificate (BLC) and are eligible to earn one additional credit by completing #974.1.

### INSTRUCTOR: Scott Luecal

Since 1991, Scott Luecal has been providing consulting and training services to consumer-owned utilities, their business subsidiaries and community-directed organizations. These consulting services have included strategic planning facilitation, financial planning, cost-of-service and rate design, organizational structure and related personnel decisions, board and CEO evaluations, diversified business plans, and programs related to training and educating directors and management on the changes taking place in the electric utility industry.

Luecal has held various executive-level positions with Central Area Data Processing and the National Information Solutions Cooperative (NISC). In August 2007 he left NISC to start his consulting business.

### Capital Credits: Legal and Financial Issues

#### NRECA #975.1

November 9 — Mandan

According to the Capital Credits Task Force Report of 2005, adopting and implementing a capital credits policy is a key responsibility of a co-op's board of directors and management. As the elected representatives of the members, directors must understand the co-op's capital credits policy to be able to explain why it was adopted and how it works, to members who have questions. Management and staff are responsible for executing the board's policy.

#### KEY TOPICS:

- ▶ Funds allocated to members
- ▶ Member notice of allocations
- ▶ Amount of capital credits to retire each year
- ▶ Retirement method to use
- ▶ Special retirements
- ▶ Discount of any retirements and the discount rate to use

*Note: This is an advanced course for REC board members. NRECA recommends that board members who wish to take this course, have completed NRECA #2640.*

### INSTRUCTOR: Scott Luecal





# WEBINARS



These webinars provide learning opportunities without leaving the office. Each webinar is a 60-minute presentation followed by a 30-minute question-and-answer period.

## Listening to Customers is the Key

**March 15 (1 to 2:30 p.m. Central Time)**

Whether a customer is making a normal, everyday inquiry or is upset about a service issue, really hearing the customer is the key to making a good impression and bringing the issue to a successful conclusion. Active listening is not easy. Most people have had training in speaking, reading and writing. Very few people have had formal training in listening well. Combine that with time constraints and the repetitive nature of customer requests and the results are not always positive.

This webinar leads employees to a better understanding of the importance of listening in the service experience and gives them a simple and effective system for actively listening to customers.

### KEY TOPICS:

- ▶ The importance of active listening
- ▶ Barriers to listening well
- ▶ Steps to active listening

### INSTRUCTOR: Debra Ballard

Debra Ballard founded her consulting company, the Ballard Group, in 1996. She conducts training and consultation in leadership, planning, change management, customer service and communication. Her major clients are utility companies (cooperatives, municipals and investor-owned) throughout the United States, as well as the U.S. Air Force, the Boeing Corporation, small businesses, non-profit organizations and technical schools.

Previous experience includes a variety of management positions with Knight-Ridder Newspapers and assistant division manager for ARA Transportation, which involved supervising 320 AFL-CIO unionized bus drivers. Ballard also worked for an electric cooperative in Macon, Ga. as member services manager for 10 years.

## Phrasing for Successful Conclusions

**April 12 (1 to 2:30 p.m. Central Time)**

Communicating with customers in a positive way can be difficult, especially in situations where the employee can't tell the customer exactly what it is they want to hear. Every service experience leaves the customer with an opinion of the service provider, the service received and the utility. Attendees need to be prepared to phrase answers to tough questions in a way that reflects concern and a positive service attitude. This course makes participants aware of the power behind their words and the way they use them.

### KEY TOPICS:

- ▶ The communication cycle
- ▶ Understanding of the customer's viewpoint
- ▶ Negative service filters and how to avoid them
- ▶ Positive ways to phrase answers to customers

### INSTRUCTOR: Debra Ballard

## A Professional Telephone Image

**May 10 (1 to 2:30 p.m. Central Time)**

More and more service is being done by telephone with fewer and fewer people actually visiting the utility office. To the customer or other callers (including legislators, vendors, board members), the entire impression of the utility comes from that voice on the other end of the telephone line. This puts pressure on the utility employee to develop excellent telephone skills and use those skills in each and every encounter. These skills include proper use of tone of voice and attention to speech patterns.

### KEY TOPICS:

- ▶ Understanding the importance of a professional image by telephone
- ▶ Defining the challenges of service by telephone
- ▶ Using voice and speech patterns professionally
- ▶ Developing better technical skills in handling calls

### INSTRUCTOR: Debra Ballard

## Improve Your Outlook:

### Daily Organization Tips using Microsoft Outlook 2007

**May 12 (12 to 1:30 p.m. Central Time)**

Most people use Outlook as a glorified storage area and address book and become overwhelmed with the massive amounts of material that accumulate. Organizing the volumes of e-mail you receive can be a challenge, but it doesn't have to be. Using features built into Outlook can help organize e-mail, sort contacts, schedule meetings and organize tasks.

### KEY TOPICS:

- ▶ Organizing e-mail with the DDS method
- ▶ Using your calendar as a time management tool
- ▶ Turning e-mails into tasks and appointments
- ▶ Creating an electronic to-do list

### INSTRUCTOR: Emily Jones

Emily Jones is a senior manager with Jackson Thornton Technologies, LLC and the Learning Director for Jackson Thornton in Montgomery, Ala. She has 23 years of managerial, consulting and technical experience in information technology and implementation. While she focuses on the Microsoft family of products, Windows and the Office packages, Jones also works with various accounting software packages. She is a Certified Project Manager, Microsoft Certified Professional, a Certified Associate in Business Management and a member of the American Society of Training and Development.

## Taking Angry Customers from Unreasonable to Reasonable

**June 14 (1 to 2:30 p.m. Central Time)**

When customers are angry, they sometimes act in unreasonable ways. Anger amplifies feelings while inhibiting clear thought processes. In this webinar, employees gain a better understanding of the psychological effects of anger on a person's behavior and learn a four-step process that helps the customer move from an unreasonable state of mind to a more reasonable one so problem-solving can occur.

### KEY TOPICS:

- ▶ Causes and effects of anger
- ▶ Confidence in dealing with anger through self-control
- ▶ A four-step process for resolution

### INSTRUCTOR: Debra Ballard

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