

Energy Supply and Auditing Process

Step	Task	Process/Documents	Completed? YES/NO
1	Research potential clients	Log information onto tracking sheet Sales Consultant Track Sheet	<input type="checkbox"/> / <input type="checkbox"/>
2	Sales call	Phone script Benchmark Sales Call - NYC Sales Call Qualification Form	<input type="checkbox"/> / <input type="checkbox"/>
3	Successful call!	Log information onto project log E ₂ CØ Project Tracking Sheet	<input type="checkbox"/> / <input type="checkbox"/>
If EUI QuickCheck not required, Proceed to Step 8			
4	Conduct EUI QuickCheck	Answer 4 questions (6 if including water) Energy Use Index	<input type="checkbox"/> / <input type="checkbox"/>
5	Submit data to ECO Zero for analysis		<input type="checkbox"/> / <input type="checkbox"/>
6	Report returned by ECO Zero		<input type="checkbox"/> / <input type="checkbox"/>
7	Initial client visit	EUI QuickCheck Report	<input type="checkbox"/> / <input type="checkbox"/>
8		Client signs energy supply LOA Supply Data LOA Benchmark contract signed BMS Agreement Benchmark questionnaire completed BMS Survey	<input type="checkbox"/> / <input type="checkbox"/> <input type="checkbox"/> / <input type="checkbox"/> <input type="checkbox"/> / <input type="checkbox"/> <input type="checkbox"/> / <input type="checkbox"/>
9	Housekeeping	Track Work Process on Checklist E ₂ CØ Project Tracking Sheet	<input type="checkbox"/> / <input type="checkbox"/>
10	Submit data to ECO Zero	Signed data collection LOA Completed Benchmark Questionnaire	<input type="checkbox"/> / <input type="checkbox"/> <input type="checkbox"/> / <input type="checkbox"/>
11	Proposals returned by ECO Zero	Energy Supply Proposal Benchmark Report Work for Hire Contract	<input type="checkbox"/> / <input type="checkbox"/> <input type="checkbox"/> / <input type="checkbox"/> <input type="checkbox"/> / <input type="checkbox"/>
12	Second visit	Energy Supply Proposal presented Benchmark Report presented	<input type="checkbox"/> / <input type="checkbox"/> <input type="checkbox"/> / <input type="checkbox"/>

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13	Second visit, continued	Walkthrough contract signed	<input type="checkbox"/> / <input type="checkbox"/>
		Survey completed	<input type="checkbox"/> / <input type="checkbox"/>
		H ₂ O Consumption Study contract signed	<input type="checkbox"/> / <input type="checkbox"/>
		Survey completed	<input type="checkbox"/> / <input type="checkbox"/>
		Zero Waste Mgmt Study contract signed	<input type="checkbox"/> / <input type="checkbox"/>
		Survey completed	<input type="checkbox"/> / <input type="checkbox"/>
		Ready Energy Savings contract signed	<input type="checkbox"/> / <input type="checkbox"/>
		Survey completed	<input type="checkbox"/> / <input type="checkbox"/>
		HVAC Analysis contract signed	<input type="checkbox"/> / <input type="checkbox"/>
		Survey completed	<input type="checkbox"/> / <input type="checkbox"/>
		Renewable Technology contract signed	<input type="checkbox"/> / <input type="checkbox"/>
		Survey completed	<input type="checkbox"/> / <input type="checkbox"/>
		Corporate Sustainability contract signed	<input type="checkbox"/> / <input type="checkbox"/>
		Survey completed	<input type="checkbox"/> / <input type="checkbox"/>
		Indoor Air Quality contract signed	<input type="checkbox"/> / <input type="checkbox"/>
		Survey completed	<input type="checkbox"/> / <input type="checkbox"/>
		Best Utilities Management Practices	<input type="checkbox"/> / <input type="checkbox"/>
		Survey completed	<input type="checkbox"/> / <input type="checkbox"/>
14	Submit data to ECO Zero	Signed Contract	<input type="checkbox"/> / <input type="checkbox"/>
		Survey Data	<input type="checkbox"/> / <input type="checkbox"/>
15	Report returned by ECO Zero	Study Report & Findings	<input type="checkbox"/> / <input type="checkbox"/>
		Level II Contract (if candidate)	<input type="checkbox"/> / <input type="checkbox"/>
16	Third visit	Report & Findings presented	<input type="checkbox"/> / <input type="checkbox"/>
		Level II Contract signed	<input type="checkbox"/> / <input type="checkbox"/>
17	Third/Fourth visit	Level II Survey conducted	<input type="checkbox"/> / <input type="checkbox"/>
18	Fifth visit (and others)	Review of Level II findings	<input type="checkbox"/> / <input type="checkbox"/>