

# FirstAdvisor

## Definitions

**Customer:** Small Medium Business or Large Commercial or Industrial customer of the utility. A person or organization which purchases energy services from a Utility.

**Demand:** Energy consumed at a period in time, typically measured in kW, therms/day.

**Primary Activity:** A classification of building occupancy, referring to the type of Site/building and activity occurring within the Site.

**Recommendations:** An energy conservation measure that is particularly suitable for a Site, based on that Site's energy usage history and Site Profile information.

**Service Account:** A contract between a customer and a utility to receive a particular service at a specific Service Delivery Point.

**Service Delivery Point (SDP):** A fixed point at a Site or building where a meter is installed and energy is delivered. SDP Identifier is a key attribute and should never change regardless of if the meter or customer changes. An SDP can be de-energized, but is never removed unless the site/building is destroyed. One or more SDPs may belong to a single site/building.

**Site Profile:** A collection of information about each Site, which characterizes the Site's Primary Activity, size, operating hours, and other useful information about the Site's construction or operations.

**Site:** A physical building, facility, or premises at a location. Details about the Site (size, occupancy etc.) are captured in a Site Profile. Site may also be referred to as a building, location, or premise. Site is defined by a collection of Service Accounts located at the same physical address.

**Usage:** Energy consumed over time, typically measured in kWh, therms, CCF, etc.

**Utility Program:** A product or service that the Utility provides to their Customer; e.g. an Energy Efficiency Rebate Program.

**Utility:** An organization delivering energy or other services to a group of Customers.

FirstAdvisor includes the following features and capabilities across its three main components (1) Customer Planning Dashboard, (2) Single Site Overview, (3) Configurable Customer Collateral.

### (1) Customer Planning Dashboard

Feature	Definition
<b>Customer Segmentation</b>	Instant and dynamic territory-level searches by up to 24 different filters, including Primary Activity, Customer Segment (as defined by Utility), Utility Program, Peak Demand, location.
<b>Dynamic Mapping</b>	Geographic display of customer sites based on active filters and mouse-over summary that highlights a subset of key site KPI's.
<b>Site Key Performance Indicators (KPIs)</b>	Site-level Key Performance Indicators help program and account team review characteristics of multiple sites. These include number of Service Agreements within the Site, Primary Activity, size, annual energy expenditures, energy savings potential, peak demand, screening scores, and more.
<b>Customer Value Scoring</b>	The Customer Value Score combines propensity modeling with a wealth of aggregated customer data to uncover the highest value customers for a particular program or purpose, providing a superior lead generation tool for initial customer outreach. The score is Calculated based on both of the following: <ul style="list-style-type: none"> <li>• Propensity to save: Customer's potential energy savings based on load-specific analysis</li> <li>• Propensity to act: Customer's likelihood of action based on historical participation data provided by the utility and other profile information</li> </ul>
<b>Exportable Customer Lead Lists</b>	Reports based on search results for further analysis, qualification and engagement. These lists are exportable in CSV format for incorporation into other systems like customer relationship management (CRM) and marketing automation software.

### (2) Single Site Overview

Feature	Definition
<b>Notes of Customer Interaction</b>	Add notes and events to capture Site-level insights and observations.
<b>Compare Charges</b>	Compares a Site's bill to its previous bill, or to the corresponding bill from the same time period the previous year (if enough data is available).  Includes 'Charge Insights' analysis that attributes the bill variance to various categories, including weather, operations and other factors, and days in billing period.

<b>Electricity and Gas Cost Display</b>	Electricity and gas cost over historical periods with configurable timeframe views (monthly). Temperature overlay helps user correlate changes in temperature with cost increases/decreases.
<b>Energy and Gas Usage Display</b>	<p>Electricity and gas consumption over historical periods with configurable timeframe views (monthly, weekly, daily, hourly interval). User options to toggle fuel types. Temperature overlay helps user correlate changes in temperature with usage increases/decreases.</p> <p>➤ Note: Some Views Require Interval Data</p>
<b>Weather Impact</b>	Weather normalized analysis plots customer usage and disaggregates into base load and weather-impacted load, separating weather-related from non-weather-related energy consumption.
<b>Schedule Impact</b>	<p>Overlays a customer's operating schedule on a heat map of energy consumption over an average week. This analysis identifies abnormal usage patterns compared to baseline conditions.</p> <p>➤ Note: This chart requires Interval Data</p>
<b>End Use Estimates</b>	<p>Site and load specific end-use estimates based on a unique model of each site provides a disaggregated view of energy usage to help users understand what factors are impacting their energy usage. The analysis incorporates weather and usage data to show heating, cooling, lighting and other categories. The disaggregation can also be compared to other similar sites, to find the biggest opportunities for energy savings.</p> <p>Note: For sites with only monthly meter data, FirstFuel's End Use Analysis shows an annual breakdown.</p>
<b>Annual Demand Intensity Chart</b>	<p>A visual heat map of a site's demand in the past 12 months.</p> <p>Each day is represented by a single line with color gradient corresponding to hourly demand intensity.</p> <ul style="list-style-type: none"> <li>• Heating Degree Days (HDD) and Cooling Degree Days (CDD) illustrate energy required to heat or cool the site given the local temperature on each day.</li> </ul> <p>➤ Note: This chart requires Interval Data</p>
<b>Load Duration Curve</b>	The Load Duration Curve helps customers identify the time duration spent at a particular load or energy demand. This data visualization helps to quickly identify the amount of time spent at peak load, and peak load shaving opportunities.
<b>Data</b>	Formatting and download of all data, charts, and graphs from the

<b>Export/Download</b>	Portal. Supported export formats include: CSV, PDF, Image (charts-only)
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#### Site Plan

Feature	Definition
<b>Personalized Recommendations</b>	Advanced analytics based models of 125+ Primary Activities generate personalized energy-saving recommendations for every Site based entirely on that Site’s energy usage and Site Profile information. Recommendations are pulled from FirstFuel’s proprietary, custom-built catalog, and include educational messaging, estimated energy savings, payback, and carbon reduction information.
<b>Rebate Program Integration</b>	FirstAdvisor has a number of components which can be used to market Utilities programs. These components include links, FAQs, informational content and banner advertisements, which can be directed to a part of the FirstFuel platform or to another third party website.
<b>Recommendation Catalog</b>	A collection of all Recommendations applicable to a Site. This collection can be ranked for each customer by relevance (e.g., expressed interest) or savings potential.
<b>Savings Plan Creation</b>	Tracks customer interest/progress in implementing Recommendations, including capabilities to: <ul style="list-style-type: none"> <li>• Review and adjust plan over time</li> <li>• Indication of intention to implement Recommendations</li> <li>• Mark Recommendations as complete, and other utility-defined actions</li> </ul>

#### Site Profile

Feature	Definition
<b>Site Profile Questions (Basic and Advanced)</b>	Editable Site Profiles for viewing and updating across interaction cycles: <ul style="list-style-type: none"> <li>➤ Basic Site Profile questions capture key information about the Site, the Primary Activity at the Site, details of the physical building, occupancy, etc.</li> <li>➤ Utilities can specify additional Advanced Site Profile questions for data gathering purposes.</li> </ul>

### (3) Configurable Customer Collateral

Feature	Definition
<b>Configurable Customer Qualification Reports</b>	Assessment Reports with customized energy analysis for each site available for download as PDF. Report includes customized observations, charts and graphs, and annotated Recommendations.

## Platform Functionality

Feature	Definition
<b>Branded web portal</b>	Individual log-in credentials for program and account teams to view key business and energy usage information on assigned facilities
<b>Technology Integration</b>	FirstFuel supports Security Assertion Markup Language (SAML) 2.0 to implement Single Sign On (SSO) for utility personnel (e.g., Account Managers).  FirstAdvisor is white-labeled and branded with Utility branding.
<b>Configurable CMS</b>	FirstAdvisor is equipped with a Configurable Content Management System (CMS) that enables the utility to configure content within the tool.
<b>Responsive Design</b>	FirstAdvisor adheres to responsive design principles and supports the current major release, plus the previous major release, for Internet Explorer, Firefox, Chrome and Safari browsers.