

*Successful Commercial Implementation Tactics Revealed  
Panel Discussion*

Moderator: Dan Tarrence, Franklin Energy, AESP Implementation Committee Chairperson

Panelists: These three would be able to present:

Anita Hagspiel, National Grid

Fred Dreher, Franklin Energy

Karen Maoz, KEMA

Other potential:

Ed Smyth, RLW Analytics

Phil Mosenthal, Optimal Energy

*(Final list of panelists is to be determined in our next committee conference call on October 4<sup>th</sup>)*

Members of the AESP Commercial Implementation Subcommittee reveal the best of the implementation tactics that we have identified, discussed, and documented during four conference calls in 2006. In this Session, we drill down past the general design and highlight specific tactics used to drive successful implementation in our commercial programs.

As part of the AESP Implementation Committee, a subcommittee started a Commercial Implementation Manager's Information Exchange. The purpose of our conference calls was to exchange information on proven implementation strategies and tactics as well as discuss emerging techniques. Commercial program managers across the country participated.

The main goal of this subcommittee is to produce a "Commercial Tactics Reference Guide" that will be distributed at the National Convention in Las Vegas. This reference guide will have 6-10 authors that contribute 12-20 tactics used in implementation of commercial programs across the country.

We have established a format for documenting the tactics that are presented at our meetings. The 1-2 page form provides the information needed for other program managers that may want to incorporate the tactic into their own operation. The sections of the Implementation Tactic Summary form include: tactic type (i.e. delivery, approach) and name, a program information section (name of author, program, state, and contact info), a tactic information section and an impacts section. The tactic information section asks the following questions: description, when was it used, challenges for implementing the tactic, keys for success, in what situations does it work best, and cautions if others try to use this tactic. The impacts section seeks how the tactic impacts participation levels, energy savings, market transformation, and non-energy benefits.

Successful implementation tactics used in commercial programs will be revealed through this Panel Session. Energy efficiency program managers across the country will benefit from the tactics discussed and from the Resource Guide that will allow them to incorporate these tactics into their program immediately.

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Commercial Implementation Subcommittee  
IMPLEMENTATION TACTIC SUMMARY

<b>Date Presented</b>	May 23, 2006	
<b>Tactic Type</b>	Primary: Delivery	Secondary:
<b>Tactic Name</b>	Memorandum of Understanding (MOU)	

\* Types include: Incentive, Marketing, Markets, Technologies, Design, Delivery, Trade Ally, Approach

**Program Information**

<b>Program Name</b>	Focus on Energy		
<b>Type of program</b>	Commercial Sector		
<b>Utility/Agency</b>	Wisc Division of Energy	<b>State(s)</b>	Wisconsin
<b>Contact person</b>	Dan Tarrence	<b>Title</b>	Sector Manager
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**Tactic Information**

<b>Description</b>	<p>To be cost effective with limited program budgets, our program wants to be reasonably sure that a customer will be serious about implementing a project(s) when we dedicate significant resources. We developed the MOU document that lists the responsibilities of each party, a timeframe, and a main objective. It is a non-binding agreement, but allows us to document expectations.</p> <p>Our program uses a MOU in the following cases:</p> <p>(1) We dedicate resources to assist a large customer/chain with technical assistance. Example is Roundy's, a multi-billion dollar grocery store chain. They implemented a 26-store, anti-sweat heater control project that saved nearly 4,000,000 kWh and we are still working with them today.</p> <p>(2) We pay 100% of a new technology in one site and, if M&amp;V on the project shows results that meet the company's payback criteria, then they install this technology is numerous other locations. Example is Riiser, a 23 location convenience store chain that tried ASHC in one location and after the savings proof, installed in the rest of their stores. Another technology where we are using this method includes Demand Control Ventilation (DCV) on kitchen hoods with two customers – a restaurant chain and a large hotel.</p>
<b>When was it used?</b>	First use was fall of 2004 and we still use today in targeted situations
<b>Challenges in implementing tactic</b>	Customer confusion with concept. Customer not wanting to sign official looking document that "might" commit them to

	something. Main contact wants to get signature from his/her boss or senior level person.
<b>Key concepts for success</b>	Provide an explanation that this process helps document expectations of each party up front. Honesty that we want to allocate our limited resources in the best possible way to ensure cost effective use of public money. Meet or exceed expectations of the program for the customer in a timely fashion.
<b>In what situation would it work best?</b>	(1) When a program will expend significant resources on a large customer or chain locations. (2) When paying a larger than normal incentive amount (perhaps 100%) to promote and provide M&V on a new technology.
<b>Cautions if others try to use this tactic</b>	If the customer doesn't like the MOU concept, they could back away and not participate at all.

### Impacts

<b>Participation</b>	Roundy's Supermarkets Riiser (convenience stores) Hyatt Hotel
<b>Energy savings</b>	Roundy's MOU delivered more than four million kWh in last 12 months which started with an MOU in fall of 2004. Riiser MOU tested a technology that was eventually installed in all 23 stores. Hyatt MOU tested DCV technology, results are in, and they are planning to install in four more locations.
<b>Market transformation</b>	
<b>Non-energy benefits</b>	
<b>Other</b>	