

# 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
<b>LEVEL 1</b> <b>Focus</b> Program Diagnostic	Gain insight into core issues, barriers, and opportunities, to articulate program effectiveness.	Programs with unclear problems or performance gaps.
<b>LEVEL 2</b> <b>Fix</b> Strategic Direction	Go beyond diagnosis to solve the problem.	Programs needing both clarity and a game plan.
<b>LEVEL 3</b> <b>Scale</b> Strategic Planning & Roadmap	Build a plan to optimize and scale your program.	Programs preparing to grow, shift focus, or seek funding.

#### YOU'LL GAIN

- ✓ Stakeholder-informed insights into customer and operational dynamics
- ✓ A visual, strategic diagnostic of program effectiveness
- ✓ Actionable recommendations to improve, scale, or reposition your program
- ✓ 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"> <li>Process review and SWOT analysis</li> <li>Solution co-creation workshop</li> </ul>	<ul style="list-style-type: none"> <li>Process review and SWOT analysis</li> <li>Strategic planning workshop</li> </ul>
Key Findings & Direction	Executive summary of themes and recommendations	<ul style="list-style-type: none"> <li>Executive summary</li> <li>Prioritization framework for strategic next steps</li> <li>Shortlist of recommended pilots, changes, or design improvements</li> </ul>	<ul style="list-style-type: none"> <li>Executive summary</li> <li>Strategic roadmap</li> <li>Integration planning to align with broader utility, organizational, or funding goals</li> <li>Optional briefing deck to support board or leadership communication</li> </ul>

### 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