

Program Optimization & Strategy

Our team of *engineers* blend the technical and the human to create impactful energy programs.

WE CAN HELP YOU

Identify what's working and what's not.

Gain a clear, stakeholder-informed understanding of your program's strengths and weaknesses.

Make informed decisions about what to address.

Stop spinning your wheels — get focused, actionable guidance to move forward with confidence.

Scale your program responsibly.

Build a path to scale that's aligned with your goals, capacity, and customer needs.

Align your team around a clear direction.

Reduce internal friction and improve buy-in with a roadmap everyone can support.

OPTIONS TO MATCH YOUR NEEDS & BUDGET

Three Levels of Engagement

PACKAGE

WHAT YOU GET

BEST FOR

YOU'LL GAIN

LEVEL 1

Focus Program Diagnostic

Gain insight into core issues, barriers, and opportunities, to articulate program effectiveness.

Programs with unclear problems or performance gaps.

- ✓ Stakeholder-informed insights into customer and operational dynamics

LEVEL 2

Fix Strategic Direction

Go beyond diagnosis to solve the problem.

Programs needing both clarity and a game plan.

- ✓ A visual, strategic diagnostic of program effectiveness

- ✓ Actionable recommendations to improve, scale, or reposition your program

LEVEL 3

Scale Strategic Planning & Roadmap

Build a plan to optimize and scale your program.

Programs preparing to grow, shift focus, or seek funding.

- ✓ A clear understanding of key program barriers and opportunities

PACKAGE FEATURES	LEVEL 1 Focus	LEVEL 2 Fix	LEVEL 3 Scale
Facts & Perceptions	3-5 stakeholder interviews	6-10 stakeholder interviews	10+ stakeholder interviews and cross-functional
Customer Experience	Baseline data and collateral review	Targeted data and collateral review	Comprehensive data and collateral review
Business Planning & Risk Identification	Process review and SWOT analysis	<ul style="list-style-type: none"> Process review and SWOT analysis Solution co-creation workshop 	<ul style="list-style-type: none"> Process review and SWOT analysis Strategic planning workshop
Key Findings & Direction	Executive summary of themes and recommendations	<ul style="list-style-type: none"> Executive summary Prioritization framework for strategic next steps Shortlist of recommended pilots, changes, or design improvements 	<ul style="list-style-type: none"> Executive summary Strategic roadmap Integration planning to align with broader utility, organizational, or funding goals Optional briefing deck to support board or leadership communication

Optional Add-Ons

Extend your insight and action plan

1

Customer Journey Mapping

See your program through your participants' eyes.

2

Tactical Roadmap

Outline a tactical action plan to accomplish the strategy with more specificity.

3

Government Funding Alignment

Identify where your program could tap into state or federal funds.

RECOGNIZED RESULTS

- **Gold Medal:** UCI Better Communications Competition for Special Publications, 2019
- **2-Time Winner:** ENERGY STAR® Partner of the Year Award, 2023 & 2024
- **Groundbreaking Award:** Association of Energy Services Professionals' Groundbreaking Program Design and Implementation Award, 2022
- **Energy Management Award:** Association of Energy Engineers' Central & South US Region Institutional Energy Management Award, 2023

\$530 Million+

Secured for clients from multiple sources:

- EPA
- DOE
- DOT
- USDA



Let's get started.

Schedule your free consultation today.

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