



BPA Simple Steps, Smart Savings Appendix A: Best Practices

Best Practices: Program Management

1. Institute strong communication amongst the team to ensure accountability and transparency across all functional areas.
2. Keep BPA and participating utilities informed of program progress and changes.
3. Track and monitor contractual budgets and provide monthly status reports to participating utilities.
4. Invoice participating utilities by no later than the 20th of each month.
5. Design program elements to accommodate individual utility needs.
6. Hold a regular meeting with BPA and regional stakeholders to discuss the program and other residential topics.

Best Practices: Marketing

1. Listen: strive to understand and clarify what the problem/challenge is.
2. Plan: align marketing activities and tactics with client and program goals.
3. Communicate: keep everyone on the team in the loop.
4. Optimize: continuously learn from and improve upon past approaches.
5. Innovate: explore new opportunities to evolve the way we engage with market actors in order to meet customers where they are at.

Best Practices: Field Services

1. Educate store associates and customers about the Simple Steps program and the benefit to their store and business on each store visit.
2. Take clear, in-focus, professional pictures to document shelf conditions, POP in place showing correct utility attribution and priority placement on a regular basis to share with BPA/participating utilities.
3. Plan for and execute lighting and appliance outreach events, update event calendar and inform the team about upcoming events so they can inform participating utility contacts.
4. Seek priority placement for program products without any associated costs—including end caps, aisle displays, stack outs and blocks.
5. Plan routes to maximize the number of store visits in the most efficient manner possible, minimizing environmental impact while maximizing utility value.
6. Keep an eye out for stores that are not currently on the program and notify the team if one is identified in a participating utility territory.
7. Maximize time at each visit—representatives must merchandise the shelf, collect pricing data and market intelligence, place POP and educate store associates/customers.
8. Notify the team of any pricing anomalies to ensure correct incentives are being provided at all retail locations.
9. Respond to participating utility concerns in a timely manner to address issues such as attribution, POP or resets.

Best Practices: Account Management

1. Conduct regular outreach with current manufacturer and retailer partners to maintain market intelligence and inform program decisions.
2. Vet products for program inclusion against program requirements and product qualifications, with special attention to unique circumstances (i.e. exceptions) for participating utilities.
3. Identify and recruit new manufacturer/retailer partnerships to expand program reach through the addition of new stores/products.
4. Ensure pricing compliance by coordinating with manufacturer/retailer partners on pricing anomalies identified during field visits.



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5. Ensure invoicing obligations are met by facilitating resolution of sales data discrepancies with manufacturer/retailer partners.
6. Ensure timely response to requests from the team to modify store locations and/or SKUs in order to meet the needs of participating utilities.
7. Manage promotion timelines with retailers to ensure that new promotions launch in a timely manner.

Best Practices: Data Processing

1. Create opportunities for automation by streamlining processes such as schedule updates in order to increase accuracy and efficiency.
2. Conduct extensive quality checks on all parts of the process to reduce errors.
3. Maintain continual communication with partners to ensure sales data is submitted in a timely and accurate fashion.
4. Automate processing in a single database to increase efficiency and reduce data entry errors.
5. Ensure cross-training of team members and document processes / workflows for resiliency and flexibility.