

# ENERGY AMBASSADOR PROGRAM TOOLKIT

*This toolkit provides an overview of the Energy Ambassador program, steps for completing the project, and other helpful materials.*

A JOINT PROGRAM OF



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## Overview of the PG&E and Net Impact Partnership

PG&E and Net Impact are thrilled to partner on the Energy Ambassador Program, providing students and professionals the opportunity to gain hands-on professional skills while creating a more sustainable future for California.

Pacific Gas and Electric Company, a subsidiary of PG&E Corporation, is one of the largest combined natural gas and electric utilities in the United States. PG&E is committed to giving back to communities; it cares for their customers and for the future of California. Applying expertise gained from over 100 year history of serving Californians, they have created easy-to-use energy tools to help small businesses reduce energy costs.

For two decades, Net Impact has been the leading nonprofit that inspires a new generation to work within and beyond business for a sustainable future. Net Impact empowers student and professional leaders to act locally through a vibrant chapter network, as well as to connect globally online and through Net Impact's flagship conference.

## Energy Ambassador Program Overview

### What is the Small Business Energy Ambassador Program?

As an Energy Ambassador, you'll help small businesses in California reduce their environmental impact by becoming more energy efficient. Through a quick visit to make sure they are familiar with the tools available to them, you can help find ways for business owners to monitor and reduce their energy use and potentially save on their utility bill.

### What's the best way to ensure I know what I'm doing?

First, read through this toolkit! Next, attend the in-office training on Thursday, February 9<sup>th</sup>.

If you still have questions, contact Net Impact with any questions, review the resources available in the [shared folder](#), connect with other Ambassadors, and share tips.

## Visiting a Business

Here are the steps to follow when visiting small businesses.

### Step 1: Make sure you have the necessary equipment with you

- Since the assessment is completed online, you'll need to remember to have the tablet and hotspot that is provided to you for this project. Also, make sure your tablet has enough battery power to last through your visits. We recommend carrying the charger along in case you need to power up. While not required, it's also helpful to bring your shirt and business cards so that business owners see you as a member of a legitimate organization and are more willing to take the time to talk with you
- Use the [Visit Tracking form](#) to input information as you conduct the visit

### Step 2: Contact businesses in your assigned customer list

- You can call ahead to schedule an appointment or directly visit the local business at the address provided in the customer list
- Whether by phone or in person, introduce yourself and ask if you can schedule a visit at a time when a key decision maker will be present - or, if you're at the business and they have time, do it right then!

### Step 3: Conduct the energy efficiency visit

- Sit down with the business owner or decision-maker to discuss how their business can better manage their energy needs. You can begin by asking them about what are their energy-related priorities as a business owner.
- Using your personal tablet, go over the list of options appearing in the Visit Tracking form to help them determine one or more energy-related topics they would like to address.
- Going off what the business owner has expressed as his energy-related priority for the business, provide them with the relevant information available through the YourAccount website.
- Show the Your Account website features. Touch on billing and payments, My Usage feature, and profile alerts.

- If the business owner has questions you can't address by connecting them to the relevant PG&E resource, you can put them in touch with the Business Customer Service Center. We want to minimize the number of customers who get referred to the BCSC line, since our priority is to address their questions and concerns during the visit. However, we know there might be times when the issue at hand cannot be resolved during the visit and you will need to request the BCSC's assistance
- As part of the visit conclusion, provide them with Time of Use information and Your Account brochure.
- Thank the business owner for his/her time. Also, make sure you got the official business name, phone number and email address correctly!
- If the business owner needs follow-up or has a particular service issue, make sure to note it in the appropriate section within the visit tracking form.

(Total time commitment: 40-60 minutes per completed visit)

## Best Practices

**Rule of thumb:** Small business owners are busy people! So they might not be able to meet with you on the day you visit. For every 5 businesses you reach out to, 1 will most likely be able to meet. As you gain more experience, this ratio should hopefully improve, but don't be discouraged by a 10-20% acceptance rate at the start.

Here is a list of things to keep in mind:

- **Map your work.** Before you start reaching out, come up with a list of all the businesses that you want to visit that day or week
- **Work your map.** Think of mapping out their location so you know where you are going and can cut down on unnecessary travel time
- **Always better to go in person.** Small business owners are very busy. Because of this, unfamiliar emails and calls often go ignored. The more personal, the more likely they are to say yes
- **Don't go empty-handed.** Maybe the business owner doesn't have time to talk to you right now but

is interested in learning more. Always bring personal business cards and program brochures that you can give to them to look over on their own and check back again at a later time

- **Be mindful of the time of day.** When visiting or calling a business, try to pick a time of day when you know the owner will be there and is likely to be a slower time of day for business. If you want to be creative, there are some online tools that show when businesses are most likely to be busy - avoid these times
- **Local businesses love students.** If you are a local student, be sure to make a point of saying that you are a student from the local university whenever introducing yourself. Local businesses are usually happy to support students
- **It really is FREE.** Be sure to reiterate that the visit costs them nothing and is strictly an educational and service outreach project, meaning no one will try to sell them something at a later point
- **Follow up, follow up, and follow up.** Persistence is the key. If the owner is not there, try to get a card and follow up with them directly. Try to follow up at least three times before giving up on that business. And if a business says no, just remember it's not you, it's them. Business owners are busy and might not be available for a multitude of reasons. So don't take it personally if they say no

## Sample Introduction

### Students:

"Hi, I'm [YOUR NAME]! I'm a student at [LOCAL UNIVERSITY] and I'm working as an Energy Ambassador with PG&E and Net Impact, a local nonprofit, to help businesses like you reduce energy use, save money and lessen their environmental impact through quick energy efficiency visits. It's completely free to participate and it's a great way to learn about tools and ways to help you reduce your utility bills and find out about rebates available from PG&E. Would you be interested in receiving a free energy efficiency visit? It only takes a few minutes and you can cut down on energy costs!"

### Professionals:

"Hi, I'm [YOUR NAME]! I'm an Energy Ambassador with PG&E and Net Impact, a local nonprofit, to help businesses like you reduce energy use, save money and lessen their environmental impact through quick energy efficiency visits. It's completely free to participate and it's a great way to learn about tools and ways to reduce your utility bills and find out about rebates available from PG&E. Would you be interested in a free energy efficiency visit? It only takes a few minutes and you can save a lot on energy costs!"

## Sample Questions You Might Get from Businesses

***Business Owner: “Seriously though, how much does it cost?”***

You: “It’s completely free. No fine print.”

***“Is someone going to be knocking on my door next week trying to sell me something?”***

“No one will ever try to sell you any products or services related to receiving this free energy visit.”

***“I’m kind of busy. What’s involved with this energy efficiency visit?”***

“It only takes a few minutes. We’ll pick a time when you have 15-30 minutes to sit down and go over PG&E’s website so that I can point out the several useful features there, such as the Business Energy Check-up tool that can give you custom recommendations on ways to reduce your utility costs. You can also find out about how to get mobile account alerts and ways to potentially lower your bill.”

***“What do you use to conduct the energy efficiency visit?”***

“We use PG&E’s My Account website and note any specific issues or concerns that you might have as well as any questions regarding the features and tool available to you from PG&E. My goal is to make sure to address any questions that you might have about how to access and use the My Account resource.”

***“So what do you need from me to conduct this energy efficiency visit?”***

“Hardly anything. I just need to know a time that works best for you to sit down together for about 20 minutes to complete the visit. That’s it!”

***“What about privacy? Who else is going to see my account information?”***

“Nobody! I can use my account information to walk you through PG&E’s site. If you want to look at the info on your account, I’ll let you log in and out so that none of your identifying information will be shared.”

***“This all sounds great, but what do you get out of this?”***

“A lot. I am being paid for each of the visits I complete. Also, I’m always looking for ways to make a positive impact in my community and gain some professional skills for my resume. This project is a great way for me to do both.”

## Frequently Asked Questions

### What are the benefits for a business receiving one of these energy efficiency visits?

- Know where to look for customized energy savings recommendations
- Learn about rebates and incentives that are available to make upgrades cost-effective
- Discover how their energy usage compares to similar businesses
- Learn how to create a short- and long-term energy plan for their business
- Better understand their energy spending and therefore be able to cut down on costs
- Learn how to receive alerts on outages and other scenarios

### What should I take with me when reaching out to businesses?

- Tablet and mobile hotspot
- Energy Ambassador business cards
- Wear your Energy Ambassador shirt to the location
- Educational materials and co-branded flyers to hand out to the business

### How do I track which businesses I've done energy visits for?

You'll need to take down some essential pieces of information in order to receive credit for every visit you complete. You will use the [Visit Tracking form](#) to input the following:

- Business contact email address
- Business' main energy concern
- Name of the person you met with
- Level of satisfaction with PG&E's service
- The action that was taken to address the business' main energy concern

You should also try to collect information on:

- Whether the business has already taken some steps towards becoming more energy efficient
- Any follow-up information the business might need



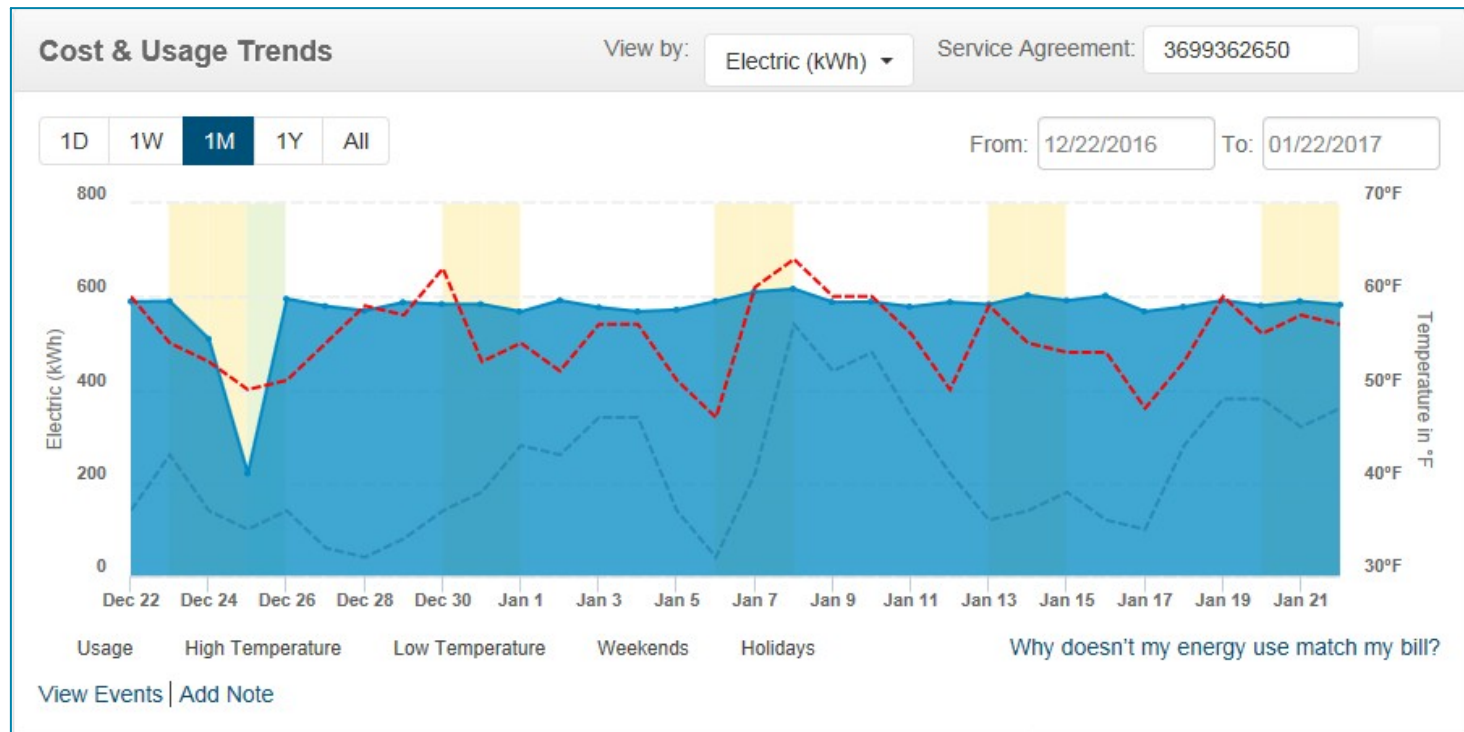
## Micro Product Chart

Segment/Technology	Retail w/ Refrigeration Grocery	Office	Retail	Car Dealerships, Repair shops	Small Manufacturing, Warehousing				Skill Level required Low/Med/High	Info on Website	Point of Sale	Trade Pro - Install
Low Flow Pre-Rinse Spray Valve	●							✓	Low	Yes	Yes	Yes
Door Closers	●					✓	✓		Low	Yes	No	Yes
Anti-Sweat Heat controls	●					✓			Med	Yes	No	Yes
ECM Motors	●					✓	✓		Med	Yes	No	Yes
Refrigeration Night Covers	●					✓			Med	Yes	No	Yes
Vending Machine Controllers	●	●	●	●	●	✓			Low	Yes	No	Yes
VFD's for Process motors				●	●	✓			High	Yes	No	Yes
LED Troffer Replacements	●	●	●	●	●	✓	✓		Med	Yes	No	Yes
Low Wattage T8	●	●	●	●	●	✓	✓		Low	Yes	No	Yes
Screw-in LED replacement lamps	●	●	●	●		✓	✓		Low	No	Yes	No
Down light Retrofit Kits	●	●	●	●		✓	✓		Low	Yes	No	Yes
LED Exterior Lighting	●	●	●	●	●	✓			Med	Yes	No	Yes
LED High & Low-Bay	●		●	●	●	✓	✓		Med	Yes	No	Yes
<i>DI or 3P</i>												
<i>Future or pending products not yet in market (subject to change)</i>												
LED CFL lamp replacements	●	●	●			✓	✓		Low	TBD	TBD	TBD
LED Linear Fixtures	●		●	●	●	✓	✓		Med	TBD	TBD	TBD
ADR w/ Enabling Technology	●	●	●	●	●	✓			High	No	No	Q1 2017
Smart Thermostats	●	●	●	●	●	✓		✓	Med	TBD	TBD	TBD
Adaptive Refrigeration Control	●					✓			High	No	No	TBD
Commercial Dishwasher (available!)								✓	Med	Q1 2017	TBD	Q1 2017
Pool Pumps						✓	✓		High	TBD	TBD	TBD
LED Pool Lights						✓			High	TBD	TBD	TBD
Domestic Hot Water Recirc Pumps						✓		✓	Med	TBD	TBD	TBD
								✓	Med	TBD	TBD	TBD



## Your Account: Cost & Usage Trends

This feature helps you see if a business' energy usage has changed throughout a certain period of time. If there is a spike one day, you can look at that day more closely to see if a piece of equipment might be running when it is not supposed to. Conversely, if there is a valley, see if there was a power outage or equipment malfunction.





### Your Operating Schedule

Sunday	12:30 AM ▾	To	07:00 PM ▾	<input type="checkbox"/> Closed
Monday	12:30 AM ▾	To	11:00 PM ▾	<input type="checkbox"/> Closed
Tuesday	12:30 AM ▾	To	10:00 PM ▾	<input type="checkbox"/> Closed
Wednesday	12:30 AM ▾	To	12:30 AM ▾	<input type="checkbox"/> Closed
Thursday	12:30 AM ▾	To	10:00 PM ▾	<input type="checkbox"/> Closed
Friday	06:30 AM ▾	To	12:30 AM ▾	<input type="checkbox"/> Closed
Saturday	12:30 AM ▾	To	08:00 PM ▾	<input type="checkbox"/> Closed

CancelChange S

## My Account: Operating Schedule

This is a restaurant that is closed on Wednesday.  
The equipment is being fired up on Wednesday,  
so who is making hamburgers?

