

CUSTOM ENERGY SOLUTIONS CUSTOMER JOURNEY

Call (403) 800-8947
 Email customsolutions@efficiencyalberta.ca
 Visit efficiencyalberta.ca/customsolutions



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

Do you already have a project in mind?

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

Incentives to Support Investment Decisions

Custom Project Implementation

On-Site Energy Manager (OEM)

Eligibility

[Contact Account Manager](#)

Register for an account.
 Confirm eligibility.

Eligibility

[Contact Account Manager](#)

Register for an account.
 Confirm eligibility.

Eligibility

[Contact Account Manager](#)

Facility assessment.
 Facility qualification.

Program Ally Engagement

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

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.

Submit Application

Terms & Conditions signed
 Documentation provided

Determine Study Type

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

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

Submit Application

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

Candidate Qualification

Finding internal/external candidate

Receive Offer Letter

Offer letter includes pre-approved incentive amount to be reserved and payment schedule.
Audit, Study, or RCx go-ahead

Receive Offer Letter

Offer letter includes estimated incentive amount to be reserved, and measurement and verification plan if required.
 Receive payment:
25% - Custom Project Pre-approval
25% - Equipment Purchased, and Construction Scheduled
Receive 50% additional incentive for Scoping Audit, Engineering Study, or RCx Investigation (if applicable)
Project go-ahead

Receive Offer Letter

Hire go-ahead



Study, Audit, or RCx Completed



Measure Installed



OEM Hired

Request for Payment

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

Measurement and Verification

Receive payment:
40% - Equipment Installed and Pre-Commissioned or Operational
10% - Completion and Approval of M&V
Final 25% of RCx Investigation/Engineering Study incentive (if applicable)

OEM Schedule Begins

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

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.

Time to decide on your next Custom Energy Solution!

Apply for incentives to support investment decisions and custom projects.

Continuous Account Manager Support

Continuous Account Manager Support