

E SOURCE
HUB



AT THE
FORUM

E Source Toolbox for Account Managers

Devin Fink

forum

Persona introduction

- Leads account management team
- Tries to optimize team efficiency while maximizing customer satisfaction
- Liaison between front line account managers and upper management



- Is the face of the company to their assigned accounts
- Is an advocate for their customers, yet needs to know all company issues
- Is busy putting out fires but needs to do strategic planning for each account

Solving your account management problems

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I am developing an overall business customer strategy and need help on best practices. What are other high-performing organizations doing?

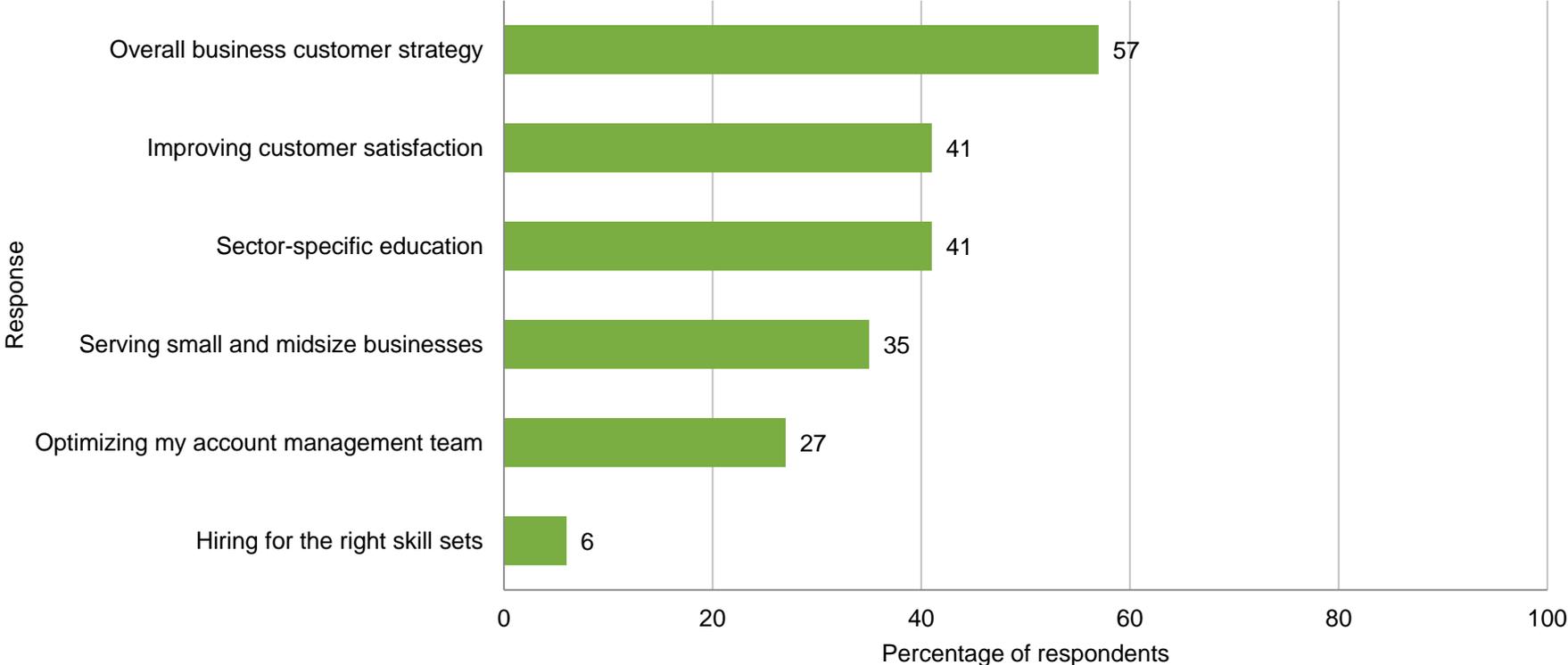


Director of Acct Mgt.

“

We want to improve customer satisfaction with all business customers. What are the key drivers and critical things I need to do in order to accomplish this?

Research areas of interest



Base: n = 49 respondents. **Question:** What area of your business customer operations are pain points that you could use some help with? Check all that apply. **Note:** This poll was conducted during the E Source Business Customer Strategy of the Future web conference in August 2018.

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Account management solutions

- E Source Account Management Service (Business Marketing Service, Technology Assessment Service)
- E Source Business Energy Advisor
- Custom account management consulting solutions

E Source Account Management Service

- Manage business customers of all sizes:
 - Small
 - Midsize
 - Key accounts
- Optimize organizational structure
- Learn best-practice insights and advice
- Receive account management support
- Participate in measurement and benchmarking:
 - E Source Business Customer Satisfaction: Gap and Priority Benchmarks
 - E Source Account Management Assessment

Account manager measurement and benchmarking



E Source Account Management Assessment

An internal look at your utility's approach to key account management that provides comparisons to best practices as well as dozens of other account management groups across the US and Canada. It includes:

- Account and sector planning
- Account management structure
- Business customer engagement
- Business customer experience and satisfaction

Account manager measurement and benchmarking (cont.)



E Source Business Customer Satisfaction: Gap and Priority Benchmarks

Two separate surveys of your key account and small and midsize business customers. We provide insights into customers' opinions about brand, account management and business representatives, communications preferences, program uptake, interest in future programs and services, decision-making, and other critical firmographics. Reports include:

- Satisfaction and value (utility and account manager)
- Net Promoter Score
- Importance and performance on a dozen attributes (gap = performance – importance)
- Communication preferences
- Products, services, measures of interest

Solving your account management problems

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I just started supporting a new business sector and need help getting up to speed about the business and the technologies they use. ASAP!



Account Manager

Contents

Fast facts

Industry overview

Industry trends

Best bets: Energy services and technologies

How to reach and serve this sector

Resources

Additional reading

Figure 2: Typical blower efficiencies in wastewater treatment plants

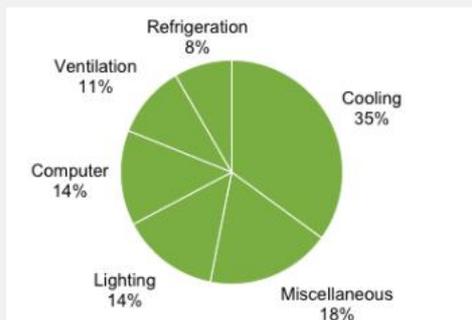
Turndown capability is an indication of the blower's ability to meet a range of airflow requirements.

Blower type	Nominal blower efficiency (%)	Turndown capability (% of rated flow)
Multistage centrifugal (inlet throttled)	50–70	60
Multistage centrifugal (variable speed)	60–70	50
Positive displacement	45–65	50
Single-stage centrifugal, integrally geared (with inlet guide vanes and variable diffuser vanes)	70–80	45
Single-stage, high-speed turbo	70–82	50

© E Source; data from Carollo Engineers

Figure 1: Energy consumption by end use in K–12 schools

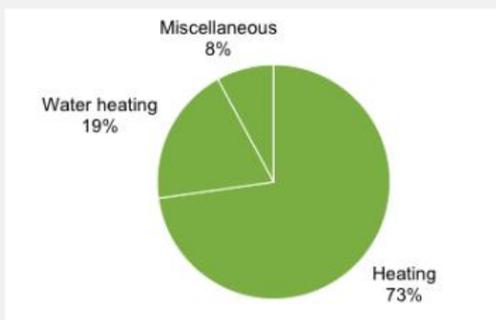
A. Electricity



Notes: Office, heating, water heating, and cooking each represent less than 5 percent of electricity consumption and are included in "Miscellaneous" uses.

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B. Natural gas



Notes: Cooling and miscellaneous end uses represent less than 5 percent of gas consumption and are included in "Miscellaneous" uses.

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Industrial facilities can save between 5% and 20% of their total energy consumption by installing energy-management and energy-information systems and by training facility staff to use the information.

Business Energy Advisor

- Online tool
- Customer access
- Employee access
- Customizable

Managing Energy Costs in Grocery Stores

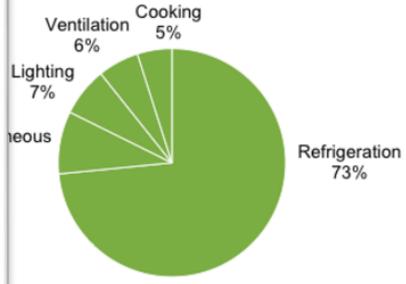
Grocery stores in the US use an average of 52.5 kilowatt-hours (kWh) of electricity and 38,000 Btu of natural gas per square foot annually. In a typical grocery, refrigeration and lighting represent about 65 percent of total use (Figure 1), making these systems the best targets for energy savings. Energy costs can account for up to 15 percent of a grocery store's operating budget. Because grocery stores' profit margins are so thin—on the order of 1 percent—every dollar in energy savings is equivalent to increasing sales by \$59.



Average energy use data

Figure 1: Energy consumption by end use
In grocery stores, refrigeration and lighting are the bulk end uses for electricity; space heating and cooking dominate natural gas use.

Electricity end uses in grocery stores



Notes: Cooling, computer, office, heating, water heating each represent less than 1 percent of electricity consumption and are included in "Miscellaneous" uses.
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[Kansas Grocery Store Earns Energy Star](#)

DR Strategies

[Strategies for C&I Demand Response: Groceries](#)

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[It's Time for Your Business to Reap the Rewards of LED Lighting](#)

[Put RTU Maintenance on Your Spring Cleaning To-Do List](#)

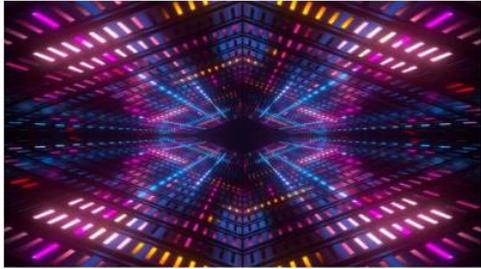
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[Getting Charged Up over Electric Vehicles](#)



Technology Assessment Services



Next Generation of Energy Savings Resource Center

July 2, 2018

Lighting baselines are rising and LED markets are transforming. Are you looking for innovative ways to fill the savings gap? Our resources will help you really get to know your customers and design programs and customer experiences that address their barriers and motivations.

- Technology-specific resource centers
- Business customer research projects (small data centers, indoor agriculture, midsize healthcare)



Emerging Technology Resource Center

June 26, 2018

Want to stay on top of all the latest technologies coming into the market? The Emerging



LED Resource Center

April 16, 2018

The E Source LED Resource Center is your one-stop shop for the latest data and resources on LEDs, including information on attributes, applications, lifetime, replacement strategies, dimming, and color quality.

How E Source consulting can help

Deep business-customer-centric best-practice knowledge and experience with:

- Key account customer prioritization and segmenting into service-level tiers
- Account management team restructuring and optimization
- Energy-efficiency propensity analysis at the business type, technology, and account level
- Hands-on implementation experience

Next steps

-  Visit the Learning Lab to try these tools
-  Schedule a meeting at the Forum with Devin or Mike
-  Attend an upcoming online meeting; check out www.esource.com/events
-  Call us after the Forum to schedule a time for us to meet with your team
-  Subscribe to monthly newsletters and weekly alerts

For more information



Mike Hildebrand

Vice President, Account Management Solutions, E Source

303-345-9176 mike_hildebrand@esource.com



Devin Fink

Manager, Account Management Services, E Source

303-345-9226 devin_fink@esource.com