



June 6, 2025

# Trade Ally Executive Alliance Roundtable

PECO Ways to Save | Trade Ally Executive Alliance

Confidential Information – For Internal Use Only

# Agenda

1. Welcome
2. Current Marketplace and Trends
3. Collaborative Selling and the Value of Partnerships
4. Project Management
5. Panel Discussion and Q&A

# State of the Trade Ally Marketplace

**Brett Riley, Sr. Energy Efficiency Program Manager | PECO**

# Agenda

1. Industry trends
2. Trade Ally resources and updates
3. Q&A

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# Industry Trends – Current and Future

# Electrification

## Benefits & Examples of Electrification

- **EV Charging** – Lower emissions and reduces maintenance costs
  - Bidirectional charging (V2G)
  - Solar + EV charging parks
- **Industrial Electrification** – More accurate temperature and flow control
  - Electric boilers
  - Industrial heat pumps for process heating
- **Heat Pumps** – More energy efficient compared to conventional systems that combust fuel for heat
  - Geothermal/ground source
  - Heat pump water heaters
- **Food Service Equipment** – Improved indoor air quality in kitchens
  - Induction cooking equipment



# Artificial Intelligence (AI)

**“AI could help reduce energy consumption and building emissions by 8-19%<sup>1</sup>”**

Machine Learning and GenAI can provide many benefits to energy efficiency:

- Grid optimization for balancing energy supply and demand (Demand-Side Management)
- GenAI can yield more targeted marketing and outreach efforts
- Automate and optimize building operations (lighting, HVAC, refrigeration, etc.)
  - Systems communicate better and improve over time
- Advanced fault detection
- Machine learning can help accelerate energy audits



<sup>1</sup>Esrarn, N. (2024, November 1). *Can artificial intelligence get us to net-zero buildings?*. ACEEE. <https://www.aceee.org/blog-post/2024/11/can-artificial-intelligence-get-us-net-zero-buildings>

# Distributed Energy Resources (DER)

## Benefits

- Reliability and resilience
- Reduced energy costs
- Economic opportunities

## Examples

- Battery storage
- Solar
  - PECO incentive = \$0.10/kWh over one-year period
  - Investment Tax Credit (ITC) still available (for now)
- Combined Heat & Power (CHP) / Fuel Cells
  - PECO incentive = \$0.10/kWh over one-year period



# Corporate sustainability goals

## Sustainability Goals Across Our Territory

- PECO Path to Clean
- University of Pennsylvania Climate and Sustainability Action Plan – Carbon Neutral by 2042
- Brandywine Realty Trust – Reducing energy usage and GHG emissions 15% by 2025
- Temple University Climate Action Plan – Carbon Neutral by 2050
- Lavazza Group – A Goal in Every Cup

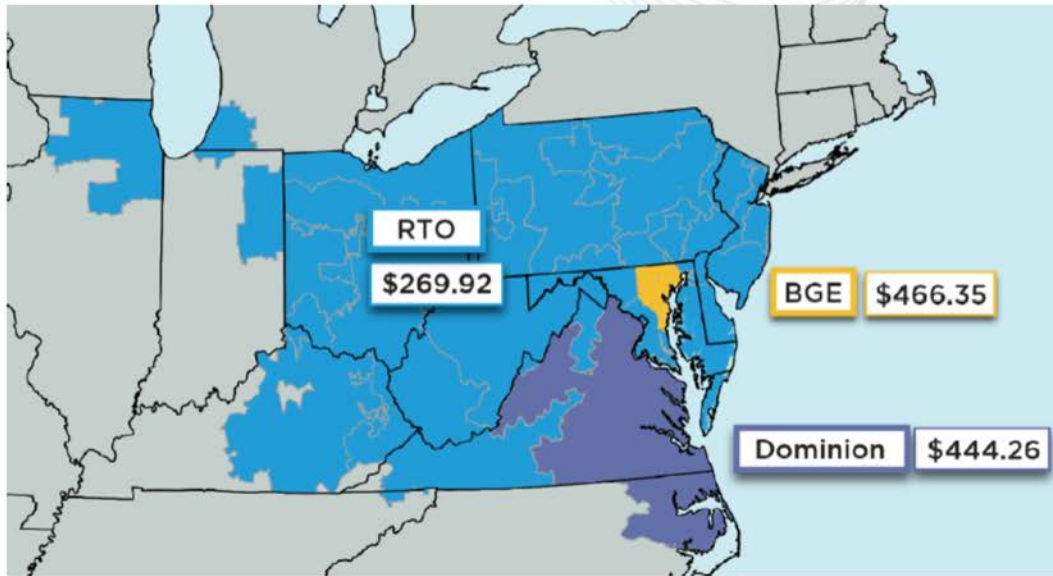
### Our Goal

As part of our Path to Clean goal, PECO and the collective Exelon utilities will reduce our operations-driven emissions by 50 percent by 2030 and support customers in reducing their emissions through access to clean and affordable energy solutions. We are deepening this commitment and will achieve net-zero operations-driven emissions by 2050.

- Cut operations-driven emissions in half by 2030
- Achieve net-zero by 2050
- Support customers and communities in reaching their clean energy goals

# Supply Charge Increases

Capacity Market Auction Prices Surge Amid Future Energy Demand & Reliability



RTO Price Comparison

	2025/2026	2024/2025
RTO Price:	<b>\$269.92/</b> MW-day	<b>\$29/</b> MW-day
Reserve Margin with IRM of:	<b>18.5%</b>	<b>20.5%</b>
	17.8%	14.7%

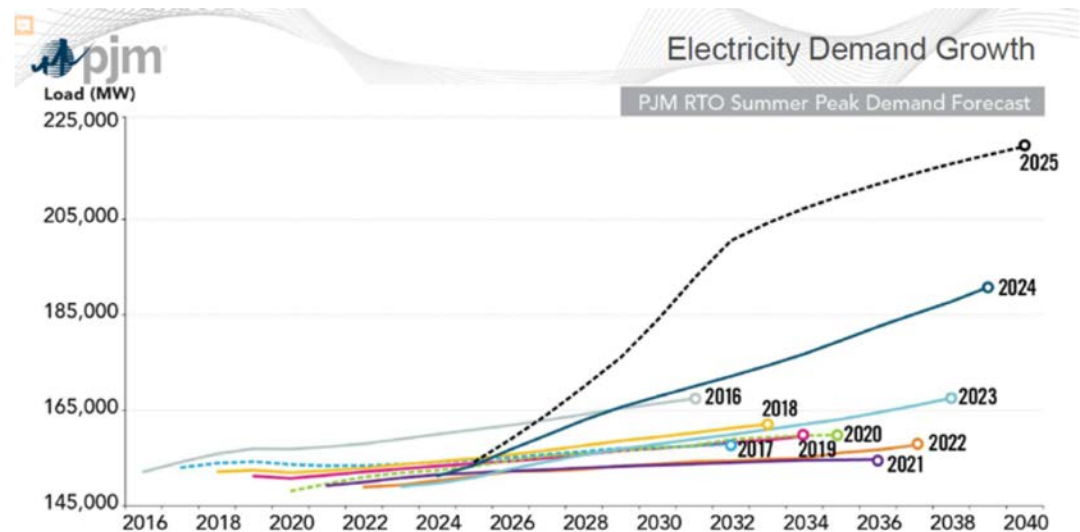
# Supply Charge Increases

## Contributing factors to supply charge increases

- Rising wholesale electricity prices
- Increased demand for electricity
- Expiration of coal and natural gas power plants
- Slow interconnection process for new supply

## When/How does this effect customers?

- Increases went into effect on June 1, 2025
- Residential customers can expect to see an increase on their supply charges from 9-13%



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# Trade Ally resources and updates

# Trade Ally Resources & Benefits

## Benefits of being a PECO Trade Ally

- Access to your own dedicated Account Manager to assist with application process and accompany on site visits
- Listed on PECO's 'Find a Provider' site for exposure to customers
- Trade Ally Member Portal - trainings, marketing material, technology profiles, etc.
- Trade Talks newsletter for up-to-date information about our program and industry news
- Company-specific branded PECO marketing material with your company name and information
- Exclusive events and bonus awards for top performing TAs
  - Let us know if there is something you want to learn more about!

The screenshot shows the PECO Trade Ally Member Portal interface. At the top, there is a dark blue header with the PECO logo (AN EXELON COMPANY) on the left and the text "PECO Trade Ally Member Portal" and "BRETT RILEY | LOG OUT" on the right. Below the header is a navigation bar with links: "Upcoming Training", "On-Demand Training", "Marketing Materials", "Online Rebate Application", and "Contact Outreach Manager". The main content area starts with a "Welcome, Brett Riley" message and a prompt to "Choose an option below to take advantage of the additional benefits you have as a PECO Trade Ally." There are five cards arranged in two rows. The first row contains: 1) "Upcoming Trade Ally Trainings" with a "Learn more" button; 2) "On-Demand Training" with a "Learn more" button; 3) "Online Rebate Application" with a "Log in" button. The second row contains: 4) "Request Branded Marketing Materials" with an "Order now" button; 5) "Have questions or need help?" with a "Contact now" button. Each card includes a small image and a brief description of the benefit.

# Other resources

## Technical and Financial Resources

- [Onsite Energy Technical Assistance Partnerships \(TAPS\)](#)
- [Solarize Greater Philadelphia & GET Solar](#)
- [RISE PA](#)
- [National Energy Improvement Fund \(NEIF\)](#)
- [Commercial PACE \(C-PACE\)](#)
- [179D Energy Efficient Commercial Buildings Tax Deduction](#)

# Important Phase IV Deadlines

## Deadlines

- Custom projects requiring utility interval data must be submitted by **August 1, 2025**
- Solar and CHP projects must be submitted by **April 1, 2026**
- All other project applications must be submitted by **May 15, 2026**

## Other Reminders

- **180-day look back** - Any projects started or completed in the last 6 months can still qualify for potential incentives
- Join our webinar on **June 12, 2025 @ 12PM** for a special **BONUS** announcement!



# Phase V Initial Overview

## Dates

- Phase V: June 1, 2026 – May 31, 2031
- June 18, 2025: Final Implementation Order published
- November 1, 2025: PECO to file EE&C plan

## Initial Insights

- Still no gas energy efficiency or fuel switching incentives
- Goals have slightly decreased since Phase IV
- Demand Response (DR) Component
  - Daily load shifting (summer and winter)
  - Event-based DR





# Thank you

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**peco**<sup>SM</sup>

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# Collaborative Selling and the Value of Partnerships

**L.J. Petroni, Energy Account Executive**  
Siemens Industry USA

## Discussion Agenda

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1 Characteristics of High Performing Partnerships



2 Defining Collaborative Selling



3 Why Partnerships Win in Today's Market



4 Success Stories and Lessons Learned



5 The Road Ahead - How This Group Can Lead



# Characteristics of High Performing Partnerships

## 1. Shared Vision and Goals

- Both parties align on long-term objectives and success metrics.
- There's a mutual understanding of purpose and desired outcomes.

## 3. Complimentary Strengths

- Each partner brings unique capabilities that enhance the other's value.
- There's a clear division of roles based on expertise.

## 2. Trust and Transparency

- Open communication and honesty are foundational.
- Partners share information freely and resolve conflicts constructively.

## 4. Data Driven Decision Making

- Decisions are based on shared data, analytics, and performance metrics.
- Real-time insights help partners adapt quickly to change.

## Characteristics of High Performing Partnerships

### 5. Flexibility and Adaptability

- High performing partnerships evolve with market conditions.
- They're open to pivoting strategies or roles as needed.

### 7. Cultural Alignment

- Shared values and compatible working styles foster smoother collaboration
- Respect for diversity and inclusion strengthens the partnership.

### 6. Continuous Improvement

- Partners regularly assess performance and seek ways to improve.
- Feedback loops and innovation are built into the relationship.

### 8. Joint Problem Solving

- Challenges are tackled collaboratively not competitively.
- There's a "we're in this together" mindset.

## Defining Collaborative Selling (Before the Customer)

### Cross-Functional Collaboration

- Siemens brings together engineering, sales, marketing, and service teams to work in unison. This ensures that customer needs are addressed holistically, from technical feasibility to long-term support.

### Partner Ecosystem Engagement

- Collaborate with partners to extend capabilities and co-develop solutions tailored to customer challenges.

### Open Innovation Philosophy

- Promote a culture of open innovation, believing that *“one genius may have a brilliant idea, but ten geniuses will find a better solution”*.

## Defining Collaborative Selling (With the Customer)

### Listen

Understanding your customer's challenges, needs and goals.

### Learn

Asking informed questions leads to a customized and tailored approach.

### Communicate

Collaborate towards a solution specifically designed to achieve critical objectives - both short-term and long-term.

Siemens defines **collaborative selling** as a strategic, customer-centric approach that integrates **cross-functional teams, digital tools, and ecosystem partnerships** to co-create value with clients throughout the sales journey.

### Prioritize

Prioritize your customer's needs ahead of your company's pre-defined solutions.

### Engage

Co-create solutions that are scalable, sustainable and future ready.

# Why Partnerships Win in Today's Market

## 1. Accelerated Innovation

- Shared expertise allows companies to co-develop new technologies and solutions faster.

## 3. Access to Capabilities

- No company can be best at everything. Partnerships bring together complementary strengths -tech, logistics, marketing, etc.

## 5. Enhanced Customer Value

- Customers benefit from integrated, end-to-end solutions rather than fragmented offerings.
- Collaborative selling and co-creation ensure solutions are tailored and future-proof.

**Partnerships enable organizations to adapt faster, innovate more effectively, and deliver greater value to customers.**

## 2. Risk Sharing

- In uncertain markets sharing investment and operational risks makes ventures more sustainable.
  - Joint ventures and co-investment models reduce the burden of any single entity.

## 4. Sustainability and ESG Goals

- Tackling climate change and social equity requires collaborative ecosystems.
- Siemens works with governments, NGOs, and other firms to drive sustainable infrastructure and energy solutions.

## The Road Ahead - How This Group Can Lead

### 1. Deepen Ecosystem Partnerships

- On-board more startups and global tech partners.
- Foster co-innovation hubs with universities and research institutions.

### 2. Accelerate Digital Transformation

- Lead AI driven industrial automation.
- Invest in cyber security to build trust in digital solutions.

### 3. Champion Sustainability

- Scale solutions for green energy, smart grids, and carbon-neutral manufacturing.
- Partner with cities and governments on climate-resilient infrastructure.

### 4. Empower Collaborative Selling

- Train cross-functional teams in value-based, consultative selling.
- Use digital platforms to co-create solutions with customers in real time.

### 5. Lead with Purpose And Inclusion

- Promote diverse leadership and inclusive innovation.
- Align business goals with ESG (Environmental, Social, Governance) metrics.

### 6. Invest in Future Skills

- Upskill employees in AI, data science, and systems thinking.
- Support lifelong learning through partnerships with educational platforms.

# Siemens | PCCA Success Story | Infographic



# Project Management

**Paul Spiegel, Director**

Practical Energy Solutions, a Division of Stevens, Spotts, and McCoy Group



## MANAGING MULTIPLE ENERGY PROJECTS

# PECO TRADE ALLY EXECUTIVE ALLIANCE

JUNE 6, 2025

Presented by:  
Paul D. Spiegel, P.E., LEED AP  
Senior Consultant, Energy &  
Sustainability Services

**PRACTICAL ENERGY SOLUTIONS**

*a Division of Spotts, Stevens and McCoy*

[practicalenergy.net](http://practicalenergy.net) | [ssmgroup.com](http://ssmgroup.com)





## QUALIFICATIONS AND EXPERIENCE

### Practical Energy Solutions/Spotts, Stevens and McCoy

- PES founded in 2006
- Became part of Spotts Stevens and McCoy in July of 2020, to serve the same clients, with complementary services
  - Energy Audits (ASHRAE I, II, and III)
  - Building Energy Modeling
  - Municipal Energy Engineering Support
  - Technical Support for Rebate, Grant, and Financing Programs
  - Operational/System Assessments and Building Retuning
  - Strategic Energy Planning and Implementation
  - ROI/Feasibility Studies for Renewable Energy Systems
  - Benchmarking Studies
  - HVAC Design and Control Sequence Consulting
  - Carbon and GHG Inventories and Climate Action Plans
  - Tenant, Stakeholder, and Community Engagement



## MUNICIPAL ENERGY INITIATIVES

# PES Relevant Experience

- Multi-Municipal and School Programs
  - DVRPC Circuit Rider Program (Energy services for 12 municipalities)
  - Chester County Municipal Audit Program (38 municipal audits)
  - Delaware County Municipal Energy Strategic Plan and Efficiency Grant Program (36 municipalities)
  - City of Philadelphia: 13 years as primary energy consultant
  - School District of Philadelphia
  - Archdiocese of Philadelphia
- Other significant energy consulting clients:
  - PJM Interconnection
  - Brandywine Realty Trust
  - QVC
  - Liberty Property Trust
  - One Penn Center
  - University City Science Center





## Current Personnel Skills and Roles

- Engineering – Civil, Mechanical, Electrical, Environmental, Water/Wastewater Treatment
- Financial, Economics
- Technical Writer
- Educational Specialists
- Data Manager
- GIS application design/development
- Sales & Marketing- including with current clients
- Psychologist...



## Project Management Challenges for Large Energy Projects

- Large buildings with complex systems
- Multi-building campuses
- Large-scale initiatives with multiple sites and buildings
- Multi-client, multi-site, multi-building energy assessments





## Case Study – City of Philadelphia Building Energy Performance Program

Bill No. 190600 (approved December 4, 2019) requires owners of certain large buildings in the city of Philadelphia to conduct Tune-ups of their energy and water systems to identify no-cost, low-cost measures to improve energy efficiency and reduce consumption.



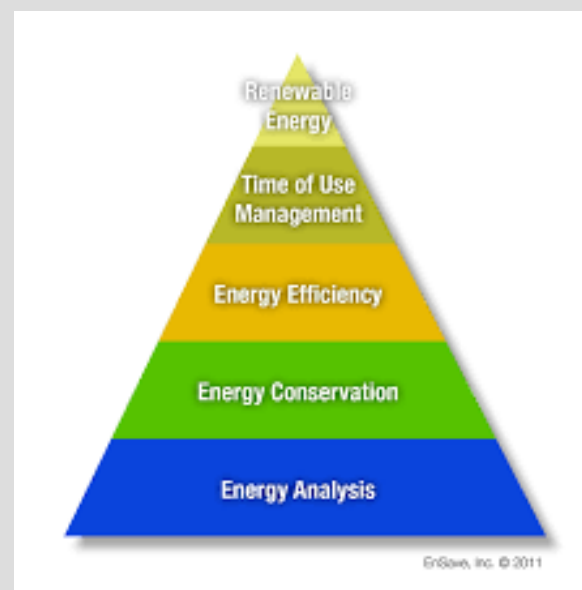
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## ENERGY PROJECT MANAGEMENT CHALLENGES

### Why BEPP?

- Better maintenance and smarter operation can yield significant savings at low cost
- A logical progression for planning and implementing a long-term energy initiative involves Energy Conservation before capital upgrades
- Get data on existing building stock to assess long-term potential savings from energy efficiency initiatives
- Eligible for PECO retro-commissioning rebate
- \$300/day fine for non-compliance





## What we're exploring today!

### PROJECT MANAGEMENT FOR MULTI-BUILDING ENERGY EVALUATIONS/INITIATIVES

- Case Study - Philadelphia “Building Energy Performance Program” (BEPP)
  - Operational assessments of commercial, institutional, and government-owned buildings larger than 50,000 square feet.
  - Required every 5 years beginning in 2021.
- After responding to a public RFP, a contract for Assessment and Retuning of 37 City-owned buildings was awarded to PES to help the City to optimize energy use without capital investment
  
- The challenge: how to efficiently and effectively manage so many locations:
  - Scheduling site visits
  - Progress/Keeping the client up to date
  - Data all in one place, easy to navigate
  - Details/Accuracy
  - Track deadlines





## PHILADELPHIA BEPP

### BEPP Assessment Processes

- Review utility bills
- Site visit to document primary energy using systems
  - Lighting
  - HVAC
  - Domestic hot water
  - Building envelope
  - Control systems – BAS settings, schedules, setpoints
  - Maintenance – pumps, motors, filters
- Determine path to compliance
  - High performance certification
  - Exemption
  - Full tune-up
- Enter field data in the workbook required by the City
- Inform building owner of any non-compliance issues
- Verify that corrections were made





PHILADELPHIA BEPP

## BEPP Assessment Processes

- To manage such a massive amount of data, a database was developed in-house using ArcGIS, a geographical Information system platform, that matched the content and format of the required workbook submittals to the City
- iPads set up with Data Capture application that can be used in the field
  - Drop down menus
  - Auto-export to Program workbook
    - Custom Data Capture tool
  - Use custom ArcGIS Project Tracker to keep tabs on multiple sites/clients
- We then showcased our project tracker in sales meetings with potential clients, showing that we could be more efficient, more accurate
- To date, PES has over 290 buildings under contract for re-tuning throughout the City, out of the 2,500+ buildings required to comply



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Office 365 Login | M... Bonusly Wells Fargo myPennMedicine ... (3) Qi Gong For Be... DCCC Met-Ed / Penelec Su... Welcome to delaGA... pdspiegel@verizon... Detek Other favorites

https://ssm.maps.arcgis.com/apps/dashboards/551414d7395e4c56ac5591d60e364fca

### BEPP Progress Tracker

Select a Building: All | Select a Client: City of Philadelphia | Select a Pathway: All | Select by OPA #: All

#### Building List

Search...

<b>660 East Erie</b> City of Philadelphia	Comply by: 4/4/2022 High Performance
<b>City Hall</b> City of Philadelphia	Comply by: 4/4/2022 High Performance
<b>Collectors HQ</b> City of Philadelphia	Comply by: 4/4/2022 High Performance
<b>Municipal Services Building (MSB)</b> City of Philadelphia	Comply by: 4/4/2022 High Performance
<b>One Parkway Building</b> City of Philadelphia	Comply by: 4/4/2022 High Performance

Done In Progress Behind Schedule N/A

Map Client/Pathway Data Download

#### Building Details

Select a building from the Building List.

**34** Total Buildings | **0** Behind Schedule | **27** Completed

Details Update Building Info

Type here to search | 86°F Mostly sunny | 3:24 PM 6/5/2025





Office 365 Login | M... Bonusly Wells Fargo myPennMedicine ... (31) Qi Gong For Be... DCCC Met-Ed / Penelec Su... Welcome to delaGA... pdspiegel@verizon... Deltek

### BEPP Progress Tracker

Select a Building: All | Select a Client: All | Select a Pathway: All | Select by OPA #: All

#### Building List

Search...

<b>3020 Market Street</b> Brandywine Realty Trust	Comply by: 4/4/2022 High Performance		
Site Visit	Workbook	Tune-Up	Complied

**660 East Erie** City of Philadelphia	Comply by: 4/4/2022 High Performance		
Site Visit	Workbook	Tune-Up	Complied
**Bulletin Building** Brandywine Realty Trust	Comply by: 4/4/2022 High Performance		
Site Visit	Workbook	Tune-Up	Complied
**City Hall** City of Philadelphia	Comply by: 4/4/2022 High Performance		
Site Visit	Workbook	Tune-Up	Complied
**Collectors HQ** City of Philadelphia	Comply by: 4/4/2022 High Performance		
Done	In Progress	Behind Schedule	N/A

#### Map

#### Building Details

Select a building from the Building List.

Map Client/Pathway Data Download

297 Total Buildings | 0 Behind Schedule | 104 Completed

Details Update Building Info

data.pa.gov, New Jersey Office of GIS, Esri, TomTom, Garmin, SafeGraph, MET/INAS... Powered by Esri

86°F Mostly sunny 3:36 PM 6/5/2025





## SOFTWARE TOOLS TO SUPPORT PROJECT MANAGEMENT

# Thoughts on use of computer based PM tools

- Geographic Information Systems (GIS)
  - Customizable database with locational capabilities
  - Wide range of uses for GIS
    - Our other divisions use customized reports from GIS to manage equipment maintenance, roadway signage, manholes, and other inventories that benefit from mapping
  
- Off the shelf dashboards and project/data management tools often provide too much information, and manual data entry
  
- Where do I see a place for AI?
  - BAS controls – reduce need for writing code to change settings for non-standard operation
  - Tracking, alarms, and automated fault correction





## Thoughts or questions? Thanks for joining us!

### **PAUL SPIEGEL, PE, LEED AP**

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# Panel Discussion | Q&A

# Questions?



# Thank you

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