

# Pivoting Outreach Techniques During the Pandemic

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## ABSTRACT

The ComEd® Energy Efficiency Program (CEEP) offers incentives and technical services to help residences, businesses, and governmental facilities reduce energy use by improving the efficiency of their equipment. ComEd has developed a network of Outreach Service Providers (OSPs) who are knowledgeable about ComEd's entire Energy Efficiency Program portfolio and are available to assist customers with various energy efficiency needs.

When the COVID-19 pandemic hit, ComEd account managers, energy engineers, program implementation teams and the OSP network pivoted their customer engagement approach to virtual engagement. The team pursued low- and no- cost operational and maintenance (O&M) projects to save energy and to act as a starting point leading to larger capital projects. This “quick win” approach helped establish strong customer relationships and deliver 77.2 gross GWh<sup>1</sup> and approximately \$6.1 million<sup>2</sup> in annual energy savings across the OSP network in 2020.

This paper will discuss how the ComEd Energy Efficiency Program overcame obstacles posed by COVID-19 in 2020. We will discuss outreach strategies in detail: pivoting to virtual relationship-building activities and steering customers to easy, quick-win savings while focusing in parallel on long measure life projects. We will also showcase the work conducted in 2020 with several large industrial customers and discuss how these relationships will continue to be successful in 2021.

## Introduction

The ComEd Energy Efficiency Program (CEEP), along with ComEd energy engineers and account managers, work with large commercial and industrial customers to deliver a premiere experience. As customers' main point of contact for all electricity needs, ComEd account managers are strategic advisors and partner with customers to develop Energy Management Action Plans (EMAPs). EMAPs are typically revisited annually to ensure ComEd is in lock step with customer's plans for managing their energy.

Outreach Service Providers (OSPs) focus on providing energy efficiency assistance for the CEEP portfolio to customers in specific market segments. In collaboration with ComEd account managers, ComEd energy engineers, and program implementors OSPs help customers with everything from project identification and prioritization to energy savings and payback

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<sup>1</sup> All energy savings values (kWh and GWh) indicated in this article are gross annual energy savings.

<sup>2</sup> Estimated (dollar) savings cited here and elsewhere in this paper are based on average retail price of \$0.0896 per kWh for commercial customers and \$0.0644 per kWh for industrial customers, according to Energy Information Administration data for the State of Illinois obtained in January 2021. A combined average of both commercial and industrial retail pricing (\$0.0786 per kWh), according to Energy Information Administration data for the State of Illinois obtained in January 2021, is used to calculate the total 2020 estimated savings.

calculations, applications, measurement and verification, and incentive reservations. The Industrial OSP team consists of trained engineers who assist industrial customers such as manufacturers, food processors, and cold storage facilities with developing their energy efficiency project plans.

OSPs combine their broad knowledge of ComEd's diverse energy efficiency offerings with their segment expertise to guide customers through the implementation of their EMAPs. For example, ComEd's industrial OSPs are well-versed in the major energy systems found at industrial sites, including compressed air and vacuum systems, industrial refrigeration, pumps, fans, process cooling, and HVAC. This expertise enables them to quickly identify energy efficiency opportunities within complex industrial systems without disrupting the customer's production process. Within their respective market segments, the combination of OSPs' technical ability, industry experience, and strong interpersonal and communication skills allow them to lead productive conversations and to build trusting, long-term relationships.

ComEd's CEEP portfolio provides multiple pathways for project engagement. Prescriptive incentives for common capital projects are available through the Standard Program, including but not limited to LED lighting upgrades, HVAC projects, and air compressor upgrades. Eligible capital projects that do not qualify for a prescriptive incentive may be incentivized through the Custom Program.

Commercial and industrial customers often operate on short project timelines. When equipment begins to fail, decisions regarding whether to repair, upgrade, or replace it must be made quickly. Recognizing this sense of urgency, ComEd continuously seeks to improve processes through such means as expanding available prescriptive incentives, not requiring pre-applications in certain cases, and by leveraging the Instant Discount program to offer discounted pricing at point-of-purchase for lighting, battery chargers and energy efficient rooftop units from approved distributors.

One to two-hour long Facility Assessments performed by ComEd engineers provide customers with a report that identifies energy efficiency opportunities at their site. The report details the pathways by which the customer can engage with the ComEd Energy Efficiency Program, provides an estimate of potential energy savings, payback estimates, and ComEd incentives, and identifies other specialized offerings that can benefit the facility. The assessments are also an opportunity for ComEd and OSPs to consult with the customer on their priorities and goals and to learn about the decision-making process involved in capital projects. Together, ComEd account managers and OSPs offer complementary skill sets to help industrial customers take full advantage of the energy efficiency offerings that best meet their needs.

Several specialized ComEd program offerings are available to industrial customers. Through the study-based Industrial Systems Program, industrial customers can benefit from incentives for two methods of reducing energy use: optimizing operation and maintenance (O&M) of their equipment and capital upgrades. O&M opportunities are essentially no- or low-cost measures that result in energy savings such as optimizing equipment setpoints, shutting down unused equipment, better aligning shifts, etc. Incentives from O&M optimization can help offset the cost of capital upgrades, some of which are needed before certain O&M changes can be made.

ComEd also offers energy management programs such as Strategic Energy Management (SEM) and Industrial Energy Management (IEM). These programs pair a customer with a team of energy efficiency coaches and engineers who guide the customer through a comprehensive energy savings and energy management practices journey. These engagements are typically over

a one-year period but can extend further. Upon completion, some customers stay engaged in alumni cohorts to further advance their energy management practices. Through energy management programs, industrial customers typically reduce their electric energy use by 5% in their first year of participation. Energy management programs are designed to instill an energy efficiency mindset in customers, and to help them develop their own energy efficiency best practices.

## **The Pandemic's Impact on Industrial OSPs**

In mid-2019, ComEd added the Industrial segment to the existing roster of OSPs to provide industrial customers with focused outreach support for energy efficiency projects. The COVID-19 pandemic struck in early 2020, just as meaningful customer relationships were beginning to take shape. OSPs were no longer able to visit customers at their facilities due to limited site access caused by the pandemic. Industrial customers were suddenly struck by a wide range of challenges – illnesses in the workplace, personnel shortages, operation at reduced or accelerated capacity, and supply chain disruptions, just to name a few. With capital budgets disappearing and workforces spread thin, energy efficiency projects quickly plummeted to a low point on customers' priority lists.

## **Respond to Market Conditions**

Responding to both the marketplace in general, and customers' heightened safety and other challenges, ComEd and its OSPs quickly pivoted to a remote outreach strategy to engage with customers. ComEd developed COVID safety protocols for energy efficiency outreach personnel to follow, to ensure that each customer's situation was simultaneously treated with both empathy and safety in mind.

ComEd responded to market conditions by shifting to increased virtual events and live webinars. Virtual Facility Assessments enabled engineers to work with customers to identify energy efficiency opportunities remotely via video conference. Webinars hosted both by ComEd and industry-specific organizations across many targeted commercial and industrial segments informed attendees how the ComEd Energy Efficiency Program could still benefit their specific facilities during the pandemic and connected interested customers with OSPs to help them with their energy efficiency needs.

Webinars are generally low-risk, educational interactions that can help personalize or “put a face to a name” while helping customers visualize how they can get started or progress on their energy efficiency journey through detailed examples and case studies. Sharing tangible examples and segment-specific knowledge go a long way toward getting customers excited about energy-saving opportunities. In the industrial segment, these informational webinars either addressed equipment systems of particular interest to industrial customers – such as compressed air and chillers – or were targeted to specific industries – such as food processing and plastics manufacturing.

Virtual delivery of information and services was essential to the ability of program implementers to continue successful customer engagement.

## **Focus on Low- and No- Cost Gems**

As the pandemic took hold, it was critical to inject a sense of momentum around energy efficiency in customers' minds. It became increasingly clear in the marketplace that it would be difficult to justify long-term capital projects in an uncertain business environment, so OSPs steered customers toward easier, quick-win savings to reduce costs. For example, ComEd engineers and OSPs reached out to customers to encourage and support them with implementing O&M savings opportunities previously identified in Facility Assessments. As previously mentioned, Facility Assessments are available to all customers and involve a 1–2-hour walkthrough of customer facilities to identify long-term projects as well as low-cost/no-cost savings opportunities.

ComEd's Compressed Air Fix-It-Now program<sup>1</sup> is another easy and effective energy efficiency entry point for industrial customers. It helps industrial customers address a large source of wasted energy – compressed air leaks – and pays approved service providers directly for identifying and repairing those leaks at the time of identification. Customers do not need to pay any upfront costs and can enjoy the resulting energy savings immediately as indicated by the offering's name. ComEd expanded this offering during the pandemic to increase the number of air leak audits that could be completed in 2020. Compressed Air Fix-It-Now was also a demonstrated quick win to customers on how they could save money and energy by implementing projects and opened the door to planning for longer term energy efficiency opportunities. An easy-to-implement program like Fix-It-Now was a win for both service providers and customers seeking low-stakes energy-saving opportunities.

## **Pair Low- and No-Cost Projects with Capital Improvements**

For midsize to large customers, ComEd energy management programs such as Strategic Energy Management (SEM) and Industrial Energy Management (IEM) can be good fit for customers looking to develop their own internal energy team leveraging technical support provided by trained engineers. Both of ComEd's energy management programs involve full-site energy audits to prioritize projects, from low-effort quick wins to longer-term strategic projects with larger energy savings. OSPs identify customers who would most benefit from such programs and continue to provide CEEP portfolio assistance during their energy management program participation.

Another option is the study-based Industrial Systems Program, in which industrial customers work with ComEd-approved service providers to identify both capital improvements and operational and maintenance (O&M) optimization of their equipment. Comprehensive, detailed reports provide customers with a solid understanding of how efficiently their equipment systems operate, and the energy and cost savings that can be realized with various modifications.

## **Remote Outreach**

The pandemic significantly reduced OSPs' ability to build rapport with customers and gather the on-site knowledge necessary to make informed decisions. Any possible opportunity to interact with customers needed to take place as smoothly and effectively as possible. OSP and ComEd account managers worked closely to meet customer needs. OSPs remotely scoped both

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<sup>1</sup> <https://www.comed.com/WaysToSave/ForYourBusiness/Pages/factsheets/CompressedAirEnergySavings.aspx>

low-cost operational and maintenance energy efficiency opportunities, as well as longer term capital projects, using the following process:

- Prepare for the meeting by researching the customer's past projects, facility assessments, program participation, and equipment on site.
- Prepare a list of scoping questions relevant to the customer's industry/equipment/processes.
- Schedule a remote meeting with a detailed agenda to set expectations.
- Include other ComEd staff in the remote meeting to help take notes and ask additional questions.
- Leverage other relevant best practices including:
  - Confirming the customer's priorities to guide the flow of the meeting.
  - Asking open-ended questions to identify customer priorities and to uncover unique project opportunities at their site.
  - Speaking with the customer "live" via video if the customer is comfortable – face-to-face communication goes a long way to building the relationship.
  - Concluding the meeting on time, respecting the customer's busy schedule.
- Send a follow-up email immediately after the meeting with specific next steps and action items.
- Follow up regularly to assist as needed or to request additional data needed to estimate energy savings and reserve incentives for specific projects.

OSPs found that asking the right questions during the remote meetings and following up with specific data requests lightened the burden on customers and made their participation easier. OSPs also focused on which data would be easy for customers to obtain to keep them engaged, and making informed assumptions wherever gaps remained.

One unexpected benefit of remote meetings was that they allowed multiple staff to assist a customer at the same time. This made it easy to capture all available necessary information and to reduce follow-ups. Virtual meetings also enabled OSPs to screen-share energy usage data from ComEd's Business Energy Analyzer (BEA) tool. BEA highlights times of day/month when energy use at a site is unexpectedly high, sparking productive discussions of possible solutions. It was also easy to set up recurring meetings for regular check-ins with customers to keep customers engaged, projects on track, and any customer concerns addressed in a timely manner.

ComEd account managers and OSPs teamed up regularly in joint customer meetings to discuss both energy efficiency and power/billing related needs. This was an efficient approach to using customers' time effectively during COVID-19 and helped build stronger relationships with the customer and the collective ComEd team. Remote meetings also enabled the OSPs to meet with more customers each week given that there was no travel time required.

## **Ongoing Support**

Ultimately, the CEEP and its OSPs provide ongoing energy efficiency support to customers at the point in time that fits their business needs.

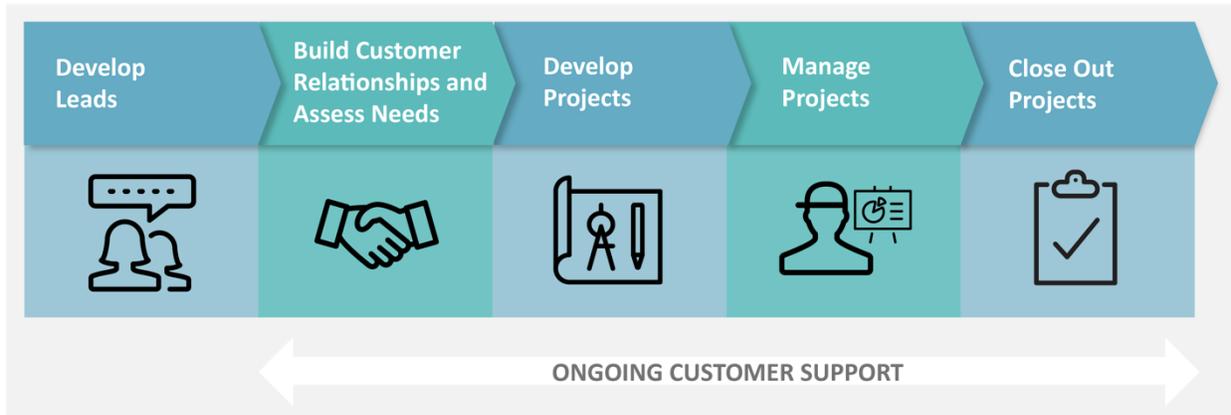


Figure 1. ComEd Outreach Service Providers (OSP) Approach

While the graphic above shows a linear continuum, OSPs help keep customers engaged following a substantial energy-saving project. ComEd and OSPs are oriented toward continuous improvement and repeat participation. Customers’ needs can change at any time, necessitating new energy-savings priorities, business realities, and even staff. OSPs engage with customers over time, which has never been more true than during the pandemic.

## Case Studies

The following are several case studies that demonstrate how ComEd and its OSPs nurtured relationships during the pandemic and found energy savings opportunities in a challenging environment.

### Automotive Parts Manufacturer I

Initial discussions about the Compressed Air Fix-It-Now offering led one manufacturer of automotive parts to consider larger projects. With continued support from the ComEd team, the customer is moving forward with a ventilation system upgrade currently projected to save over 530,000 kWh, resulting in \$34,000 in annual savings, and an incentive of approximately \$60,000. This project will also enable the facility to remove a secondary filtration system. In addition to saving energy, the upgrade will improve air cleanliness and increase employee comfort and well-being. Separately, close coordination between the ComEd account manager, ComEd engineering, and OSP paid off when the team was able to quickly resolve a customer power issue that surfaced during an energy efficiency discussion.

### Plastics Manufacturer

ComEd initially engaged with a medium-sized plastics manufacturer to discuss the Compressed Air Fix-It-Now program. When the COVID-19 pandemic struck, this manufacturer pivoted to the production of parts for ventilators, and their priorities shifted from the compressed air leak fixes to several other capital projects. Thanks to the OSP’s knowledge of ComEd’s full portfolio of energy efficiency programs, combined with close coordination with the ComEd account manager and energy engineers, the team was able to guide the customer through the

completion of several projects across multiple equipment systems representing approximately 8% of the site’s annual electric use. These projects are listed in the following table:

Table 1. Plastics Manufacturer Savings

Project	Annual Energy Saved (kWh)	Annual Savings (\$)	Paid Incentives (\$)
VFD Air Compressor	55,700	\$3,600	\$11,000
All-Electric Injection Molding Machines	111,600	\$7,200	\$18,000
Process Cooling Expansion	81,600	\$5,300	\$ 9,800
LED Lighting	27,400	\$1,800	\$1,800
Total	276,300	\$17,900	\$40,600

A quote from the customer underscores the relationship we were able to build:

*“Thank you very much for all the help on all these projects. You made it very easy for me. I will remember to contact you in the future as soon as I get wind of any future projects to allow time to get project approval, etc.”* – Vice President Operations, Plastics Manufacturer

### **Automotive Parts Manufacturer II**

Another manufacturer of automotive parts performed its first Facility Assessment in 2016, and another in 2018/2019, but did not complete any of the recommended energy efficiency projects at that time. The industrial OSP was able to engage with the manufacturer in 2020 to learn more about their team and business, and helped the customer complete their first Compressed Air Fix-It-Now project. The site’s leadership team became increasingly engaged and increased energy efficiency capital investment. By the end of 2020, the site continued to complete energy efficiency projects saving over 2.1 GWh and an estimated \$139,000 in annual energy costs, with an incentive of approximately \$220,000. In this customer journey, the customer engaged with many ComEd Energy Efficiency Programs – Facility Assessments, Industrial Studies, Standard, Custom and IEM.

In 2021, the customer has continued with the IEM program and capital investments, which are estimated to save an additional \$25,000 annually. The customer was energized to make changes with the partnership and support of ComEd’s OSPs. Outreach support and expertise, combined with regular check-ins and prompt follow-up, helped the customer take the critical first steps on their energy management path to realizing significant energy savings. Total savings for the manufacturer are in the table below.

Table 2. Automotive Parts Manufacturer II Savings

Project	Annual Energy Saved (kWh)	Annual Savings (\$)	Paid Incentives (\$)
Industrial Study, Process Efficiency	1,002,600	\$64,600	\$117,000
Central Resin Drying system	454,800	\$29,300	\$54,600
RTUs / HVAC	327,900	\$21,100	\$41,400

Ind. Energy Management (IEM)	96,300	\$6,200	NA
Increase Process Cooling Temp Setpoint	46,100	\$3,000	NA
Compressed Air Leak-Fix (2019 and 2020)	223,200	\$14,300	\$6,700
	2,150,900	\$138,500	\$219,700

### Packaging and Dispensing Manufacturer

A packaging and dispensing manufacturer with two locations in Illinois was introduced to Compressed Air Fix-It-Now and SEM prior to the pandemic. The ongoing support from the OSP throughout the pandemic kept them motivated, and both sites are now taking full advantage of the wide variety of programs that ComEd offers. The OSP helped the two sites save approximately 1.5 GWh in energy and \$100,000 in annualized costs in 2020, in addition to earning incentives totaling approximately \$160,000. The customer has completed multiple capital projects involving LED lighting, injection molding machines, and now has vacuum process efficiency study underway which is estimated to save an additional 500,000 kWh and \$34,000 annually in addition to the 2020 savings summarized below. The OSP facilitated these efforts across the CEEP team and service providers to provide a seamless experience for the customer.

Table 3. Packaging and Dispensing Manufacturer Savings

Project	Annual Energy Saved (kWh)	Annual Savings (\$)	Paid Incentives (\$)
Lighting	18,600	\$1,200	\$2,400
Injection molding machines and blankets	941,000	\$60,600	\$116,600
Compressed air leak fixes	439,700	\$28,300	\$22,100
Compressed air study	159,100	\$10,200	\$19,100
	1,558,400	\$100,300	\$160,200

### Conclusion

ComEd and its OSP network rose to the challenges of the pandemic and quickly implemented strategies to keep customers engaged and participating in the ComEd Energy Efficiency Program. Together, ComEd account managers, energy engineers, program implementation teams, and OSPs leveraged their collective expertise to ensure successful participation in the energy efficiency program and maximum customer incentives.