

Tacoma Power

Customer Energy Programs Annual Trade Ally Meeting Summary

March 28, 2019

8:30am to 10:30am

Allenmore Events Center

Attendees: Customer Energy Programs (CEP) Staff, Residential and Commercial Trade Allies

Patrick:

- Welcome and appreciation to trade allies for attending annual meeting
- Safety Note – Exits
- Thank you to Bernie Peterson for coordinating this year's event
- Ice Breakers
- Review Agenda:
 - i. 2018 Partnership Success
 - ii. Keynote Speaker – Matt Gibbs
 - iii. Looking Forward – Program Changes
 - iv. Breakout Sessions

2018 Partnership Successes (Steve Bicker):

- Contractors are critical to the work of energy efficiency
- In 2018 CEP Programs:
 - ❖ Commercial/Industrial (C/I) programs distributed 7 million dollars in incentives
 - ❖ Residential programs distributed over 1,000 incentive payments and 2.5 million in incentives
 - ❖ C/I and Residential programs combined to save enough energy to power Gig Harbor for one year
- More efficient processes reduced days from project submission to payment by 6 days between 2017 to 2018
- Moving towards DocuSign to further automate processes
- Customer surveys reveal 57% of customers selected their contractor due to their being on TPU's Participating Contractor List
- 96% of customers responded they would recommend their contractor
- 98% of customers were very satisfied with their contractor

Keynote: How Change Creates Opportunity (Matt Gibbs, Evergreen Consulting Group):

- Trade Allies are the life blood of utility conservation programs
- The purpose of a business is to “Meet Needs”
 - ❖ **Compliment and Ask** (who has gone to dinner with a friend that only talks about themselves)
 - ❖ **Stop Selling Only What You Have** (Look for other opportunities when you’re with a customer)
 - ❖ **Close-Ended Question** (we’ve got a great project here, who makes the decision? Who is the decision maker here?)
- Utilities can have the best products/programs in the world, but must have a trusted network to distribute it. TAs are the Power and the Engine.

Looking Forward (Lonnie Junderson):

- **CEP is focusing on Improving Customer Experience**
 - ❖ Helping Tacoma’s Low Income Community is very important to Tacoma’s City Council and TPU’s Board
 - ❖ Instigating a Custom Projects Program – programs that save a significant amount of energy, but outside the realm of our conventional programs
 - ❖ In the Works or Anticipate Completing:
 - i. Updated Application
 - ii. User Friendly Website
 - iii. Program Summary Brochure
 - iv. Rebate Summary Sheet
 - v. Improved Notifications
 - vi. DocuSign
- **CEP is focusing on improving the Trade Ally (TA) Experience**
 - ❖ Continuing to limit program changes to April 1st and October 1st
 - ❖ Available and happy to schedule one on one training sessions with companies and sales staff
 - ❖ Updated bid form for HVAC contractors and removing requirement that HVAC contractors must use TPU Bid Form
 - ❖ Trade Ally Logo Assistance (Hollis Tamura)
 - ❖ Trade Ally Portal (Hollis Tamura) – only one individual confirmed they were familiar with TA Portal (Anne Larrabee)
- **April Changes**
 - i. Duct Sealing for Manufactured Homes is decreasing from \$450 to \$250. Incentive remains at \$450 for stick built homes
 - ii. Sales Tax within City of Tacoma limits increases to 10.2% on April 1st

- iii. Marketing will increase with new billboards (12 panels in TPU's service territory) and increased digital presence at Tacoma Rainiers and Movie Theaters
- iv. Targeted Outreach: HPWH, and Insulation/Windows for income-eligible customers

Breakout Sessions (Click [here](#) for summary)

In Closing (Patrick Urain):

- ❖ Thank you for coming
- ❖ Evaluations
 - i. Hard Copies
 - ii. QR Code