

# Advisor/Broker/Consultant Evaluation Checklist

## PRICE

- ABC works with competitive suppliers.
- ABC works with vetted industry leaders.
- ABC provides competitive pricing from multiple suppliers.

How many electric suppliers does the ABC work with? \_\_\_\_\_

How many natural gas suppliers does the ABC work with? \_\_\_\_\_

How is the ABC paid (By the supplier? Charges you a direct fee?) \_\_\_\_\_

## PRODUCT

ABC provides custom pricing for the following electric products:

- Fixed All-In
- Index
- Pass-through
- Energy Only

ABC provides custom pricing for the following natural gas products:

- 100% Fixed
- Index
- Swing Options
- Layered/Hedging

ABC can assist with the following energy efficiency projects (check all that apply):

- Lighting
- Water
- HVAC
- Building Automation Systems (BAS)
- VFDs
- RTUs
- Batteries
- Boilers

- ABC can enroll you in a Demand Response program.
- ABC can perform a Reverse Auction.
- ABC has knowledge of electric suppliers' product portfolios.
- ABC has knowledge of natural gas suppliers' product portfolios.

## SERVICE

- ABC performs bill audits.
- ABC provides budgets.
- ABC resolves billing issues directly with suppliers.
- ABC resolves customer service issues directly with suppliers.
- ABC resolves customer service issues directly with the utility.
- ABC provides usage histories.
- ABC provides variance reports.
- ABC provides annual reports.
- ABC provides pricing analyses between suppliers.
- ABC has a back office dedicated to customer support.
- ABC has an educational website.
- ABC provides peak day alerts.
- ABC actively monitors the market.
- ABC provides renewal pricing proactively.
- ABC has Certified Energy Professionals on staff.
- ABC offers Lunch and Learns.
- ABC reviews contracts and negotiates with suppliers.