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

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Reimagine tomorrow.

Joe Larsen

June 14, 2018

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Agenda

Launching a Tiered Network
iEnergy Trade Ally

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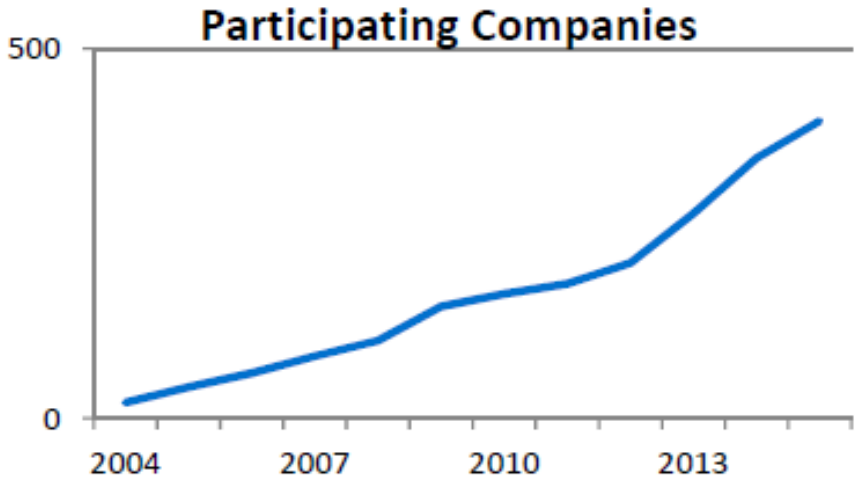
Launching a Tiered Network

Where We Came From

- **More is better**
- **Open network**
- **Five states, multiple technologi (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

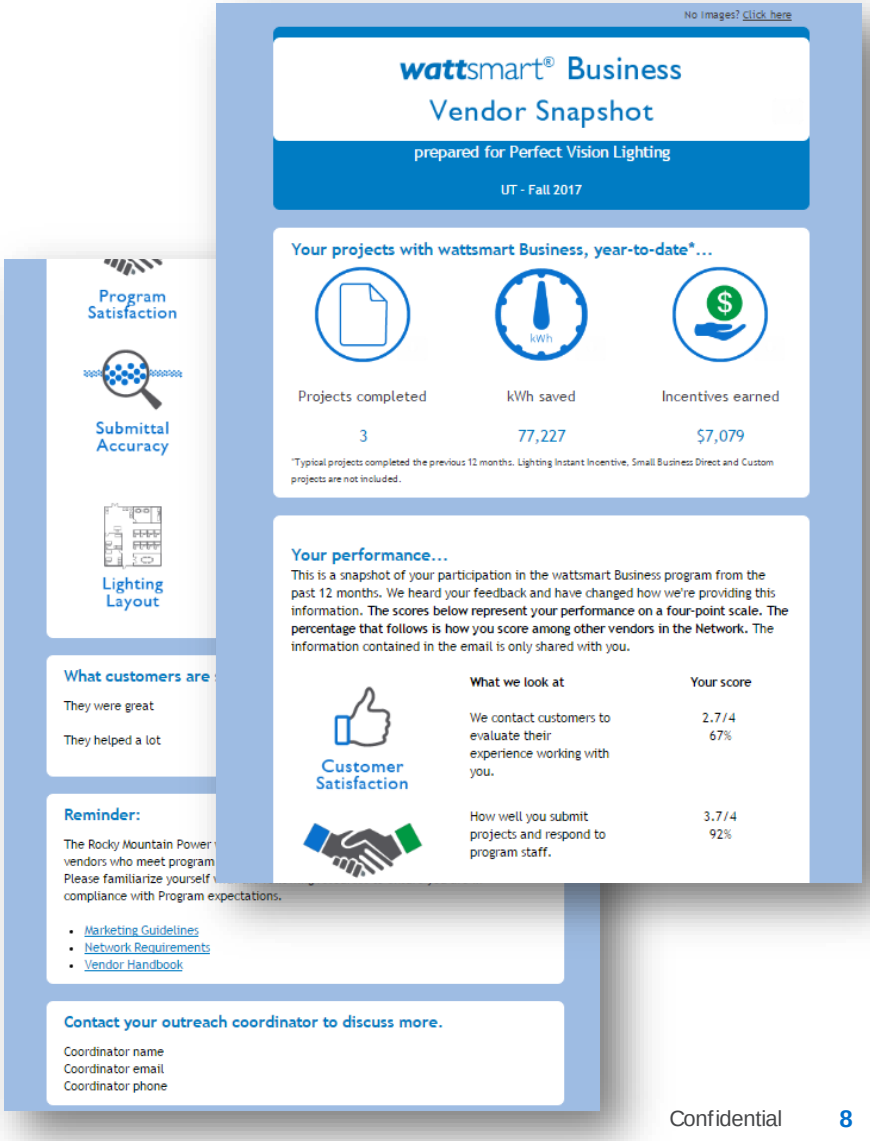
- Teams
  - Executive committee
  - Implementation team
- Timing
- Needs
- Goals
- Challenges

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**



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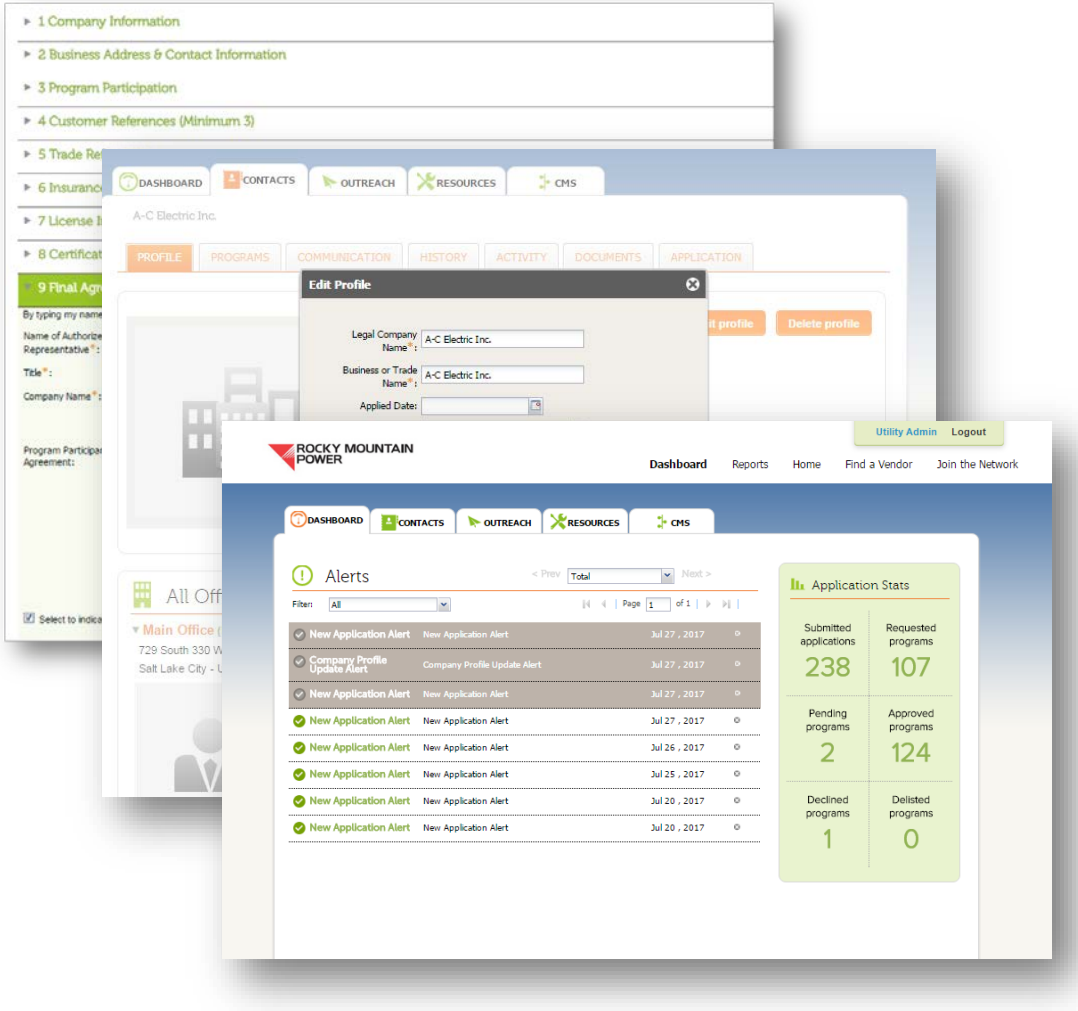
iEnergy Trade Ally

- **Online Vendor application**
- **Dashboard**
- **Database**
- **Reporting**



iEnergy Trade Ally

Vendor Resource

Self-Service

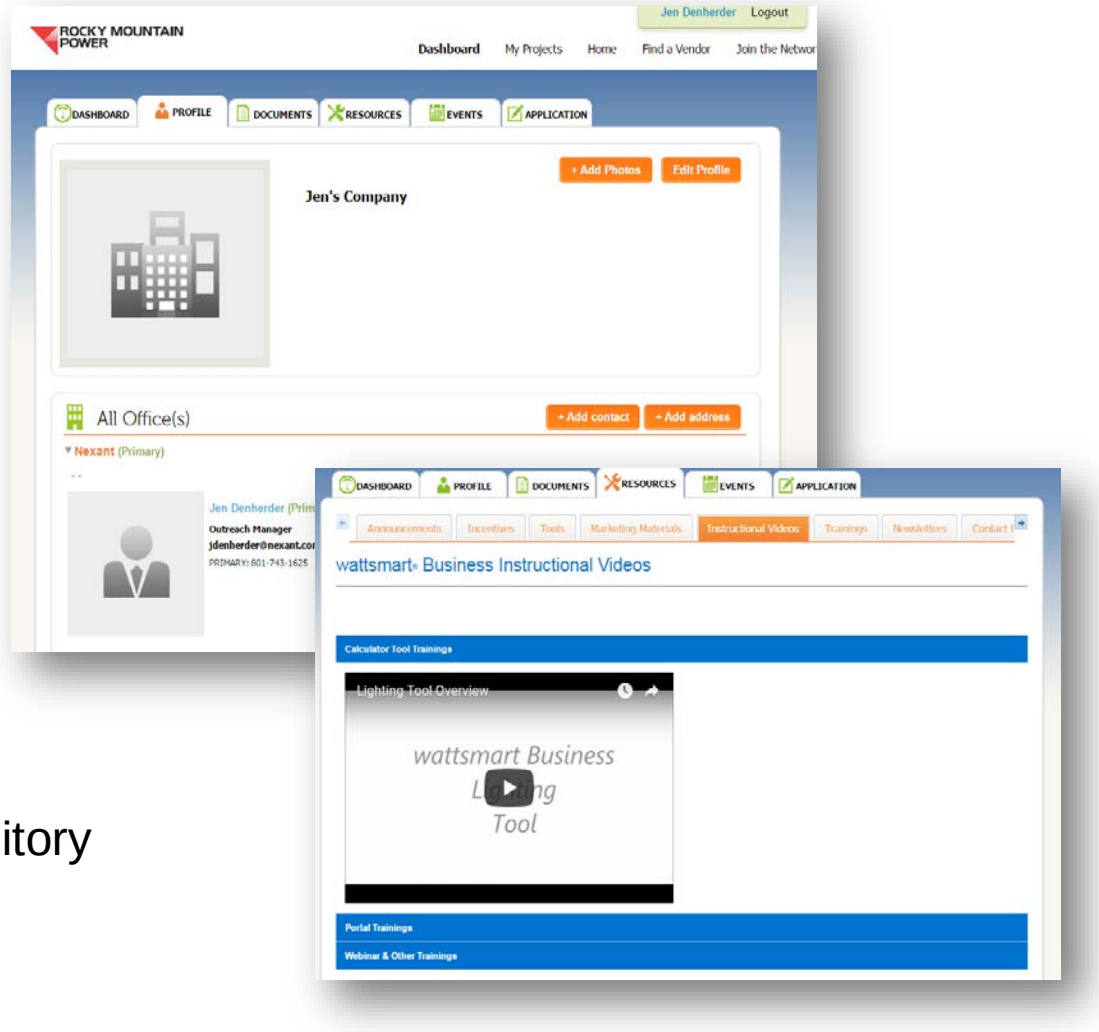
- Manage online profile
- View project status
- On-demand training videos

Access to Tools

- Incentive calculator tools
- Marketing materials

Communications

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



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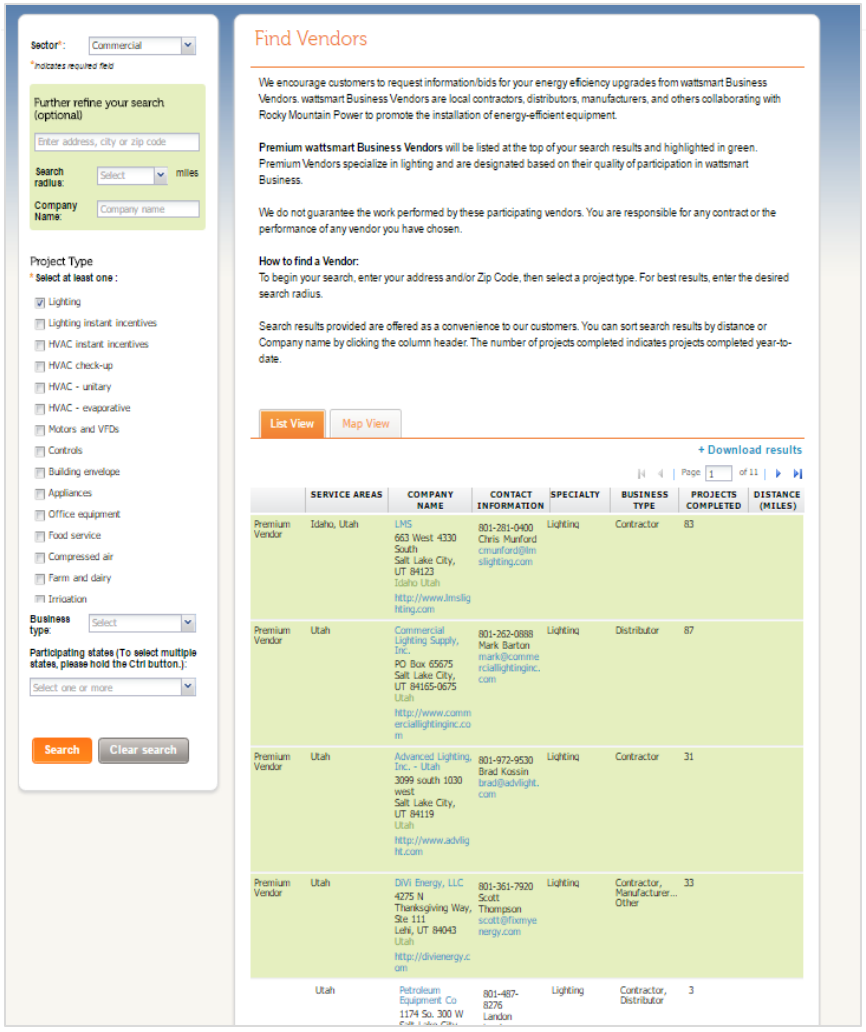
Marketing - Utility Promotion



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 :

- [x] 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

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	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.lmslighting.com	801-281-0400 Chris Munford cmunford@lmslighting.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@commerciallightinginc.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 Kossin brad@advlight.com	Lighting	Contractor	31	
Premium Vendor	Utah	DiVi Energy, LLC 4275 N Thanksgiving Way, Ste 111 Lehi, UT 84043 Utah http://divienergy.com	801-361-7920 Scott Thompson scott@fixmyenergy.com	Lighting	Contractor, Manufacturer... Other	33	
	Utah	Petroleum Equipment Co 1174 So. 300 W	801-487-8276 Landon	Lighting	Contractor, Distributor	3	

Premium wattsmart® Business Lighting Vendors Utah
Fall 2017

ROCKY MOUNTAIN POWER

wattsmart BUSINESS VENDOR PREMIUM FALL 2017

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

ROCKY MOUNTAIN POWER

…endor status based on their top
September 26, 2017:

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

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

…uarterly based on the previous 12
…on. Top performing Vendors are selected

- 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.

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Questions?

Trade Ally Referrals

2018 Nexant User Consortium

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June 14, 2018

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

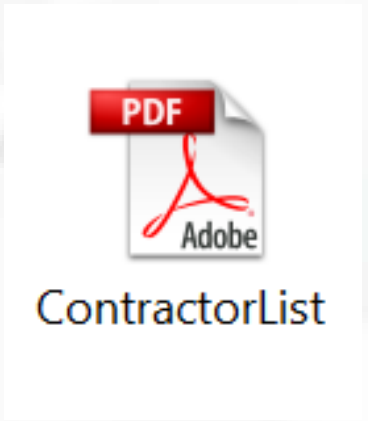
Contractor Search

Referral Request

Contractor List

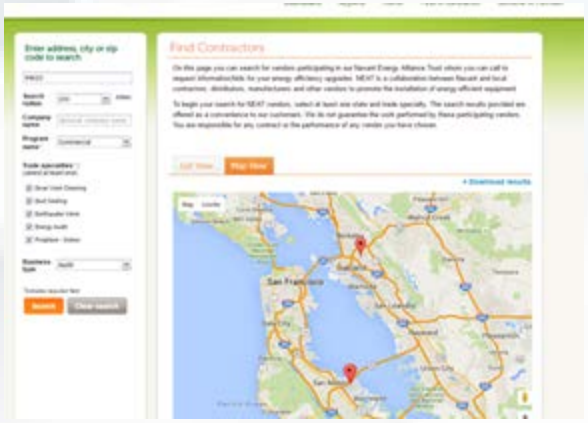
The standard solution is providing a customer-facing list of contractors in utility service territory.

e.g. PDF, Excel, Web Page



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

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

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

- 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

Select

Contact

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.

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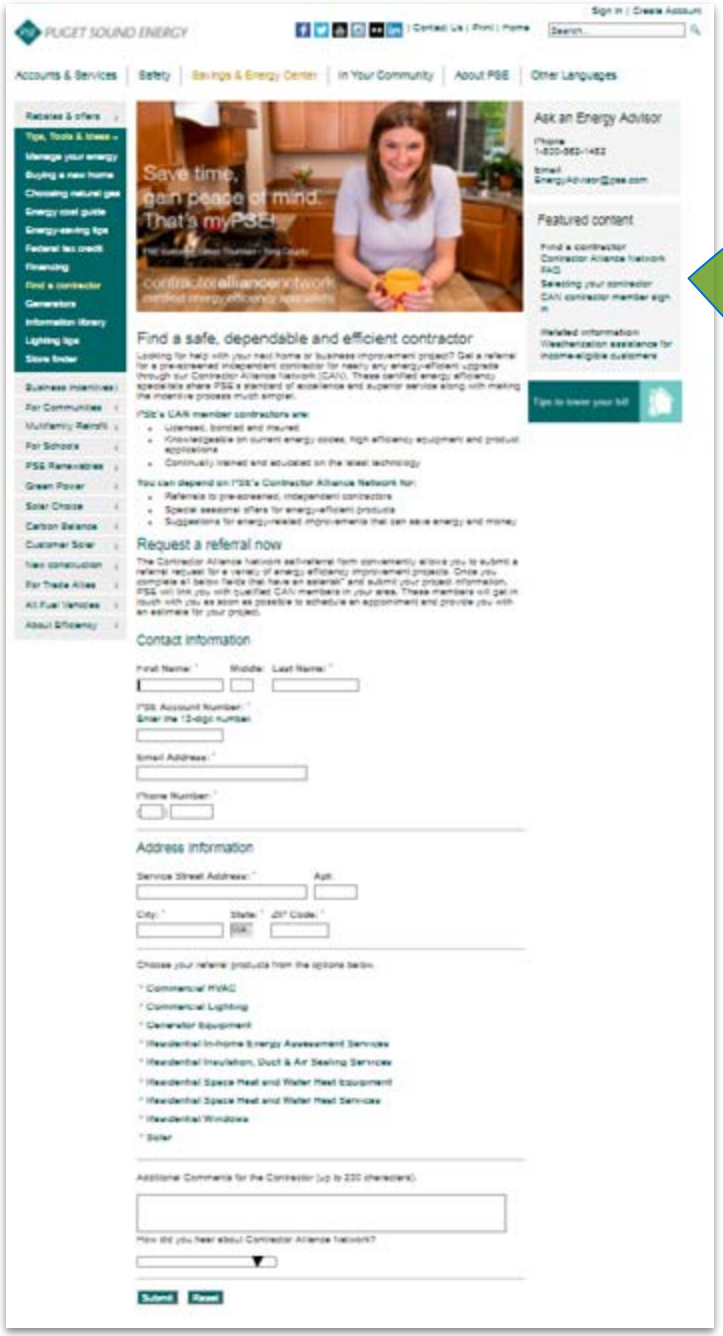
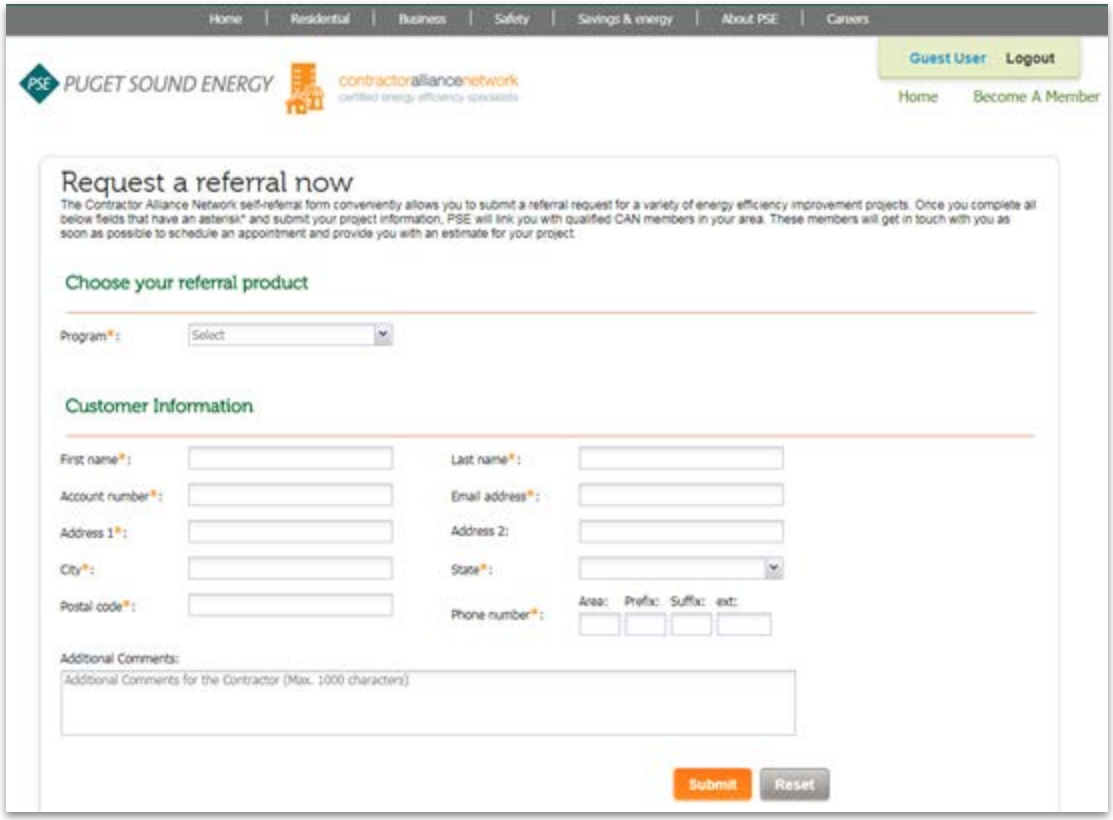
Customer Referral Request





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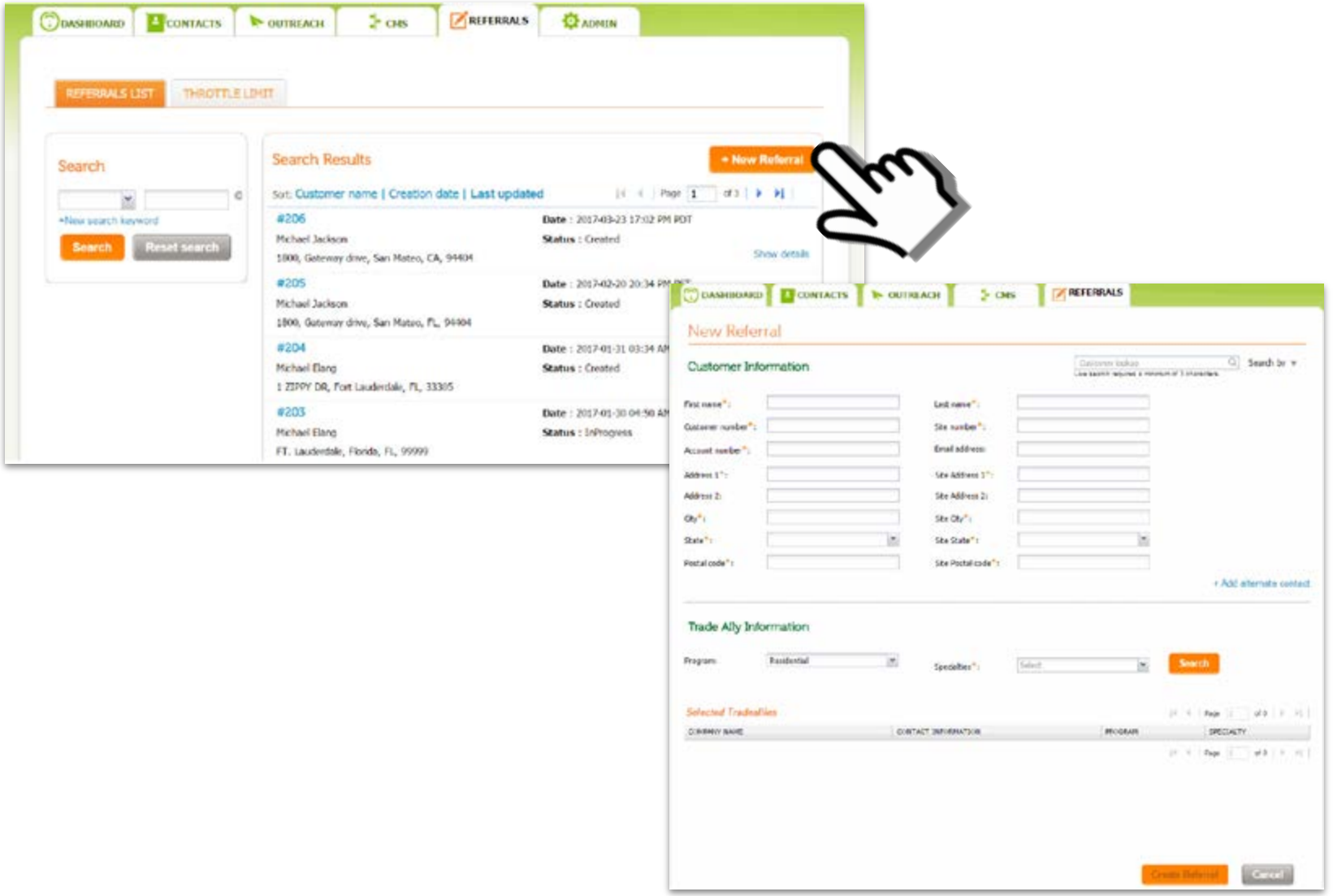
Referral Request - Internal Utility Staff



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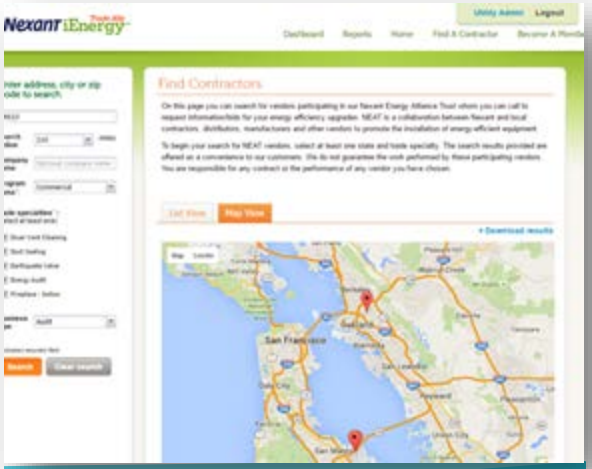
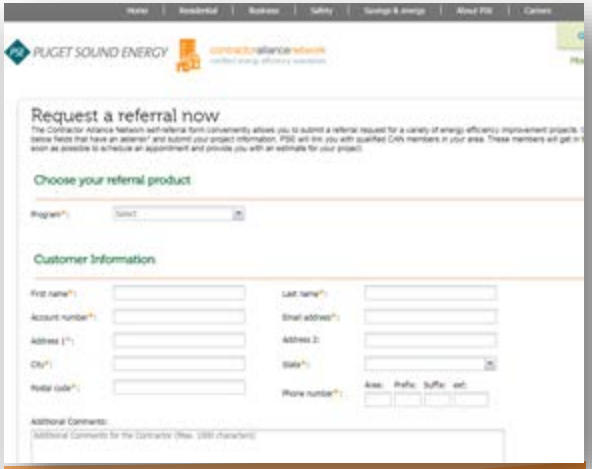
Connect Motivated Customers with Qualified Contractors

ContractorList

Industry Standard



New Standard



Innovating

Questions?

Mobile Assessment Tools

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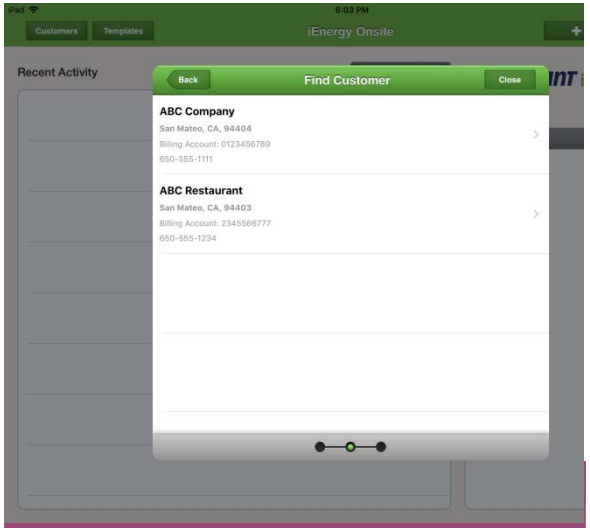
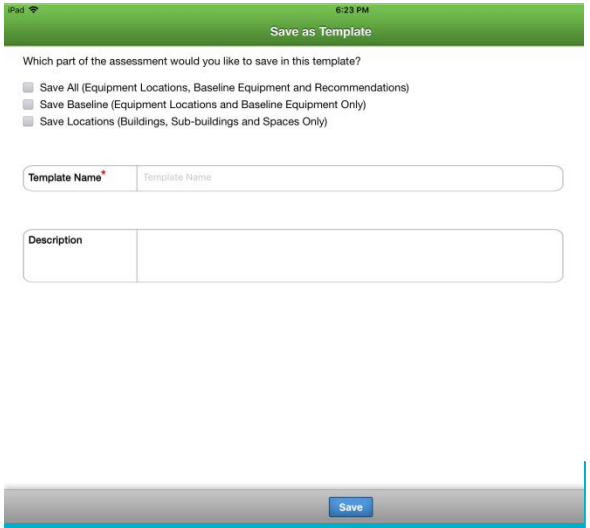
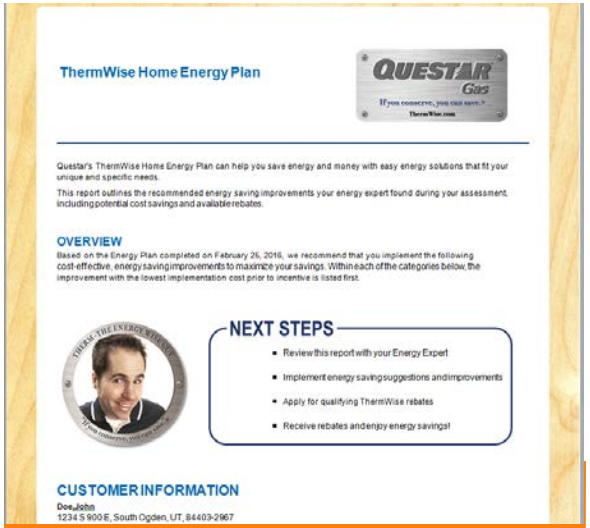
iEnergy Onsite – The Good



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