



*Sales Consultant  
Project Tracking*

CLIENT NAME: \_\_\_\_\_

TRACKING #: \_\_\_\_\_

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# E<sub>2</sub>CO PROJECT TRACKING SHEET



CONTACT		COMPANY	
NAME:		Name:	
POSITION:			
PHONE NUMBER:		Address:	
CELL NUMBER:			
EMAIL ADDRESS:			
NOTES:			
SERVICES SOLD		TRACKING #:	
ENERGY SUPPLY:	Q		
EUI QUICKCHECK:	Q		
BENCHMARK:	Q		
WALKTHROUGH:	Q		
WATER CONS.:	Q		
ZERO WASTE:	Q		
READY SAVINGS:	Q		
HVAC ANALYSIS:	Q		
RENEWABLES:	Q		
SUSTAINABILITY:	Q		
AIR QUALITY:	Q		
BUMP:	Q		
NOTES:			

# E<sub>2</sub>CO PROJECT TRACKING SHEET



TASK DESCRIPTION	DATE
<b>ENERGY SUPPLY:</b>	
2 MONTHS ENERGY DATA COLLECTED	
DATA SUBMITTED TO ECO Zero	
PROPOSAL PRESENTED	
<b>QUICKCHEK:</b>	
EUI QUICKCHECK CONDUCTED	
EUI QUICKCHECK SUBMITTED TO ECO Zero	
REPORT PRESENTED	
<b>BENCHMARK:</b>	
CONTRACT SIGNED	
12 MONTHS ENERGY DATA COLLECTED	
DATA SUBMITTED TO ECO Zero	
REPORT PRESENTED	
<b>WALKTHROUGH:</b>	
CONTRACT SIGNED	
WALKTHROUGH CONDUCTED	
DATA SUBMITTED TO ECO Zero	
REPORT PRESENTED	
<b>H<sub>2</sub>O CONSUMPTION:</b>	
CONTRACT SIGNED	
DATA COLLECTED	
DATA SUBMITTED TO ECO Zero	
REPORT PRESENTED	
<b>ZERO WASTE MANAGEMENT:</b>	
CONTRACT SIGNED	
DATA COLLECTED	
DATA SUBMITTED TO ECO Zero	
REPORT PRESENTED	
<b>READY ENERGY SAVINGS:</b>	
CONTRACT SIGNED	
DATA COLLECTED	
DATA SUBMITTED TO ECO Zero	
REPORT PRESENTED	
<b>RENEWABLE TECHNOLOGY:</b>	
CONTRACT SIGNED	
DATA COLLECTED	
DATA SUBMITTED TO ECO Zero	
REPORT PRESENTED	
<b>BEST UTILITIES MGMT (BUMP - LEVEL II):</b>	
CONTRACT SIGNED	
SURVEY CONDUCTED	
DATA SUBMITTED TO ECO Zero	
REPORT PRESENTED	

## E<sub>2</sub>CO PROJECT TRACKING SHEET



LT BROWN PAGES:	Energy Supply		
LT GREEN PAGES:	EUI QuickCheck		
SALMON PAGES:	Benchmark		
LT BLUE PAGES:	Walkthrough		
LT GREY PAGES:	H <sub>2</sub> O Consumption		
ROSE PAGES:	Zero Waste Management		
DK GREEN PAGES:	Ready Energy Savings		
DK BLUE PAGES:	Renewable Technology		
LAVENDER PAGES:	Best Utilities Mgmt Prog (BUMP - Level II)		

# PROJECT CHECKLIST



Client Name:

## Energy Supply Data Collection:

Utility bills from the two (2) most recent months needed for the following:

- Electric
- Natural Gas
- Propane
- Fuel Oil (Specify: #1/#2/#4/#5H/#5L/#6 )
- Other

Date utility bills received: \_\_\_/\_\_\_/\_\_\_\_\_

Energy Supply LOA signed by client.

Date Energy Supply LOA signed: \_\_\_/\_\_\_/\_\_\_\_\_

## Energy Supply Workup:

Utility bills forwarded to ECO Zero for workup.

Date utility bills sent to ECO Zero: \_\_\_/\_\_\_/\_\_\_\_\_

Energy supply proposal rates received from ECO Zero.

Date Energy supply proposal received: \_\_\_/\_\_\_/\_\_\_\_\_

Estimated supply side annual savings:

## Energy Supply Client Follow-up:

Client has been informed of potential supply side energy savings.

Does the client want to proceed to change energy supplier?  
Yes   
No

**If client does not want to change energy suppliers, continue on Page 5.**

Successfully scheduled an appointment to review findings and sign a supply LOA.

Appointment date:

Appointment time:

# PROJECT CHECKLIST



Client Name:

## Energy Supply Progress:

An ESCO Supply Change LOA has been signed.

Callback dates:

\_\_\_/\_\_\_/\_\_\_

Check after call was made:

\_\_\_/\_\_\_/\_\_\_

Check after call was made:

\_\_\_/\_\_\_/\_\_\_

Check after call was made:

\_\_\_/\_\_\_/\_\_\_

Check after call was made:

\_\_\_/\_\_\_/\_\_\_

Check after call was made:

\_\_\_/\_\_\_/\_\_\_

Check after call was made:

\_\_\_/\_\_\_/\_\_\_

Check after call was made:

An ESCO contract has been signed.

# PROJECT CHECKLIST



Client Name:

## Energy Utilization Index (EUI) QuickCheck

Does the client want a free EUI QuickCheck to be collected?

- Yes
- No (Continue on **Page 6.**)

The 6-question EUI QuickCheck Survey has been completed.

EUI QuickCheck data forwarded to ECO Zero for workup.

Date EUI QuickCheck forwarded to ECO Zero : \_\_\_\_/\_\_\_\_/\_\_\_\_

EUI Report received from ECO Zero.

Date EUI Report received: \_\_\_\_/\_\_\_\_/\_\_\_\_

Does it appear that substantial efficiencies can be instituted?

- Yes (Proceed with EUI process below)
- No (Call client and inform of findings)

## EUI Client Follow-up:

The client has been informed of potential energy efficiency savings.

Does the client want to continue to identify energy efficiency savings?

- Wants to continue with a Benchmark Survey (Continue on **Page 6.**)
- Wants to continue with a Walkthrough Survey (Continue on **Page 8.**)
- Wants to continue with a Level I Survey (Continue on **Page 9.**)
- No

# PROJECT CHECKLIST



**Client Name:**

### Benchmark Study (BMS) Data Collection:

Appointment scheduled to review findings and sign a Benchmark Agreement.

Appointment date:

Appointment time:

Benchmark Study (BMS) contract has been signed.

Date of BMS contract signed: \_\_\_/\_\_\_/\_\_\_\_\_

Utility bills requested from the twelve (12) most recent months.

Bills will be provided by client.

Bills will be downloaded from utility by ECO Zero.

The following energies are being used by the client:

Electric

Natural Gas

Propane

Fuel Oil (Specify: #1/#2/#4/#5H/#5L/#6 )

Other

Water and Waste

If utility bills will be provided by client, indicate route:

Internet (info@myEcoZero.com)

Mail (1099 Boulevard, New Milford, NJ 07646)

Personal pickup

The BMS Questionnaire for the specific facility type has been completed.

Date of BMS Questionnaire submitted to ECO Zero : \_\_\_/\_\_\_/\_\_\_\_\_

HARD COPIES of utility bills from the twelve (12) most recent months received:

Electric

Natural Gas

Propane

Fuel Oil (Specify: #1/#2/#4/#5H/#5L/#6 )

Other

Water and Waste



# PROJECT CHECKLIST



Client Name:

DOWNLOADS of utility bills from the twelve (12) most recent months completed:

- |            |   |                          |
|------------|---|--------------------------|
| File Name: | Electric                                | <input type="checkbox"/> |
| File Name: | Natural Gas                             | <input type="checkbox"/> |
| File Name: | Propane                                 | <input type="checkbox"/> |
| File Name: | Fuel Oil (Specify: #1/#2/#4/#5H/#5L/#6) | <input type="checkbox"/> |
| File Name: | Other                                   | <input type="checkbox"/> |
| File Name: | Water and Waste                         | <input type="checkbox"/> |

Date utility bills received/downloaded: \_\_\_/\_\_\_/\_\_\_\_\_

Date utility bills submitted to ECO Zero for analysis: \_\_\_/\_\_\_/\_\_\_\_\_

The BMS Questionnaire for the specific facility type has been completed.

Date BMS Questionnaire submitted to ECO Zero : \_\_\_/\_\_\_/\_\_\_\_\_

Date BMS report returned by ECO Zero : \_\_\_/\_\_\_/\_\_\_\_\_

Estimated annual energy efficiency cost savings:

## Benchmark (BMS) Client Follow-up:

The client has been informed of potential energy efficiency savings.

Date called to schedule BMS review with client: \_\_\_/\_\_\_/\_\_\_\_\_

- Does the client want to continue to identify energy efficiency savings?
- |   |                          |
|---|--------------------------|
| Wants to continue with a Walkthrough Survey (Continue on <b>Page 8</b> .) | <input type="checkbox"/> |
| Wants to continue with a Level I Survey (Continue on <b>Page 9</b> .)     | <input type="checkbox"/> |
| No  | <input type="checkbox"/> |

# PROJECT CHECKLIST



Client Name:

## Walkthrough Study (WTS) Data Collection:

Appointment scheduled to review findings and sign a Walkthrough Agreement.

Appointment date:

Appointment time:

Walkthrough Study (WTS) contract has been signed.

Date WTS signed: \_\_\_/\_\_\_/\_\_\_\_\_

Date of WTS: \_\_\_/\_\_\_/\_\_\_\_\_

Date WTS document sent to ECO Zero for analysis: \_\_\_/\_\_\_/\_\_\_\_\_

Date WTS report returned by ECO Zero : \_\_\_/\_\_\_/\_\_\_\_\_

Estimated cost of retrofits to experience projected energy cost reductions:

## Walkthrough Survey (WTS) Client Follow-up:

The client has been informed of estimates costs of retrofits.

Date called to schedule WTS review with client: \_\_\_/\_\_\_/\_\_\_\_\_

Does the client want to continue to identify energy efficiency savings?

Wants to continue with a Level I Survey (Continue on **Page 9**.)

No

# PROJECT CHECKLIST



Client Name:

## H<sub>2</sub>O Consumption Study (HCS) Data Collection:

Appointment scheduled to review findings and sign Agreement.

Appointment date:

Appointment time:

H<sub>2</sub>O Consumption Study (HCS) contract has been signed.

Date HCS signed: \_\_\_/\_\_\_/\_\_\_\_\_

Date of HCS: \_\_\_/\_\_\_/\_\_\_\_\_

Date HCS document sent to ECO Zero for analysis: \_\_\_/\_\_\_/\_\_\_\_\_

Date HCS report returned by ECO Zero: \_\_\_/\_\_\_/\_\_\_\_\_

## H<sub>2</sub>O Consumption Study (HCS) Client Follow-Up:

Date called to schedule HCS review with client: \_\_\_/\_\_\_/\_\_\_\_\_

Does the client want to continue to identify energy efficiency savings?

Wants to continue with a Level I Survey (Continue on **Page 11**.)

No

# PROJECT CHECKLIST



Client Name:

## Zero Waste Management (ZWM) Data Collection:

Appointment scheduled to review findings and sign Agreement.

Appointment date:

Appointment time:

Zero Waste Management (ZWM) contract has been signed.

Date ZWM signed: \_\_\_/\_\_\_/\_\_\_\_\_

Date of ZWM: \_\_\_/\_\_\_/\_\_\_\_\_

Date ZWM document sent to ECO Zero for analysis: \_\_\_/\_\_\_/\_\_\_\_\_

Date ZWM report returned by ECO Zero : \_\_\_/\_\_\_/\_\_\_\_\_

## Zero Waste Management (ZWM) Client Follow-up:

Date called to schedule ZWM review with client: \_\_\_/\_\_\_/\_\_\_\_\_

Does the client want to continue to identify energy efficiency savings?

Wants to continue with a Level I Survey (Continue on **Page 11** .)

No

# PROJECT CHECKLIST



Client Name:

## Total Energy Consumption (TEC) Data Collection:

Appointment scheduled to review findings and sign Agreement.

Appointment date:

Appointment time:

Total Energy Consumption (TEC) contract has been signed.

Date TEC signed: \_\_\_/\_\_\_/\_\_\_\_\_

Date of TEC: \_\_\_/\_\_\_/\_\_\_\_\_

Date TEC document sent to ECO Zero for analysis: \_\_\_/\_\_\_/\_\_\_\_\_

Date TEC report returned by ECO Zero : \_\_\_/\_\_\_/\_\_\_\_\_

## Total Energy Consumption (TEC) Client Follow-up:

Date called to schedule TEC review with client: \_\_\_/\_\_\_/\_\_\_\_\_

Does the client want to continue to identify energy efficiency savings?

Wants to continue with a Level I Survey (Continue on **Page 11**.)

No

# PROJECT CHECKLIST



Client Name:

## Analysis of Renewable Technologies (ART) Data Collection:

Appointment scheduled to review findings and sign Agreement.

Appointment date:

Appointment time:

Renewable Technologies (ART) contract has been signed.

Date ART signed: \_\_\_/\_\_\_/\_\_\_\_\_

Date of ART: \_\_\_/\_\_\_/\_\_\_\_\_

Date ART document sent to ECO Zero for analysis: \_\_\_/\_\_\_/\_\_\_\_\_

Date ART report returned by ECO Zero: \_\_\_/\_\_\_/\_\_\_\_\_

## Analysis of Renewable Technologies (ART) Client Follow-up:

Date called to schedule ART review with client: \_\_\_/\_\_\_/\_\_\_\_\_

Does the client want to continue to identify energy efficiency savings?

Wants to continue with a Level I Survey (Continue on **Page 11**.)

No

# PROJECT CHECKLIST



Client Name:

## Best Utilities Management Practices (BUMP - Level I) Study:

Appointment scheduled to review findings and sign a Level I Study Agreement.

Appointment date:

Appointment time:

Level I Study (L1S) contract been signed.

Date L1S signed: \_\_\_/\_\_\_/\_\_\_\_\_

Date of Level I Onsite visit: \_\_\_/\_\_\_/\_\_\_\_\_

Date L1S findings sent to ECO Zero for analysis: \_\_\_/\_\_\_/\_\_\_\_\_

Date L1S report returned by ECO Zero : \_\_\_/\_\_\_/\_\_\_\_\_

Date called to schedule Level I client review: \_\_\_/\_\_\_/\_\_\_\_\_

Successfully scheduled an appointment.

Appointment date:

Appointment time: