ENTERPRISE CHECKLIST / UTILITY EXPENSE MANAGEMENT

UEM vs. Energy Management Decision Checklist

Find the work your enterprise needs and who will act.

TELLENNIUM
Enterprise Expense Management
AN OPTRIC COMPANY

UEM generally focuses on utility accounts, invoices, charges, and expense processes. Energy management software generally focuses on consumption and facility performance. Actual offerings can overlap.

Use this checklist with finance, AP, procurement, facilities, and operations. Bring a recent bill, current account and site records, and an unresolved billing or usage question.

HOW TO USE THIS CHECKLIST

CLEAR
Current records support the answer and someone owns the next action.

PARTIAL
Some evidence exists, but a material data or ownership gap remains.

UNKNOWN
The team cannot yet show what happened, what data it has, or who acts.

Mark the strength of your answer for each area. These marks do not select a product for you.

FIRST, DEFINE THE TWO JOBS

FINANCIAL / ADMINISTRATIVE
Are services billed accurately, reviewed, allocated, and paid? Who resolves supported billing issues?

FACILITY / OPERATIONAL
What drives energy use or demand? Who investigates building conditions, acts, and measures the result?

DECISION ASSESSMENT

#	AREA	ASSESSMENT QUESTION	CLEAR	PARTIAL	UNKNOWN
01	**Outcome**	What must improve first: expense control, building performance, or both?	☐	☐	☐
02	**Process gap**	Where does a bill or usage concern stall before action?	☐	☐	☐
03	**Available data**	Which account, invoice, meter, and facility records are reliable?	☐	☐	☐
04	**Ownership**	Who investigates, acts, and verifies the result?	☐	☐	☐
05	**Measurement**	How will you know whether the chosen work succeeded?	☐	☐	☐

Remember: A higher bill does not prove a billing error or inefficient equipment. A missing record is a gap to investigate.

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EVIDENCE AND WORKING NOTES

For each area, record what the available evidence supports, who owns the work, the provider scope to verify, and the next action. An empty field signals a question to resolve.

01 OUTCOME

Can finance and facilities name the problem each would solve first? Record both when priorities differ.

CURRENT STATE / EVIDENCE

OWNER

PROVIDER SCOPE TO VERIFY

NEXT ACTION

02 PROCESS GAP

Trace one bill through payment and one usage concern through site action. Where did the work stall?

CURRENT STATE / EVIDENCE

OWNER

PROVIDER SCOPE TO VERIFY

NEXT ACTION

03 AVAILABLE DATA

Connect accounts, meters, invoices, and service records to sites. Which rate or facility context is missing?

CURRENT STATE / EVIDENCE

OWNER

PROVIDER SCOPE TO VERIFY

NEXT ACTION

04 OWNERSHIP

Who reviews, pays, disputes, investigates, acts, and verifies? Check the proposed provider agreement.

CURRENT STATE / EVIDENCE

OWNER

PROVIDER SCOPE TO VERIFY

NEXT ACTION

05 MEASUREMENT

Which evidence fits the job: invoice coverage or documented corrections, or energy trends and project results?

CURRENT STATE / EVIDENCE

OWNER

PROVIDER SCOPE TO VERIFY

NEXT ACTION

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READ THE RESULTS

MOSTLY CLEAR

You can define the job and compare actual provider scope.

SEVERAL PARTIAL

Resolve important data and ownership gaps before comparing offerings.

MOSTLY UNKNOWN

Establish the facts with a real bill, site records, and an owner.

These ratings show decision readiness. They do not say which product is better for you.

WORK THROUGH THE FIVE QUESTIONS

1 Define the outcome

Ask finance and facilities what each would fix first. Bill accuracy or AP work suggests expense work; consumption or equipment performance suggests energy work.

2 Find the break

Trace a bill from receipt to payment and a usage concern from alert to site action. Where did either one stop?

3 Check the data

Connect accounts and meters to sites. Find the rate records for billing checks and the meter and facility context for the energy question.

4 Name the owners

Assign billing review, payment, disputes, facility action, and verification. Confirm the work included in any provider agreement.

5 Choose measures

Use invoice coverage or documented corrections for UEM; appropriate demand trends or verified project results for energy work. A flag is not automatically a saving.

CHOOSE THE FIRST MOVE

Expense and invoice control	UEM
Consumption or building performance	Energy management and facilities
Significant gaps on both sides	Coordinated approach
Too little reliable information	Focused records and ownership review

OUR FIRST PRIORITY ☐ UEM ☐ Energy ☐ Both ☐ Gather information

Why: _____

First action and owner: _____

Review date: _____

SUGGESTED NEXT STEP

Ask a provider to walk one realistic concern from signal to evidence, action, and verified result. Confirm what it does, the data required, and what remains with your team.

Want to see how Tellennium could help with utility expense control?

REQUEST A DEMO

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