E Source Toolbox for Utility Partner Business Development Strategists

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Persona introduction

- Sells solutions to utility demand-side management (DSM) teams within utilities

- Needs to find business targets by identifying:
  - Which regulatory environments are ripe for business
  - Which utility portfolios have the most opportunity

- Wants to understand utility DSM goal achievement for promoting their services

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Tools to give you the intel you need

DSM INSIGHTS ➔ Program and portfolio performance from regulatory filings

MEASURE INSIGHTS ➔ Program input data from technical reference manuals

DSMdat ➔ Program profile from utility websites
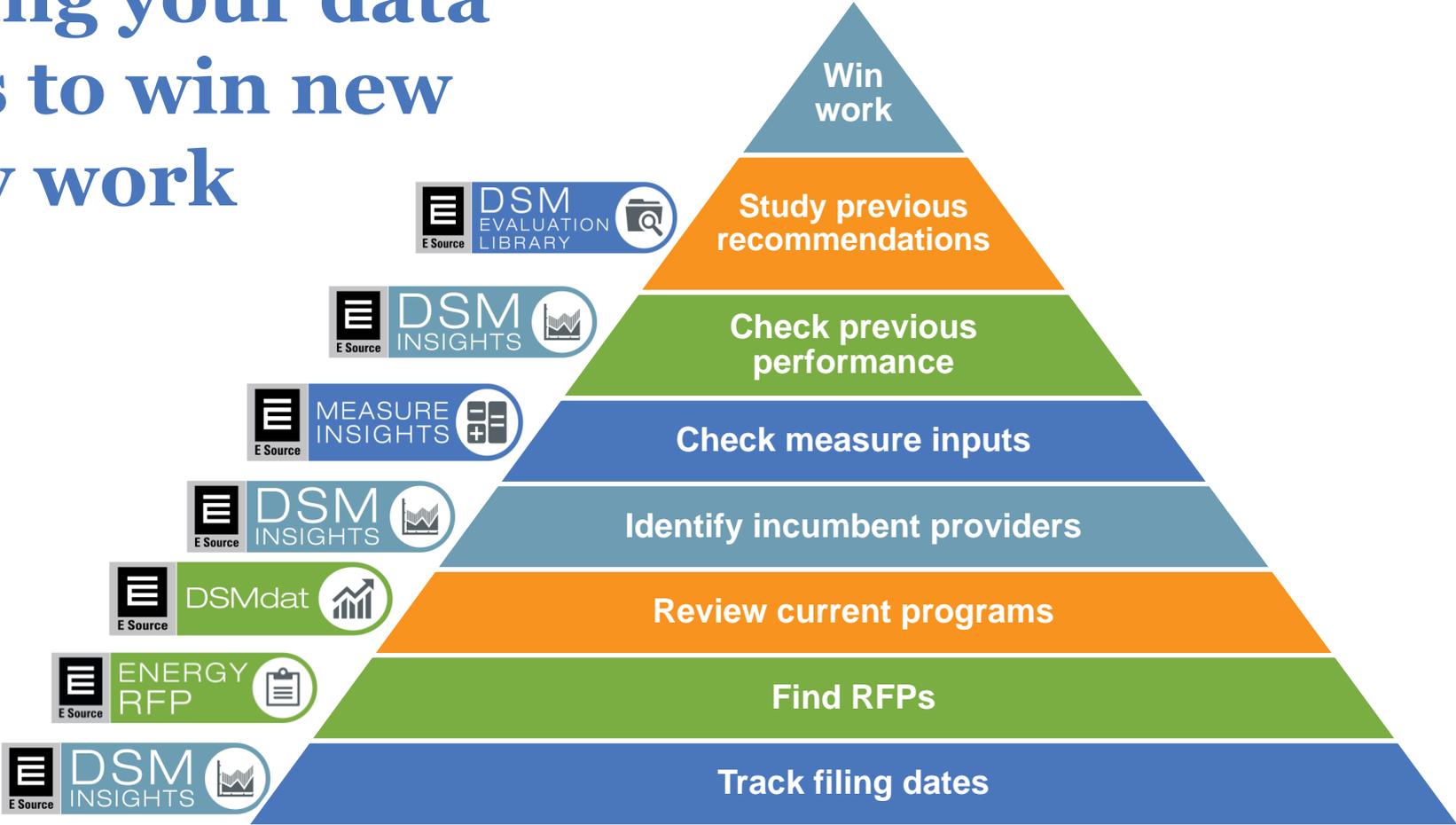
DSM EVALUATION LIBRARY ➔ Repository of impact and process evaluations

ENERGY RFP ➔ Library of energy-efficiency and demand-response-related requests for proposal (RFPs), requests for information, and requests for quotation

Meeting your data needs to win new utility work

Win work

DSM EVALUATION LIBRARY | **Study previous recommendations**

DSM INSIGHTS | **Check previous performance**

MEASURE INSIGHTS | **Check measure inputs**

DSM INSIGHTS | **Identify incumbent providers**

DSMdat | **Review current programs**

ENERGY RFP | **Find RFPs**

DSM INSIGHTS | **Track filing dates**

DSM tools at a glance

Intent	![Measure Insights] Program inputs	![DSMdat] Program profiles	![DSM Insights] Program and portfolio results	![DSM Evaluation Library] "Why" behind results
Measure attributes	✔			
Baseline assumptions	✔			
Incentives		✔		
Measures		✔		
Results			✔	✔
Spending			✔	
Source	Technical reference manuals	Utility websites	Filings	Impact and process evaluations

DSM tools at a glance

Intent	ENERGY RFP (E Source)	MEASURE INSIGHTS (E Source)	DSMdat (E Source)	DSM INSIGHTS (E Source)	DSM EVALUATION LIBRARY (E Source)
	Open and historical RFPs	**Program inputs**	**Program profiles**	**Program and portfolio results**	**"Why" behind results**
Measure attributes		✔			
Baseline assumptions		✔			
Incentives			✔		
Measures			✔		
Results				✔	✔
Spending				✔	
Source	Utility RFPs	Technical reference manuals	Utility websites	Filings	Impact and process evaluations

How the tools fit together for portfolio development

- How much savings are they planning for each measure to get to the program estimates?

- Who else already has a program with that measure?
- What incentives do they provide for the measure?

MEASURE INSIGHTS — E Source

DSMdat — E Source

DSM INSIGHTS — E Source

DSM EVALUATION LIBRARY — E Source

- How well does that program perform?
- How much are they planning to spend and to save with that program?

- Why did the program design change course?
- Why did the program perform the way it did?

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" How much are utilities planning to spend on direct-install programs over the next few years?

" I want to determine which utilities are filing programs.

DSM Insights: Find opportunities

Redesigned user experience makes it even easier to pull data from one report instead of having to go to multiple dashboards to find your answer. See all opportunities in a single report.

State/Province	Program Administrator	Program Name	PYEnd	Reporting Type	Net | Gross	Spending	Actual Impacts	$ per	Plan	Data Source	Results Narrative
IL	ComEd	Small Business Energy Savings - IPA	2017	Program Reported (ex ante)	Net	$67,441,000	252,108,000	$0.27	view plan	view source	view narrative
MA	NSTAR	C&I Direct Install	2016	Verified (ex post)	Net	$39,460,660	62,232,000	$0.63	view plan	view source	
MA	NSTAR	C&I Direct Install	2017	Verified (ex post)	Net	$34,995,924	65,858,000	$0.53	view plan	view source	view narrative
IL	ComEd	Small Business Energy Savings - IPA	2016	Program Reported (ex ante)	Net	$34,196,000	146,218,000	$0.23	view plan	view source	view narrative
MA	National Grid - MA	C&I Direct Install	2016	Verified (ex post)	Net	$22,370,569	43,560,628	$0.51	view plan	view source	
CA	Southern California Edison	SCE-SW-002D - Commercial Direct Install Program	2016	Program Reported (ex ante)	Gross	$19,251,825	33,597,832	$0.57	view plan	view source	view narrative
			2017		Net				view	view	view

EIA Insights | DSMi+EIA | vs. Plan | $ | MWh | Therms | $ per | Top10 | Dockets - Documents | Explorer | Performance | Cycle Tracker

Start Here, Filter Data	Below Goal Programs	Least Cost-effective Programs	Who's Spending the Most?	Who's Filing Soon?

Expected Program Plan Filings

▼ +

State/Province	Program Administrator	Current Cycle Years	Cycle End Date	Expected Plan Date	Prior Cycle $ MM	Days to Plan	Link to Docs
MS	Entergy Mississippi	1	Dec 31 2017	Sep 30 2018	$1.0	27	doc list
VA	Dominion	3	Apr 30 2018	Oct 3 2018	$41.0	30	doc list
UT	Dominion Energy (Questar Gas - UT)	1	Dec 31 2018	Oct 15 2018	$2.6	42	doc list
ME	Efficiency Maine	3	Jun 30 2019	Oct 31 2018	$22.5	58	doc list
RI	National Grid - RI	1	Dec 31 2018	Nov 1 2018	$7.0	59	doc list
GA	Georgia Power Co.	3	Dec 31 2019	Jan 31 2019	$11.7	150	doc list
TX	AEP Texas Central Company	1	Dec 31 2019	Apr 1 2019	$5.9	210	doc list
	AEP Texas North Company	1	Dec 31 2019	Apr 1 2019	$1.3	210	doc list
	CenterPoint Energy - Texas	1	Dec 31 2019	Apr 1 2019	$23.7	210	doc list
	Entergy Texas	1	Dec 31 2019	Apr 1 2019	$4.6	210	doc list
	Oncor	1	Dec 31 2019	Apr 1 2019	$57.5	210	doc list
	Texas-New Mexico Power Company	1	Dec 31 2019	Apr 1 2019	$1.6	210	doc list
IN	Indianapolis Power & Light	3	Dec 31 2020	May 1 2019	$23.0	240	doc list
AR	AEP - Southwestern Electric Power Co. AR	3	Dec 31 2019	Jun 1 2019	$2.6	271	doc list
MN	CenterPoint Energy - Minnesota	3	Dec 31 2019	Jun 1 2019	$4.0	271	doc list
AR	Entergy Arkansas	3	Dec 31 2019	Jun 1 2019	$27.8	271	doc list
MN	Minnesota Energy Resources Corporation	3	Dec 31 2019	Jun 1 2019	$0.2	271	doc list

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" I need to know who the implementers are for direct-install programs.

Provider mentions

View implementers by:

- **Program administrator**
- **Program category**
- **Provider**

Tracked Providers						
Provider	View by Program Administrator	View by Program Category	# Mentions	# States/Provinces	# Program Administrators
Action Housing, Inc.	view	view	8	1	4
ADM Associates	view	view	15	3	9
Applied Energy Group Inc. (AEG)	view	view	2	1	1
Beslin Communication Group	view	view	1	1	1
Cadmus Group	view	view	10	4	4
California Retrofit Inc.	view	view	1	1	1
CB&I - Chicago Bridge and Iron Company	view	view	3	1	1

Administrator Provider Count	
Program Administrator	# Providers
AEP - Southwestern Electric Power Co. AR	1
AEP - Southwestern Electric Power LA	2
AEP Ohio	3
Ameren Missouri	1
Arizona Public Service	1
BGE	1
Black Hills Energy - CO	4
Cleco	2
ComEd	2
Consumers Energy Company	4
Dayton Power & Light	2
DTE Energy	3
Duke Energy - OH	1

“ Can you help me determine which utilities are issuing RFPs?

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RFPs, RFIs, and RFQs

Access current and archived

issued by

utilities, public power associations,
public utility commissions,
regional energy-efficiency organizations,
and municipal governments

Next steps

Visit the Learning Lab to try these tools

Schedule a meeting at the Forum with Jeannine or Rachel

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

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