

Engaging Nonresidential Customers in Whole Organization, Whole Building Efficiency

Marjorie McRae, Joe Van Clock, and Michelle Levy, Research Into Action, Inc.

ABSTRACT

Programmatic approaches that target attitude and behavior changes to support whole organization, whole building efficiencies can achieve greater savings than programs promoting individual measures and activities, even if the latter programs offer a broad array of incentives and technical assistance. Although recent nonresidential programs have moved away from single end-use measures toward multiple building measures and services, these oft-called “comprehensive” programs still rely mostly on devices to achieve energy efficiency. By contrast, this paper examines programs working with businesses to not only increase the up-take of utility-offered measures and services, but also to affect attitudes and behaviors of the people who operate the buildings. We dub these programs “Whole Organization” programs; ones that truly address energy use *comprehensively* by including the human element to reap maximum efficiencies.

Some program administrators have developed programs we termed in this paper Whole Organization efficiency programs to address a several shortcomings in previous generation efficiency programs, notably the difficulty those programs have in motivating continued, repeat participation and the opportunity for significant additional savings through changes in facility operations and organizational practices.

We interviewed nine Whole Organization program managers to explore how these programs work and why they show promise for capturing nonresidential efficiencies beyond traditional measure-based programs. In addition, this paper considers insights from the literature on two marketing trends, “customer focus” and “relationship marketing,” which offer potentially useful strategies for working with energy efficiency program participants.

Introduction

Programs that promote individual measures and activities are unlikely to reach multiple interactive building systems or bring about a significant change in customers’ approaches to energy management, even if these programs offer a broad array of incentivized measures and technical assistance.

While repeat participation is relatively common among measure- and service-based programs, there are often delays of several years between projects, and programs are challenged to keep “making the sale” to attain continued, repeat participation (Bliss et al. 2009). The authors have observed these phenomena in interviews with participants in a program that provides technical assistance and incentives for industrial process improvements. When asked why they had chosen inefficient equipment in a subsequent purchase rather than use the program again, contacts responded, “We just didn’t think of it” (Peters et al. 2008).

So while program designs have shifted their focus in recent years away from individual measures to encompass multiple measures or services designed to address the various barriers to using energy more efficiently, even repeated participation in such programs does not capture the

potentially large savings from behavioral and operational changes. Efficiency investments only generate anticipated savings if an efficiently designed, constructed, and/or equipped building is *operated* optimally. This includes commissioning new efficient equipment and operating and maintaining commissioned equipment with a concern for efficiency.

A Whole Organization program, in our terminology, is one that seeks to bring about a shift in business culture on the part of participants making energy efficiency part of their day-to-day business considerations, automatically woven into operating existing facilities, acquiring new facilities, and purchasing equipment and supplies. Whole Organization programs view this shift in attitude as a long-term process; they seek to generate specific efficiency projects in the course of altering the multitude of small behaviors that affect energy use.

This paper begins with a brief consideration of programs that sought to promote energy efficiency retrofits targeting multiple building systems. It then draws on interviews with nine program managers of Whole Organization programs to identify lessons learned in the effort to induce business culture change. Finally, we review the marketing literature to identify ways in which other industries have responded to barriers like those faced by energy efficiency programs, and demonstrate parallels between Whole Organization program designs and two marketing strategies – “relationship marketing” and “customer focus.”

The nine program managers we interviewed manage programs that address a variety of commercial customer types and approach their customers in a variety of ways (Table 1). Most commonly, the comprehensive programs examined have subsector-specific activities (such as for the medical and hospitality subsectors). These programs comprise two variants: the program administrator may offer a single program, within which staff are assigned to specific submarkets and supported by submarket-specific materials; or the program administrator may offer a suite of comprehensive programs or initiatives with unique names and staffing, each targeting a specific submarket.

The authors interviewed these program managers as part of a process evaluation of Pacific Gas & Electric Company’s Medical Efficiency Program (McRae et al. 2009). A brown bag presentation sponsored by the Association of Energy Services Professionals and hosted by Tracy Narel of the U.S. EPA provided additional detail about these programs (Hagispiel 2008; Kowalis 2008; Narel 2008; Walker, 2008), as did a process evaluation of the Northwest Energy Efficiency Alliance’s BetterBricks program (Research Into Action, Inc. et al. 2009).

Table 1: Whole Organization Programs Examined

Program Administrator	Program Name	Program Focus	Program Structure
Efficiency Vermont	Efficiency Vermont	Commercial Sector	N/A
Hydro-Québec	Empower Program	Sub-Sector Specific	Assigned Submarkets
MidAmerican Energy Company (Western and Central Iowa)	EfficiencyPartners®	Commercial Sector	N/A
National Grid (Massachusetts)	Whole Building Assessment Initiative	Commercial Sector	N/A
New York State Energy Research and Development Authority	New York Energy \$mart SM Focus on Healthcare	Sub-Sector Specific	Suite of Unique Efforts
Northwest Energy Efficiency Alliance (Oregon, Washington, Idaho and Western Montana)	BetterBricks Hospitals and Healthcare Initiative	Sub-Sector Specific	Suite of Unique Efforts
Pacific Gas & Electric (California)	Medical Efficiency Program	Healthcare	N/A
Wisconsin Focus on Energy	Focus on Energy	Sub-Sector Specific	Assigned Submarkets
Xcel Energy® (Central and Northwestern Colorado)	Commercial Real Estate Efficiency Program	Commercial Real Estate	N/A

Previous-Generation Program Approaches

Many equipment incentive programs, standard performance contracting programs, and building performance programs have encouraged participants to take on multiple measures, but few have directly focused on meeting a building's full energy savings potential (Amann and Mendelsohn 2005, 2-3). Programs seeking to meet the full range of energy-saving opportunities within a facility typically do so by encouraging participants to expand retrofit projects in which the customer was already interested to include multiple measures, as well as by offering technical assistance, loans, and other aids to reduce evident barriers. However, these programs encountered additional barriers in that participants were often reluctant to expand the scope of their projects and that larger projects required the involvement of individuals at multiple levels within the participant's organization, which programs at times found difficult to induce or coordinate. In some cases, programs encountered difficulty in identifying the appropriate decision-maker to approve a project (Ibid., 2).

Whole Organization Efficiency Program Approach

The Whole Organization programs this paper examines, according to the interviewed managers, face many of the same types of barriers that the previous generation of efficiency

programs encountered, including (1) first costs, (2) planning and timing with budget cycles, and (3) achieving stakeholder approval and buy-in. While all three of these barriers are pertinent to some degree to all programs, they are especially pertinent to Whole Organization programs because the activities these programs promote may be more costly and involve more people.

While incentives help to reduce first costs, program managers describe additional approaches to mitigating this barrier. They encourage customers to plan their efficiency expenditures over time (perhaps three to five years), to start with shorter payback measures so that they quickly can begin reaping energy cost savings, and to commit the money saved from efficiency improvements to a fund for subsequent efficiency improvements. Further, programs encourage customers to view efficiency as an investment that contributes to profitability, and to analyze efficiency opportunities with the same methods used to assess other potentially profitable investments, rather than considering efficiency upgrades as simply another facilities cost. While traditional programs make this argument as well, Whole Organization programs have developed relationships with company executives and are able to make the business case for efficiency investments to the financial decision makers in terms the latter staff use.

These strategies to reduce the first-cost barrier also reduce the barrier related to budget cycles. The Whole Organization programs do not face the same intensity of pressure as other programs to maximize annual savings; program cycles conflict with customer's budget cycles. Instead, Whole Organization programs make investments in the longer term by establishing relationships with customers and getting their ongoing commitment to efficiency.

Whole Organization programs seek to influence more people within the organization and thus face a greater barrier than other program types in attaining stakeholder buy-in. Whole Organization programs address this barrier by attempting to establish relationships with directors and managers of several departments, meeting periodically with contacts, and explaining the benefits of efficiency using the concepts and terms the contact uses to assess opportunities. Finally, Whole Organization programs frequently bring together parties outside of the customer's organization—such as program staff and consultants, the customer's utility account representative, and the customer's contractors and consultants—over the course of working with customer contacts.

While previous programs sought to encourage multiple measures in a single project, Whole Organization programs take a long-term approach that seeks to gradually bring about a change in participants' attitudes. Contacts stated that customers may initially see less risk in investing in energy efficiency through relatively simple projects (like lighting retrofits). The program managers interviewed reported that once these projects are completed and successful, there may be opportunities to leverage that success to encourage the customer to take on additional measures. One contact said that business executives might be willing to take on additional projects if their staff members "bring them a success that is tangible."

The program managers interviewed stated that building and maintaining relationships with program participants is important in their efforts to influence participants to take a comprehensive approach to energy efficiency in this gradual way. As part of their effort to build these relationships, program managers reported following up with customers on energy audit or engineering assessment recommendations, holding periodic meetings with customers, and providing customers with an account manager who is available to answer their questions. One program manager described the success of these relationship-building efforts, saying, "Over time, we've achieved comprehensiveness. We've built relationships with customers that over time have touched each service we offer."

One manager of a Whole Organization energy efficiency program described the ultimate goal of her program: “I think that true comprehensiveness is embodied in the idea that energy management is woven into the business of the organization in the same way as are safety, staff retention and community support.” Another program manager said that his program sought to encourage customers to “incorporate energy efficiency in their decision-making.”

Typical Services and Characteristics of Whole Organization Programs

The Whole Organization efficiency programs examined typically offer or coordinate four primary services for their participants: (1) multi-year action plans developed from an assessment of the energy efficiency opportunities available; (2) individualized support to address barriers; (3) incentives to reduce cost barriers; and (4) education and training for customers and trade allies.

Action Plans Developed from Efficiency Assessments

Program managers stated that comprehensive audits or engineering assessments to identify energy efficiency opportunities constitute a key part of their program. Three of these managers reported providing incentives to cover approximately half of the \$4,000 to \$8,000 typical cost of these assessments.

In addition to identifying facility-based opportunities, one program manager stated that his program also evaluates a customer’s management practices using EnVINTA’s One-2-Five® Energy system to identify opportunities for energy savings through administrative changes (see www.envinta.com). Another program evaluates customers’ energy-related management practices using a tool developed by program staff. These tools formalize, and conduct early on, a process that other programs engage in informally as customers have difficulty moving forward with identified actions.

Once assessments have identified energy efficiency opportunities in terms of equipment and operations, the Whole Organization programs often work with the customer to develop a long-term energy efficiency plan. According to contacts, these plans define payback periods for each measure, prioritize the efficiency measures identified, and set out timelines for implementing the range of recommended measures. An energy efficiency plan may span a year or two or may phase in over five years significant expenses or procedural changes needing the cooperation of many groups within the organization. They may address existing facilities, new construction, or both.

Program managers reported that through the development of action plans, they provide assistance to the customer in planning and budgeting for energy efficiency improvements, reducing the likelihood that customers feel overwhelmed and stymied by the many opportunities an audit may identify. Action plans typically encourage customers to begin with projects with short payback periods so that the savings, which quickly begin accruing, can be invested in subsequent measures.

While the program managers described the benefits of long-term action plans, they asserted that these plans must be adapted to meet the needs of the individual customer and may not be appropriate for every firm. Contacts reported that detailed, long-term plans typically are most useful to large institutional or bureaucratic customers or those whose corporate headquarters may be separate from their business locations. According to contacts, smaller

customers may be more receptive to a short list of the highest-priority measures and a succinct outline of the steps required to implement each measure.

One program manager also emphasized that, even for large customers, the plan should take into account the needs of executives in the customer's organization. The plan should be brief, should state which staff will be accountable for the measures, and should outline a business case for undertaking energy efficiency measures – this may also include non-energy benefits and benefits related to the organization's mission statement. The mission statements of large hospital organizations, for example, often include the intent to provide leadership toward a healthier community, which increasingly includes environmental sustainability.

The programs typically ask the customer to sign the action plan. For more complex organizations, programs ask senior executives to sign (and, in some cases, the chair of the board of directors), as well as the facilities management and program staff.

Individualized Support to Address Barriers

Whole Organization programs work closely with participating organizations to assist customers both in identifying opportunities (the efficiency assessments and action plans) and in resolving customer-specific barriers and hindrances to incorporating cost-effective energy efficiency actions in facility operations and investments. Sometimes the barrier is simply “out of sight, out of mind.” Program managers stated they meet periodically—as often as once a quarter—with their participating or targeted customers to forestall this barrier.

Utility's Whole Organization programs typically rely on their large-customer account representative to maintain the relationship with the customer. These representatives have access to the customer's facility director and offer to all contacts within the firm the credibility of the utility. Non-utility program administrators assign a specific staff member to each customer, an “account representative” approach although not tied to the serving utility. Contacts stated that sector-specific expertise enables them to “speak the same language” as the customer.

Account representatives market the programs to their targeted accounts and continue to serve them as they embark on Whole Organization efficiency. To the extent that programs market to smaller customers, they do so through presentation and training events, outreach to professional and trade organizations, and various media. At least one program assigns account representatives to smaller customers that commit to a Whole Organization approach. Another program directs such customers to detailed information available on the program website, and acquaints customers with trade allies working in the Whole Organization approach.

Typically, program staff are available to accompany account representatives as they meet with customers. According to contacts, the program must ensure that account representatives are aware of the opportunities the program offers, but account representatives do not need in-depth knowledge of the program. “Representatives need to be familiar with the program, but they don't need to be an expert or have the final answer,” one contact said. “They can look to us to be a tool in their toolbox.”

Perhaps because account representatives have existing relationships with facility directors, typically programs first contact facility directors to interest them in the Whole Organization approach. However, the programs have found they cannot limit themselves to the facility directors; rather, it is necessary to make contact with individuals at multiple levels within the customers' organizations. While program staff generally work most closely with facilities directors, all of the program managers interviewed stated that gaining support at the

organization's executive level plays an important role in motivating program participation once implementation of specific projects has begun. Supporting this view, one contact stated that facilities directors may not value efficiency programs in the same way or for the same reasons as company executives. Another contact said that support at the executive level "provides some pressure for the facilities director," motivating the director to participate in the program.

The program managers described a variety of strategies for reaching out to executives in the customer's organization. One contact stated that peer relationships between utility executives and executives in the customer's organization have the potential to give program staff access to customer executives. If these relationships are not available, this contact said, program staff must develop a succinct presentation demonstrating concrete benefits the program will provide and connecting those benefits to the business objectives that the executives seek to meet. Other program managers described building on their relationships with facilities directors to make contacts at the executive level of their customers' organizations.

Relationships throughout the organization—with chief executives, executives for operations and for finance, and facility directors—provide three important supports to energy efficiency. These relationships ensure or improve: (1) buy-in by the organization, (2) accountability, and (3) problem-solving. The barriers of cost and knowledge, addressed in the next sections, are only one of many impediments to energy efficiency. Attaining whole building energy efficiency requires that energy efficiency be a criteria in such diverse aspects as purchasing equipment (including office equipment), servicing equipment and cleaning the facility, synchronizing the delivery of lighting and space conditioning services to patterns of occupation, and orienting facilities to be built to manage thermal gains and natural light. Incorporating energy efficiency in these activities engenders both practical problems and organizational problems—ranging from those defined by economists, such as split incentives, to those addressed by industrial psychologists, such as "turf wars."

Program managers reported that building relationships with the customer and gaining the customer's trust has been effective; however, this approach requires a great deal of resources and effort. The programs we have dubbed Whole Organization are still in their infancy, and these are programs designed to take the long view. Data are not available to adequately compare their cost-effectiveness with that of traditional programs.

Contacts stated that, in deciding the amount of resources to devote to each relationship, they had to determine whether the customer was motivated to carry out comprehensive efficiency upgrades. While the program managers interviewed stated that they seek to motivate customers to internalize the goals of their long-term energy efficiency plans, program managers have reduced the amount of resources that they devote to projects that are not promising. Even in these cases, however, one program manager stated that she seeks to maintain the program's relationship with the customer through periodic contact in order to identify and respond to additional barriers that the customer may face.

Incentives to Reduce Cost Barriers

Whole Organization programs focus on encouraging customers to alter their approach to energy management and addressing the barriers individual customers face in doing so. To this end, Whole Organization programs offer or coordinate for their participants incentives for both prescriptive and custom measures and actions, such as energy efficient design for new construction. These incentives typically do not differ from the incentives already available

through applicable retrofit and new construction programs, although some programs offer higher incentives for projects identified in the action plans. One program manager reported his program is considering replacing the higher project-based incentive to a longer-term performance-based incentive, in response to customers that seemingly have dropped out of the program after taking a single action from their plan.

Education and Training

Education and training provided to customers and trade allies play an important role in maximizing the benefits of Whole Organization programs. Most customers are familiar with incentive programs, yet do not understand the need for equipment tune-ups and energy use optimization. They understand that a given piece of equipment can be more efficient, but do not understand systems of equipment and interactions within and between systems that affect energy consumption.

Not surprisingly, the typical trade ally understanding of these energy efficiency programs is not much more sophisticated than customer understanding, since customers seldom request their contractors to go beyond installing efficient equipment.

The examined programs provide education and training activities to customers and trade allies covering topics ranging from energy management for commercial customers, to technical training on systems like HVAC or lighting, to training related to LEED certification. Contacts reported that sessions typically last one full day, although as with incentive offerings and the formation of action plans, the program managers interviewed stated that they may develop and offer customize trainings to best meet participant needs. If a customer is unlikely to attend a training, one program manager reported that program staff will seek to inform the customer about the topic through their day-to-day interactions. Some programs have the ability to conduct trainings at the customer's site.

Maintaining strong relationships with trade allies, such as developed through training and education services, enables programs to become involved in projects as early as possible, ideally during or before the design phase – such as for new construction during the conceptual design, or even the point of the RFP and proposal. Projects in facilities like hospitals are complex, and new construction typically takes a minimum of five years from initial planning to a completed facility. Early involvement in a project allows Whole Organization programs to ensure that customers consider energy efficiency throughout the process and to support customers as they implement energy efficiency measures.

Relationship Marketing and Customer Focus

The interviewed program administrators developed the programs this paper terms Whole Organization efficiency programs to address several shortcomings in previous generation efficiency programs, notably the difficulty those programs have in motivating continued, repeat participation and the opportunity for significant additional savings through changes in facility operations and organizational practices.

Similar to the challenge of repeat participation, changing economic conditions over the last 20 years have increased the importance to all businesses of retaining existing customers. To

this end, marketers have developed a variety of methods to encourage customer loyalty. Two of these methods, relationship marketing and customer focus, closely parallel the approach taken by Whole Organization programs.

Relationship Marketing

In the early 1990s, marketing scholars noted two broad changes in the economic environment that, they argued, required businesses to take on a marketing strategy based on building and maintaining relationships with customers. First, marketers noted that competition had increased and it had become more difficult for businesses to constantly attract new customers (Varva 1992, 4). Second, marketers observed a decrease in brand loyalty among consumers (Varva 1992, 7). As a result, marketers saw an opportunity to increase sales by developing relationships with existing customers that would lead to repeat business and grow sales at a much lower cost than a focus on constantly attracting new customers (Varva 1992).

Business decision makers increasingly view their facilities and equipment purchases in terms of life-cycle costs rather than simply first costs. As a result, energy efficiency programs may face cost pressure to a lesser extent than companies selling products that have become commoditized in a global marketplace. However, the experience of Whole Organization programs demonstrates that the type of relationships and repeated contact with existing customers that proponents of relationship marketing favor is crucial to bringing about a shift in participants' attitudes and behaviors related to energy management.

Proponents of relationship marketing argue that maintaining customer relationships provides businesses with two primary benefits. First, to the extent that partners are committed to a relationship, they will be reluctant to pursue short term gains at the expense of the relationship (Morgan and Hunt 1994, 24). This type of relationship commitment results from the value that partners perceive in the relationship and the costs that they perceive in leaving the relationship in terms of finding new partners and ending the relationship itself (Ibid). In business relationships, this implies that the customer will not base their choices solely on price when they value their relationship with a supplier. Likewise, a customer who values the advice and support they receive from an energy efficiency program may continue to participate in the program even if some subsequent program offerings are not as attractive as initial measures.

Second, to the extent that partners in a relationship trust each other, they will be willing to take risks that they would not take if the support the relationship provides were not available (Morgan and Hunt 1994, 22). Shared values and frequent and open communication contribute to this type of trust (Morgan and Hunt 1994, 25). In the context of an energy efficiency program, this implies that a partner in a trusting and committed relationship with the program would be willing to take on measures or incorporate emerging technologies that they would not consider in the absence of the relationship.

Seeking to synthesize relationship marketing with other trends in the field, marketing scholars Stephen Vargo and Robert Lusch argue that the creation of value in an economic exchange occurs through a transfer of skills and knowledge. This transfer may occur either directly through the provision of a service, or indirectly, as occurs when the skills and knowledge are embodied in a product that the consumer uses (Vargo and Lusch 2004, 9).

According to Vargo and Lusch, since value creation occurs through a transfer of skills, the relationship between the producer and the consumer extends beyond the transaction itself as the consumer gains value from the knowledge and skills embodied in the product and as the

producer gains value through brand equity (Vargo and Lusch 2004, 12). As a result, companies benefit from constant interaction with the customer, which allows them to refine products in order to better meet customer needs and to expand the market by developing products to meet new needs (Ibid).

The Whole Organization program approach is consistent with Vargo and Lusch's assertion that a transfer of skills and knowledge is at the center of economic exchange. While Whole Organization programs provide customers with concrete energy efficiency measures and services, the central focus of Whole Organization programs is on ensuring that the knowledge and skills embodied in those services are transferred to the customer in a way that will inform future decision making. For this reason, Whole Organization programs maintain relationships with their customers that allow them to identify and meet individual customers' needs.

Customer Focus

In terms of their outward focus, companies have begun to offer customized solutions to meet customers' needs, and to build and maintain positive relationships with their customers.

The concept of customer focus examines the internal characteristics that are necessary for an organization to take on a service-oriented approach and build the types of customer relationships that Vargo and Lusch and proponents of relationship marketing advocate. According to supporters of customer focus, companies could better meet customers' needs, and as a result, increase the value of their products, by offering customized combinations of products to their customers rather than seeking to market each product individually. Whole Organization programs take this approach, seeking, over time, to address each of the energy saving opportunities within a customer's facility in a comprehensive way.

However, companies are generally structured in a way that seeks to innovate on and streamline the production of individual products without considering the benefit that the customer could receive from combining multiple products. Typically, each product is produced within a silo (Gulati 2007, 100). Many utilities and other energy efficiency organizations face similar structural barriers to providing a well-coordinated, customized combination of services that meets customer needs across multiple areas. For example, customer projects may involve elements of new construction, retrofits to existing facilities and appliance upgrades. Separation between each of these program areas, as occurs among program administrators, can make program participation more difficult for customers who must go through separate application and verification processes for each element of their project.

In order to overcome these silos, proponents of customer focus suggest that companies alter their organizational structure to better respond to customer needs, suggesting two solutions demonstrated in Whole Organization program approaches. First, companies may create a separate business unit with the task of coordinating between the different silos in order to meet customer needs (Gulati 2007, 102). Whole Organization programs typically play this role, coordinating energy efficiency services in multiple areas for their customers. Second, companies may organize divisions by customer type rather than by product, allowing them to develop expertise and offer specialized solutions for each type of customer. As noted above, several of the Whole Organization programs examined take this approach, developing sector-specific expertise.

To successfully restructure itself in either of these ways, customer focus proponents argue that an organization must create a culture that emphasizes meeting customer needs and

provides training, metrics for measuring success, and reward practices that reinforce that culture (Gulati 2007, 103-105). The experience of Whole Organization programs also reflects this assertion in that these programs must gain support of utility account representatives and successfully coordinate with third party program implementers who may face incentives inconsistent with building long term customer relationships.

Conclusion

Whole Organization energy efficiency programs, as we define them for this paper, seek to bring about a change in behaviors and attitudes on the part of their participants, motivating participants to minimize energy use through their day-to-day decision making and activities. These programs take a gradual approach to achieve this goal, developing ongoing relationships with customers and trade allies and building on past success to encourage participants to take on more ambitious efficiency measures. This approach contrasts with efficiency programs that seek to encourage retrofits across multiple systems or throughout an entire facility but do so by encouraging participants to take on a single large, multi-faceted project and do not strive for continuing business culture change.

Building long-term customer relationships that bring about repeat participation is crucial to the success of Whole Organization programs. Although their motivation differs, many businesses have also found it increasingly necessary to retain customers by building customer relationships. To this end, marketing scholars have developed the strategies of relationship marketing and customer focus, which closely parallel the approach of Whole Organization programs.

Whole Organization efficiency programs offer services responsive to the unique needs of each participating organization, increasing the value that each participant gains from those services. Based on these relationships, customers may be willing to take on efficiency investments that they would not otherwise consider and begin to integrate energy efficiency into the myriad decisions and actions that drive energy consumption. Whole Organization programs offer the promise of attaining “deep” energy savings among businesses. Time will tell if the approach bears cost-effective fruit.

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