In the nearly two decades that Evergreen Consulting Group has worked with utilities and energy organizations to establish and invigorate trade ally networks, our clients have exceeded bottom line goals, saved energy and built stronger relationships with allies and customers. Together we have achieved these results through four key strategies:

1. We develop and maintain long-term relationships.
2. We design the programs to be simple and intuitive.
3. We support allies with professional training and field assistance.
4. We complete tasks efficiently and communicate consistently.

“A well-designed and managed trade ally network is a powerful asset.”

A Win-Win Strategy
Trade allies are essential resources and partners for utilities working to achieve significant savings through energy efficiency. By helping utilities promote and close the deal on projects that achieve large volumes of low-cost kilowatt-hour savings, a well designed and managed trade ally network is a powerful asset. Evergreen has developed and implemented systems that strengthen operations, increase the number of completed projects and improve results for utilities and the contractors who align with them.

“Our approach incorporates straightforward business principles. We focus on results, work to meet the needs of customers and make sure professionals have the skills and resources necessary to do their job well.”

Roger Spring, Owner, Evergreen Consulting Group
“We are a small utility and can’t justify staffing a conservation department,” explains Dan Brooks, general manager, Elmhurst PUD in the Tacoma, Washington area. “Evergreen has a ton of experience and a significant network of qualified contractors. Working with them, we have excellent conservation results for a utility of our size: in 2014, Elmhurst saved 902,182 kilowatt hours.”

**Relationships**

It’s important to identify top performing contractors with expertise in energy-efficient construction and upgrades, plus the distributors, equipment manufacturers and retailers in the area who sell, install and service equipment and systems. But a fully functional trade ally network engages professionals in meaningful ways over the long haul. “Trade allies are a critical delivery channel for efficiency programs,” says Spring. “They are out in the marketplace communicating your program. How are you helping them succeed?”

**Simplicity**

Every industry has its own culture and language. While utilities may eat and breathe energy efficiency, most trade allies have a much wider range of priorities. Evergreen works with clients to streamline procedures and clearly define program requirements. The easier it is for trade allies to navigate incentives and other programs, the more likely they are to sell and complete energy saving projects with customers. Some of the ways Evergreen helps invigorate ally performance include:

- improving forms by clarifying instructions and simplifying steps
- ensuring that the network is easy to find on the utility website
- providing a single point of contact for questions and tech support
- scheduling timely and convenient training sessions
- developing and rehearsing precise selling points

**Professional Support**

Over the years and across the country, one of Evergreen’s most successful strategies for elevating trade ally performance has been placing subject area specialists in the field. Well-connected with utilities and versed in the program rules and requirements, specialists help translate technical specifications into...
“At Evergreen, our expectation is that we will respond to clients and each other within 24 hours,” says Spring. “We try to establish this same ethic within trade ally networks as well.” Communicating consistently and in a timely manner is a matter of respect, and an effective way to accomplish results. Ongoing, two-way conversations generate new ideas and move projects forward.

All trade allies have a project coordinator and a subject area specialist assigned to them. This consistent, single point of contact encourages trade allies to engage in the program while respecting their time.

“We jumped right in to the trade ally network with its incentives and expertise to help us sell energy efficiency retrofits. Our customers save on energy costs and we’ve gained quite a few leads from the utility. Everyone wins.”

Randy Rainey, Retrofit Team Manager, ATS Electric

**Signs of a healthy Trade Ally Network:**

- Increases activity in energy efficiency programs
- Educates contractors about program specifications and requirements
- Engages contractors to help market and promote energy efficiency programs

Communication and Efficiency

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Results
Evergreen’s team of 58 professionals works with utility clients and their trade ally networks to increase the number of high-quality, cost-effective completed projects that deliver significant energy savings and more. Altogether in 2014 we:

- Saved 263,000,000 kilowatt hours of electricity.
- Managed more than 2,500 trade allies across eight states.
- Processed 5,400 projects.
- Worked with more than 8,000 trade ally contacts across nine states.

In addition, Evergreen delivered 110 technical training sessions, including 38 trade ally sessions, 29 sales trainings, 11 trade ally webinars, 13 building operator certification trainings and 19 utility customer event trainings.

Trade Ally Network Services

Implement a full commercial/industrial trade ally program.
- Design and process incentives
- Recruit, train and support allies
- Expand the program over time

Manage ongoing a la carte services.
- Technical training on a specific topic
- Sales training
- Field specialists to assist with a specific program

Provide consulting services.
- Reenergize an established trade ally network
- Establish a new network or program

“We are working to cut the time and cost of achieving energy savings to an absolute minimum while maintaining the quality and effectiveness of energy efficiency solutions.”
Roger Spring, Owner, Evergreen Consulting Group

Evergreen Consulting Group develops and implements commercial, industrial, and residential energy-efficiency programs for utilities and organizations across the country.

To learn how we can put our expertise to work for you, contact Dave Backen at dave.backen@evergreen-efficiency.com.