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TRANSFORM



2017

SEEA & AESP SE Conference
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Trade Ally Models: Applying Best Practices

Jeromy Cotton, TVA

Jason LaStella, Franklin Energy Group

Brody Vance, Franklin Energy Group

Learning Objectives

- Demonstrate the role of a trade ally
- Demonstrate the role of an energy advisor
- Debate pros and cons of both trade allies and energy advisors
- Outline best practices for addressing EE and DR in various residential, commercial, small business, and multi-family programs

A TALE OF TWO PROGRAM DELIVERY MODELS

Jeromy Cotton – TVA

Jason LaStella – Franklin Energy Group

Brody Vance – Franklin Energy Group

PURPOSE OF PRESENTATION

Outline two methods of program delivery
(there are many more) considering:



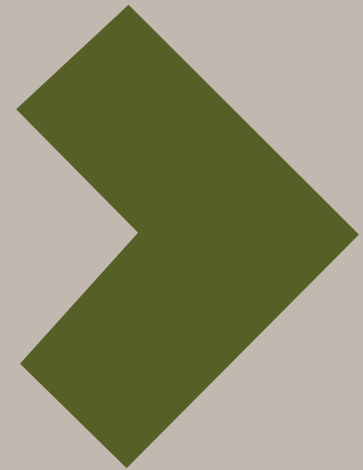
Utility motivation



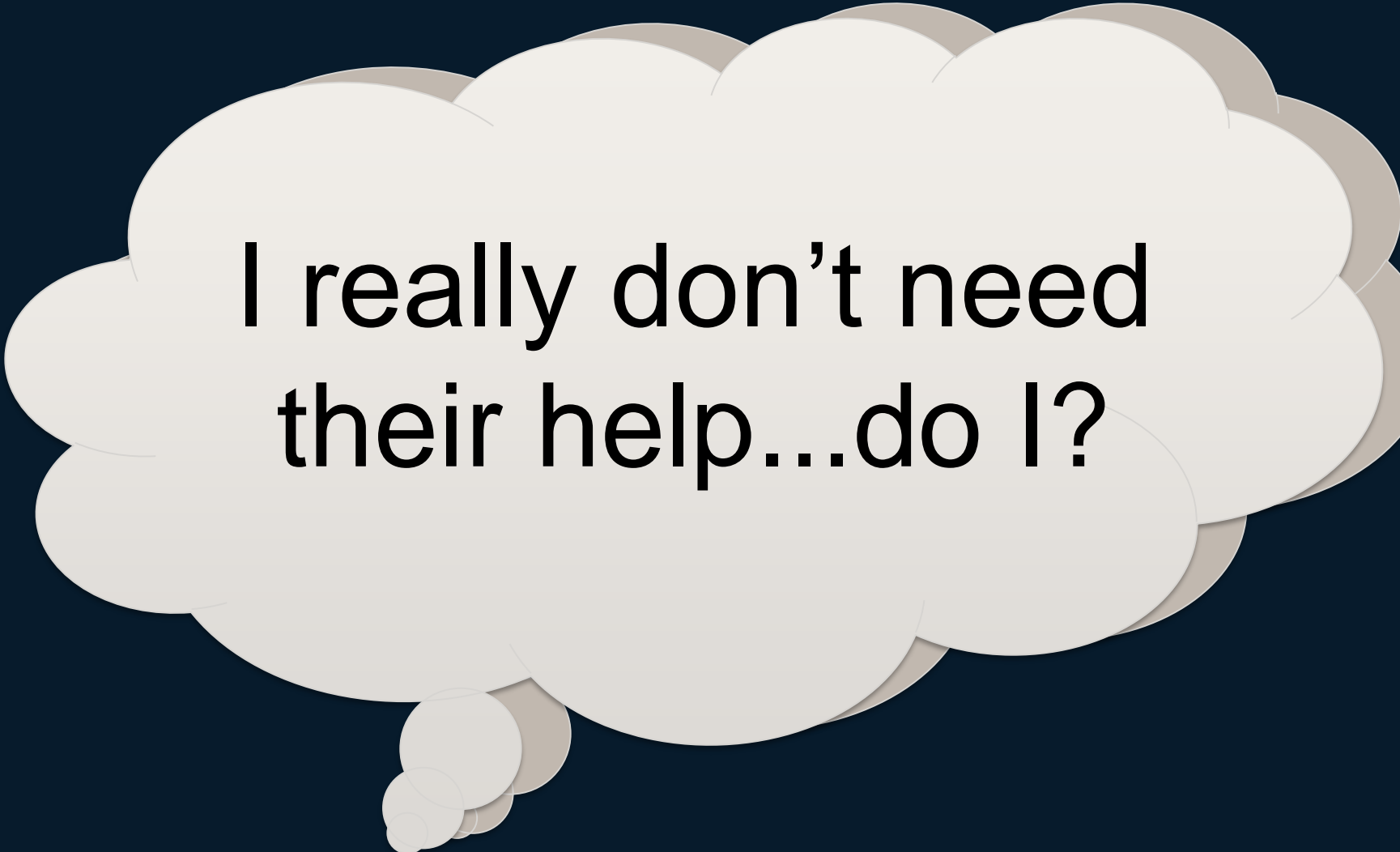
Budget
considerations



Types of
customers
you are serving



Marketing of
the program

A large, light-colored thought bubble with a smaller one below it, containing text. The thought bubble is composed of several overlapping, rounded rectangular shapes, giving it a layered, 3D appearance. The text is centered within the largest bubble.

I really don't need
their help...do I?

PROGRAM DELIVERED BENEFITS

- Field staff are comprehensive in what they look at while at a building
- Field staff can install equipment such as LEDs or faucet aerators while onsite
- Program staff are unbiased and keep the customers best interests in mind
- Program staff know the program rules and qualifying equipment
- Applications provided by field staff are often more accurate



PROGRAM DELIVERED LONG TERM BENEFITS

- Program staff serve as a consistent single point of contact for customers
- Create long term relationships with utility customers
- Program rules are easier to enforce with internal staff
- Outreach can be done with a targeted approach





PROGRAM DELIVERED DRAWBACKS

- Program staff time is expensive
- Timeliness to complete a report and then yield a completed project after an audit
- Limited utility coverage
- Customer equity
- Inaccurate cost estimations – rely heavily on a Trade Ally

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He is NOT motivated
by saving energy

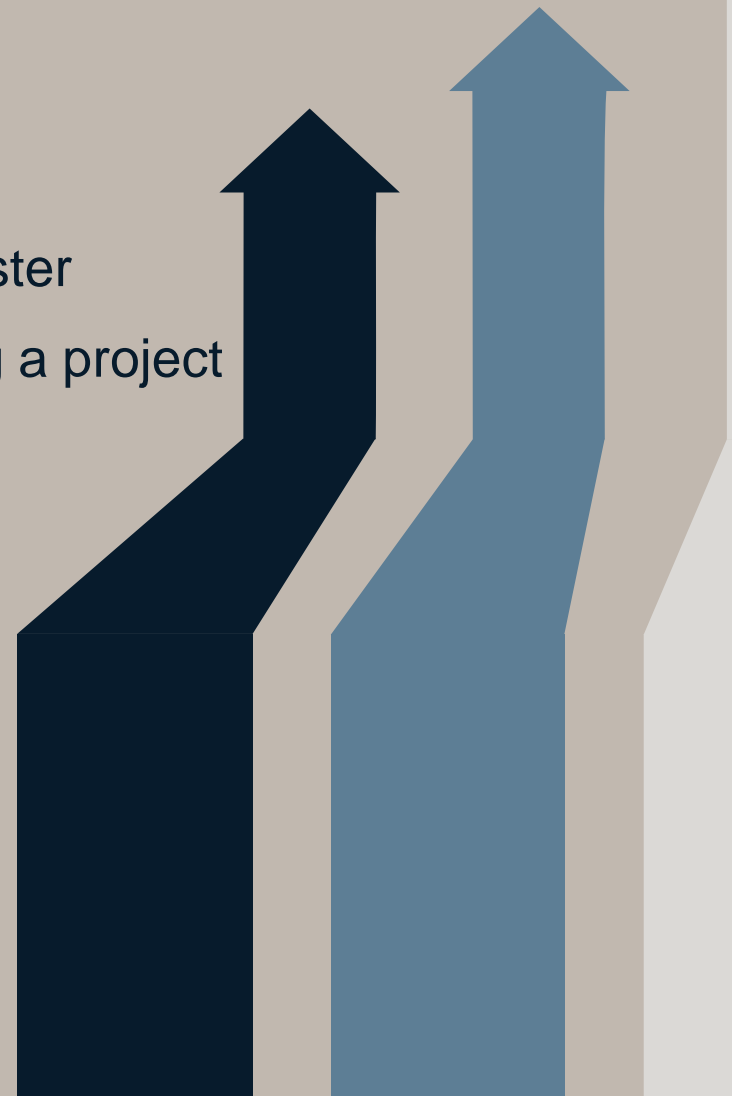
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TRADE ALLY DELIVERED BENEFITS

- Stimulate the local economy
- Larger geographic coverage
- Marketing cost are minimized
- Projects involving a Trade Ally complete faster
- Some Trade Allies can assist with financing a project





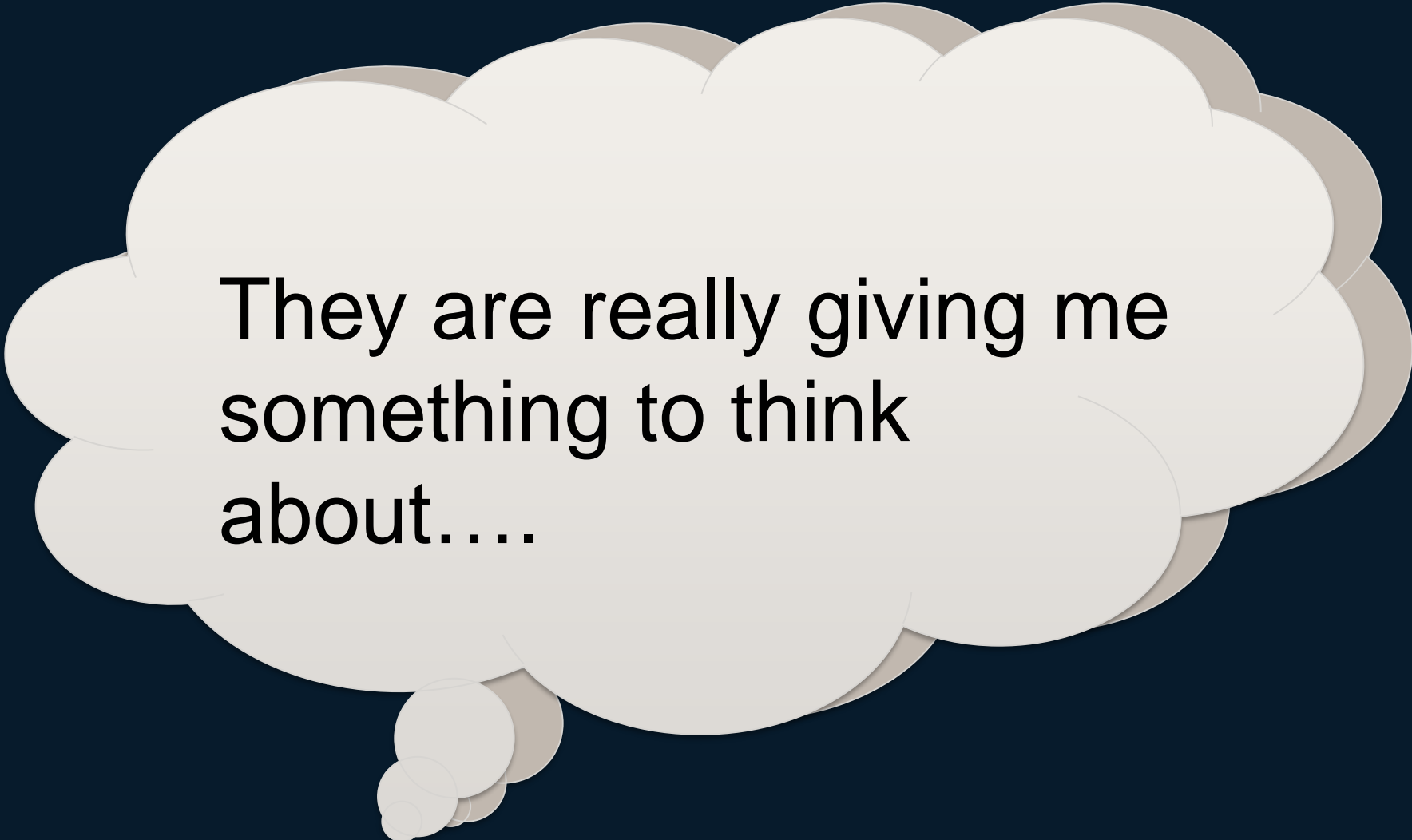
TRADE ALLY DELIVERED DRAWBACKS

- Incomplete applications
- Non-qualified products are installed
- Ineligible customers are promised services or program dollars
- Overstated savings estimates



TRADE ALLY CUSTOMER DRAWBACKS

- Silo savings – lighting vs. HVAC vs. other technologies
- Best solutions/interest for the customer
- Consistency of customer experience
- Budget throttle – the dreaded customer wait list
- Potential for underserved customers to remain underserved



They are really giving me
something to think
about.....

So Jeremy.....
What direction
are you going
to go?

FINAL CONSIDERATIONS ON A DESIGN

- Consistency in customer delivery
- Ability to throttle program budget
- Comprehensive savings assessment
- Accuracy in applications and savings expectations
- Long term customer relationship and pipeline development
- Position utility as an energy partner
- Motivated to sell projects
- Experience of Trade Allies
- Motivated to complete projects quickly
- Simulates the local economy
- Reduction in marketing to end-use customers
- Doesn't disrupt existing relationships

Combine the BEST
and deal with the REST



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FRANKLIN ENERGY GROUP 



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or at Registration**

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Faces of EE


Get your headshot taken on Tuesday!

It stimulates [our] local, regional & national economy.

Derrick Blue,
Coastal Bay Properties,
Plant City, FL

Energy efficiency: America's Job-creation powerhouse

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I am a quality control inspector for a weatherization program.

Kenny Vance, Central Virginia Alliance for Community Living, Rustburg, VA

Energy efficiency: America's Job-creation powerhouse

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[I am a] community action weatherization coordinator.

Melissa Mattox, Blue Grass Community Action, Georgetown, KY

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