ENTERPRISE ASSESSMENT · UTILITY EXPENSE MANAGEMENT

Utility Stack Savings Assessment

A practical self-assessment for determining whether your enterprise can turn utility data into verified savings

TELLENNIUM
An OPTRIC Company
Enterprise Expense Management

Connected meters, submeters, sensors, and facility systems can reveal when utility usage changes. But an operational signal does not automatically show what the event cost, who owns the response, or whether the financial result was verified. Use this assessment to determine whether your utility-management process can consistently answer three questions:

QUESTION 01
What changed?

QUESTION 02
What did it cost?

QUESTION 03
What happened next?

01 How to Use This Assessment

Apply one rating to each of the 10 assessment items.

GREEN
Traceable, financially connected, owned, documented, and consistent.

YELLOW
Useful information exists, but manual work, unclear ownership, inconsistent follow-through, or incomplete documentation creates risk.

RED
Data is fragmented, financial linkage is missing, ownership is unclear, action is reactive, or savings are assumed rather than verified.

02 Assessment Areas

WHAT CHANGED?

#	AREA	ASSESSMENT QUESTION	GREEN	YELLOW	RED
01	**Operational Data Coverage**	Can connected meters, submeters, sensors, or facility systems identify material changes in usage, load, runtime, or consumption patterns?	☐	☐	☐
02	**Site, Asset, and Meter Mapping**	Can each material event be traced to the correct location, asset, meter, or utility service?	☐	☐	☐
03	**Exception Prioritization**	Are alerts evaluated for materiality so important exceptions can be separated from routine noise?	☐	☐	☐

WHAT DID IT COST?

#	AREA	ASSESSMENT QUESTION	GREEN	YELLOW	RED
04	**Account and Invoice Linkage**	Can each material event be connected to the correct provider, account, service address, invoice, and billing period?	☐	☐	☐
05	**Rate and Billing Context**	Can your team explain how rates, tariffs, demand charges, time-based pricing, fixed charges, or other billing terms affect the financial impact?	☐	☐	☐
06	**Financial Allocation**	Can the affected utility charge be tied to the correct cost center, business unit, and financial owner?	☐	☐	☐

WHAT HAPPENED NEXT?

#	AREA	ASSESSMENT QUESTION	GREEN	YELLOW	RED
07	**Action Ownership**	Does every material exception have a named owner, required action, due date, and escalation path?	☐	☐	☐
08	**Investigation and Follow-Through**	Is there a repeatable process for investigating the issue, reviewing billed charges, filing disputes when needed, and following up with the provider?	☐	☐	☐
09	**Correction and Credit Confirmation**	After action is taken, do you confirm that the issue was resolved and any correction, adjustment, or credit appeared?	☐	☐	☐
10	**Savings Verification**	Are claimed savings checked against an appropriate baseline and supporting records, then documented?	☐	☐	☐

OVERALL RATING RULE

Use the weakest material answer, not the average. A process should not be rated green when a critical issue cannot be traced, financially evaluated, assigned, or verified. Automation is not the same as control. A green process may still include controlled human review.

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03 Scoring Guidance

MOSTLY GREEN	Your organization has a strong foundation for turning utility signals into financially accountable action. **PRIORITY ACTION:** Keep mappings current, review materiality thresholds, confirm disputes and credits, document verified savings, and reassess ownership as conditions change.
MOSTLY YELLOW	Useful data and processes exist, but gaps in financial linkage, ownership, follow-through, or verification may be limiting measurable savings. **PRIORITY ACTION:** Start with the weakest material answer. Focus on mapping, invoice linkage, ownership, provider follow-up, and documented savings.
ANY MATERIAL RED OR MOSTLY RED	Your organization may be identifying utility issues without a reliable path to financial closure. **PRIORITY ACTION:** Map sites, meters, accounts, and invoices; connect events to financial records; assign owners and due dates; confirm corrections and credits; verify and document the result.

04 Five Warning Signs Your Utility Data Is Not Producing Verified Savings

1. **Alerts cannot be matched to the correct account or invoice**
   The organization can see that usage changed but cannot connect the event to the right provider, service address, billing period, or charge.

2. **Usage falls, but no one can explain why the bill did not**
   Demand charges, fixed charges, rate conditions, estimated readings, or billing-period differences may be affecting cost, but the financial analysis is incomplete.

3. **Material utility exceptions have no clear owner**
   Facilities sees the event. Finance sees the bill. Procurement or Accounts Payable holds another piece of the answer. No one owns the full path to closure.

4. **Disputes or corrective actions are started but never confirmed**
   A provider ticket is opened, a physical issue is corrected, or a billing charge is challenged, but no one confirms the later invoice, credit, adjustment, or final outcome.

5. **Savings are reported without a baseline or supporting records**
   The organization estimates that an action created savings but cannot distinguish projected impact from realized or verified savings.

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05 Suggested Next Step

Start with the weakest material answer. Assign an owner, define the action required, set a due date, and identify the evidence needed for closure. Prioritize issues involving:

- events that cannot be traced to a site, meter, account, or invoice
- rates or billing conditions that have not been reviewed
- charges with no cost center or responsible owner
- disputes, credits, or corrections that remain unconfirmed
- savings claims that lack a baseline or supporting records

PRIORITY ISSUE

OWNER

DUE DATE

EVIDENCE REQUIRED FOR CLOSURE

06 Savings Definitions

Estimated impact	Projected before confirmation.
Realized savings	Financial benefit that occurred after action.
Verified savings	Realized savings checked against an appropriate baseline and documented.

CLOSING INSIGHT

Utility data creates an opportunity to act. Financial context, ownership, follow-through, and verification determine whether that opportunity becomes measurable savings.

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