

CKAE Business Plan & Member Engagement Plan Guidelines



These guidelines help you structure both your Business Plan (for your key accounts program) and Member Engagement Plan (an individual key account). Both the plans should clearly define your strategy, goals, and actions of your key accounts program and to details on how you would serve a particular key account effectively. This document also outlines pitfalls to avoid so you can prepare actionable plans.

Business Plan Guidelines

Section 1: Strategic Alliance

Explain why Key Accounts matter to your cooperative today, beyond the historic focus on retail competition. This section should answer the following questions:

1. What's been done in the past for Key Accounts?
1. What's driving the need for action now?
2. Why aren't all members Key Accounts?
3. How are other utilities approaching this?
4. Risks of doing nothing.
5. How Key Accounts align with your operational and strategic plans.
6. How Key Accounts support regulatory compliance.

Section 2: Segment Research

Describe the Key Accounts segment as a whole—not individual members. Include:

1. Selection criteria (revenue and non-revenue accounts).
2. Segment categories and analysis.
3. Member count and revenue impact by segment.

4. Total power and energy impacts.
5. Complete Key Accounts list (in appendix).

Section 3: Competitive Analysis

Detail what competitors offer to Key Accounts.

1. How your rates, services, and value compare to the competitors serving their other locations.
 - a. Rate comparisons for load factors and kW demand sizes representative of your members.
2. Whether you could be competitive enough to win their business at those other sites or keep them from moving operations elsewhere.

Section 4: Program Objectives & Goals

List SMART goals (Specific, Measurable, Attainable, Realistic, Time-based) that align with your cooperative's mission and strategic plan. Focus on big-picture objectives. Member specific goals go in the Member Engagement Plan.

Section 5: Organizational Alignment

Show how your cooperative is structured to support Key Accounts. Include:

1. Job descriptions and resource needs for all Key Accounts staff.
2. Organizational chart showing placement.
3. Interdepartmental goals and strategies for cooperation.
4. Anticipated challenges and plans to address them.

Section 6: Financials

Include

1. Detailed year-one budget.
2. Three-year financial forecast for Key Accounts activities.

Member Engagement Plan Guidelines

A Member Engagement Plan is developed for one specific Key Account. It outlines how you will work with that member to achieve mutually beneficial outcomes.

Section 1: Profile

Contact Profile

- Names, roles, and decision-making authority.
- Contact information (office, mobile, email, preferred contact method).
- Contact history and level of engagement.

Business Profile

- Business description, product lines, target markets, competitors, years in operation, number of employees, NAICS code.
- Industry trends and trade associations.
- Business model, revenue drivers, and key issues (prioritized).
- Energy costs as a percentage of total facility costs.

Utility Profile

- Energy consumption history and load profiles (electric, water, gas).
- Load and power factors, end-use breakdown.
- Rate analysis and bill comparisons for last three years between you and competitor where the member has other facilities
- Equipment data, maintenance history, and power quality needs.
- Outage history and momentary operations for last two years from OCR counters.
- Forecasted energy needs, distributed generation potential, and renewable initiatives.

Section 2: Action Plan

Detail what you plan to do for this member:

1. Specific product/service to provide.
2. Timeline for completion.
3. Why this benefits the member.
4. Competitor offerings considered.
5. Required financial resources and funding approach.
6. Impact on your cooperative's operations, staffing, and facilities.
7. Next steps and deadlines.

General Best Practices & Pitfalls to Avoid

1. Make goals measurable using metrics like satisfaction scores or participation rates.
2. Link tactical actions to strategic goals.
3. Highlight justification early (e.g., revenue contribution from key accounts).
4. Be concise – only include visuals/data that support your message.
5. Support claims with sources for credibility.
6. Show the full energy profile, including all energy sources.

Plan submission

Email both plans to Charu Gupta at charu.gupta@nreca.coop.

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