

Smart Ideas for Your Business Program Year 5 Changes

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Agenda

- ✓ Background of the Smart Ideas for Your Business program (SIFYB)
- \checkmark Evolution of the Program
- ✓ Growth Strategy
- ✓ IT infrastructure
- ✓ Changes to program elements



Background

✓ For the first three years the Smart Ideas for Your Business portion of the portfolio (SIFYB) had the following program elements and performance...

	Pre	scriptive / Cu	istom Incentiv	Retrocom	missioning	New Con	struction	Small C&I CFL Kit		
Year	Projects	Gross kWh	Net kWh	Incentive	Gross kWh	Net kWh	Gross kWh	Net kWh	Gross kWh	Net kWh
PY1	479	98,982,269	85,693,000	\$7,670,239	1,500,000	1,090,000	0	0	16,816,000	2,815,000
PY2	1,930	240,839,491	209,151,000	\$15,569,364	7,982,019	6,574,000	1,615,000	803,000	0	3,008,000
PY3	4,407	313,941,160	233,427,564	\$23,107,780	22,071,853	17,657,482	9,202,539	5,521,523	0	0
Total	6,816	653,762,919	528,271,564	\$46,347,383	31,553,872	25,321,482	10,817,539	6,324,523	16,816,000	5,823,000

- ✓ The C&I portion of the portfolio fell short of plan goals in PY3
- ✓ PY4-PY6 goals have aggressive increases in plan kWh savings

	Total	C&I		
Year	Gross kWh	Net kWh	Plan Goal	% of Goal
PY1	117,298,269	89,598,000	80,093,000	112%
PY2	250,436,510	219,536,000	168,037,000	131%
PY3	345,215,552	256,606,570	275,686,000	93%
PY4	527,137,798	348,515,000	348,515,000	
PY5	607,791,286	399,228,000	399,228,000	
PY6	623,438,536	408,451,000	408,451,000	



Background

- ✓ In PY4, SIFYB introduced the following new program elements
 - ✓ Compressed Air
 - ✓ Request for Incentive (Energy Efficiency RFP)
 - ✓ Midstream Incentives
 - ✓ Small Business Energy Savings
- ✓ SIFYB has also been working to launch the following planned program elements in PY5
 - ✓ Commercial Real Estate
 - ✓ Data Center
- ✓ Midstream, Request for Incentive, and Small Business have 50% increases in planned savings targets



✓ The SIFYB program is moving from a simple, "one size fits all" approach to a more expansive, complex, and comprehensive suite of offerings...

PY1	PY2	PY3	PY4	PY5	PY6	+
<u>Launch</u>		<u>Growth</u>		Maturation		
Widget Ba	sed	System Based		Market Based		
One Size F	its All	Segment by Size		Segment by Indust	ry	
Utility Cha	nnels	Leverage Trade Allie	es	Rely on Providers	5	Sustainable
Mass Mark	kets	Targeted Marketin	g (One on One Marke	ting	Results
Operation	al N	Aarketing / Awarene	ess F	Pipeline Manageme	ent	
Brochures		Awareness Ads	Targ	eting Specific Cust	omers	
Waitlist		Bonuses		Customer Solution	S	

✓ Changes to specific elements to follow...

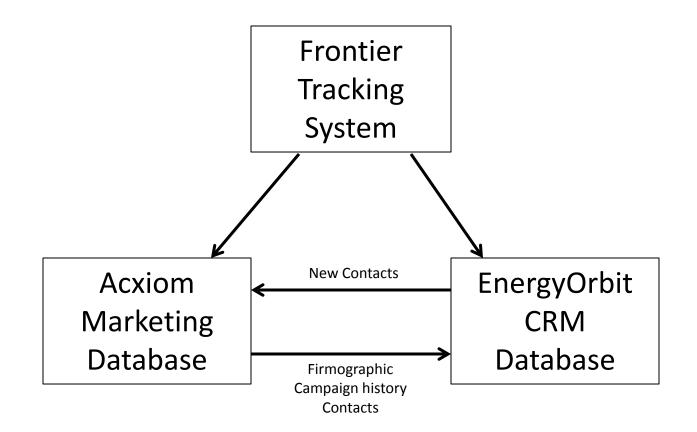
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SIFYB New Organizational Structure for PY5

Segment Based Acqu	Segment Based Acquisition			otimization / Comp	rehensive Solutions
<u>Markets</u>	Providers		Syster	<u>n</u>	Providers
Hospitality Commercial Real Estate	ECOVA Shaw Environmental	✦┳✦	Commercial Building - RCx		RSPs
Data Center	Wildan		Monitoring S	ystems - MBCx	MBSPs
TBD - Commercial	TBD		Compressed Air		Compressed Air Firms
TBD - Commercial	TBD		Refrigeration Systems R		Refrigeration Firms
TBD - Industrial Segment	TBD - Industrial Segment TBD		Process Heating (On Hold)		
TBD - Industrial Segment	TBD		System 6		
			Syster	n 7	
	Core	Program 1	Elements		
Program Element	Char	nnels		Technical Effort	Incentive Fulfillment
System Optimization	Comprehensive So	olution Pro	viders	System Providers	Nexant
SBES	Energy Advisors, Event	ts, Direct Marketing Franklin / Nexa		Franklin / Nexant	Franklin / Nexant
Mid Stream	Distri	butors		APT	APT
New Construction	Design / Architec	ctural Community		ECW	ECW
Custom	Trade Allies, Segmer	nt Based Providers		ComEd Engineers	KEMA
RFI	Trade Allies, Segmer	nt Based Pr	roviders	ComEd Engineers	KEMA
Prescriptive / Standard	Trade Allies, Account Segment and Technolo	U ,		KEMA	GEMANNE

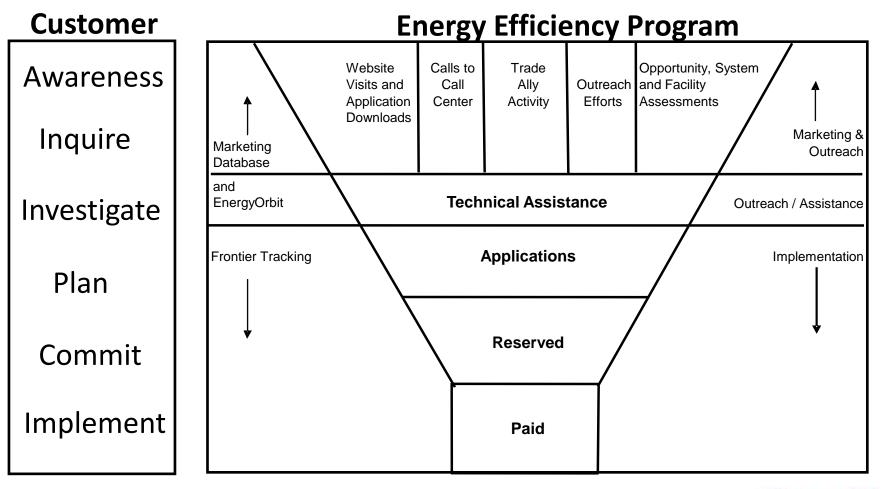
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Three IT systems each with it's own purpose that share data... (A year and a half in the making)





Evolution of Energy Efficiency Project Tracking (Prescriptive / Custom)





Frontier Tracking System

- ✓ Applications
- ✓ Stage of Project
- ✓ Timelines
- ✓ Progress to kWh goal
- Customer e-mail notification

lome Efficiency Programs Company Settings	Reports Payment Letters Monday, A	Apr 02, 2012.	Logged in as: Steve Baal) <u>Siq</u>
Project #: 08-28	Project Name : 28 - Cheshire Ca	t	Quick Links	
Stage : Payment	Status : Paid		Review Proj#	
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Home Effic	iency Programs Comp	any Setting	is Reports	Payment L	Letters	Monday, Apr	02, 2012.		Logg	ed in as: Steve Baab	<u>Sign Of</u>
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100%	F	ind Next	Select a for	rmat	 Export 	1 🔒			~	Proj#	
Active	by Status (P	robabil	ity-Wei	ghted)						Payment Proj#	Go
Program Year	Status	Project count	Gross kW	Net kW	Gross kWh	Net kWh	Projected Incentive	\$/Gross kWh	\$/Net		
2011	Pre-App - Reviewing	313	2,156.2	1,575.7	31,076,624	21,148,800	\$2,355,531.73	\$0.076	9		
2011	Pre-App - Approved	1705	28,428.8	20,843.1	157,640,346	113,600,040	\$11,609,006.76	\$0.074	9		
2011	Final - Reviewing	144	3,089.0	2,259.8	25,084,334	17,811,414	\$2,049,242.13	\$0.082	9		
2011	Final - Approved	74	763.3	564.9	4,363,809	3,229,218	\$305,625.02	\$0.070	9		
2011	Final - Paid	2824	46,791.1	34,475.8	199,111,853	145,638,699	\$14,335,401.38	\$0.072	9		
2011	Final - Payment Requested	39	365.5	270.5	2,037,664	1,507,871	\$146,926.34	\$0.072	ę		
2011	Total	5099	81,593.9	59,989.8	419,314,630	302,936,043	\$30,801,733.36	\$0.073	\$		



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Marketing Database

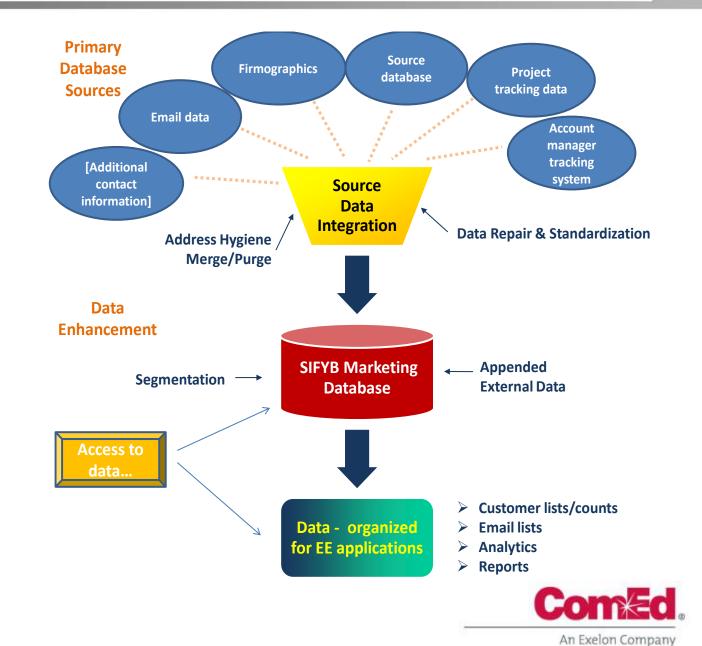
Functionality

Merge existing data

- Claritas
- iAvenue
- CIMS
- Frontier
- Questline
- Energy efficiency attributes

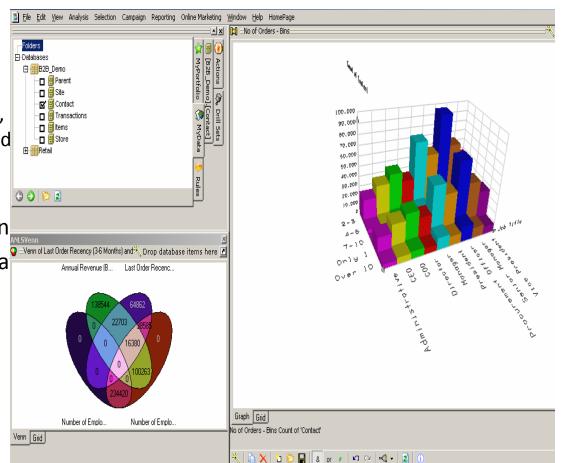
Cleanse data

- Merge/purge
- Verification
- Scheduled updates



Market Analysis

- ✓ Directly interact with the data
 - Homepage shows latest trends, segmentation performance, and links to analytical tools
- Transform data into useful metrics and graphical illustration
- Conduct on-demand analysis that reduces timely and costly outsourced ad hoc requests
- ✓ Integrate analysis directly into campaign management





Campaign Management

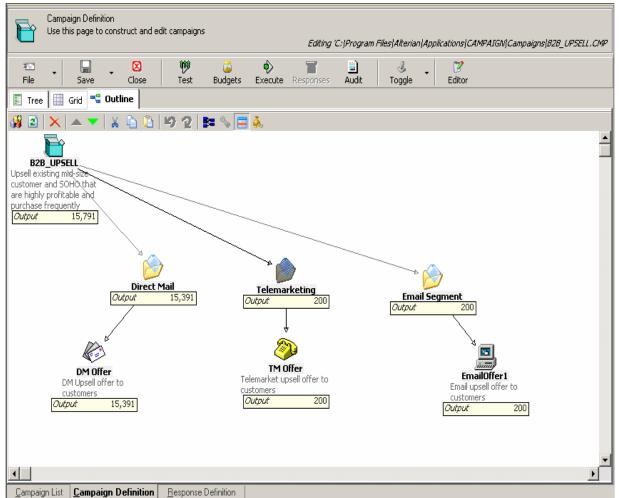
- ✓ Compare the costs and response rates of select campaigns
- ✓ Create new or tweak existing campaigns
- ✓ GUI helps visualize campaign structure
- Design multi-level strategies and rules
- ✓ Easily measure effectiveness
- ✓ Automate marketing programs and response processing

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Email Deployment

- Provides a centralized platform for capturing and reporting on campaign and activity data
- All promotion and response history generated during campaign fulfillment can be maintained at the account level
 - Include/exclude contacts from campaigns
 - Run analyses
 - Create segmentation
- Email capability is integrated into database platform and provides use of all data elements for campaign execution
- Deployment history, as well as campaign activities upon delivery and interaction by recipients, is logged.

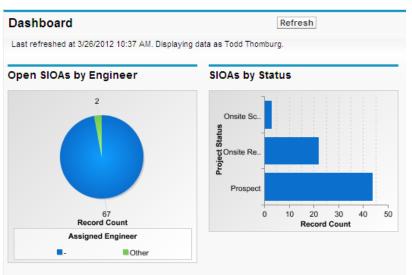




Energy Orbit CRM System

- ✓ Built on the Salesforce.com
 platform
- ✓ Tracks future project opportunities
- ✓ Large / medium
 customers (over
 100kW top 24k)
- ✓ Shared platform with all of our implementation contractors

energy	Search All Search Options	Steve Baab 🔻
Home Reports Accounts	Contacts EE Opportunities Program Management Equipment Management Trainings/Events +	
Create New 🔻		Custo
Shortcut	C Hide Chatter 🔁 Follow	
A Unresolved Items	Write something Followers	
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Recent Items		
<u>COMED</u> <u>A</u> Teri Lewand	Sort by: Post Date 💌	
 Hill Mechanical Group (The Hill Group) 	There are no updates.	
🧃 Jeff McClain	Contacts [0] Sites (Account) [0] Open Activities [0] Activity History [0]	Notes & Attachments [0] Account History [0]
Schneider Electric Buildings 3/ Judd Moritz	Account Detail Edit Delete Initiate EE Project	
💐 EnerNOC, Inc.	Account Name COMED [View Hierarchy]	Phone (630) 576-7158
Roosevelt University-FA Results	Parent Account	Fax
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	Market Segment 🥝	Industry
🔯 Recycle Bin	Description	NAICS Code 🥝
	Marketing Event 🥝	D&B Location Sales 🥝





Prescriptive

- ✓ Changes:
- ✓ Name changed to "Standard"
- ✓ Additional measures added
- Application split into application agreement and incentive worksheets
- Creating fill-able pdfs with an end goal of on-line submission
- ✓ Removing per premise caps

- ✓ Desired Outcome
- ✓ Less confusion
- ✓ Growth in kWh
- ✓ Less paperwork

✓ Encourage larger projects



- ✓ Changes:
- ✓ Name changed to Business
 Instant Lighting Discounts
- Additional LED and non-labor measures added
- Enhanced incentives for distributors
- ✓ Increased marketing focus of the program with distributors

- Desired Outcome
- ✓ Less confusion
- ✓ Growth in kWh
- ✓ Encourage distributor to promote EE products to their customer base
- Position Smart Ideas as a way to drive additional business



- ✓ Changes:
- ✓ Transitioning RFI to Custom

- ✓ Rate reduced to 7 cents / kWh
- ✓ Firm commitment option of 6 cents / kWh
- ✓ Removing per premise caps

- Desired Outcome
- ✓ Eliminate program shopping
- ✓ Balance risk / reward
- ✓ Set \$/kWh
- Continued engagement of larger projects
- ✓ Lower \$ / kWh
- Customers that need financial certainty satisfied
- ✓ Encourage larger projects



- ✓ Changes:
- Adding a monitoring based program offering (MBCx)

 Developing an incremental TAS scope addition to existing RCx and System based jobs

- Desired Outcome
- ✓ Provides customer options
- Longer term engagement with customers
- Able to identify additional operational savings across heating and cooling seasons
- Promote bundling of lowcost and capital measures



- ✓ Changes:
- ✓ Increasing customer payment to 7 cents per kWh
- Adding process cooling and industrial refrigeration

 Developing an incremental TAS scope addition to Industrial System based jobs

- Desired Outcome
- Aligns with custom rate and eliminates "incentive shopping"
- ✓ Increased penetration into large, industrial customers through skilled provider network.
- ✓ Increased kWh savings
- Promote bundling of low-cost and capital measures



✓ Changes:

✓ Desired Outcome

- Phasing out the TAS offering as a "stand-alone" offer
- Developing a "study-based" offering within the data center track
- ✓ Lower \$/kWh acquisition customer cost
- ✓ Scope of study tailored to needs of data center customers



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