

# CUSTOM ENERGY SOLUTIONS CUSTOMER JOURNEY

Contact an Account Manager today!

Call (403) 800-8947

Email [customsolutions@efficiencyalberta.ca](mailto:customsolutions@efficiencyalberta.ca)

Visit [efficiencyalberta.ca/customsolutions](http://efficiencyalberta.ca/customsolutions)



Not sure where to begin? Want to learn more about your facility?

**Incentives to Support Investment Decisions**



**Eligibility**

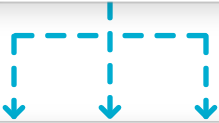
[Contact Account Manager](#)

Register for an account.  
Confirm eligibility.



**Program Ally Engagement**

Work with approved Program Allies or gain approval for new Program Ally.



**Determine Study Type**

Scoping Audit  
or  
Engineering Study  
or  
Retro- and Re-Commissioning Investigation (RCx)



**Submit Application**

Submitted by Program Ally or Customer  
Terms & Conditions signed  
Documentation provided



**Receive Offer Letter**

Offer letter includes pre-approved incentive amount to be reserved and payment schedule.

**Audit, Study, or RCx go-ahead**



**Study, Audit, or RCx Completed**



**Request for Payment**

Submit documentation.  
Scoping Audit:  
**Receive 50% of incentive**  
RCx Investigation/  
Engineering Study:  
**Receive 25% of Incentive**



**Finalized**

Completed Scoping Audit, Engineering Study, or RCx Investigation  
**Full incentive received upon Custom Project Implementation**



**Continue to Custom Project Implementation or Engineering Study or determine next steps with your Account Manager.**



Do you already have a project in mind?

**Custom Project Implementation**



**Eligibility**

[Contact Account Manager](#)

Register for an account.  
Confirm eligibility.



**Prepare Documentation**

To apply, we will need some documentation about your project, such as:

- An energy usage baseline
- A project plan, including estimated GHG reductions, project costs and timeline.

For large projects, a measurement and verification plan may be required. For projects requiring additional baseline or technical project development, a scoping audit or engineering study may be required.



**Submit Application**

Submitted by Program Ally or Customer  
Terms & Conditions signed  
Documentation provided



**Receive Offer Letter**

Offer letter includes estimated incentive amount to be reserved, and measurement and verification plan if required.

**Receive additional 50% incentive for Scoping Audit, Engineering Study, or RCx Investigation (if applicable)**

**Project go-ahead**



**Measure Installed**



**Request for Payment**

Submit post-installation documentation, including measurement and verification details when required. 10% of incentive payment may be held back pending completion of post-installation site visit or measurement and verification plan.



**Payment**

**100% of custom incentive**  
**Final 25% of RCx Investigation/Engineering Study incentive (if applicable)**



**Time to decide on your next Custom Energy Solution!**



Are you a large facility interested in an on-site resource?

**On-Site Energy Manager (OEM)**



**Eligibility**

[Contact Account Manager](#)

Facility assessment.  
Facility qualification.



**Submit Application**

Terms & Conditions signed  
Documentation provided



**Candidate Qualification**

Finding internal/external candidate



**Receive Offer Letter**

**Hire go-ahead**



**OEM Hired**



**OEM Schedule Begins**

**33% incentive upon hire**  
Remainder of incentive based on milestones  
Begin executing projects through Custom Project Implementation.



**Apply for incentives to support investment decisions and custom projects.**

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Continuous Account Manager Support