



Strategic Energy Management

COLLABORATIVE

Customer Succession planning -Tips and Tricks

This is a guide for SEM energy coaches. Use this to help minimize impact from SEM energy team turn-over.

Training and Development

- Once you have an Energy Champion in place, focus on their training and development – but don't do so in a vacuum. Think about ways to subtly cross-train both the executive sponsor and other members of the team, to make sure you don't strand a customer's investment in capacity building. Life changes, geographical changes, and jobs change, so don't proceed as if anyone you are working with will stay in place forever. Instead, think about succession planning right out of the gates.
 - Think about ways to encourage additional presenters from the Energy Team, not only the Energy Champion presenting each time.
 - Consider adding others into the Cc line when you email with the Energy Champion.
- Effective Energy Champions come from many walks of life, and technical competence is not key. Accounting, Communications and Production staff can be great Energy Champions. Think about opportunities to build the capacity of the customer's staff beyond just Facilities, Management and Engineering – one of those people may be the next (and best ever) Energy Champion.

Program Design and Requirements

- Establish non-negotiables for Executive Sponsors: Energy Management Assessment (EMA) sessions, signing participation contracts and provide feedback in meetings are important areas of participation from the Executive Sponsor. Consider requiring in the participation agreement that your customer's Executive Sponsor attend EMA sessions.
- Trainings and events form the core of Cohort-based program delivery. Consider requiring that at least two staff from each site attend your trainings and events, especially those that require travel. While it adds an expense, it ensures your program does not hinge entirely on the continued employment and enthusiasm of the current Energy Champion.
- Consider linking long-term customers with new Energy Champions as mentors
- Succession planning may look different for different organizations- might be a skillset, a role or a specific person. Value in discussing it with proposed successor. Coach could help facilitate this discussion and by incorporating "train the trainer" into delivery.
- Positive recognition for Energy Champion to make it a competitive role.

Documentation

- Succession plans should be well-documented. We've got an example one from a company where the plan was followed, and it resulted in a smooth succession.
- A file folder structure that the customer understands can be a big asset for executing a succession plan. A good file structure helps ensure the customer's energy management program is well designed, well documented, standardized, and set up for continuous improvement. When such a structure is in place and is clearly understood by the energy team, a new Energy Champion will have a much easier time taking over the role. See the next page for an established file structure used for DOE 50001 Ready.
- Built-in requirement in enrollment agreement.

DOE 50001 Ready file structure

- I. !Archive
- II. 1-----Planning-----
- III. 1) Scope and Boundaries
- IV. 2) Policy
- V. 3) Management Commitment
- VI. 4) Energy Team
- VII. 5) Legal Requirements
- VIII. 6 -----Energy Review
- IX. 6) Energy Sources and Consumption Data
- X. 7) Energy Consumption of Systems and Equipment
- XI. 8) Determine SEUs and Review
- XII. 9) SEU Data Collection
- XIII. 10) ENPIs Identified
- XIV. 11) Energy Baselines- Objectives- Targets
- XV. 12) Identify ENPI opportunities
- XVI. 13) Develop Action Plans and Implement Projects
- XVII. 14-----Continual Improvement-----
- XVIII. 14) Ongoing Monitoring of energy and action plans
- XIX. 15) Energy management plan and review
- XX. 16) Investigate Deviations and Take Action
- XXI. 17) New Design Consideration
- XXII. 18-----System Management-----
- XXIII. 18) 50001 Ready documents and records systems in place
- XXIV. 19) Internal and External Communication
- XXV. 20) Training for 50001 and SEUs
- XXVI. 21) Procurement Specs for SEUs
- XXVII. 22) Internal Audits of the EnMS
- XXVIII. 23) Determine Energy Performance Improvement
- XXIX. 24) Top management Reviews

Doc: 50001 Ready Assessment Grid template

Doc: Getting Started Navigator

Within each folder, have the following folders:

- !Archive
- Completed
- In Progress
- Worksheets
- Doc: Navigator guidance