

# Demand Side Management (DSM) Operations Platform

energyOrbit provides the industry's leading independent platform for DSM Operations, providing utilities and 3rd-party implementers an easy-to-use solution for DSM management, tracking, and reporting. Focused on empowering DSM managers to more quickly setup, modify, and execute DSM programs, our solution has been extensively field tested and continuously refined for over seven years. By enabling our clients to manage the entire EE value chain more efficiently and flexibly than any other alternative, customers more easily meet savings goals.



# PLATFORM FEATURES

## Easy-to-Use DSM Management & Tracking

- ➔ Configurable setup of database and energy efficiency (EE) program details, e.g. measures, trade allies, customer accounts, sites, contacts, and workflow
- ➔ Intuitive, wizard-driven, information-rich dashboards and customizable views for project tracking and task management
- ➔ DSM incentives budgeting, forecasting, and tracking
- ➔ Dynamic framework and libraries for managing EE measures and equipment
- ➔ Rapid cloning and reconfiguration of programs and measures



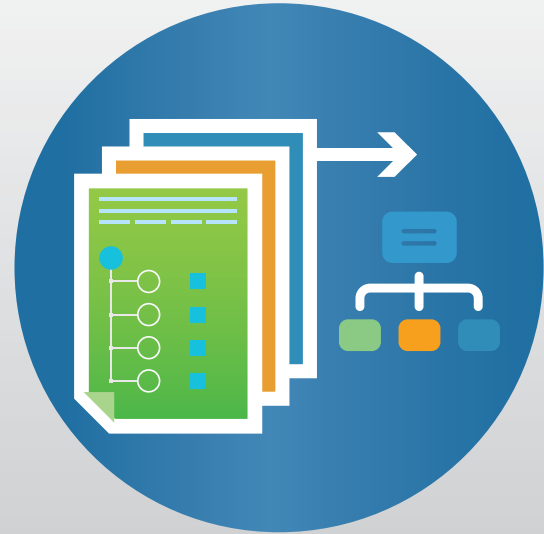
## Industry-Leading Customer & Partner Relationship Management

- ➔ On-demand, 360-degree views of trade ally and customer data – from contact information through to project details, communication and activity history
- ➔ Automated communications on status changes, powered by configurable work-flow
- ➔ Organized tracking of status, e.g. rebates, contractor feedback and quality control
- ➔ Full CRM option for customer support cases, leads management, and in-depth marketing automation
- ➔ Upload and maintain notes, attachments and documents
- ➔ Enterprise social media interface to improve internal collaboration and reduce email traffic
- ➔ Access to the world's largest CRM application exchange (analogous to Apple's App Store), opening up access to turnkey and seamlessly-integrated solutions such as customer service, marketing, IT and administration, HR, Finance, ERP, collaboration, and analytics



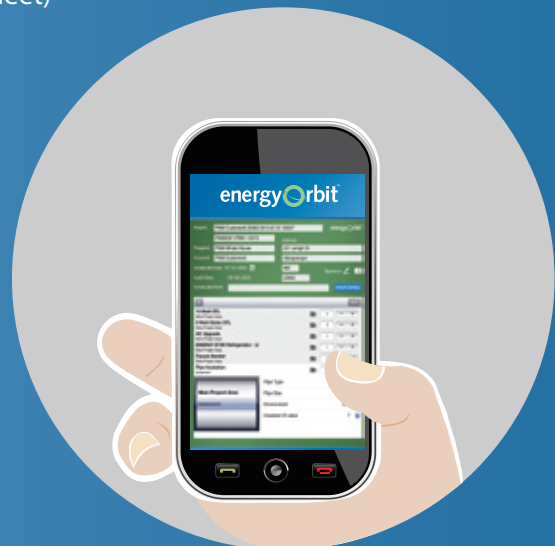
## Powerful Ad Hoc Reporting & Analytics

- ➔ Ability to create reports using simple, wizard-driven and drag-and-drop reporting tools
- ➔ Configurable, role-based dashboards, e.g. DSM program manager, utility executive, trade ally employees
- ➔ Satisfy stringent regulatory reporting requirements with ease
- ➔ Scheduled reports, drilldowns, and multi-format export
- ➔ Incentive payment tracking and export files for payment processing



## Robust Mobile Application and Customer & Partner Portals

- ➔ Easy access via web and mobile devices
- ➔ Customer and partner tracking of incentive status
- ➔ Easily-configured portals for both customer and trade allies
- ➔ Mobile application for trade ally data capture and auditing of program and project status (see separate datasheet)
- ➔ Work order close out for audits and installations
- ➔ Quality control, including signatures and image capture
- ➔ Eliminates paperwork, works across all environments



The energyOrbit platform is powered by the leading cloud-computing infrastructure services provider, Force.com, a twelve-year old enterprise cloud platform operated by salesforce.com.

- ➔ Force.com provides industry-leading security and data privacy, including:
  - TRUSTe, ISO 27001, SSAE 16/ISAE 3402 SOC-1, SOC 2, SOC 3 (SysTrust), FISMA, PCI-DSS
  - Regular security assessments and certifications performed by third parties
- ➔ Seamless integration is enabled with other Force.com applications, e.g. reporting, marketing automation, CRM, Financial, HR, etc.
- ➔ Easily-configurable system requires no development resources, yet is extensible to allow custom coding via APIs (e.g. data integration, server and front-end logic)
- ➔ Force.com's multi-tenant architecture ensures a massively scalable environment, protecting your investment for years to come



- ➔ No hardware infrastructure costs
- ➔ Reduced need for ongoing professional services
- ➔ Industry-standard APIs for data integration with other systems
- ➔ Rich application development stack and active developer community

## energyOrbit Benefits

- ➔ Dramatically improved productivity
- ➔ Higher likelihood of achieving savings goals
- ➔ Greater collaboration with trade allies
- ➔ Closer connection to customers
- ➔ Higher portfolio visibility

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### OUR DSM/EE SOLUTIONS AT WORK

Leading utilities from coast to coast use energyOrbit to lower operating costs and achieve significant energy savings.

