

Better Results, Better
Experience: Benefits
of iEnergy Trade Ally
for a Tiered Network



Agenda

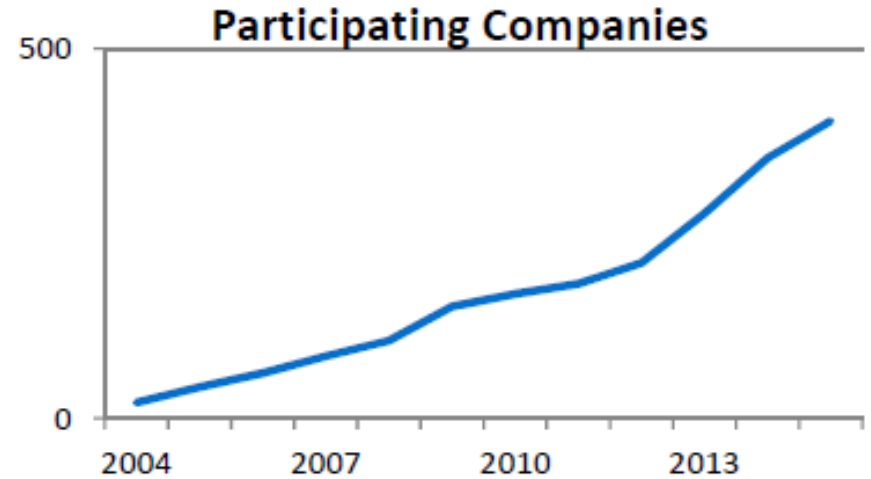
Launching a Tiered Network
iEnergy Trade Ally



Launching a Tiered Network

Where We Came From

- **More is better**
- **Open network**
- **Five states, multiple technologies (predominately lighting)**
- **Aging Trade Ally agreement**
- **Poor connection with many of our Trade Allies**



Where We Wanted To Go

- Raise the bar
- Increase value for all stakeholders
- Achieve savings targets in mature and difficult to reach markets
- Reduce administrative burden
- Easy to understand



Approaching Change

- Teams
 - Executive committee
 - Implementation team
- Timing
- Needs
- Goals
- Challenges



Criteria



Criteria	Previous	Standard	Premium
Approved Network application	✓	✓	✓
Completed project	✓	✓	✓
General liability, workers compensation and auto insurance	✓	✓	✓
Complete Network and calculator tool training		✓	✓
Complete Online Lighting Basics training		✓	✓
Company attendance at Program meetings		✓	✓
Meet customer and program satisfaction requirements		✓	✓
Meet project requirements		✓	✓
Approved trade ally in network minimum of 12 months			✓
Hold LC, CLMC, CLEP or complete NXT Level Training			✓
Top 10% ranked trade allies			✓

Achieving Premium

- Project count
- Project accuracy (inspection)
- Customer satisfaction (surveys)
- Program satisfaction (coordinators)
- Lighting design layout submission

No Images? [Click here](#)

wattsmart® Business
Vendor Snapshot

prepared for Perfect Vision Lighting

UT - Fall 2017

Your projects with wattsmart Business, year-to-date*...

Projects completed	kWh saved	Incentives earned
3	77,227	\$7,079

*Typical projects completed the previous 12 months. Lighting Instant Incentive, Small Business Direct and Custom projects are not included.

Your performance...

This is a snapshot of your participation in the wattsmart Business program from the past 12 months. We heard your feedback and have changed how we're providing this information. The scores below represent your performance on a four-point scale. The percentage that follows is how you score among other vendors in the Network. The information contained in the email is only shared with you.

	What we look at	Your score
 Customer Satisfaction	We contact customers to evaluate their experience working with you.	2.7/4 67%
	How well you submit projects and respond to program staff.	3.7/4 92%

What customers are saying

They were great

They helped a lot

Reminder:

The Rocky Mountain Power coordinators are looking for vendors who meet program requirements. Please familiarize yourself with the program requirements and compliance with Program expectations.

- [Marketing Guidelines](#)
- [Network Requirements](#)
- [Vendor Handbook](#)

Contact your outreach coordinator to discuss more.

Coordinator name
Coordinator email
Coordinator phone

Program Satisfaction

Submittal Accuracy

Lighting Layout



iEnergy Trade Ally

iEnergy Trade Ally

- Online Vendor application
- Dashboard
- Database
- Reporting

The image displays several overlapping screenshots of the iEnergy Trade Ally web application. The top screenshot shows a navigation menu with options: DASHBOARD, CONTACTS, OUTREACH, RESOURCES, and CMS. Below this is a profile management section for 'A-C Electric Inc.' with tabs for PROFILE, PROGRAMS, COMMUNICATION, HISTORY, ACTIVITY, DOCUMENTS, and APPLICATION. An 'Edit Profile' modal is open, showing fields for 'Legal Company Name' (A-C Electric Inc.), 'Business or Trade Name' (A-C Electric Inc.), and 'Applied Date'. Below the profile section is a 'Rocky Mountain Power' dashboard with a navigation bar (Dashboard, Reports, Home, Find a Vendor, Join the Network) and a 'Utility Admin' / 'Logout' link. The dashboard features an 'Alerts' section with a table of notifications and an 'Application Stats' summary card.

Filter	Alert Title	Date	Action
All	New Application Alert	Jul 27, 2017	o
All	Company Profile Update Alert	Jul 27, 2017	o
All	New Application Alert	Jul 27, 2017	o
All	New Application Alert	Jul 27, 2017	o
All	New Application Alert	Jul 26, 2017	o
All	New Application Alert	Jul 25, 2017	o
All	New Application Alert	Jul 20, 2017	o
All	New Application Alert	Jul 20, 2017	o

Submitted applications	Requested programs
238	107
Pending programs	Approved programs
2	124
Declined programs	Delisted programs
1	0

iEnergy Trade Ally

Vendor Resource

Self-Service

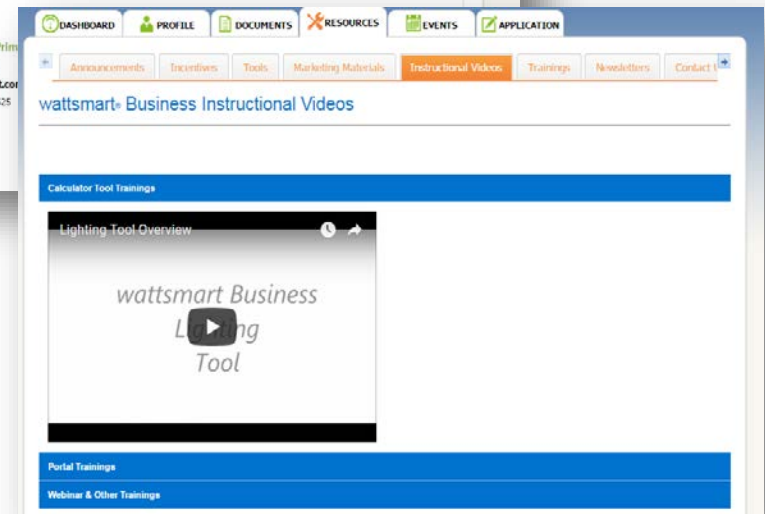
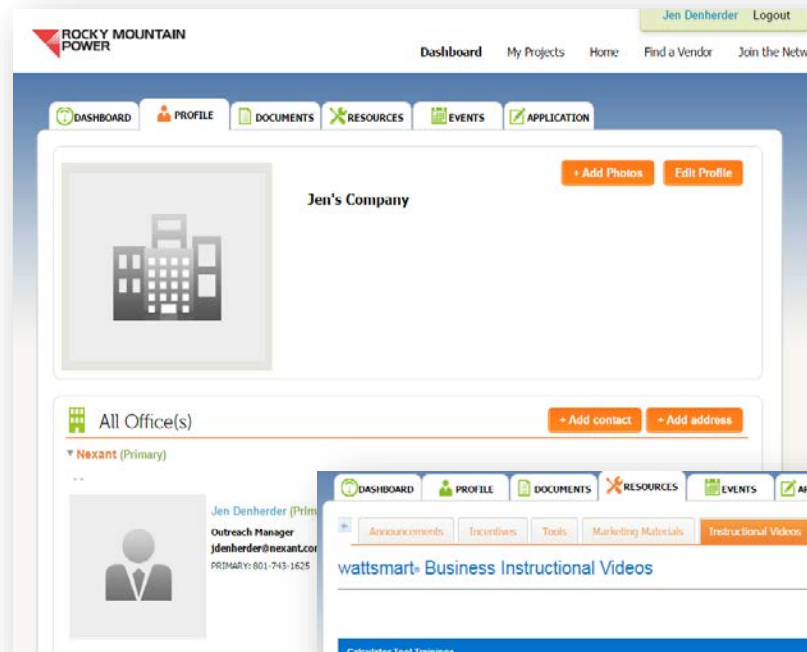
- Manage online profile
- View project status
- On-demand training videos

Access to Tools

- Incentive calculator tools
- Marketing materials

Communications

- Bulletin board
- Newsletter & training repository
- Program documents
- Industry resources



Marketing - Utility Promotion

Sector: Commercial

*Indicates required field

Further refine your search (optional)

Enter address, city or zip code

Search radius: Select miles

Company Name: Company name

Project Type

Select at least one:

- Lighting
- Lighting instant incentives
- HVAC instant incentives
- HVAC check-up
- HVAC - unitary
- HVAC - evaporative
- Motors and VFDs
- Controls
- Building envelope
- Appliances
- Office equipment
- Food service
- Compressed air
- Farm and dairy
- Irrigation

Business type: Select

Participating states (To select multiple states, please hold the Ctrl button):

Select one or more

Search
Clear search

Find Vendors

We encourage customers to request information/bids for your energy efficiency upgrades from wattsmart Business Vendors. wattsmart Business Vendors are local contractors, distributors, manufacturers, and others collaborating with Rocky Mountain Power to promote the installation of energy-efficient equipment.

Premium wattsmart Business Vendors will be listed at the top of your search results and highlighted in green. Premium Vendors specialize in lighting and are designated based on their quality of participation in wattsmart Business.

We do not guarantee the work performed by these participating vendors. You are responsible for any contract or the performance of any vendor you have chosen.

How to find a Vendor:
To begin your search, enter your address and/or Zip Code, then select a project type. For best results, enter the desired search radius.

Search results provided are offered as a convenience to our customers. You can sort search results by distance or Company name by clicking the column header. The number of projects completed indicates projects completed year-to-date.

List View
Map View
+ Download results

	SERVICE AREAS	COMPANY NAME	CONTACT INFORMATION	SPECIALTY	BUSINESS TYPE	PROJECTS COMPLETED	DISTANCE (MILES)
Premium Vendor	Idaho, Utah	LMS 663 West 4330 South Salt Lake City, UT 84123 Idaho Utah http://www.lmslghting.com	801-261-0400 Chris Munford cmunford@lmslghting.com	Lighting	Contractor	83	
Premium Vendor	Utah	Commercial Lighting Supply, Inc. PO Box 65675 Salt Lake City, UT 84165-0675 Utah http://www.commerciallightinginc.com	801-262-0888 Mark Barton mark@commerclightinginc.com	Lighting	Distributor	87	
Premium Vendor	Utah	Advanced Lighting Inc. - Utah 3099 south 1030 west Salt Lake City, UT 84119 Utah http://www.advlight.com	801-972-9530 Brad Kassin brad@advlight.com	Lighting	Contractor	31	
Premium Vendor	Utah	Divi Energy, LLC 4275 N Thanksgiving Way, Ste 111 Lehi, UT 84040 Utah http://divienergy.com	801-361-7920 Scott Thompson scott@divienergy.com	Lighting	Contractor, Manufacturer... Other	33	
	Utah	Petroleum Equipment Co 1174 So. 300 W Park View, UT	801-467-8276 London	Lighting	Contractor, Distributor	3	

Premium wattsmart® Business Lighting Vendors Utah
Fall 2017

Vendor status based on their top September 26, 2017:

LMS - Lighting Maintenance Service
Salt Lake City, UT
Lighting Contractor
Phone: 801-281-0400
Email: cmunford@lmslghting.com
Online: www.lmslghting.com

Divi Energy, LLC
Lehi, UT
Lighting Contractor; Manufacturer Representative
Phone: 801-361-7920
Email: scott@divienergy.com
Online: divienergy.com

Quarterly based on the previous 12 months. Top performing Vendors are selected

The wattsmart Business Vendor Network is a resource for Rocky Mountain Power customers to find qualified and knowledgeable vendors to help with their energy efficiency projects. Vendors on our list meet Network requirements such as holding appropriate licenses and insurance, having knowledge of lighting technology and the wattsmart Business program and having good business references.

Continued on the other side

- Industry training
- Customer and program feedback

To find a complete searchable list of wattsmart Business Vendors, visit wattsmart.com. We do not guarantee the work performed by these participating vendors. You are responsible for any contract or the performance of any vendor you have chosen.

© 2017 Rocky Mountain Power. wattsmart is registered in U.S. Patent and Trademark Office. *Continued on the other side*

Questions?





Trade Ally Referrals

2018 Nexant User Consortium

Agenda

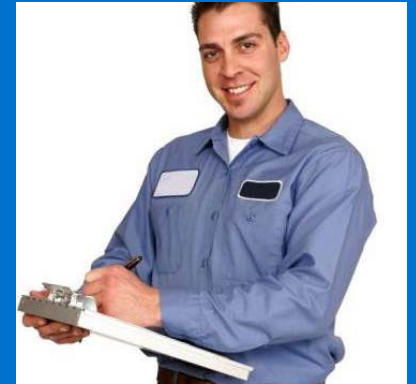
Challenge

Solution - Contractor Search

Solution - Referrals

Utility Challenge

Matching customers with high quality contractors and
securing cost-effective project leads



Utility Solution

Provide utility customers with a means to connect with contractors to execute energy efficiency projects.



Contractor List



Contractor Search



Referral Request

Contractor List

The standard solution is providing a customer-facing list of contractors in utility service territory.

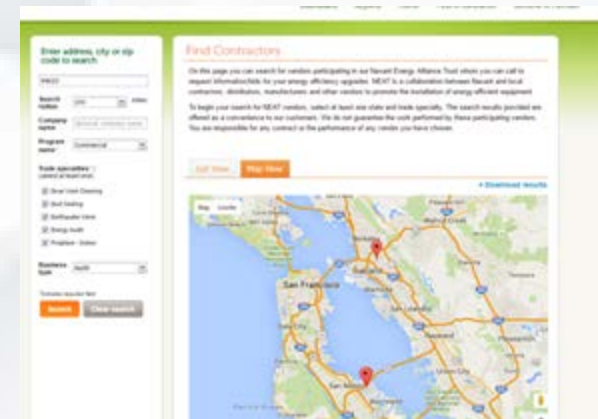
e.g. PDF, Excel, Web Page



ContractorList

Contractor Search

A better solution is providing a customer-facing search tool focused on drilling down to best match customer criteria.



Innovative Solution - Customer Referral Request



Qualified Contractors

- Tier 1 contractors only
- Throttle limit on outstanding referrals
- Motivated customer leads
- Sets basis for future business



Satisfied Customers

- Matched with high quality contractors
- Piece of mind in choosing a contractor recommended by utility
- Single contractor match on multiple criteria when possible



EE Funding

- 6% of project cost paid to PSE
- Referral period of 1 year
- EE and non-incented projects

Customer Journey

Review trade allies

Customer selects a trade ally from the two or three options provided by PSE.



Request

Contact

Select



Request a referral

Customer navigates to PSE website and is directed to the Referral Form.

Customer enters in applicable fields.

Or

Customer calls PSE Energy Advisor to create referral.

Initiate project

Customer contacts approved trade ally to initiate project.

- Relieve stress
- Top, Tools & Tricks
- Manage your energy
- Buying a new home
- Choosing natural gas
- Energy cost guide
- Energy-saving tips
- Federal tax credit
- Financing
- Find a contractor
- Generators
- Information library
- Lighting tips
- Smoke tracer



Ask an Energy Advisor
 Phone: 1-800-969-1422
 Email: EnergyAdvisor@pse.com

Featured content
 Find a contractor
 Contractor Alliance Network
 FAQ
 Selecting your contractor
 CAN contractor member sign in
 Related information
 Weatherization assistance for income-eligible customers

Sign to view your bill

- Business incentives
- For Communities
- Multifamily Rate(s)
- For Schools
- PSE Rate schedule
- Green Power
- Self Choice
- Carbon Balance
- Customer Solar
- New construction
- For Trade Allies
- All Fuel Vehicles
- About Efficiency

Find a safe, dependable and efficient contractor
 Looking for help with your next home or business improvement project? Get a referral for a pre-screened independent contractor for nearly any energy-efficient upgrade through our Contractor Alliance Network (CAN). These certified energy efficiency specialists share PSE's standard of excellence and superior service along with making the incentive process much simpler.

- PSE's CAN member contractors are:
- Licensed, bonded and insured
 - Knowledgeable on current energy codes, high efficiency equipment and product applications
 - Continually trained and educated on the latest technology
- You can depend on PSE's Contractor Alliance Network for:
- Referrals to pre-screened, independent contractors
 - Special seasonal offers for energy-efficient products
 - Suggestions for energy-related improvements that can save energy and money

Request a referral now
 The Contractor Alliance Network self-referral form conveniently allows you to submit a referral request for a variety of energy efficiency improvement projects. Once you complete all below fields that have an asterisk and submit your project information, PSE will link you with qualified CAN members in your area. These members will get in touch with you as soon as possible to schedule an appointment and provide you with an estimate for your project.

Contact information

First Name* Middle Last Name*

PSE Account Number*
 Enter the 12-digit number:

Email Address*

Phone Number*

Address information

Service Street Address* Apt.

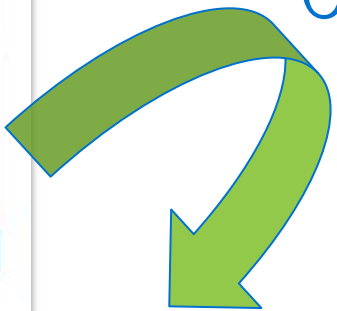
City* State* ZIP Code*

- Choose your referral products from the options below:
- * Commercial HVAC
 - * Commercial Lighting
 - * Generator Equipment
 - * Residential In-home Energy Assessment Services
 - * Residential Insulation, Duct & Air Sealing Services
 - * Residential Space Heat and Water Heat Equipment
 - * Residential Space Heat and Water Heat Services
 - * Residential Windows
 - * Solar

Additional Comments for the Contractor (up to 255 characters)

How did you hear about Contractor Alliance Network?

Customer Referral Request



Home | Residential | Business | Safety | Savings & energy | About PSE | Careers

Guest User Logout

Home Become A Member

PSE PUGET SOUND ENERGY contractoralliancenetwork certified energy efficiency specialists

Request a referral now

The Contractor Alliance Network self-referral form conveniently allows you to submit a referral request for a variety of energy efficiency improvement projects. Once you complete all below fields that have an asterisk and submit your project information, PSE will link you with qualified CAN members in your area. These members will get in touch with you as soon as possible to schedule an appointment and provide you with an estimate for your project.

Choose your referral product

Program*:

Customer Information

First name*: Last name*:

Account number*: Email address*:

Address 1*: Address 2:

City*: State*:

Postal code*: Phone number*: Area: Prefix: Suffix: ext:

Additional Comments:
 Additional Comments for the Contractor (Max. 1000 characters)

Referral Request - Internal Utility Staff

The image displays two overlapping screenshots of a web application interface for managing referral requests.

Top Screenshot (Search Results):

- Navigation:** DASHBOARD, CONTACTS, OUTREACH, CMS, REFERRALS, ADMIN.
- Buttons:** REFERRALS LIST, THROTTLE LIMIT, + New Referral.
- Search Section:** Search input field, +New search keyword, Search, Reset search.
- Search Results Table:**

Customer name	Creation date	Last updated	Date	Status
#206 Michael Jackson 1800, Gateway drive, San Mateo, CA, 94404			2017-03-23 17:02 PM PDT	Created
#205 Michael Jackson 1800, Gateway drive, San Mateo, FL, 94404			2017-02-20 20:34 PM PDT	Created
#204 Michael Elang 1 ZIPPOY DR, Fort Lauderdale, FL, 33305			2017-01-31 03:34 AM	Created
#203 Michael Elang FT. Lauderdale, Florida, FL, 99999			2017-01-30 04:50 AM	InProgress

Bottom Screenshot (New Referral Form):

- Navigation:** DASHBOARD, CONTACTS, OUTREACH, CMS, REFERRALS.
- Section:** New Referral
- Customer Information:**
 - Customer lookup: Search by
 - First name*, Customer number*, Account number*, Address 1*, Address 2*, City*, State*, Postal code*
 - Last name*, Site number*, Email address, Site Address 1*, Site Address 2*, Site City*, Site State*, Site Postal code*
- Trade Ally Information:**
 - Program: Residential Specifier*:
 - Search button
- Selected Tradelines:**

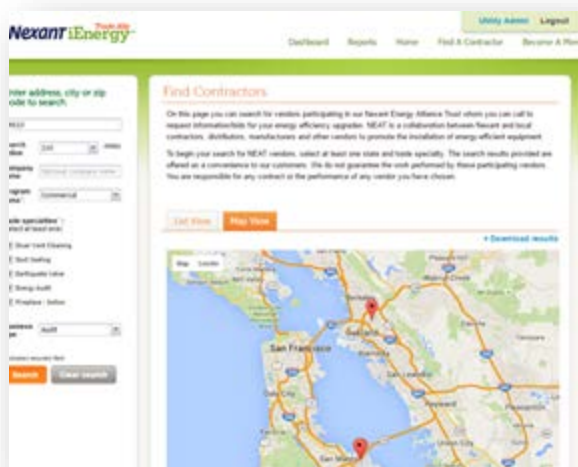
TRADING NAME	CONTACT INFORMATION	PROGRAM	SPECIALTY
- Buttons:** + Add alternate contact, Create Referral, Cancel

Connect Motivated Customers with Qualified Contractors

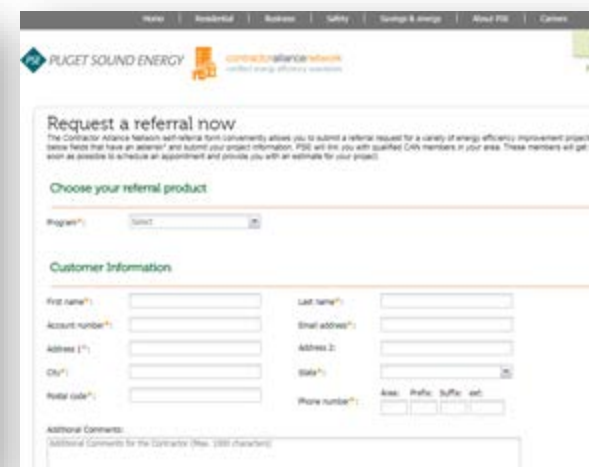


ContractorList

Industry Standard



New Standard



Innovating

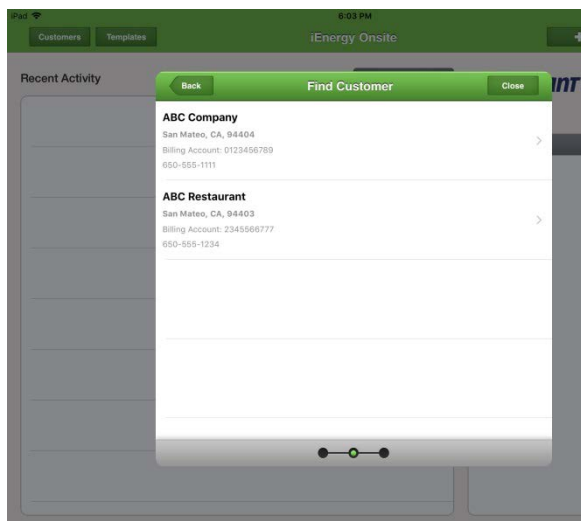
Questions?



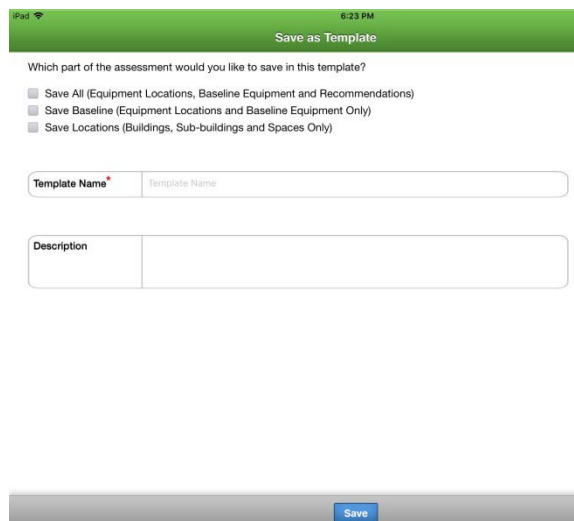


Mobile Assessment Tools

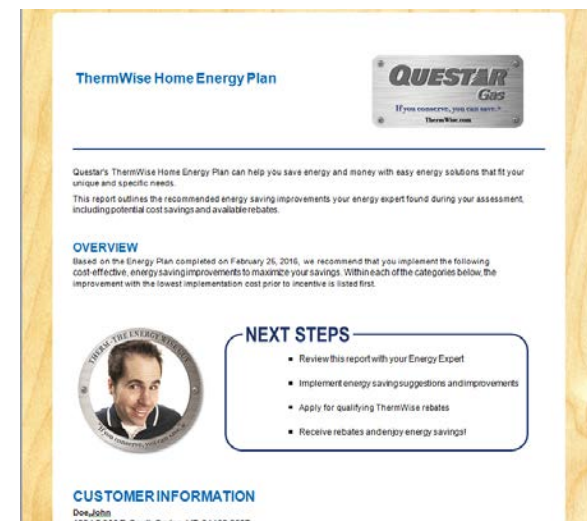
iEnergy Onsite – The Good



Links with DSMC
Customer, Measure
and Equipment
libraries



Templates on common
customers to jump start
audit



Branded and formatted
report

Technology-Driven Customer Journey

Energy Assessment

Trade ally performs energy assessment; information collected in mobile assessment tool

Measure Selection

Customer selects measures for preapproval; Trade ally updates mobile assessment tool

Measure Installation

Trade ally installs selected measures; Trade ally updates and submits in mobile assessment tool

Initiate

Assess

Report

Select

Preapprove

Install

Pay



Customer Info

Trade ally collects customer information in mobile assessment tool



Assessment Report

Trade ally generates assessment report in mobile assessment tool and reviews opportunities with customer



Program Agreement

Trade ally generates Assessment Report for signature, customer signs, trade ally submits for preapproval; Nexant performs QC for preapproval



Approve and Pay

Nexant performs QC for installation and cuts a check to the trade ally



Welcome



Congrats



Preapproved



Paid