



**VERMONT ENERGY**  
INVESTMENT CORPORATION

# **NASEO 2012**

## **Annual Meeting**

**Advancing Commercial and Industrial Efficiency  
through Collaborative Account Management**

**Erin Carroll, Managing Consultant, VEIC**

September 11, 2012

- **Mission-driven nonprofit**
- **25 years reducing economic, environmental costs of energy**
  - 3 regional hubs
  - 35 states, 6 Canadian provinces
  - 6 Countries in Europe, Asia
- **Energy efficiency, renewable energy & transportation**

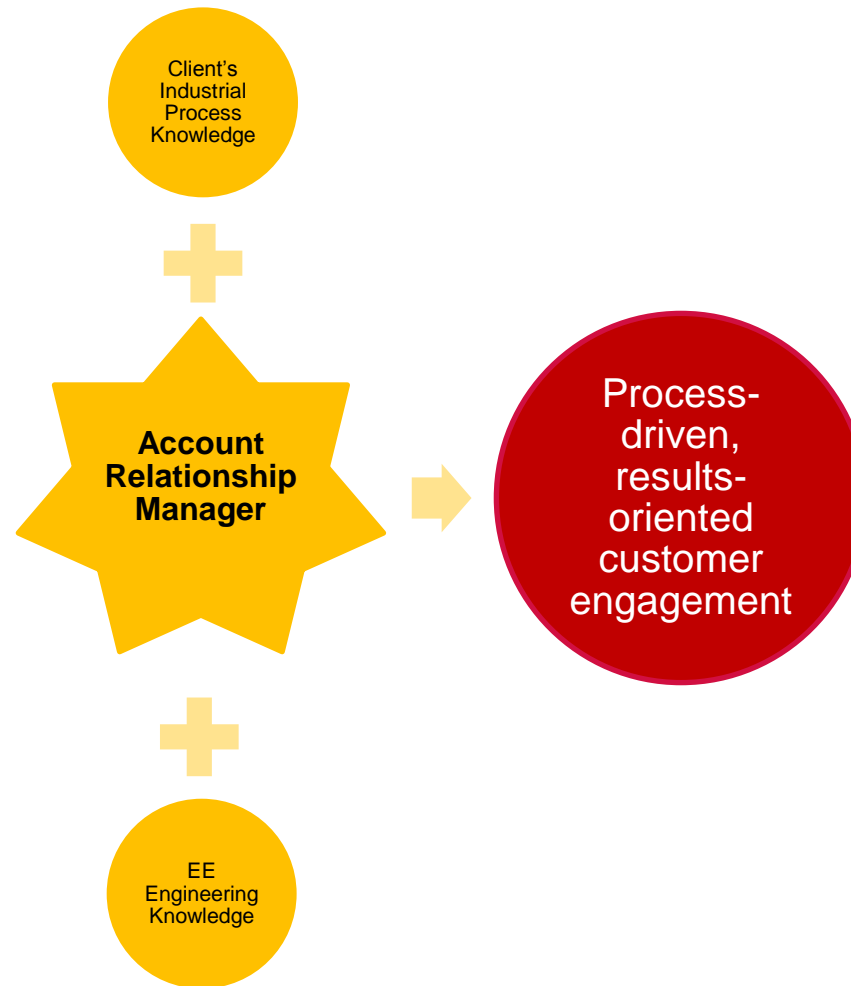
- **National & international consulting & implementation**
  - Program design, planning, & evaluation; policy & advocacy, research & development
  - Regulators, government agencies, utilities, foundations, advocates
  
- **3 Energy Efficiency Utilities**
  - Efficiency Vermont: nation's 1<sup>st</sup> energy efficiency utility
  - Efficiency Smart: efficiency services to 48 Midwest municipal electric systems
  - DC SEU: sustainability services in the nation's capital



# Challenges in Serving C&I Customers

- Our process is unique
- We don't have time to do this
- There is nothing for us to benchmark to
- We already replaced our lighting so we all set
- We can't afford to make the investment

# Collaborative Account Management



# Managing Key Accounts

- **We focus on customer needs, not on running pre-packaged programs or projects**
  - Services, responsiveness, partnerships
- **We solicit the help of market partners**
  - You need allies everywhere
- **There are always market-driven opportunities**
  - Relationships will make these real
- **Human assistance and financial assistance**
  - The value of trust and relationships
- **We don't fear complexity**
  - Customers want more help, not less
- **Develop a vibrant institutional culture**
  - Expect and reward staff and client innovation

# Collaborative Engineering/Account Management Approach

- Deep customer engagement at multiple levels of an organization
- Seamless integration of service providers Engineering and Account Management
- Working collaboratively to provide solutions for customers
- Speaking the same language and working towards the same goal
- Transcend the typical friction that exists between “the sales folks” and the “technical folks”
- Results in world class service that is not lost on our customers



# Collaborative Engineering/Account Management Approach



## ➤ Strategy Applied: Fairbanks Scales

“Efficiency Vermont was a major reason these projects happened. They pulled data and provided specific information on savings for each lighting scenario. Working with the Efficiency Vermont team allowed us to create a much more flexible and efficient facility.”

## ➤ Strategy Applied: National Life

“Our partnership with Efficiency Vermont supports National Life’s goal of reducing its electrical use by 15% over the next three years. Efficiency Vermont helps us find energy efficiency solutions that work with our business goals and provide long term savings..”

– *Tim Shea, 2<sup>nd</sup> Vice President of Facilities, National Life Group*



# How do we modify this for your office?

- **They key is developing the relationship so that the trust is there**
- **Self serve methods are good but they don't seem to have the traction that is needed to drive long term savings for C&I customers**
- **Create market partners and utilize technology to modify the approach to match your resources:**
  - **Creative use of a website to employ a virtual account manager**
  - **Virtual mentoring/coaching for facilities engineering staff**
  - **Establish a network of energy professionals in the applicable geographic area that you can train on this approach**

# Contact Information



## Vermont Energy Investment Corporation

**Erin Carroll**  
**ecarroll@veic.org**  
**(802) 540-7668**  
**[www.veic.org](http://www.veic.org)**

**Joanne Bachmann**  
**jbachmann@veic.org**  
**(723) 218-4430**  
**[www.veic.org](http://www.veic.org)**

**Matt Dooley**  
**mdooley@veic.org**  
**(802) 540-7637**  
**[www.veic.org](http://www.veic.org)**