Energy Trust of Oregon
851 SW Sixth Avenue, Suite 1200
Portland, Oregon 97204

Telephone: 1.866.368.7878
Facsimile: 503.546.6862
energytrust.org

# MEMO

**Date:** November 9, 2011
**To:** Board of Directors
**From:** Tom Beverly, Trade Ally Network Manager
Philipp Degens, Evaluation Manager
**Subject:** Staff Response for the 2011 Trade Ally Survey

Energy Trust continues to see value in surveying its trade allies on an annual basis. The survey provides a venue from which to gauge how well Energy Trust communicates and interacts with its trade allies. It also offers trade allies a vehicle for providing feedback.

It is clear from the survey responses that Energy Trust has worked with the majority of the trade allies surveyed for over three years, and nearly half for over five years. Also, most of the trade ally respondents plan to continue working with Energy Trust in the future. Energy Trust needs to consider trade ally relationships as long-term in nature and continue efforts to enhance this working relationship.

A greater emphasis will be placed on viewing program paperwork from the trade ally perspective as a result of the survey. Many of the trade allies reported that they complete most of the paperwork on behalf of their customers. As high volume form completers, trade allies can provide important feedback on changes Energy Trust is considering to improve the usability of current forms. Also providing more training and easier access to forms for trade allies will have an impact on processing times for incentives. Trade allies are more familiar with our forms, and as a result, turn in fewer forms with incomplete information.

Based on survey feedback, Energy Trust will continue electronic communications to trade allies via Insider, provide more frequent program-specific emails, offer additional training to assist trade allies in selling projects using new techniques and further refine the regular meetings and training we offer to support trade allies as a sales force for Energy Trust.

Energy Trust staff were pleased to see that the bulk of trade allies surveyed prefer receiving program communications via electronic media (email, webinars etc.). These communication channels are inexpensive and offer flexibility. Energy Trust will continue employing techniques that allow us to cost-effectively and efficiently communicate about Energy Trust offerings, updates and program-technical requirements to trade allies.